State of Nevada

Silver State Health Insurance Exchange
2310 S. Carson St. #2
Carson City, NV 89701

Nevada Health Link State Based Exchange Platform

Agent User Reference Manual

October 29, 2019

Version 1.0

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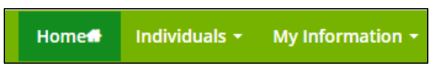
1. Overview

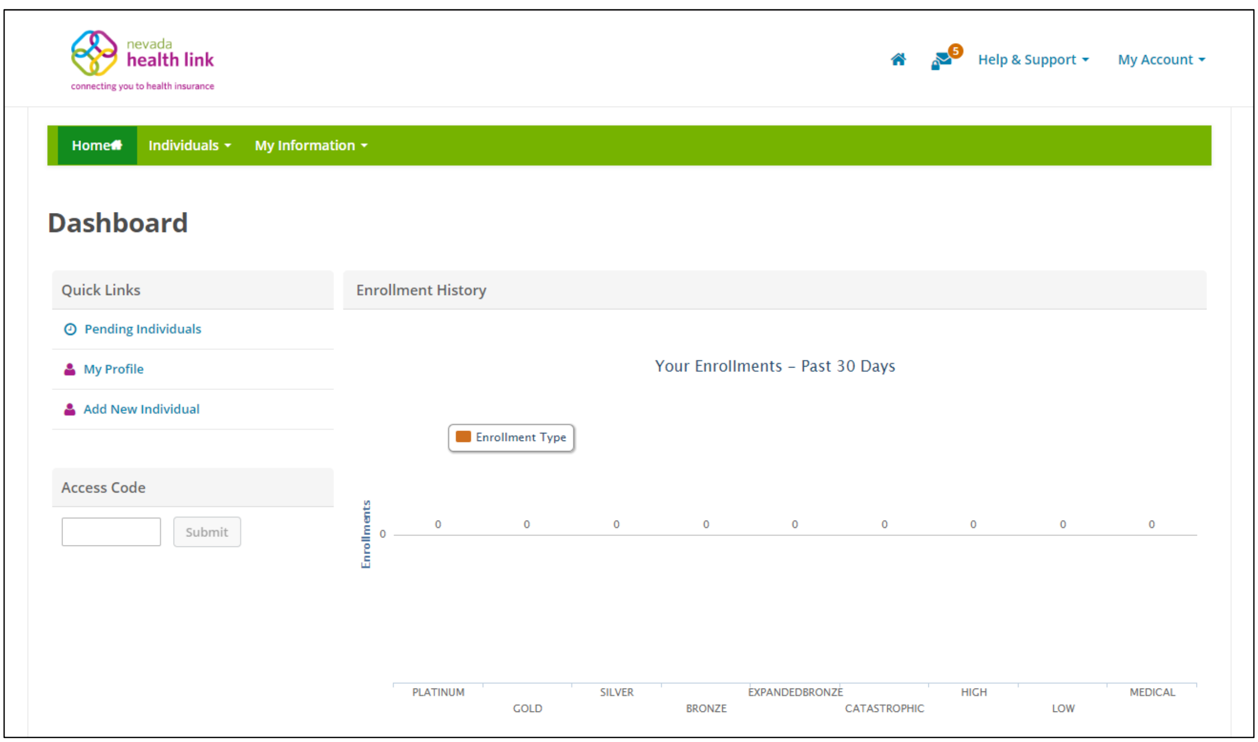
This manual is intended to provide a detailed description of the functions available through the Agent Portal of the Nevada Health Link State Based Exchange (SBE) Platform. “Agents” refers collectively to the health insurance agents or brokers who are certified by Nevada Health Link to offer enrollment assistance to Nevada’s Affordable Care Act, Exchange marketplace consumers. The Agent Portal is a complete solution for Agents to submit applications/enrollments and perform account maintenance transactions on behalf of existing consumers, create new user accounts on behalf of new consumers, and manage their book of business.

PLEASE NOTE: This manual is for Agents who have already completed Nevada Health Link’s Training and Certification Curriculum and completed the user account registration process for the SBE Platform. For information on training/certification and gaining access to the SBE Platform please visit https://www.nevadahealthlink.com/brokers-agents-onboarding/.

2. Home/Dashboard



The Agent Dashboard is the landing page for the Agent/Broker portal. This page shows a graph of the Agent’s enrollments for the previous 30-day, grouped by plan type:

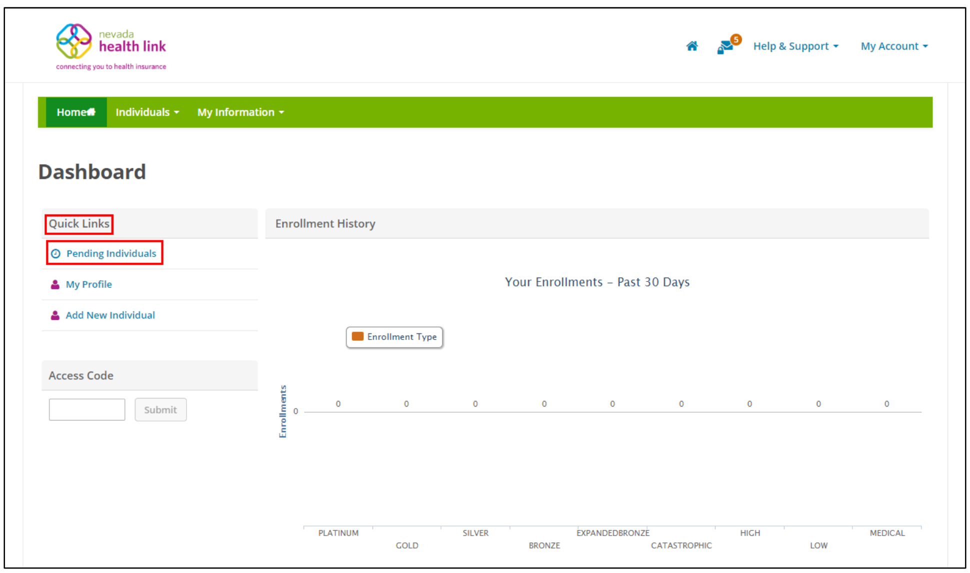


2.1 Pending Individuals

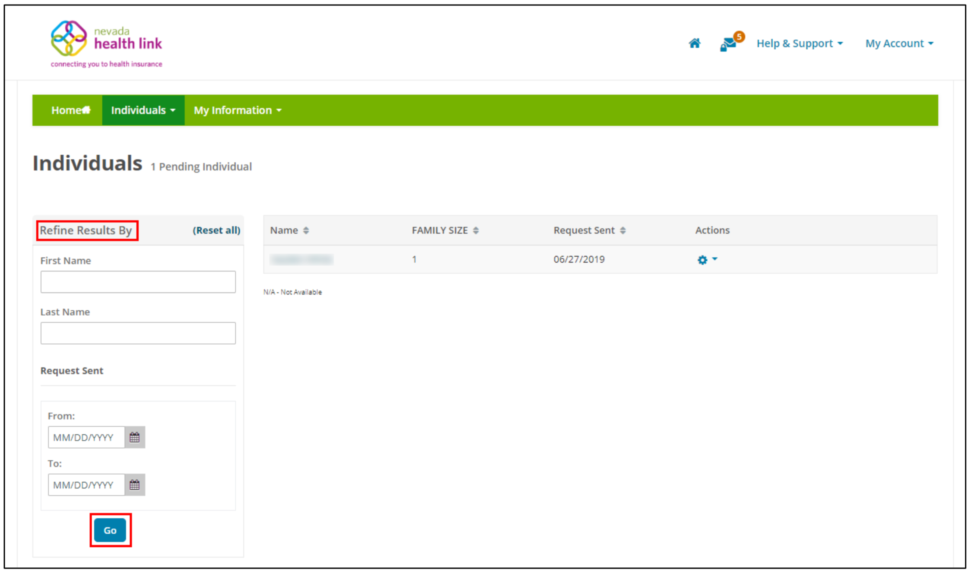
The Pending Requests page displays a list of pending individuals that have requested for Agent designation. The Agent has the option to accept or decline an individual's designation request. If the request is accepted, then the individual will move to the Active Individual section. If the request is declined the consumer will automatically move to the Inactive Individual section. The Agent can view and search for the list of pending individuals filtered by their First name, Last name, and request sent date range.

2.1.1 View and search for pending individuals

- Step-1: Go to 'Home Page' and click on 'Pending Individuals' tab under "Quick Links" section.

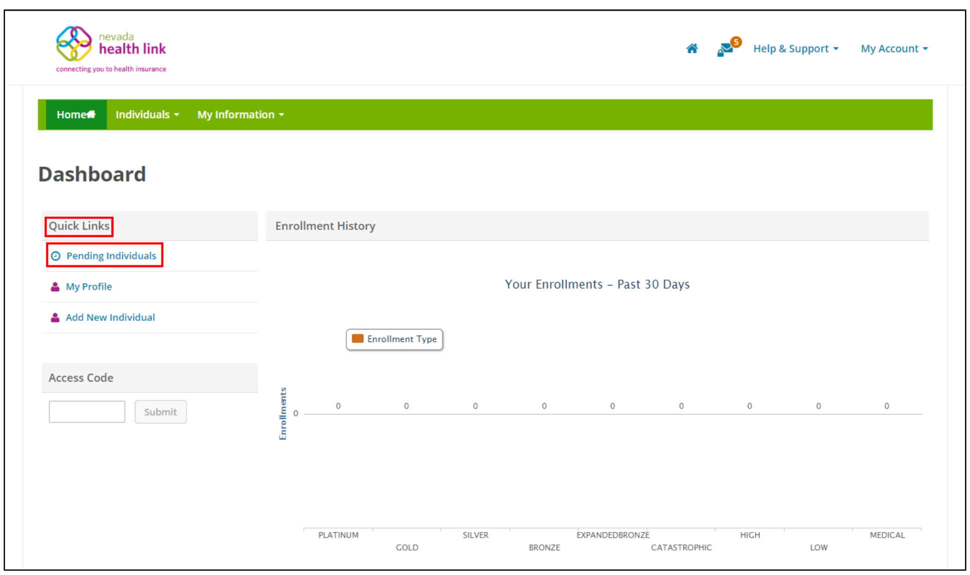


- Step-2: Enter individual's first name in the 'First Name' field or last name in the 'Last Name' field or enter the desired date range during which an individual sent the designation request in the 'Request Sent' section under the "Refine Results By" section and click on the 'Go' button.

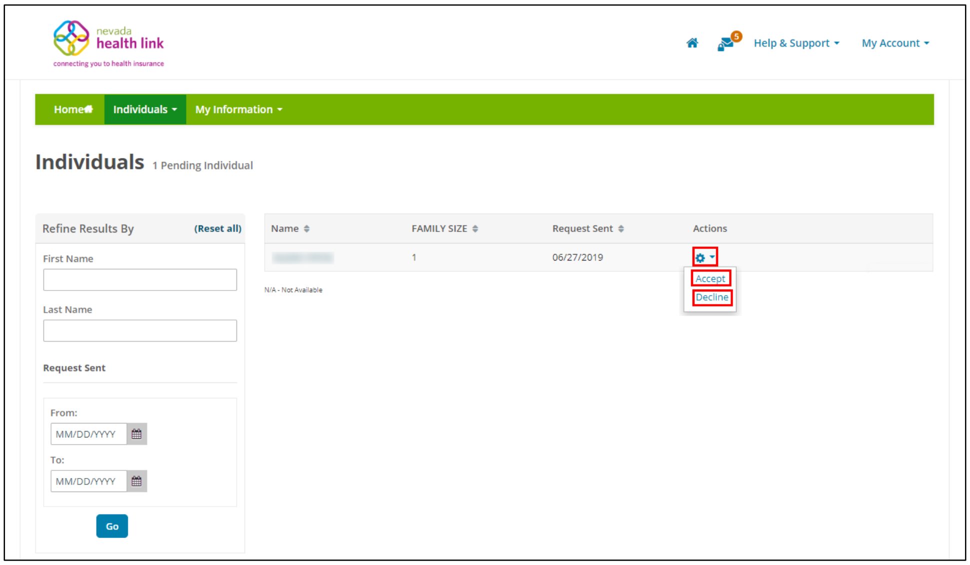


2.1.2 Accept or decline individual designation request

- Step-1: Go to 'Home Page' and click on 'Pending Individuals' tab under "Quick Links" section.

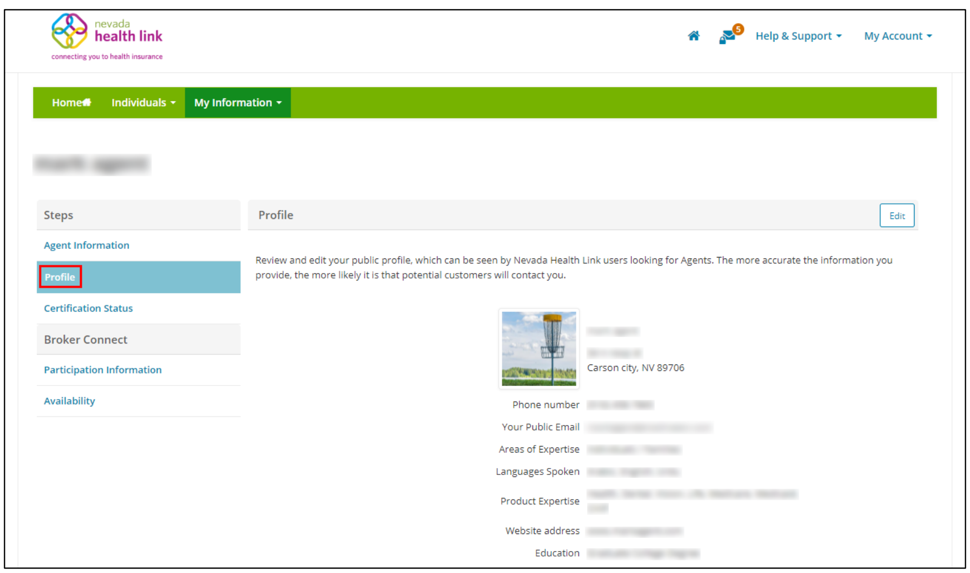


- Step-2: Click on ⚙ ▾ and click on 'Accept' to accept an individual's designation request or click on 'Decline' to decline the request.



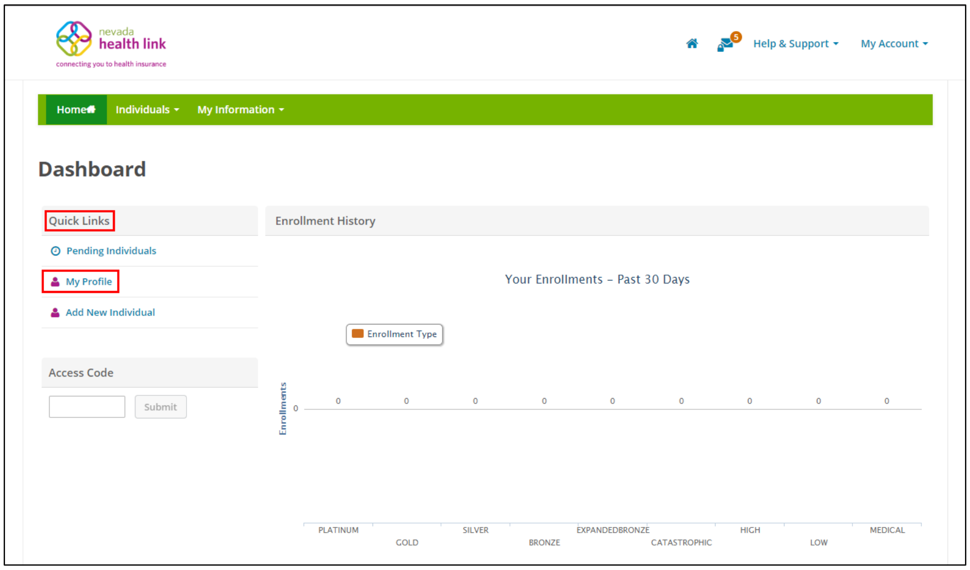
2.2 My Profile

The My Profile section displays an Agent's public profile information. This information will be displayed to consumers who use Nevada Health Link's "Find Local Assistance" directory tool. The Agent can update their Agent photo and Business information within this section.

