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 <u>https://www.nevadahealthlink.com/brokers-agents-onboarding/</u>.

2. Home/Dashboard

Home Individuals - My Information -

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:

Home Individuals - My Inform	ation +								
Dashboard									
Quick Links	Enrollmen	t History							
② Pending Individuals									
💄 My Profile				Your Enrollm	ents – Past	30 Days			
💄 Add New Individual									
		Enrollment T	ype						
Access Code	19								
Submit	Enrollments	0 0	0	0	0	0	0	0	0
	Ena								

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.

nevada health link	i 💏 🔊 Help & Support 👻 My.	Account 🕶
Home# Individuals • My Informa Dashboard	tion -	
Quick Links Pending Individuals My Profile	Enrollment History Your Enrollments – Past 30 Days	
Add New Individual	Enrollment Type	
Submit	9 19 19 19 19 19 19 19 19 19 19 19 19 19	0
	PLATINUM SILVER EXPANDEDBRONZE HICH ME COLD BRONZE CATASTROPHIC LOW	DICAL

• 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.

Home Individua	ls - My Informa	ation -				
nonca nuvidua	is my morna					
ndividuals 1	Des dis e te dividue					
Individuals 1	Pending Individua	I				
Refine Results By	(Reset all)	Name \$	FAMILY SIZE \$	Request Sent \$	Actions	
First Name			1	06/27/2019	0.1	
		N/A - Not Available				
Last Name						
Request Sent						
nequest sent						
From:						
MM/DD/YYYY						
To: MM/DD/YYYY 🛗						

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.

nevada health link				÷	Pelp & Sup	port • My Account •
Home# Individuals - My Inform	nation -					
	Enrollment Histor	ý				
Pending Individuals My Profile			Your Enrolln	nents – Past 30 Days		
Add New Individual		nrollment Type				
Access Code Submit	• • •	0	0 0	0 0	0	0 0
	PLATINUM	GOLD	VER BRONZE	ÉXPANDEDBRONZÉ CATASTROPHIC	нісн	MEDICAL

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

First Name 1 06/27/2019 Last Name Accept	Refine Results By (Reset al) Name © FAMILY SIZE © Request Sent © Actions First Name 1 06/27/2019 • • Last Name • • • • Request Sent • • • •
Refine Results By (Reset all) Name © FAMILY SIZE © Request Sent © Actions First Name 1 06/27/2019 Image: Comparison of the sent of th	Refine Results By (Reset al) Name © FAMILY SIZE © Request Sent © Actions First Name 1 06/27/2019 • • Last Name • • • • Request Sent • • • •
First Name 1 06/27/2019 Last Name Accept	First Name 1 06/27/2019 0 Last Name Incent Incent Request Sent Incent Incent
Last Name Last Name	Last Name Accept Request Sent Accept
N/A . Net Available	Last Name Last Name Request Sent
Last Name	Last Name Request Sent
Request Sent	
Request Sent	
From:	From:
MM/DD/YYYY 🗎	MM/DD/YYYY
	To:
MM/DD/YYYY	MM/DD/YYY 🖀

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.

connecting you to health insurance	🌴 🔊 Help & Support + 🛛 My Account 🕯
Homen Individuals - My I	nformation *
torit agent	
Steps	Profile Edit
Agent Information	
Profile	Review and edit your public profile, which can be seen by Nevada Health Link users looking for Agents. The more accurate the information you provide, the more likely it is that potential customers will contact you.
Certification Status	
Broker Connect	
Participation Information	Carson city, NV 89706
Availability	Phone number
	Your Public Email
	Areas of Expertise Languages Spoken
	Product Expertise
	Website address
	Education

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.

nevada health link					* 🎤	Help & Support 🝷	My Account
Home Individuals - My Informa	ation -						
Dashboard							
Quick Links	Enrollment History						
Pending Individuals My Profile Add New Individual	-	ollment Type	Your Enrollm	ients – Past 30 Day	/5		
Access Code	e o e	0 0	0	0 ()	0 0	0
	PLATINUM	GOLD	BRONZE	ÉXPANDEDBRONZÉ CATAST		HICH LOW	MEDICAL

• Step-2: Click on the 'Edit' button.

Home Individuals - My	/ Information *	
and agent		
Steps	Profile	Edit
Agent Information		
Profile	Review and edit your public profile, which can be seen by Nevada Health Link users looking for Agents. The more accurate the information y provide, the more likely it is that potential customers will contact you.	JU
Certification Status		
Broker Connect		
Participation Information	Carson city, NV 89706	
Availability	Phone number	
	Your Public Email	
	Areas of Expertise	

• Step-3: Click on 'Choose File'.

connecting you to health link		🕷 🔊 Help & Support + 🛛 My Account +
Home ff Individuals - My	Information -	
torth agent		
Steps	Profile	
Agent Information		
Profile		
Certification Status		
Broker Connect		
Participation Information		Change Photo Choose File No file chosen Upload
Availability		You can upload a JPG, GIF or PNG file (File size limit is 5 MB).
		Agent Name

• 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.

