



connecting
the enrollment
community



Developing an Onboarding Plan for New Assisters

1. Share organizational best practices

- Allow new staff to meet one-on-one with current staff who can share their best practices
- Provide an overview of lessons learned from previous experiences
- Inform new staff how your organizational internal referral process works
- Share your organizational approach to outreach, such as the types of events and resources to be employed immediately leading up to the start of the open enrollment period and the marketing strategies that will be used in outreach

2. Provide training, mentoring and shadowing opportunities

- If your organization has multiple assisters, have new staff shadow each assister during an enrollment session to get a better understanding of the process
- Develop a mentoring program to connect new assisters with more experienced peers who can share their knowledge and best practices
- Train new staff by allowing them to practice giving educational presentations with internal staff prior to going out into the community.
- Remind new staff to comply with any state licensure or certification requirements, if required, and follow the federal [personally identifiable information \(PII\) guidelines](#)

3. Connect them to resources and community partners

- Federal resources:
 - [Assister Roadmap to Resources](#)
 - [Marketplace.cms.gov](#)
 - [CMS Assister Training Portal](#) and [Landing Page](#)
- National and State Organization resources:
 - [In the Loop](#)
 - CBPP's [Beyond the Basics webinar series](#)
 - [Georgetown's Navigator Resource Guide](#)
 - [National Health Law Program's MAGI Guide](#)
 - [Cover Missouri Coalition's OE4 Planning Tool](#) (or your own coalition's plan!)
- Community Resources:
 - [Consumer Assistance Programs](#)
 - [Tax Preparation Services](#)
 - [SHIP Counselors](#)
 - Legal aid organizations