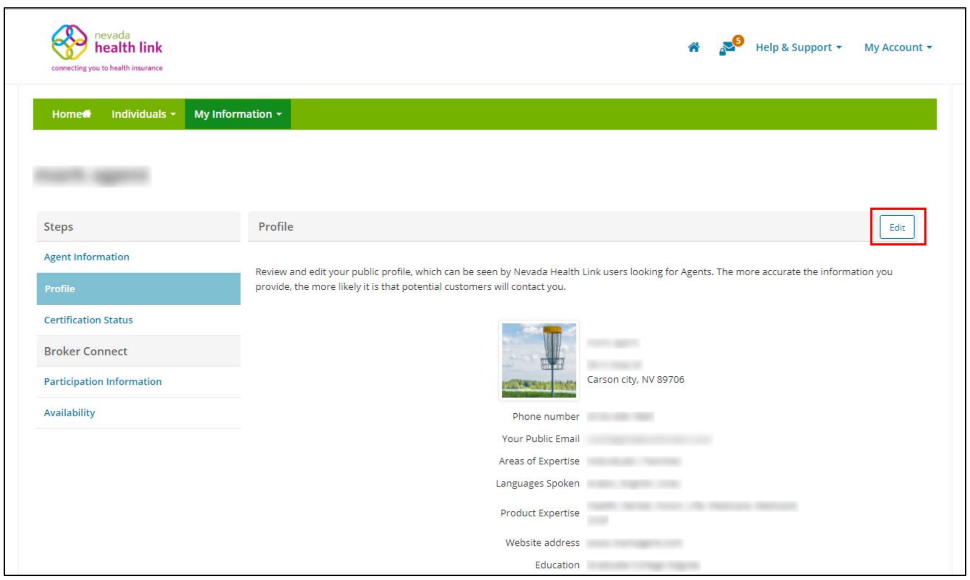


2.2.1 Add or update Agent profile photo

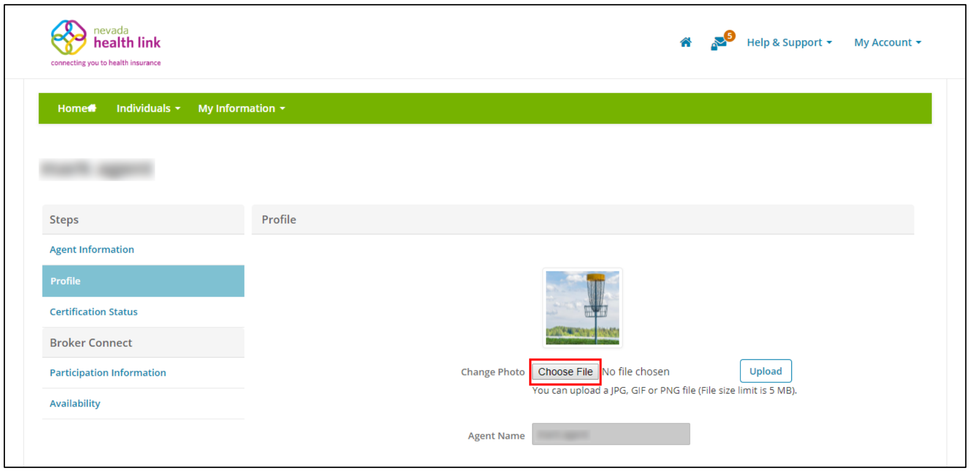
- Step-1: Go to 'Home Page' and click on 'My Profile' tab under "Quick Links" section.



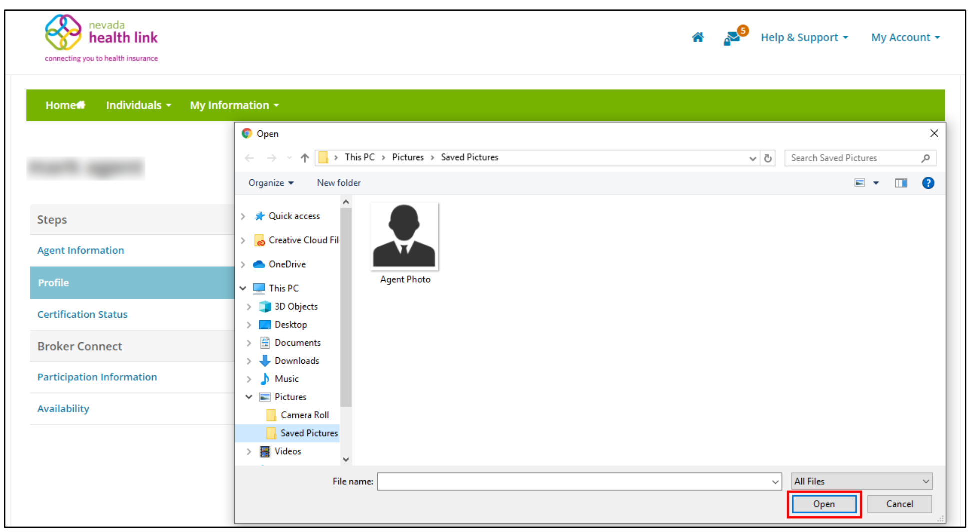
- Step-2: Click on the 'Edit' button.



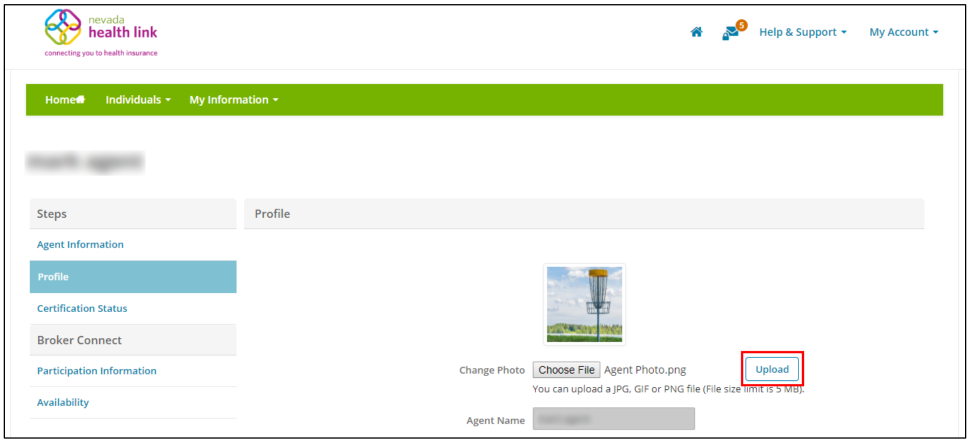
- Step-3: Click on ‘Choose File’.



- Step-4: A file browser opens. Navigate to the file on your computer of the photo that you wish to use and double click on the photo or select it and click on the ‘Open’ button.

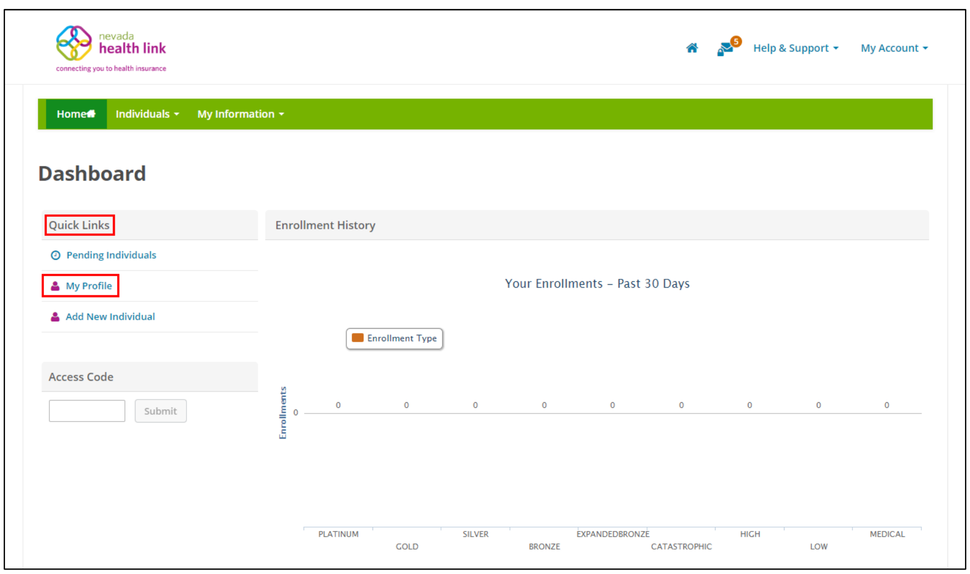


- Step-4: Click on the ‘Upload’ button.

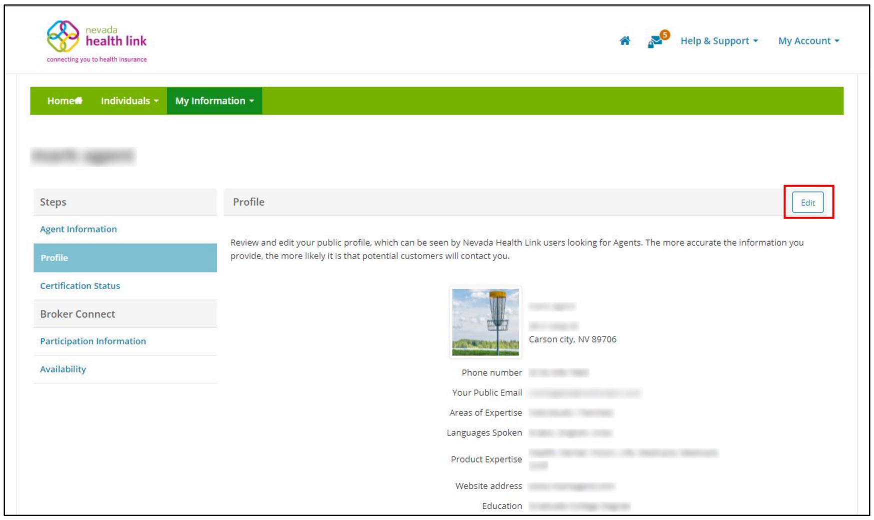


2.2.2 Add or update Agent business information

- Step-1: Step-1: Go to ‘Home Page’ and click on ‘My Profile’ tab under “Quick Links” section.

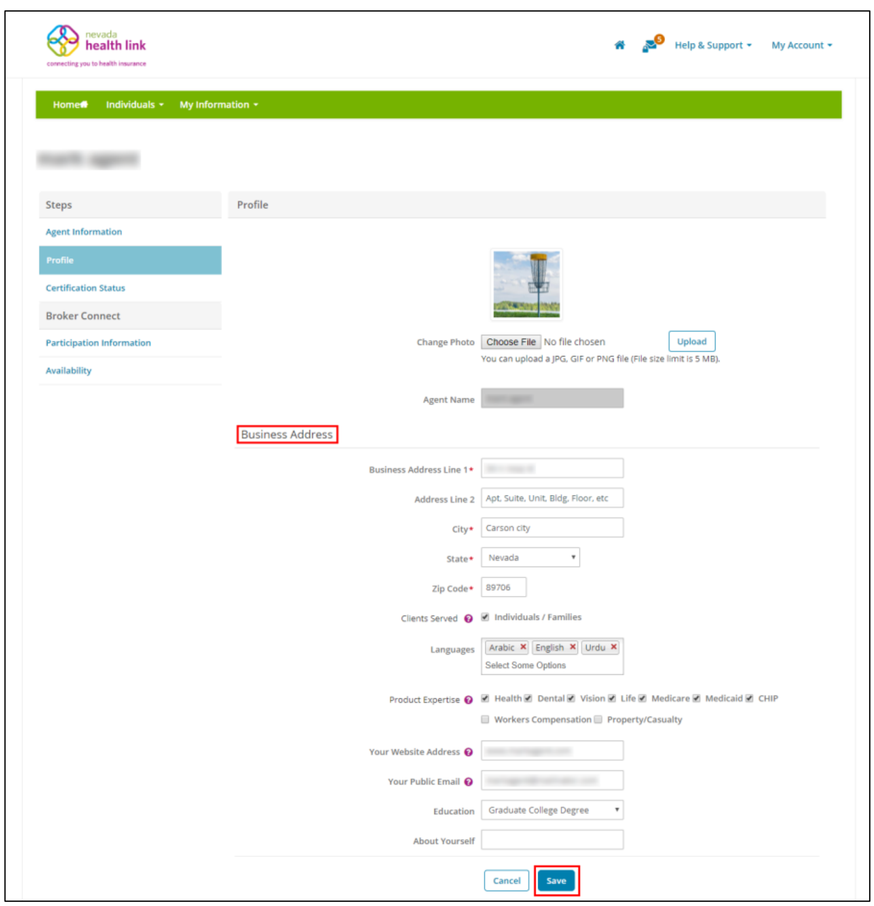


- Step-2: Click on the ‘Edit’ button.



- Step-3: Enter Agent's business information in the "Business Address" section and click on the 'Save' button. If you have a home office, please input the address of a public place where you meet clients (e.g., a coffee shop).

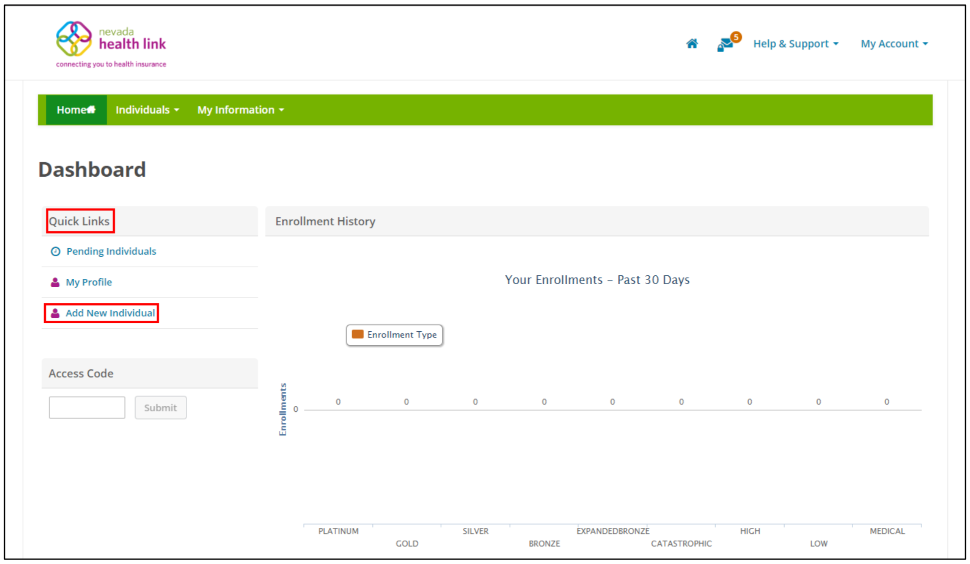
  PLEASE NOTE: Agents who do not select the 'Clients Served' field won't appear on the Agent Directory.