Home 🖬 Individuals 👻 🕅	My Information +	
	Open	
	$\leftarrow \rightarrow \checkmark \uparrow$ is PC \rightarrow Pictures \rightarrow Saved Pictures	✓ Ŏ Search Saved Pictures
	Organize 🔻 New folder	• • •
Steps	> 🖈 Quick access	
Agent Information	> Creative Cloud Fil > OneDrive	
	Agent Photo	
Certification Status	> 🗊 3D Objects > 📃 Desktop	
Broker Connect	> 🖹 Documents > 🕹 Downloads	
Participation Information	> 👌 Music	
Availability	V 🔄 Pictures	
	Saved Pictures > Wideos	

• Step-4: Click on the 'Upload' button.

connecting you to health link		🎇 💦 🔁 Help & Support 👻 My Account
Home My	Information -	
tort agent		
Steps	Profile	
Agent Information		
Profile		
Certification Status		
Broker Connect		and the second states
Participation Information		Change Photo Choose File Agent Photo.png Upload
Availability		You can upload a JPG, GIF or PNG file (File size limit is 5 MB).
		Agent Name

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.

nevada health link connecting you to health insurance							ñ	Nelp 8	Support +	My Account 👻
Home Individuals - My Informat	ion -									
Quick Links	Enrol	lment History	1							
Pending Individuals My Profile Add New Individual			nrollment Type		Your Enrollm	ents – Past	30 Days			
Access Code	Enrollments o	0	0	0	0	0	0	0	0	0
		PLATINUM	GOLD	SILVER	BRONZE	XPANDEDBRONZ	É CATASTROPHIC	нісн	LOW	MEDICAL

• Step-2: Click on the 'Edit' button.

Steps Profile Agent Information Review and edit your public profile, which can be seen by Nevada Health Link users looking for Agents. The more accurate the provide, the more likely it is that potential customers will contact you. Profile Certification Status Broker Connect Participation Information	Profile Eac N Review and setty your public profile, which can be seen by Nevada Health Link users looking for Agents. The more accurate the information you provide, the more likely it is that potential oustomers will contact you. tus ct	Home Individuals - My	Information -	
Agent Information Review and edity our public profile, which can be seen by Nevada Health Link users looking for Agents. The more accurate the provide, the more likely it is that potential customers will contact you. Certification Status Broker Connect Participation Information Cerson city, NV 99706	Review and edit your public profile, which can be seen by Newada Health Link users looking for Agents. The more accurate the Information you provide, the more likely it is that potential customers will contact you. tus ct ormation Phone number	Homew Individuals • My		
Agent Information Review and edity our public profile, which can be seen by Nevada Health Link users looking for Agents. The more accurate the provide, the more likely it is that potential customers will contact you. Certification Status Broker Connect Participation Information Certification Information Certification Information	Review and edit your public profile, which can be seen by Nevada Health Link users looking for Agents. The more accurate the information you provide, the more likely it is that potential customers will contact you. tus ct ormation Phone number Your Public Ental Areas of Expentis			
Agent Information Review and edity our public profile, which can be seen by Nevada Health Link users looking for Agents. The more accurate the provide, the more likely it is that potential customers will contact you. Certification Status Broker Connect Participation Information Cerson city, NV 99706	Review and edit your public profile, which can be seen by Newada Health Link users looking for Agents. The more accurate the Information you provide, the more likely it is that potential customers will contact you. tus ct ormation Phone number			
Review and edit your public profile, which can be seen by Nevada Health Link users looking for Agents. The more accurate the provide, the more likely it is that potential customers will contact you. Certification Status Broker Connect Participation Information Cerson city, NV 89706	Review and edit your public profile, which can be seen by Nevada Health Link users looking for Agents. The more accurate the information you provide, the more likely it is that potential customers will contact you. tus ct ct promation Phone number Vour Public Email Areas of Expentise	Steps	Profile	Edit
Profile provide, the more likely it is that potential customers will contact you. Certification Status Environment of the status Broker Connect Environment of the status Environment of the status Participation Information Carson city. NV 89706	provide, the more likely it is that potential customers will contact you. tus ct commation Phone number Your Public Emai Areas of Expension	Agent Information		
Broker Connect Participation Information Carson city. NV 89706	ct Carson cty: NV 89706 Carson cty: NV 89706 Phone number Vour Public Email Areas of Expensio	Profile		ion you
Participation Information Carson city. NV 89706	ormation Carson city: NV 89706 Phone number Your Public Email Areas of Expensis	Certification Status		
	Phone number Phone number Your Public Email Areas of Expensio	Broker Connect		
	Phone number Phone number Your Public Email Areas of Expensio		Carson city, NV 89706	
Availability	Your Public Email Areas of Expertise			
There is a second s	Areas of Expertise	Availability		
	Languages Spoken			
Languages Spoken			Languages Spoken	
Product Expertise			Website address	
	Website address		Education	

• 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.

