



2024 Certifications

What's New and Instructions

Important Changes in 2024

Conflict of Interest removed from Certification into a separate process

- You will no longer need to complete the Conflict of Interest disclosure or attestation as a part of Certification.
- The new Conflict of Interest process will begin July 1; you will be notified via email when you need to complete the disclosure and attestation. The email will arrive on the anniversary of your Party ID (PID) date.

Content Changes / CMS Ruling Changes

- **Scope of appointment changes** (*Study Guide section 3.4, Appointment Contact*):
 - Must be obtained no less than 48 hours before the start of the appointment, unless a 48-hour exception applies.
 - Must be obtained for all consumers, including current members.
 - **At educational events**, you are prohibited from collecting Scope of Appointments or setting up future marketing appointments.
- **Third party marketing organizations (TPMO) changes** (*Study Guide section 3.2, TPMO*):
 - Must record all marketing, sales, and enrollment calls, including the audio portion of calls via web-based technology and maintain those recordings for 10 years.
 - Required to use, where appropriate, a standardized disclaimer. Review Study Guide section 3.2 for details on the disclaimer wording.
- **Enrollment changes** (*Study Guide section 3.7, Enrollment Details*):
 - Provide the Pre-Enrollment Checklist (PECL) to the consumer with the enrollment form.
 - For telephonic enrollments, the contents of the PECL must be reviewed with the consumer prior to the completion of the enrollment.
- **Marketing/Sales Events** (*Study Guide section 5.5, Marketing/Sales Events*):
 - Must not conduct a marketing/sales event (formal or informal) within 12 hours of the completion of an educational event at the same location (i.e., same building or adjacent buildings).

Assessment and Study Guide Improvements

- Many questions rewritten for readability and removed some of the scenario-based questions.
- The Events Basics assessment is shorter! It is now 13 questions instead of 19.
- Feedback is now provided on assessments when you get a question wrong. It will direct you to the section of the study guide you should review.
- The Study Guide is located within the course as always, but it is now available on a tab on the home page for easy access all year.



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Follow the instructions below to help access the right courses and modules.
(All modules are also available in Spanish.)

1 From Jarvis, click on the certification path link near the top of the screen (in the news article scroll). This will take you directly to Learning Lab and the courses you need to complete for certification.

2 When the path opens in Learning Lab, you will find some **RECOMMENDED courses**. These are optional but highly recommended. There is a **Study Guide** where you'll find all the content you need to know to pass the assessments.

3 Complete all the **REQUIRED courses**: **Pledge of Compliance and the 3 Base Level Assessments** (Medicare Basics, Ethics & Compliance, and AARP). Six attempts* are allowed on each assessment. Completing the Pledge of Compliance and successfully passing all 3 base level assessments with 85% or higher passing score will certify you to sell Medicare Advantage (non-SNP), Prescription Drug, and Medicare Supplement Plans.

4 Complete any **Next Level assessments** if you wish to certify to sell more than the base level. For example, if you want to sell **D-SNP and/or C-SNP**, complete that assessment; if you want to conduct any marketing/sales events, complete the **Events Basics** assessment. If you have been invited to sell any other products, those assessments will appear on your Home Page.

i For more detailed instructions, review the **Certification User Guide** located on Jarvis>Knowledge Center or in Learning Lab>any Certification Path>Instructions course. You may also use the **Decision Tree** to help you understand which certifications are required.

* An attempt is counted when you complete the assessment or if you restart a previous attempt.