2.3 Add New Individual

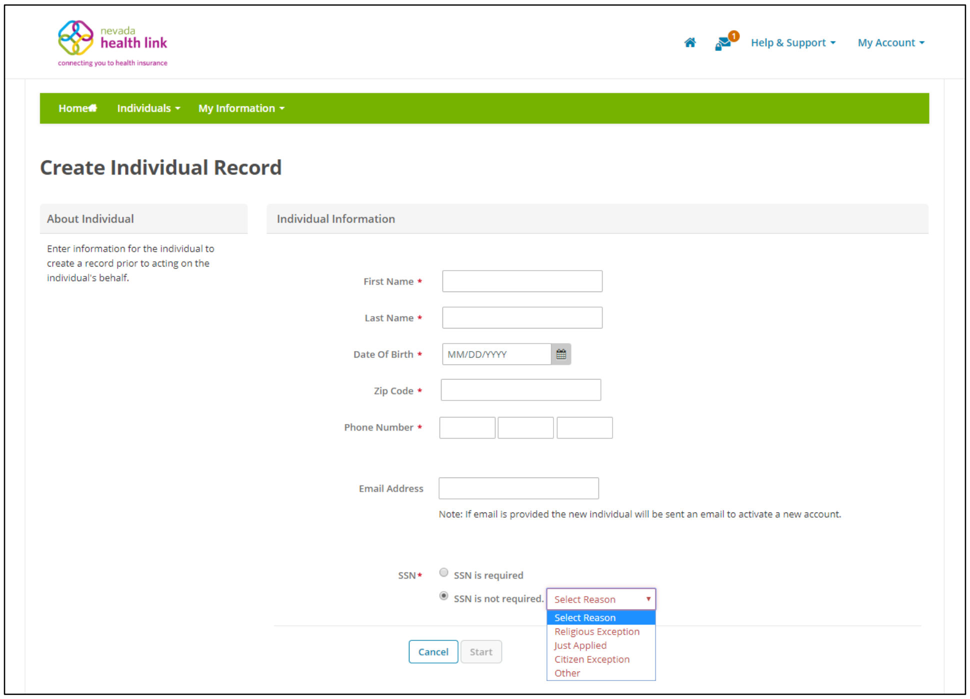
The Agent can create a new consumer account on behalf of a consumer through the Add New Individual section. Once, the new individual is added the Agent can impersonate an individual account and perform activities on behalf of the individual. (For detailed information on how to impersonate an individual account and further steps, please refer to Section 3.2.3)

- Step-1: Go to 'Home Page' and click on 'Add New Individual' tab under "Quick Links" section.

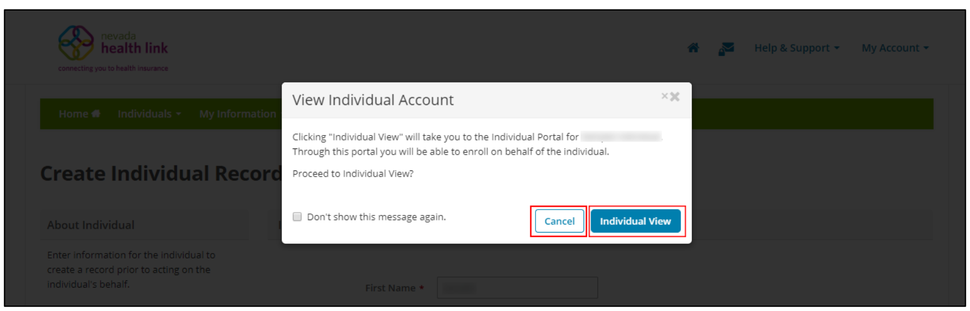


- Step-2: Enter new consumer's information (e.g., "First Name" or "Email Address") and click on the 'Start' button.

  PLEASE NOTE: The consumer will receive an email to activate their new account only if an individual email address is provided. If the Agent selects the option "SSN is not required" they will then have to select an option from the drop-down list (e.g., "Religious Exception" or "Just Applied").



- Step-3: A pop-box will appear. Click on 'Individual View' to impersonate an individual account or click on 'Cancel' to cancel the process.



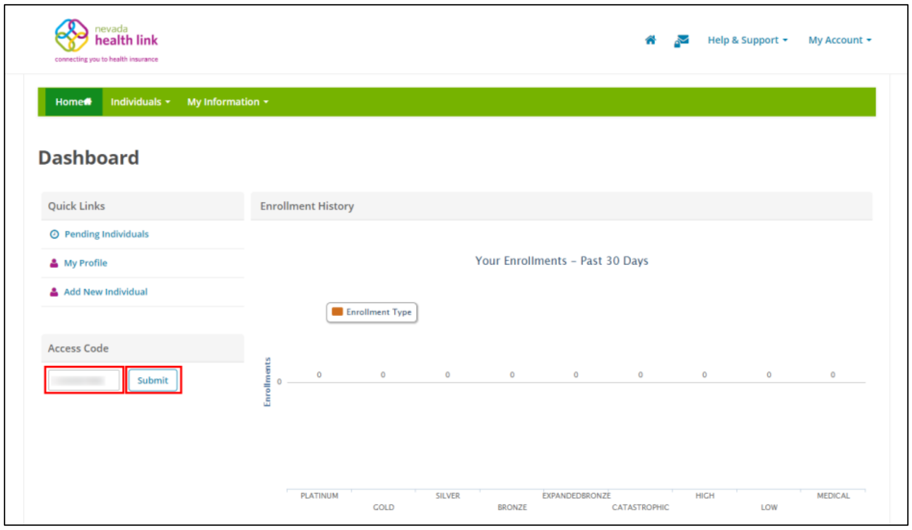
For detailed information on how to impersonate an individual account please refer to Section 3.2.3.

2.4 Access Code

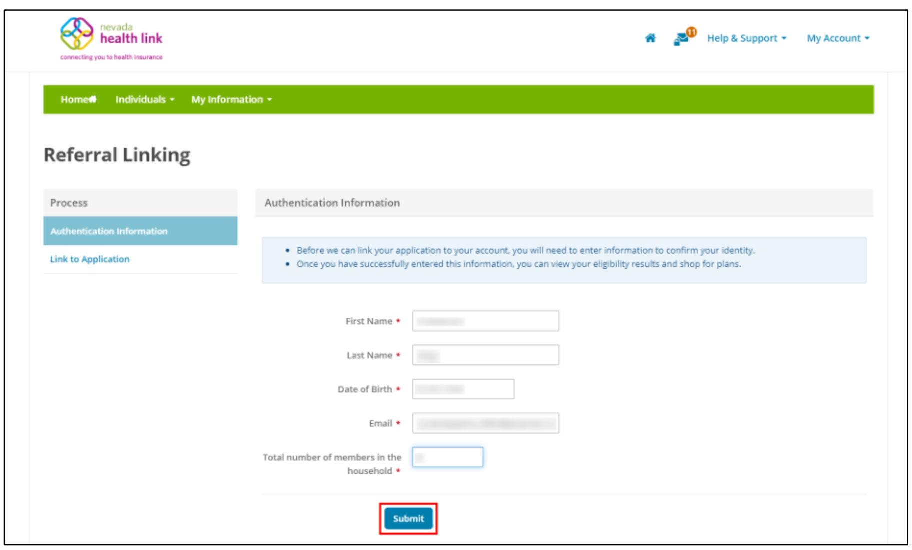
The Access Code section helps an Agent to create or claim a migrated consumer's account on the Nevada Health Link SBE platform. Consumers whose accounts are migrated from HealthCare.gov to Nevada Health Link or the Division of Welfare and Supportive Services (DWSS) will receive an access code to claim their migrated account. Once an individual receives the Access Code from one of these agencies the Agents may use this code to claim and impersonate their account.

PLEASE NOTE: The Access Code functionality is not available until Open Enrollment Period begins on November 1, 2019.

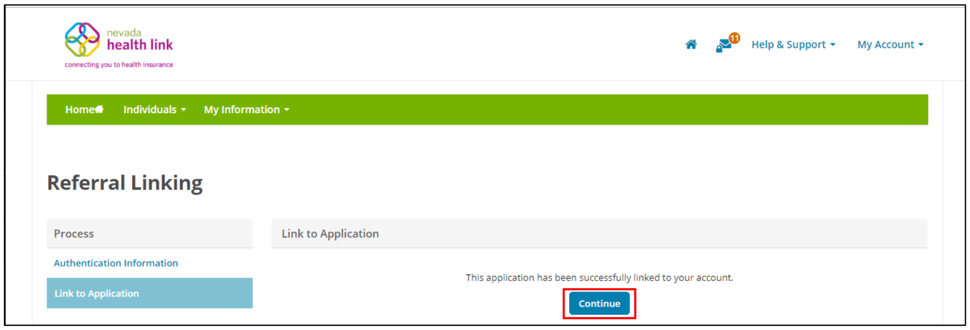
- Step-1: Go to ‘Home Page’ and enter the access code in the “Access Code” section and click on the ‘Submit’ button.



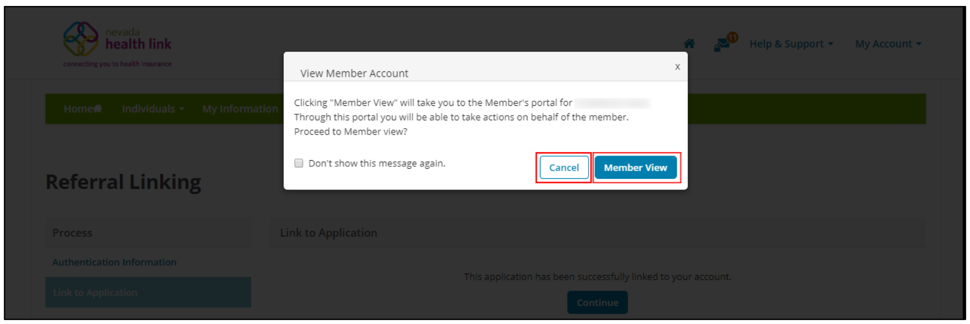
- Step-2: Enter consumer information (e.g., “First Name” or “Date of Birth”) to confirm their identity and click on the ‘Submit’ button.



- Step-3: Click on the ‘Continue’ button.

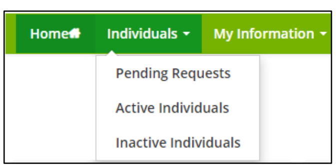


- Step-4: A pop-box will appear. Click on ‘Member View’ to impersonate an individual account or click on ‘Cancel’ to cancel the process.



For detailed information on how to impersonate an individual account please refer to Section 3.2.3.

3. Individuals (Book of Business)



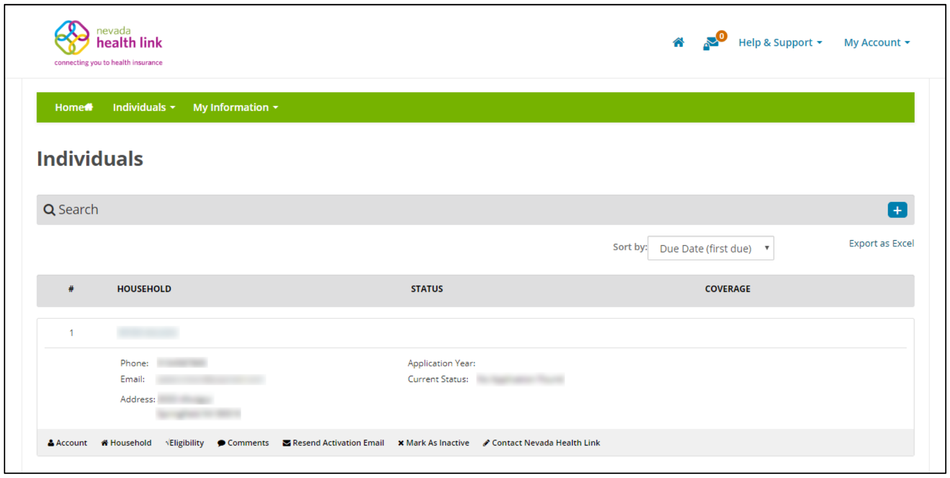
3.1 Pending Requests (New Designation Requests)

For detailed information on Pending Requests please refer to Section 2.1.

3.2 Active Individuals (Existing Designations)

An Active Individuals page displays a list of individuals that are designated to an Agent. The Active Individuals list shows their Name, Contact information, Application status, Next steps and Coverage details (if the consumer is enrolled).

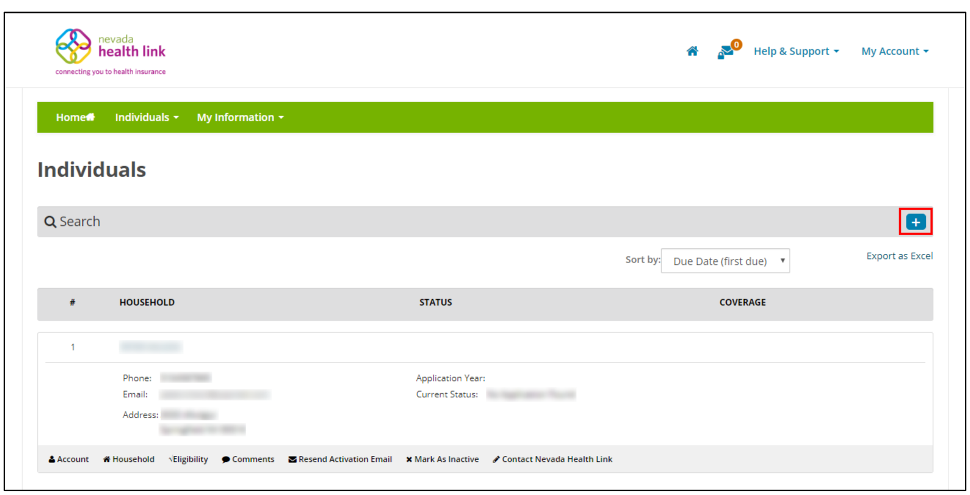
The dashboard allows an Agent to search and sort for an Active Individuals list, export Agent's Book of Business, impersonate an individual’s account, view an individual’s household and eligibility member information, provide comments on an individual's profile, resend activation email to an individual, mark an individual as inactive and contact Nevada Health Link to request support for an individual.



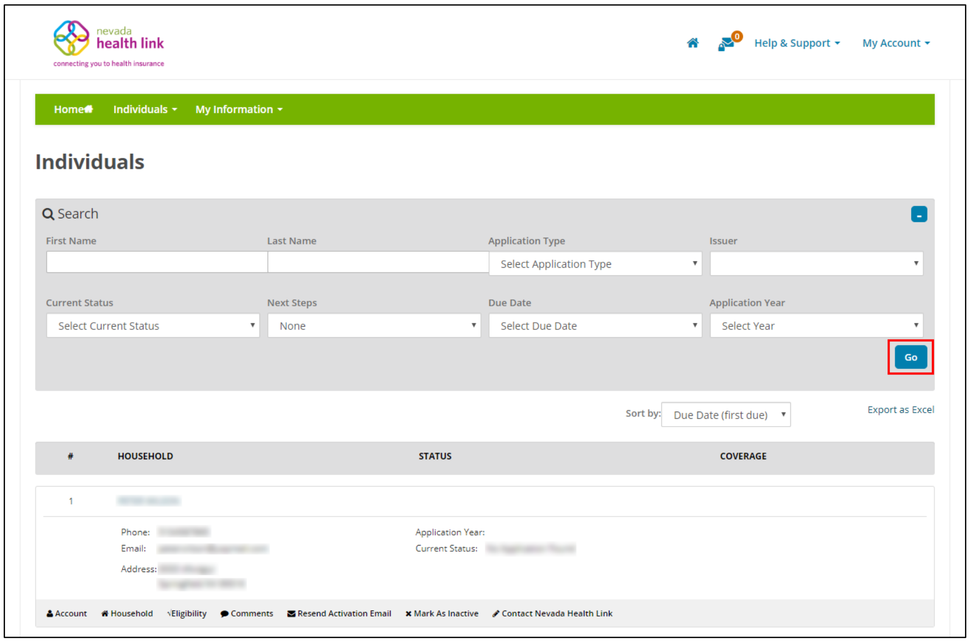
3.2.1 Search for Active Individuals

- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.

- Step-2: Click on  button and a drop-down list appears.



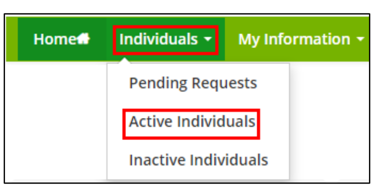
- Step-3: Enter the individual's information (e.g., "First Name" or "Application Type: Financial or Non-Financial") and click on the 'Go' button.



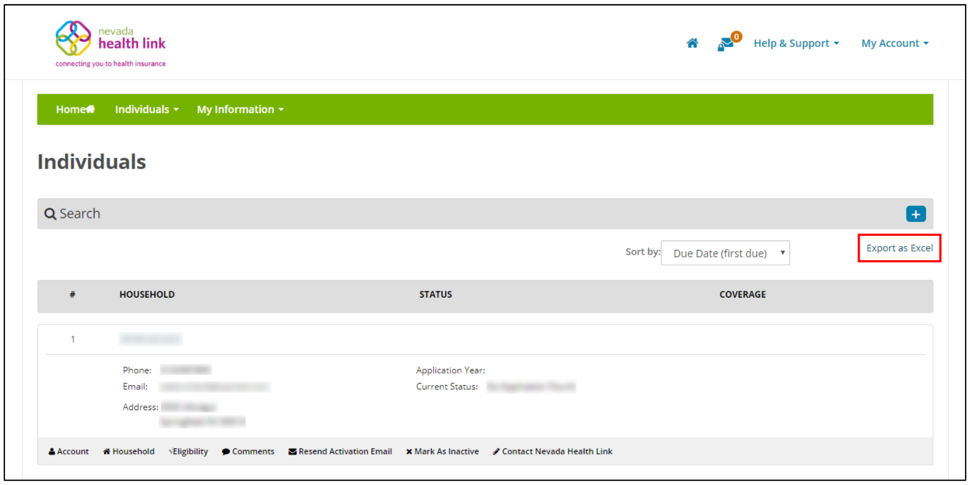
3.2.2 *Export Agent Book of Business*

Agent Book of Business includes details of Active Individuals that are designated to an Agent. The book includes details like Number (this is the Household ID number), First Name, Last Name, Phone Number, Email, Address, Application Date, Application Type, Current Status, Next Steps, Due Date, Carrier Name, Plan Name, Premium (monthly), APTC (monthly), Individual Contribution (monthly), Office Visits, Generic Drugs, Deductible and Application Year.

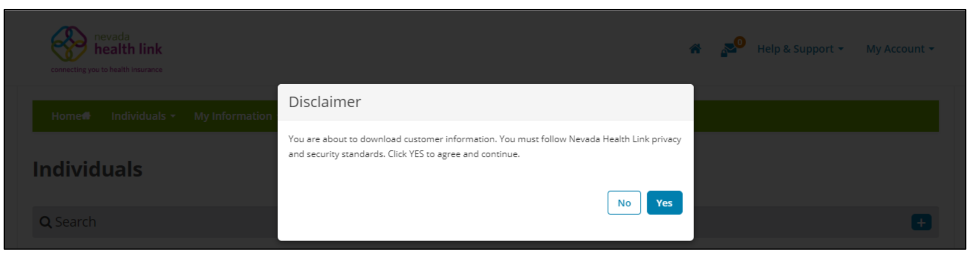
- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.



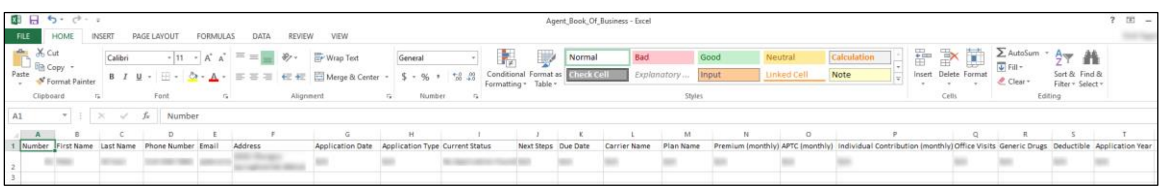
- Step-2: Click on the ‘Export as Excel’ button.



- Step-3: A disclaimer will appear on the screen. Click on ‘Yes’ to continue download or ‘No’ to cancel it.



- Step-4: The following screen displays Agent_Book_Of_Business.csv file.

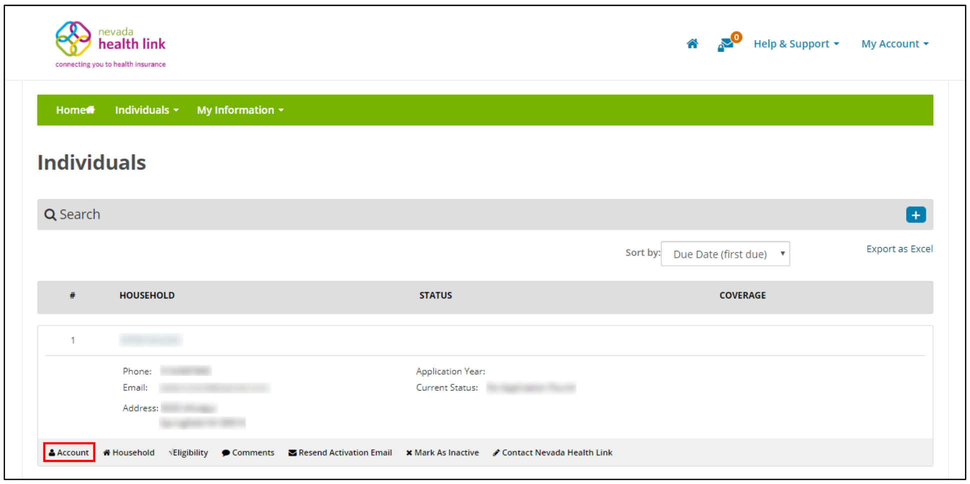


3.2.3 *Impersonate an individual’s account*

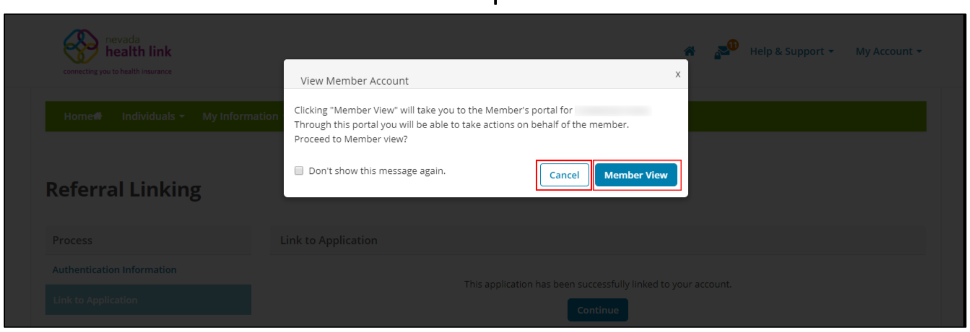
Agents can view an individual consumer’s account and can perform actions on behalf of them. They can perform actions such as report a qualifying life event, shop for new health and dental plans, start new individual application, view application status, view household eligibility, view current health and dental plans, view current and past enrollments, check inbox messages, update communication preferences, use find local assistance tool, view Agent profile and de-designate an Agent.

- Step-1: Click on ‘Individuals’ tab and select ‘Active Individuals’.

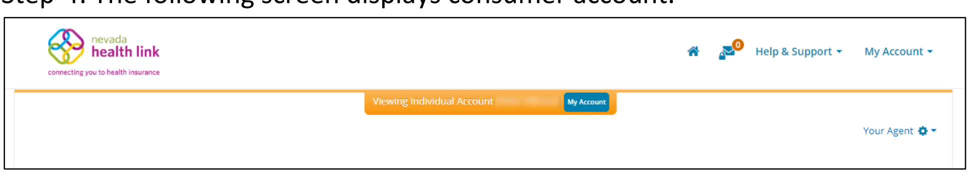
- Step-2: Click on the Account button present below an Active individual.



- Step-3: A pop-box will appear. Click on ‘Individual View’ to impersonate an individual account or click on ‘Cancel’ to cancel the process.



- Step-4: The following screen displays consumer account.

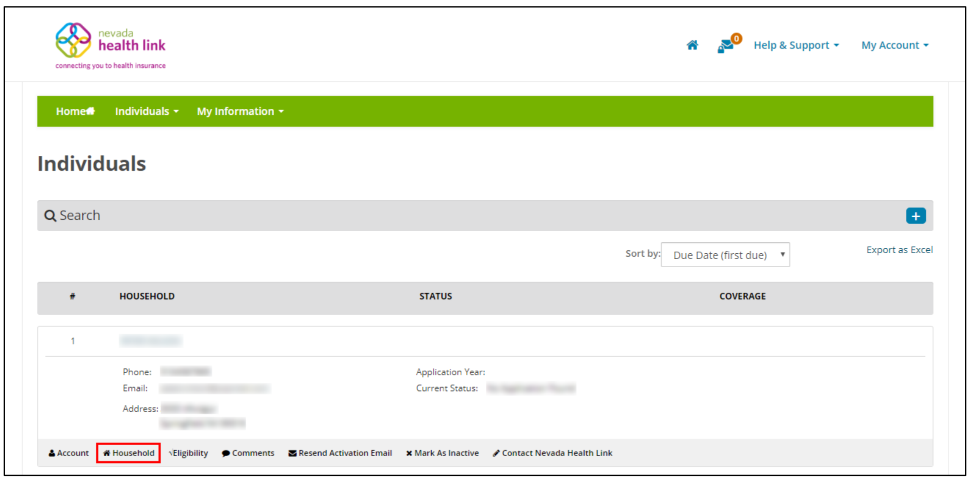


For detailed information on how to perform actions on behalf of consumers please refer to Application and Enrollment Guide.

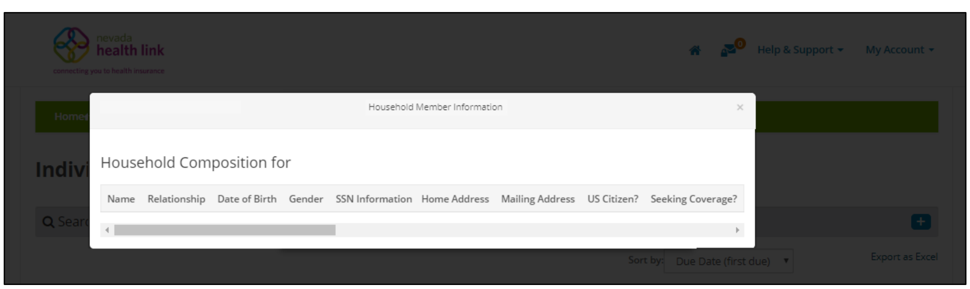
3.2.4 View individual’s household member information

- Step-1: Click on ‘Individuals’ tab and select ‘Active Individuals’.

- Step-2: Click on the Household button present below an Active individual.

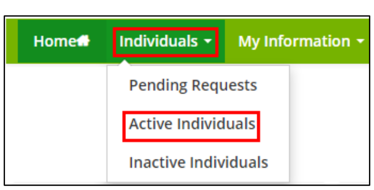


- Step-3: A pop-screen will appear with an individual’s Household Member Information.

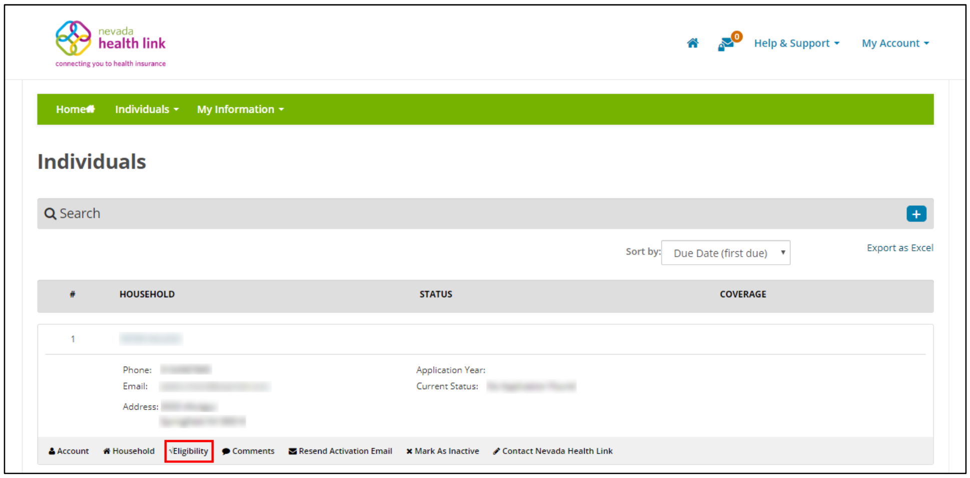


3.2.5 View individual’s household eligibility information

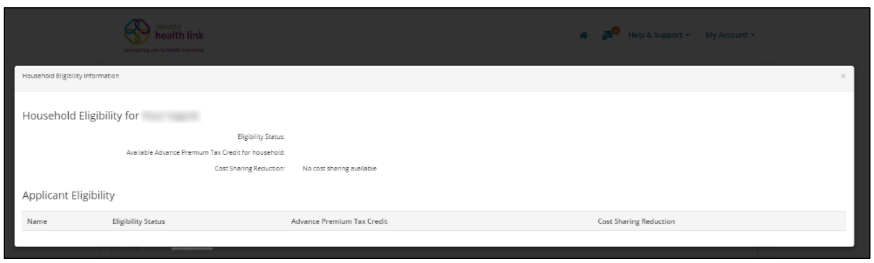
- Step-1: Click on ‘Individuals’ tab and select ‘Active Individuals’.



- Step-2: Click on the √Eligibility button present below an Active individual.



- Step-3: A pop-screen will appear with an individual's Household Eligibility Information.



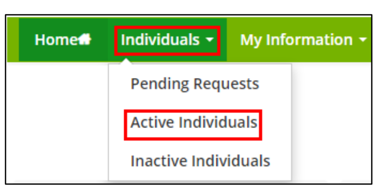
3.2.6 Comments on an individual's profile

The Comments section allows an Agent to view an individual's profile summary, provide comments on an individual profile, impersonate an individual account and resend the account activation email.

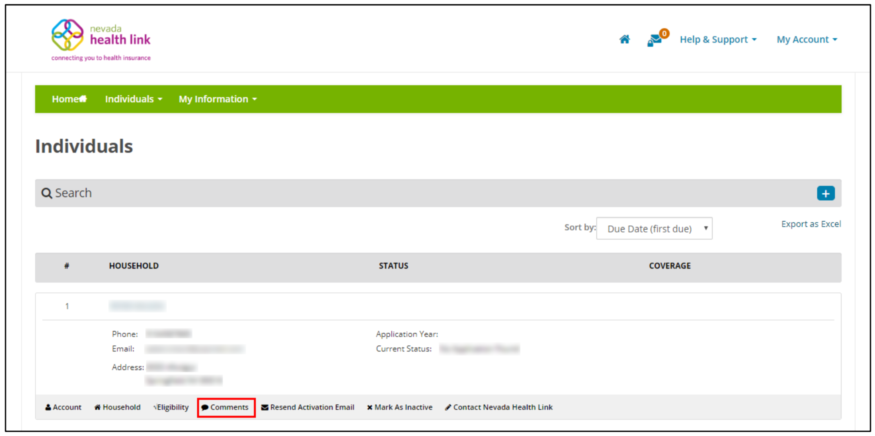
3.2.6.1 Update individual summary

PLEASE NOTE: Agents can edit individual summary only for the individuals who have not yet completed their sign-up process.

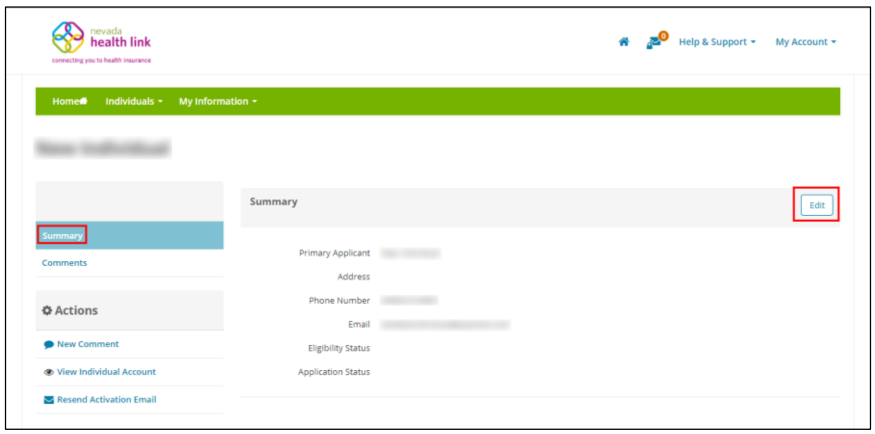
- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.



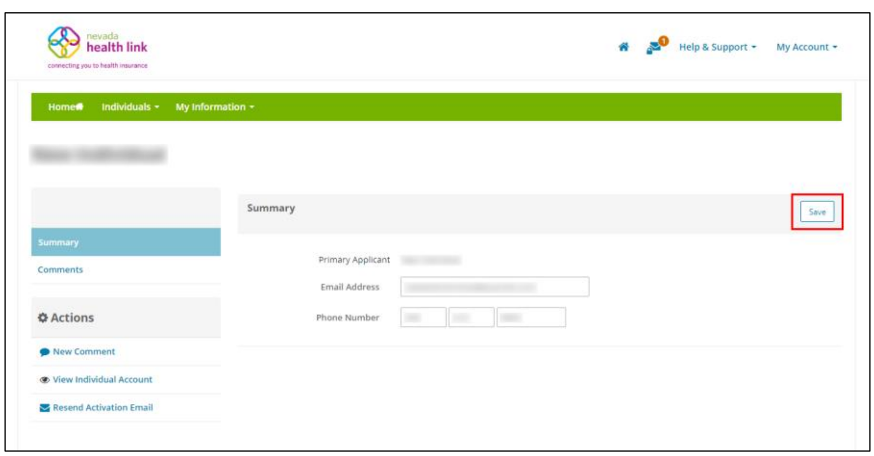
- Step-2: Click on the Comments button present below an Active individual.



- Step-3: Go to "Summary" section and click on the 'Edit' button.



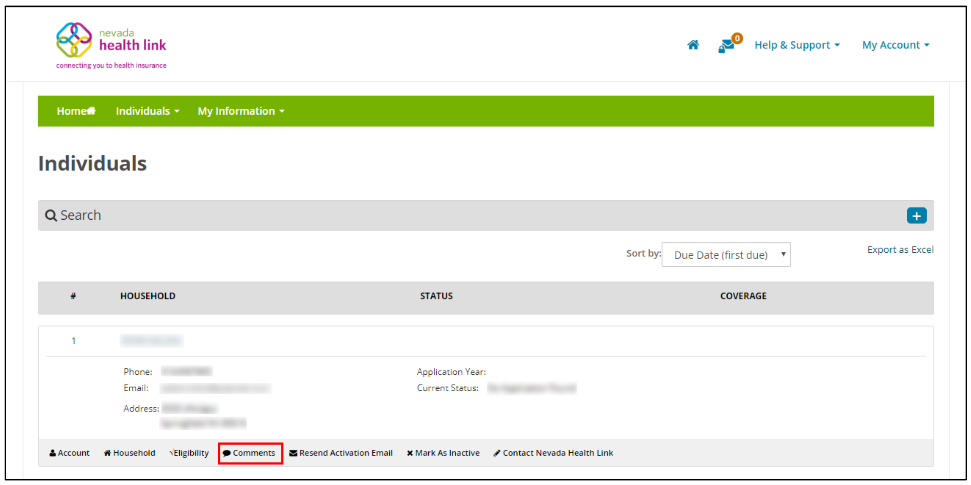
- Step-4: Enter the individual information and click on the 'Save' button.



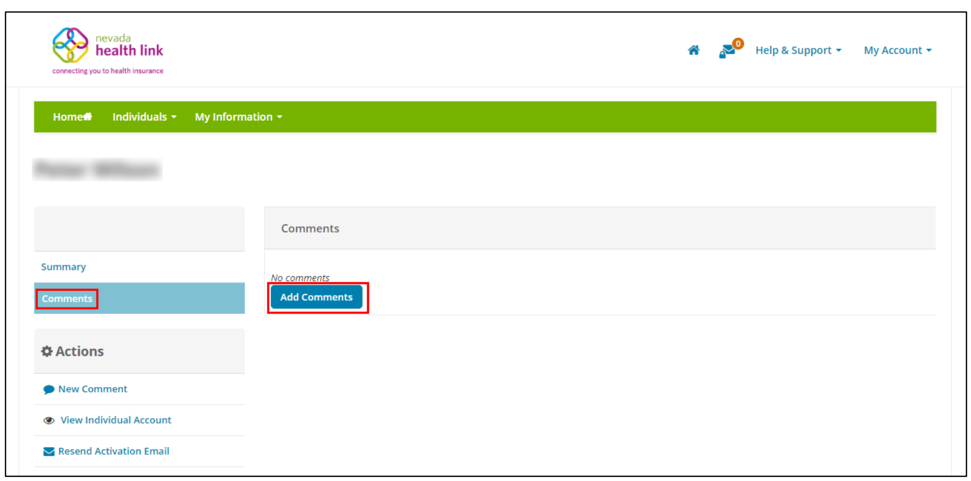
3.2.6.2 Provide comments on individual profile

- Step-1: Click on ‘Individuals’ tab and select ‘Active Individuals’.

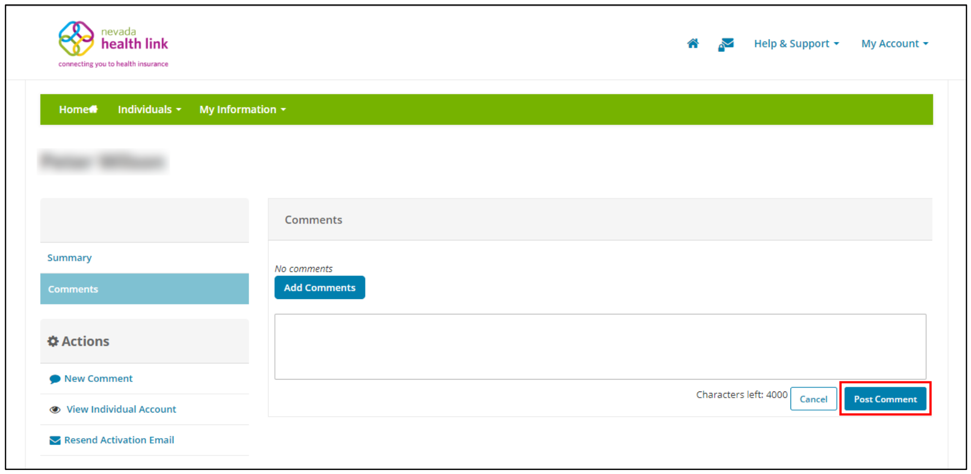
- Step-2: Click on the  button present below an Active individual.



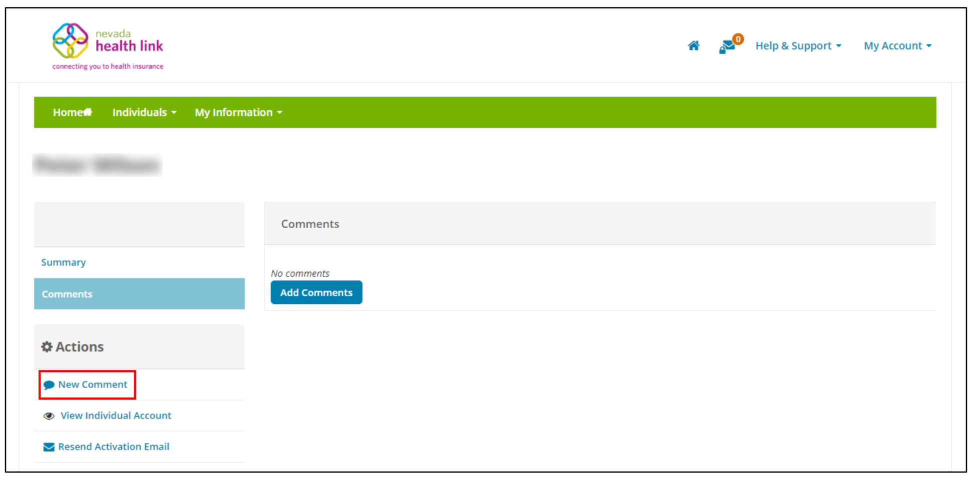
- Step-3: Go to “Comments” section and click on the ‘Add Comments’ button.



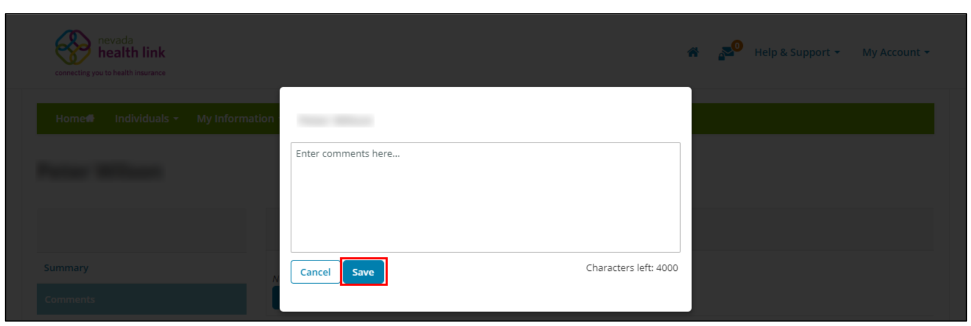
- Step-4: Provide your comments in the text area and click on the ‘Post Comment’ button.



- Step-5 (Another way): Perform Step-1 and Step-2 from Section 3.2.6.2 and go to "Actions" section and click on the 'New Comment' button.



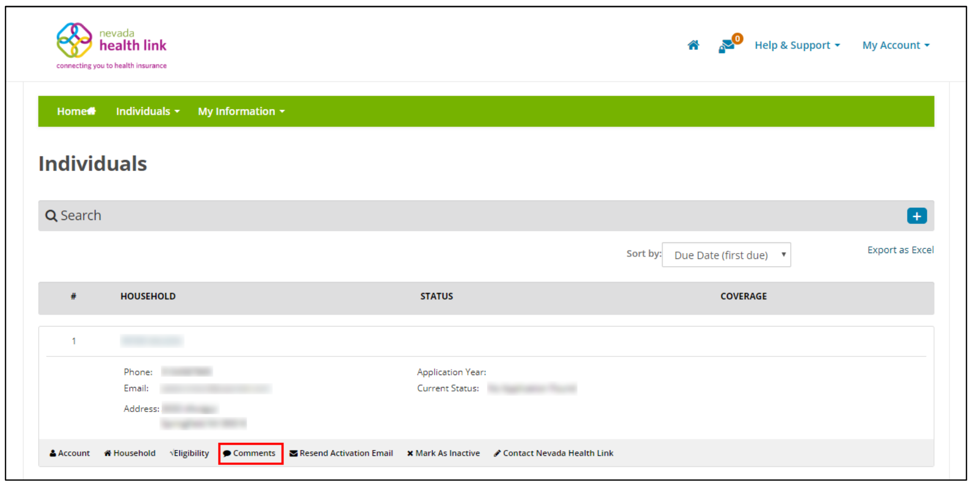
- Step-6 (Another way): A pop-up screen will appear. Enter comments in the text area and click on the 'Save' button.



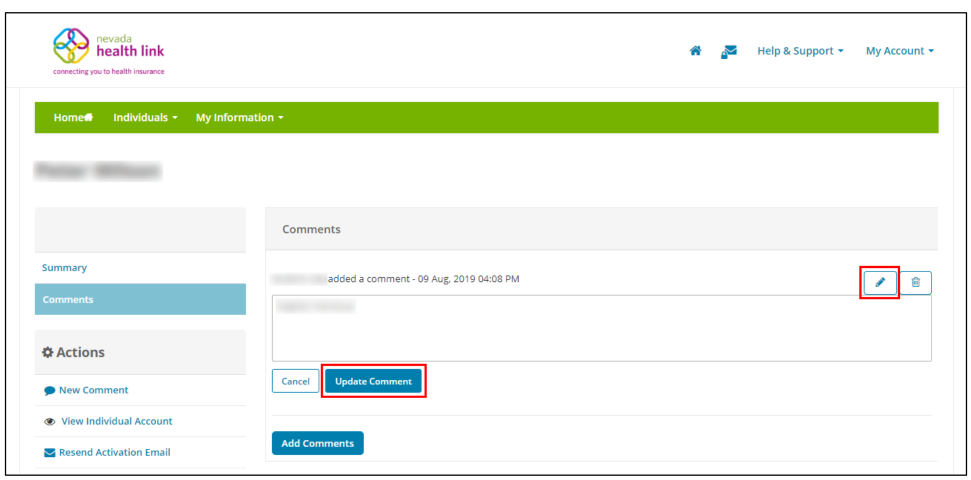
3.2.6.3 Update comments on individual profile

- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.

- Step-2: Click on the  button present below an Active individual.



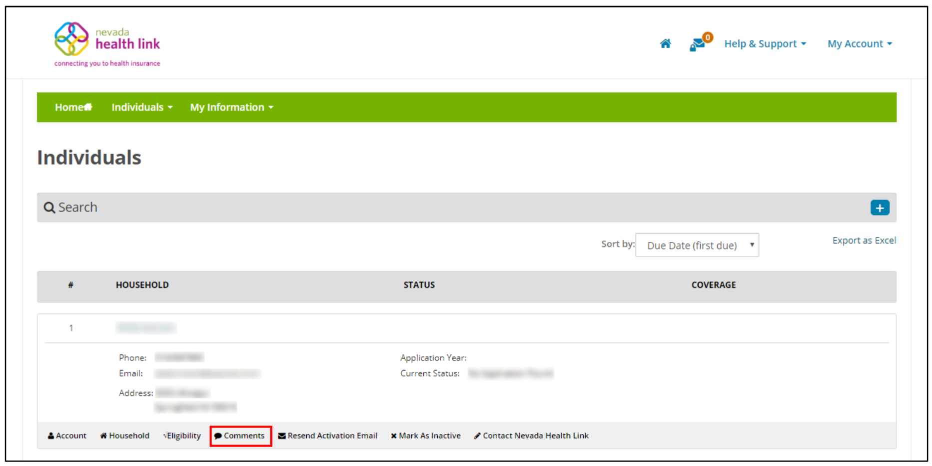
- Step-3: Go to "Comments" section and click on the  button next to a comment and enter the updated comment in the text area and click on the 'Update Comment' button.

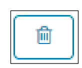


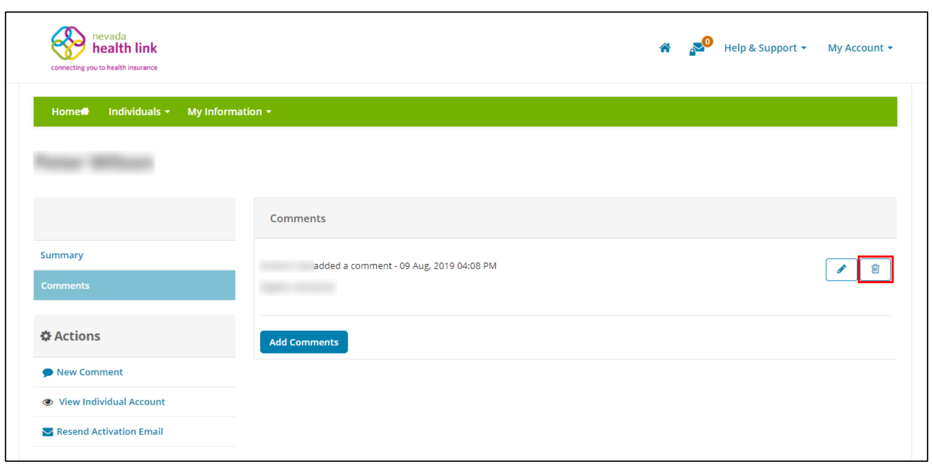
3.2.6.4 Delete a comment on individual profile

- Step-1: Click on ‘Individuals’ tab and select ‘Active Individuals’.

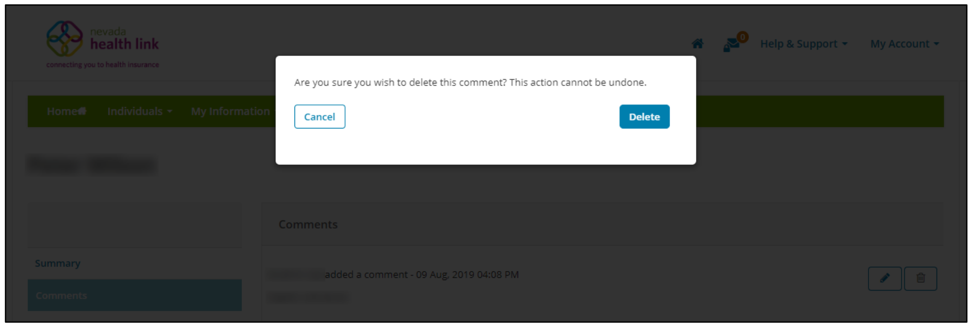
- Step-2: Click on the  button present below an Active individual.



- Step-3: Go to “Comments” section and click on the  button next to a comment.



- Step-4: A pop-up box will appear. Click on ‘Delete’ to delete the comment or click on ‘Cancel’ to cancel this process.



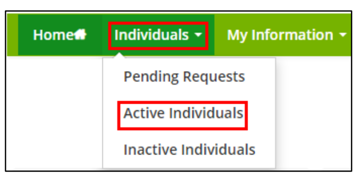
3.2.6.5 View individual account

For detailed information on view individual account please refer to Section 3.2.4.

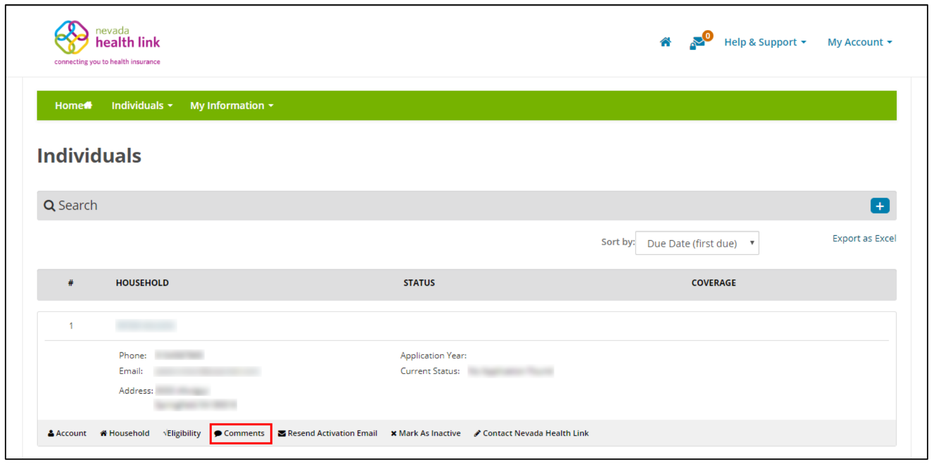
3.2.6.6 Resend Activation Email

PLEASE NOTE: This process is different from Section 3.2.7 Resend Activation Email. This process will send an email with activation link to the email address that is currently associated with the individual. Agents can only resend the account activation email link to individuals who have not yet created their account.

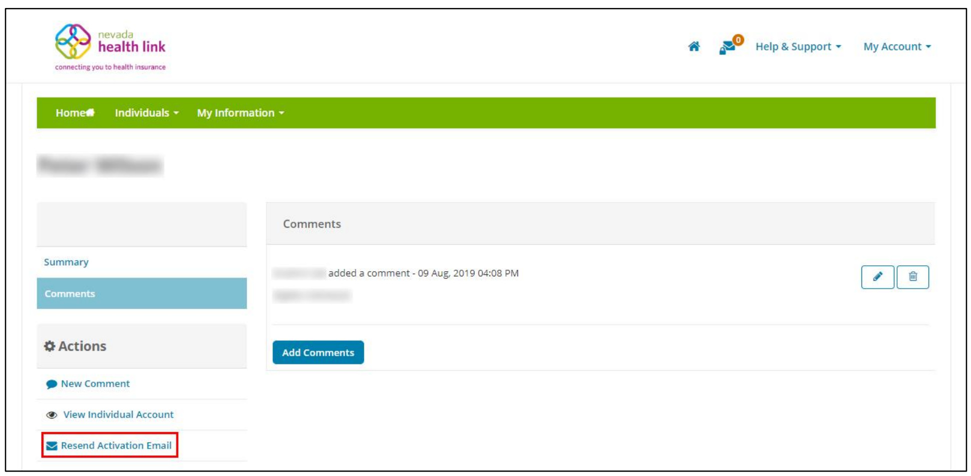
- Step-1: Click on ‘Individuals’ tab and select ‘Active Individuals’.



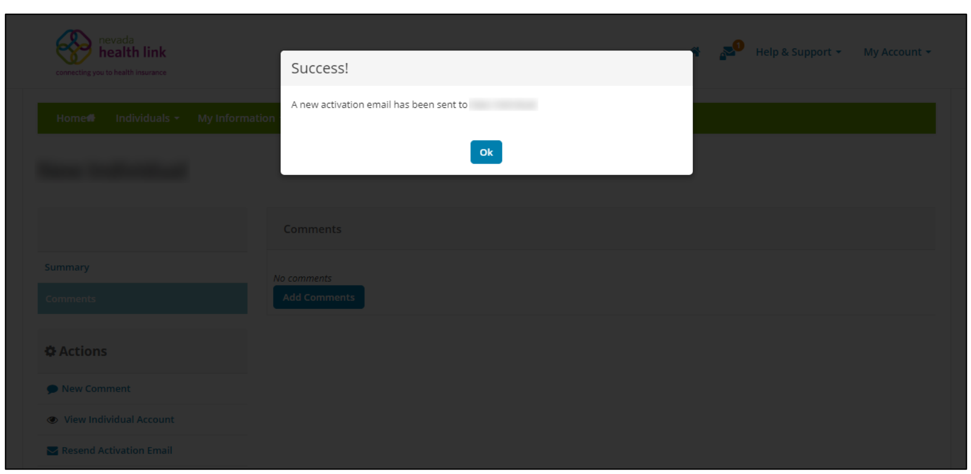
- Step-2: Click on the Comments button present below an Active individual.



- Step-3: Go to “Actions” section and click on the ‘Resend Activation Link’ tab.



- Step-5: A pop-up screen will appear with success message.

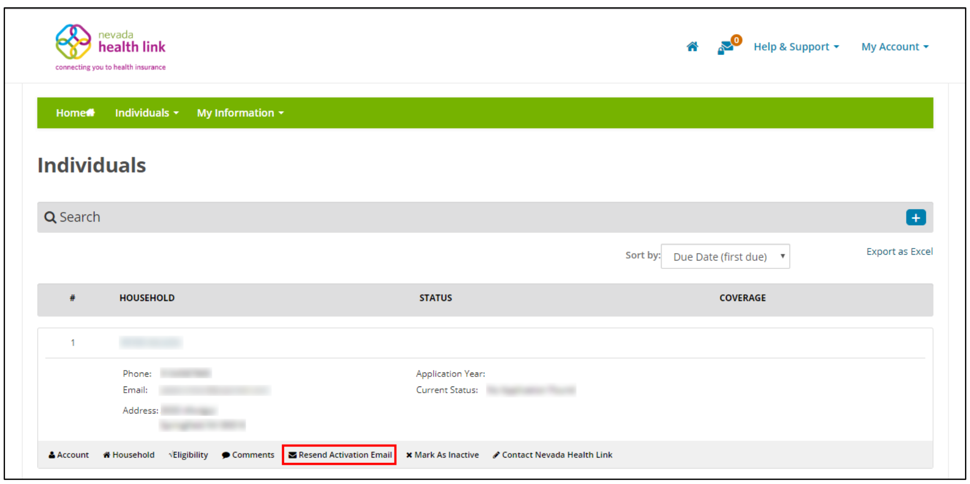


3.2.7 *Resend Activation Email*

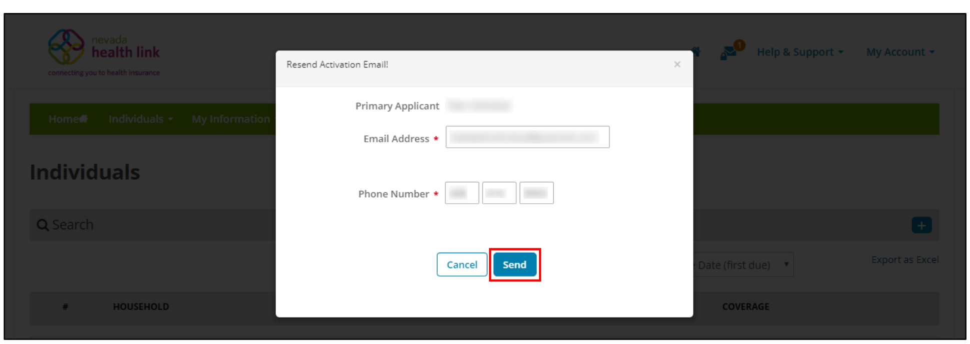
PLEASE NOTE: Resending the Activation Email is only available for consumers who have not completed the sign-up process. This step will allow an Agent to edit the individual email address and phone number before resending the activation link.

- Step-1: Click on ‘Individuals’ tab and select ‘Active Individuals’.

- Step-2: Click on the Resend Activation Email button present below an Active individual.



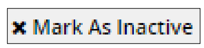
- Step-3: A pop-up screen will appear. Update individual’s email address or phone number if it’s needed or else click on the ‘Send’ button to resend activation email. A success message will appear after resending the email.



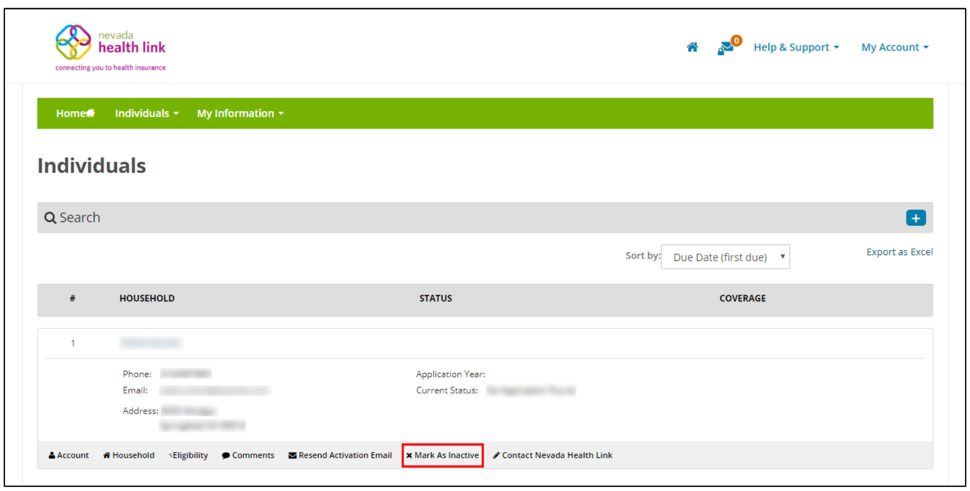
3.2.8 Mark an Individual as Inactive

PLEASE NOTE: This action cannot be undone. If an individual is marked as inactive, then it will terminate the existing relationship between the Agent and Consumer. The marked inactive individual will be listed in the "Inactive Individual" section. For detailed information on how a consumer designates an Agent, please refer to Section 4.1 of the Application and Enrollment Guide.

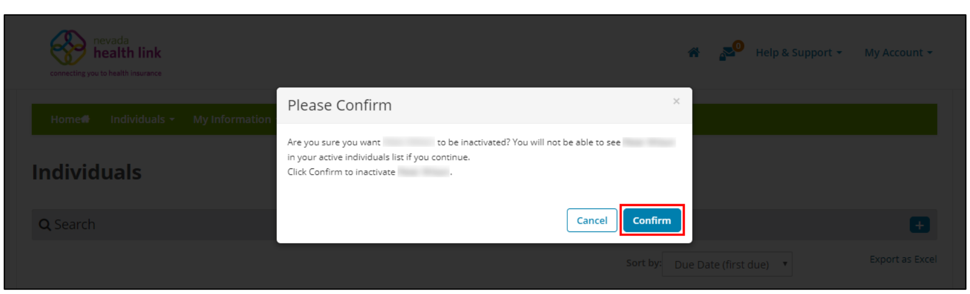
- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.

- Step-2: Click on the 

button present below an Active individual.



- Step-3: Click on the 'Confirm' button to inactive current individual or click on 'Cancel' to cancel the process.



3.2.9 *Contact Nevada Health Link*

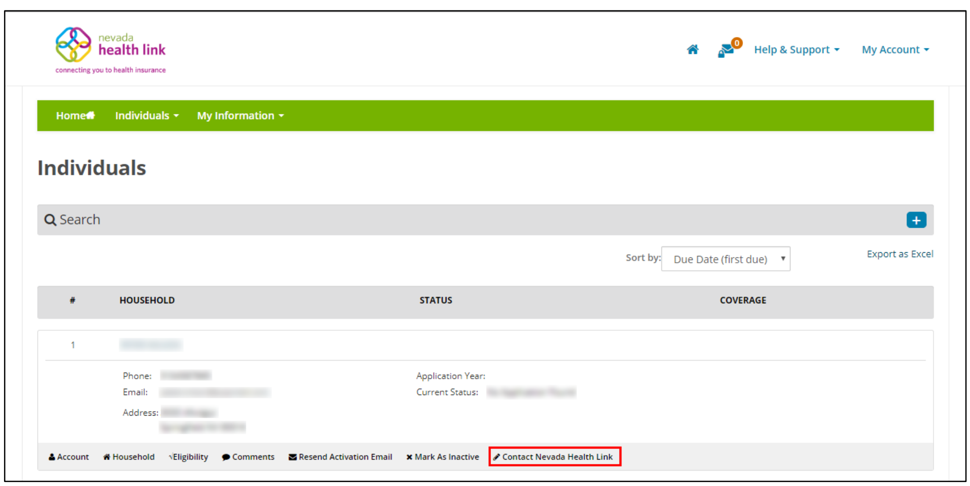
The Contact Nevada Health Link helps an Agent to submit a support request on behalf of a consumer to the Nevada Health Link Call Center.

The Agent creates a ticket on behalf of the consumer by entering a detailed description of the consumer issue. Once a request is submitted, a ticket number will be generated, and the request will be will be added into a ticketing queue. Based on the ticket type, it is forwarded to the Customer Service Representatives (CSR) at the Call Center monitor. The CSR then handles and resolves the consumer request.

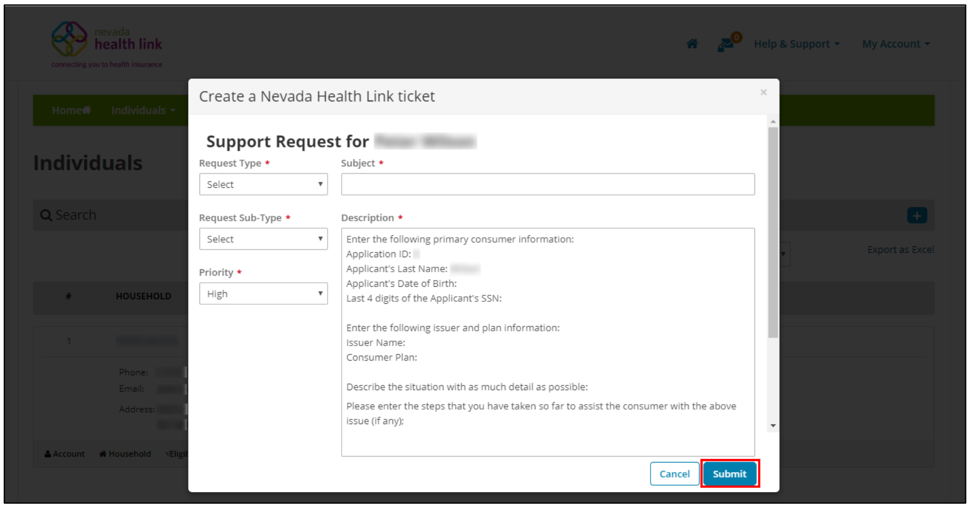
<u>PLEASE NOTE:</u> It is recommended to keep a record of the ticket number as it will be used as a source to track updates for the consumer request at the Call Center.

- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.

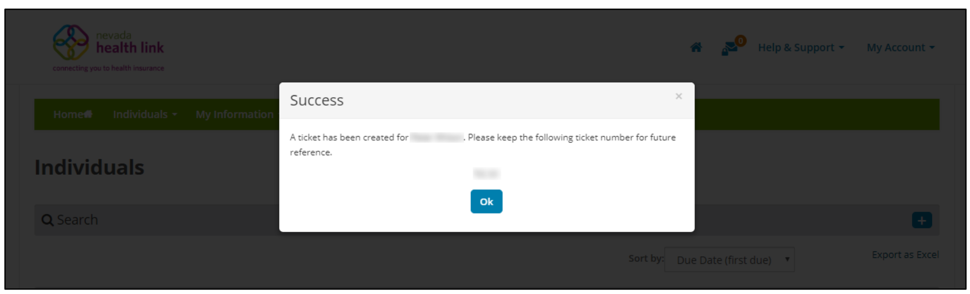
- Step-2: Click on the Contact Nevada Health Link button present below an Active individual.



- Step-3: A pop-screen will appear. Enter the information that will explain request type (e.g., "Complaint" or "Issues"), request sub-type (e.g., "Technical" or "Triage"), priority of the request (e.g., "Critical" or "Low"), subject of the request and a detailed description of the situation with all the primary consumer information (e.g., "Applicant's Date of Birth" or "Last 4 digits of the Applicant's SSN") ,and issuer and plan information (e.g., "Issuer Name" or "Consumer Plan"). After completing this process click on the 'Submit' button or 'Cancel' to cancel this process.



- Step-4: A pop-up screen will appear with success message and ticket number. **PLEASE NOTE:** Please keep the ticket number for future reference.



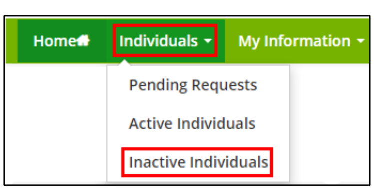
3.3 Inactive Individuals (Undesignated Consumers)

The Inactive Individual section displays the list of individuals whose designation request has been declined or marked as inactive by their Agent, or the individual has undesignated the Agent.

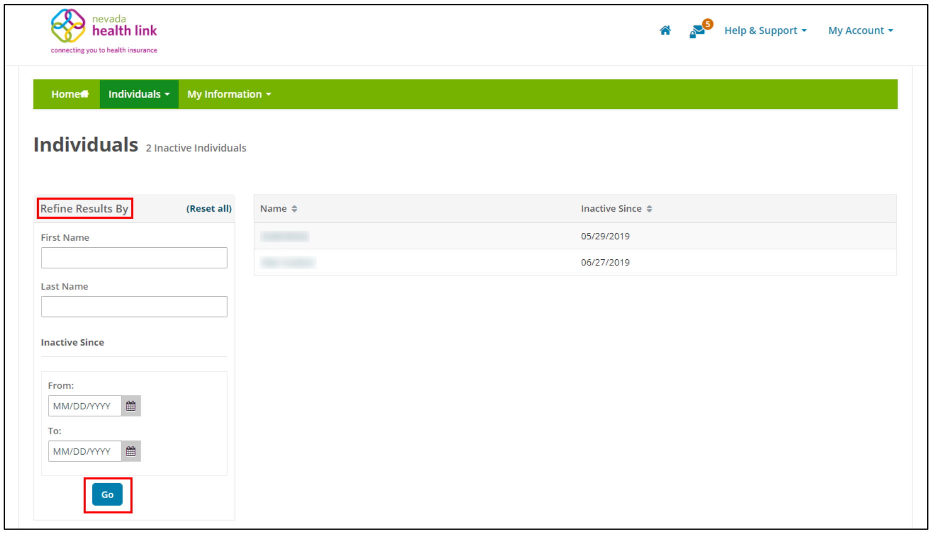
Agents can view and search for the list of inactive individuals filtered by their First name, Last name, and an Inactive date range.

3.3.1 View and search for Inactive individuals

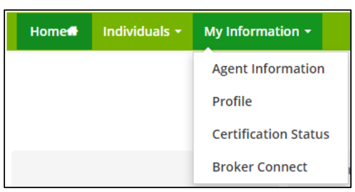
- Step-1: Click on the ‘Individuals’ tab and select ‘Inactive Individuals’.



- Step-2: Enter individual's first name in the 'First Name' field or last name in the 'Last Name' field or enter the desired date range since an individual has been inactive in the 'Inactive Since' section under the "Refine Results By" section and click on the 'Go' button.



4. My Information

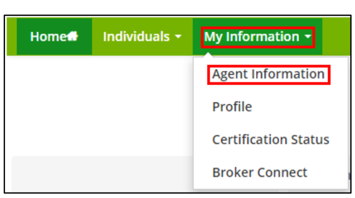


4.1 Agent Information

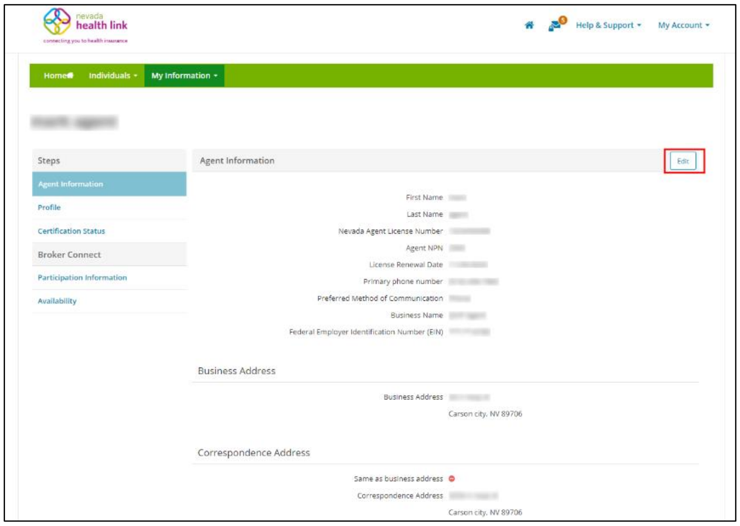
The Agent Information section displays detailed Agent information, which includes Agent Information, Business Address, and Correspondence Address. They can update this information within this section.

4.1.1 Add or update Agent Information

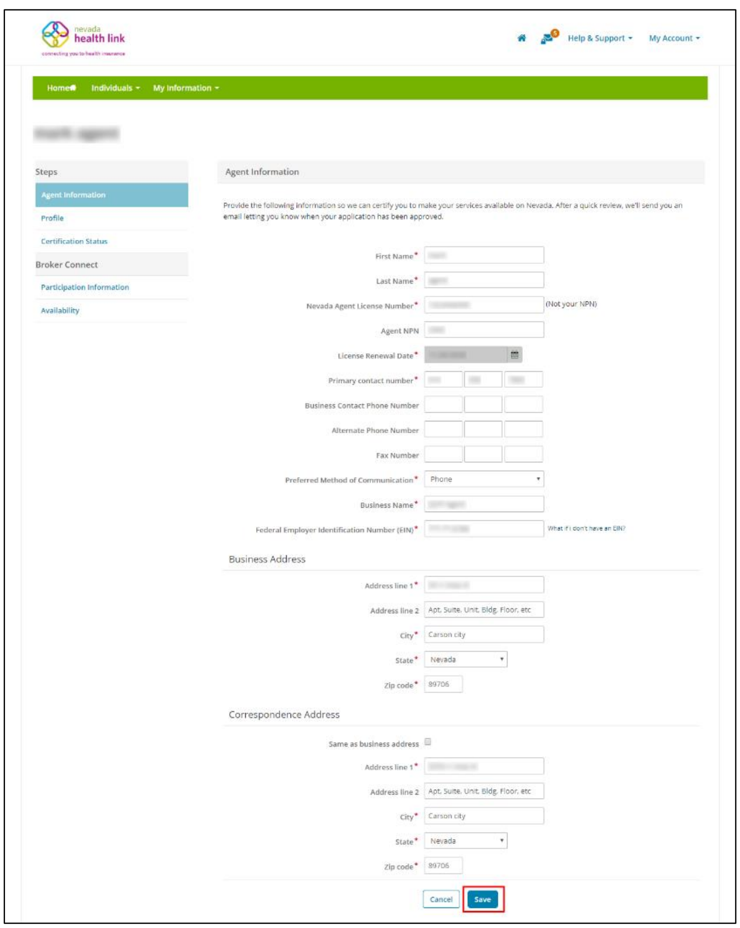
- Step-1: Click on 'My Information' tab and select 'Agent Information'.



- Step-2: Click on the ‘Edit’ button.



- Step-3: Enter the Agent Information, Business Address and Correspondence Address and click on the ‘Save’ button. If you have a home office, please input the address of a public place where you meet clients (e.g., a coffee shop).



4.2 Profile

For detailed information on Profile please refer to Section 2.2.

4.3 Certification Status

The Certification Status section provides a read-only listing to Agent number, Application submission date, Certification status, Certification number, Certification date and Renewal date.

There are five possible Certification Statuses, which are described below:

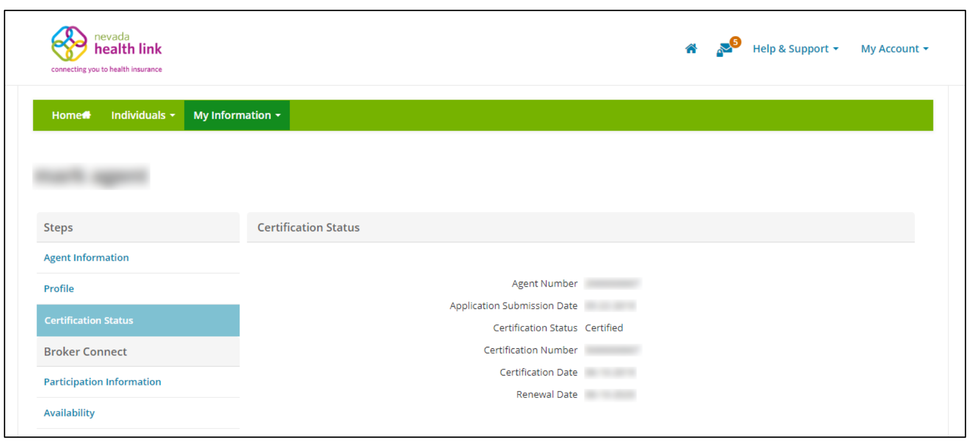
Pending
The Pending status is the default status assigned to a new Agent who has completed creating their account and public profile on the Nevada Health Link platform and Agent administrator is reviewing their information.

Certified
The Certified status is assigned once the Agent administrator has verified the Agent information. Only an Agent with certified status can have full access to the Agent portal.

Denied
The Denied certification status is assigned when an Agent's certification is rejected.

Withdrawn
The Withdrawn status is assigned to an Agent only if an Agent chooses to withdraw their application from the Nevada Health Link platform.

Deceased
The Deceased certification status is assigned when an Agent dies.



4.4 Broker Connect

Broker Connect is a telephonic consumer referral program that certified Agents can join for Consumers who are seeking assistance. Agents receive leads for consumers who need help with enrollment assistance, complete their Health insurance applications, and shop for a plan.

PLEASE NOTE: The call in Broker Connect will always come from (800)-547-2927, so it is advised to save this number in your contacts. An Agent's phone will ring for 10 seconds (3-4 rings) before it gets transferred to the next Agent, so it is advisable to pick up the call as quickly as possible before the call is passed on.

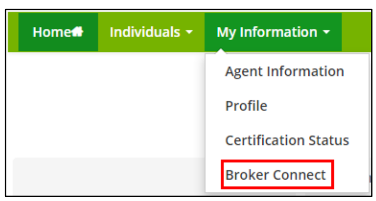
4.4.1 Participation Information

The Participation information section allows an Agent to get enrolled or disenroll from the Broker Connect program. Agents are required to provide their phone number to get enrolled and receive consumer phone calls during their business hours.

PLEASE NOTE: It is recommended to enter a mobile phone number to participate in the Broker Connect program so that the Agents don't lose a potential consumer.

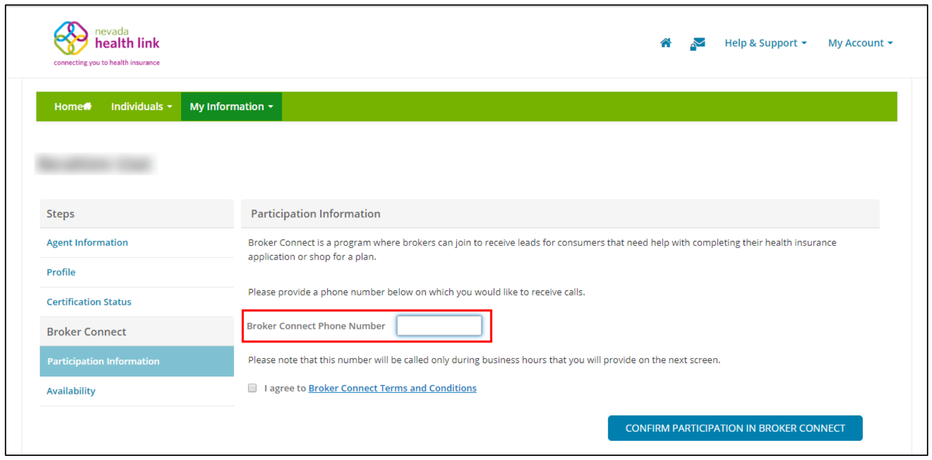
4.4.1.1 Enroll in the Broker Connect Program

- Step-1: Click on 'My Information' tab and select 'Broker Connect' and click on the 'Participation Information' section.

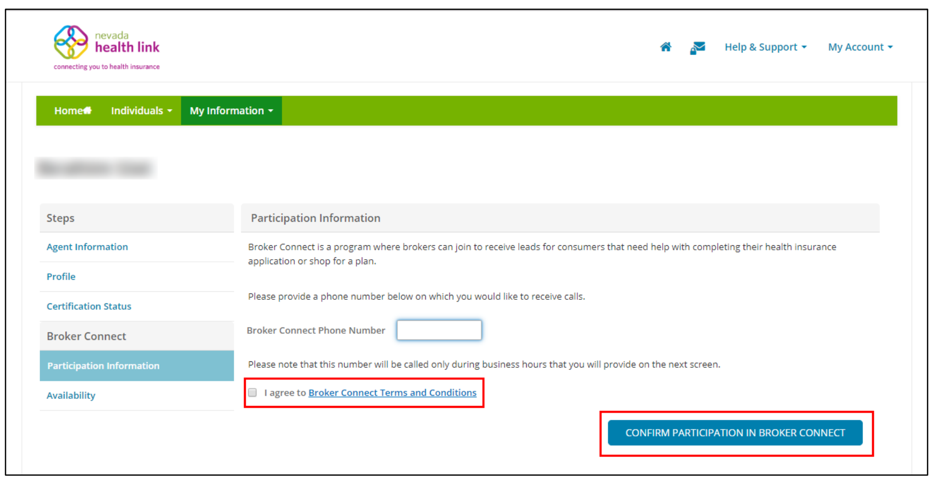


- Step-2: Go to "Broker Connect" section, click on the 'Participation Information' and provide phone number in the broker connect phone number field.

  PLEASE NOTE: It is recommended to enter a mobile phone number to participate in the Broker Connect program so that the Agents don't lose a potential consumer.

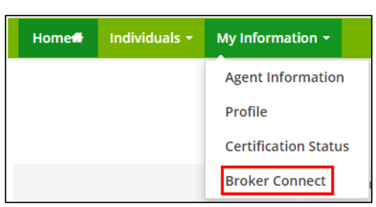


- Step-3: Click on the hyperlink "Broker Connect Terms and Conditions" to read the terms and conditions associated with the broker connect service and click on the box next to '*I agree to Broker Connect Terms and Conditions*', and click on the 'Confirm participation in Broker Connect' button.

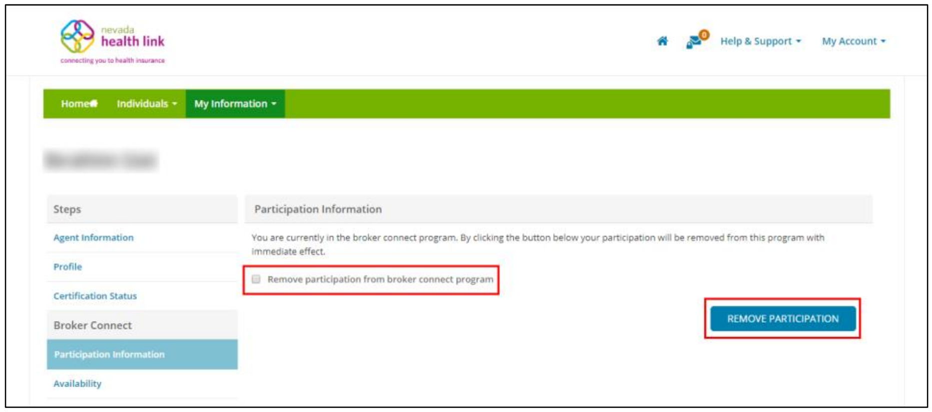


4.4.1.2 Opt-out of Broker Connect Program

- Step-1: Click on 'My Information' tab and select 'Broker Connect' and click on the 'Participation Information' section.



- Step-2: Go to “Broker Connect” section, click on the ‘Participation Information’, click on the box next to ‘*Remove participation from Broker Connect program*’ and click on ‘Remove participation’.

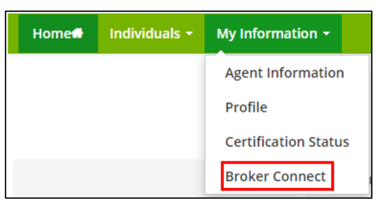


4.4.2 *Availability*

The Availability section allows an Agent to select available hours for the consumer calls for each day. An Agent can select working day hours, turn their availability on/off as needed (e.g. for vacations/out-of-office), update their broker connect phone number and apply weekday working hours to their availability schedule.

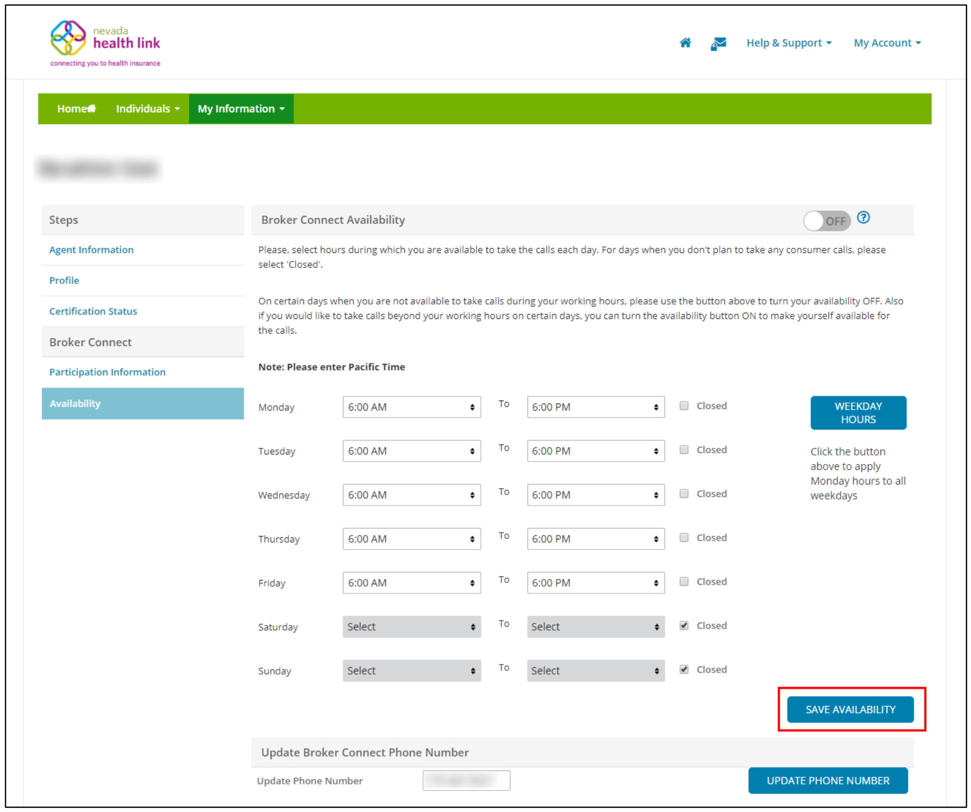
4.4.2.1 *Select working day hours*

- Step-1: Click on ‘My Information’ tab and select ‘Broker Connect’ and click on the ‘Availability’ section.



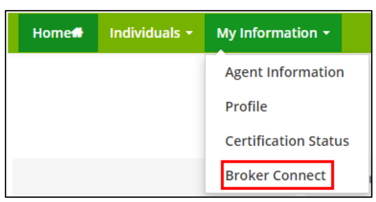
- Step-2: Go to “Broker Connect” section, click on the ‘Availability’ and select working day hours from Monday to Sunday, click on the ‘Save Availability’ button. An Agent can click on the box next to ‘Closed’ if they are not working on that particular day.

  PLEASE NOTE: Please enter Pacific Daylight Time working day hours.

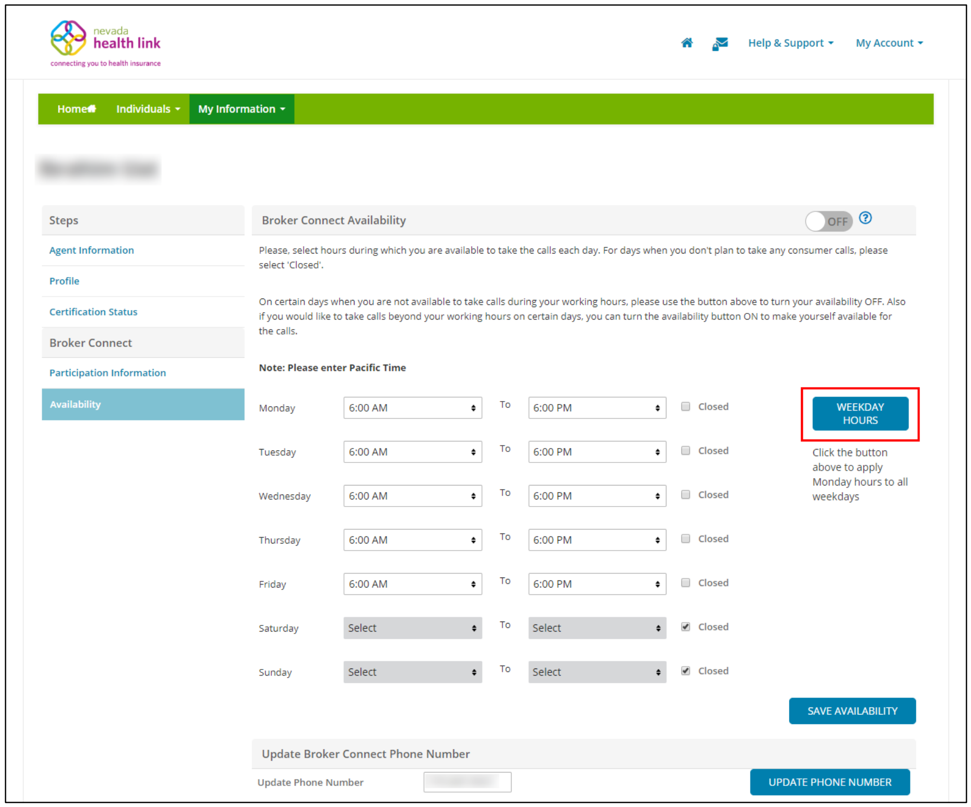


4.4.2.2 Apply Monday hours to all weekdays

- Step-1: Click on 'My Information' tab and select 'Broker Connect' and click on the 'Availability' section.



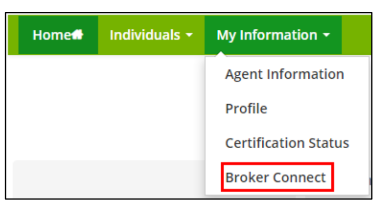
- Step-2: Go to "Broker Connect" section, click on the 'Availability' and click on 'Weekday Hours' to apply Monday hours to all weekdays.



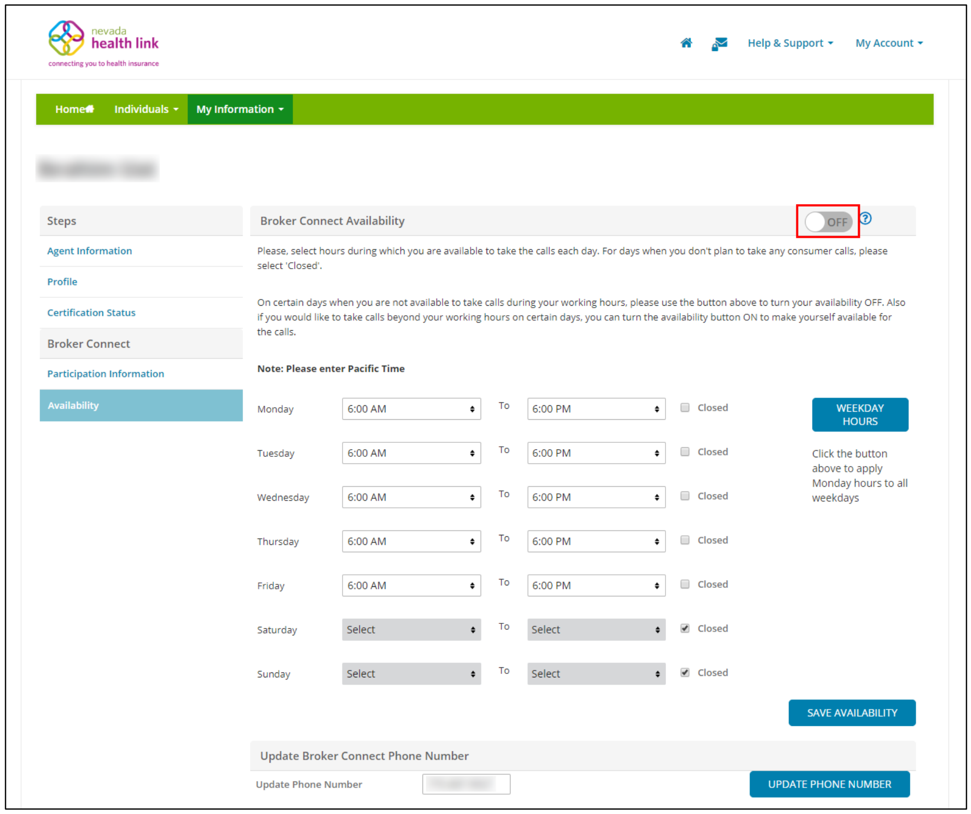
4.4.2.3 Turn on and turn off availability during working hours

The Turn on and off availability functionality allows an Agent to deactivate the Broker Connect tool when they are unable to provide enrollment assistance, for example when they are on vacation, sick leave, time off, or are unavailable.

- Step-1: Click on 'My Information' tab and select 'Broker Connect' and click on the 'Availability' section.

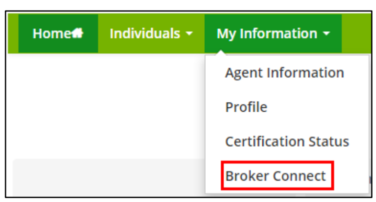


- Step-2: Go to "Broker Connect" section, click on the 'Availability' and press the toggle button to turn off and turn on to set availability during working hours.



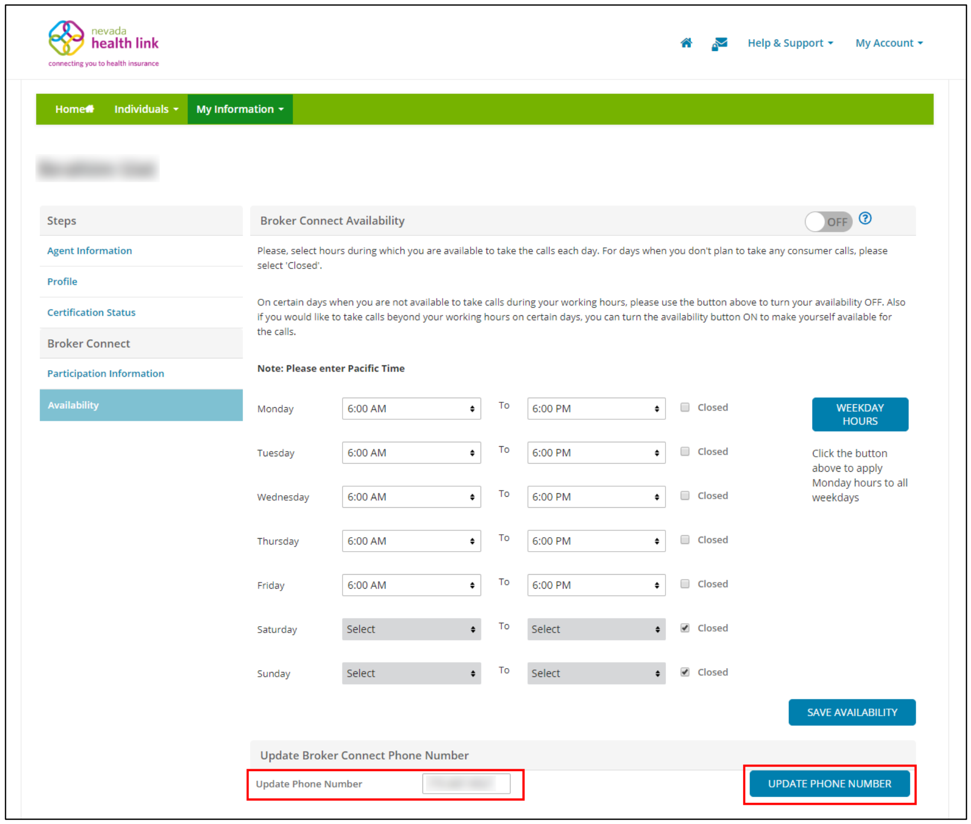
4.4.2.4 Update Broker Connect phone number

- Step-1: Click on 'My Information' tab and select 'Broker Connect' and click on the 'Participation Information' section.



- Step-2: Go to "Broker Connect" section, click on the 'Availability' and enter the updated phone number in the 'Update Phone Number' field and click on the 'Update phone number' button.

  PLEASE NOTE: It is recommended to enter a mobile phone number to participate in the Broker Connect program so that the Agents don't lose a potential consumer.


nevada
health link
connecting you to health insurance
Help & Support
My Account
Home
Individuals
My Information
Steps
Agent Information
Profile
Certification Status
Broker Connect
Participation Information
Availability
Broker Connect Availability
OFF
Please, select hours during which you are available to take the calls each day. For days when you don't plan to take any consumer calls, please select 'Closed'.
On certain days when you are not available to take calls during your working hours, please use the button above to turn your availability OFF. Also if you would like to take calls beyond your working hours on certain days, you can turn the availability button ON to make yourself available for the calls.
Note: Please enter Pacific Time
Monday 6:00 AM To 6:00 PM Closed
Tuesday 6:00 AM To 6:00 PM Closed
Wednesday 6:00 AM To 6:00 PM Closed
Thursday 6:00 AM To 6:00 PM Closed
Friday 6:00 AM To 6:00 PM Closed
Saturday Select To Select Closed
Sunday Select To Select Closed
WEEKDAY HOURS
Click the button above to apply Monday hours to all weekdays
SAVE AVAILABILITY
Update Broker Connect Phone Number
Update Phone Number
UPDATE PHONE NUMBER

Document Revision History

Version	Issue Date	Changes	Drafted	Approved
1.0	10/29/2019	Initial Release	Vinit Yagnik	Heather Korbulic