Homen Individuals - My	Information *	
Steps	Profile	
Agent Information		
Certification Status		
Broker Connect		
Participation Information	Chang	Photo Choose File No file chosen Upload
Availability		You can upload a JPG, GIF or PNG file (File size limit is 5 MB).
	Agen	it Name
	Business Address	
	Business Address	
	Addres	Is Line 2 Apt. Suite, Unit. Bldg, Floor, etc
		City* Carson city
		State* Nevada *
	Zip	0 Code • 89706
	Clients Ser	ved 😝 🗹 Individuals / Families
	Lar	Arabic X English X Urdu X
		Select Some Options
	Product Expe	rtise 😧 🖉 Health 🖉 Dental 🖉 Vision 📽 Life 🖉 Medicare 🖉 Medicaid 🖉 CHIP
	Your Website Add	
	Your Public E	mail 📀
	Ed	Graduate College Degree 🔻
	About	Yourself

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.

nevada health link connecting you to health insurance							*	Help 8	Support +	My Account 👻
Home Individuals - My Informat	tion -									
Quick Links O Pending Individuals	Enrolln	nent History			Vour Enrolle	nents – Past	20 Dave			
📥 My Profile		Enr	ollment Type		four Enrollin	nents - rast	50 Days			
Access Code Submit	Enrollments	0	0	0	0	0	0	0	0	0
		PLATINUM	GOLD	SILVER	BRONZE	EXPANDEDBRONZ	CATASTROPHIC	HIGH	LOW	MEDICAL

• 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").

nevada health link	om 😽 🔊 Help & Support + 🛛 My Account +	
Home Individuals - My In	ormation *	I
About Individual	Individual Information	
Enter information for the individual to create a record prior to acting on the individual's behalf.	First Name • Last Name • Date Of Birth • MM/DD/YYYY Zip Code • Phone Number • Email Address Invite: If email is provided the new individual will be sent an email to activate a new account.	
	SSN © SSN is required © SSN is not required. Select Reason Select Reason Select Reason Just Applied Quite Disception Just Applied Other	

• 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.

nevada health link connecting you to health insurance						* (Melp 8	k Support 🝷	My Account +
Home Individuals - My Informat	ion -								
Dashboard									
Quick Links	Enrollment Hist	ory							
Pending Individuals									
🛔 My Profile			١	our Enrollme	ents – Past	30 Days			
Add New Individual		Enrollment Type							
Access Code		Enrollment Type							
Submit	Enrollments o	0	0	0	0	0	0	0	0
	PLATINUM		SILVER		XPANDEDBRONZ	e	нісн		MEDICAL

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

nevada health link connecting you to health insurance	of a support • My Account •
Home# Individuals * My Inform	nution -
Referral Linking	
Process	Authentication Information
Authentication Information	Before we can link your application to your account you will need to enter information to confirm your identity. Once you have successfully entered this information, you can view your eligibility results and shop for plans.
	First Name *
	Last Name •
	Date of Birth +
	Email •
	Total number of members in the household •
	Submit

• Step-3: Click on the 'Continue' button.

nevada health link connecting you to health insurance			* 2	📲 Help & Support 👻	My Account 👻
Home d Individuals - N	ly Information +				
Referral Linking					
Process	Link to Application				
Authentication Information					
Link to Application		This application has been successfully linke	ed to your accou	int.	

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

nevada health link	M 20 Help & Support - My Account - X
Referral Linking	Don't show this message again. Cancel Member View
	This application has been successfully linked to your account.

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.

	nevada <mark>health link</mark> i to health Insurance		术 🔊 Help & Support + My Account +
Home	Individuals - My Information		
Individ	luals		
Q Search			•
			Sort by: Due Date (first due)
*	HOUSEHOLD	STATUS	COVERAGE
1			
	Phone: Email: Address:	Application Year: Current Status:	
Account	Household Eligibility Comments	s 🕿 Resend Activation Email 🗙 Mark As Inactive 🖌 Contact Nevada Health	Link

3.2.1 Search for Active Individuals

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

Home	Individuals -	My Information +				
	Pending Requests					
	Active Individuals					
	Inactive Individuals					

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

Home	Individuals - My Information -			
Individ	uals			
Q Search				E
			Sort by: Due Date (first due) 🔻	Export as Exc
•	HOUSEHOLD	STATUS	COVERAGE	
1				
	Phone: Email:	Application Year: Current Status:		
	Address:			

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

connecting you to he	alth link ealth insurance				4	🖌 🎥 Help & Support	t 🝷 My Account
Home d I	ndividuals 👻 My Info	ormation +					
Individu	ala						
Παινίαυ	dis						
Q Search							
First Name		Last Name		Application Type		Issuer	
				Select Application Type		•	٣
Current Status		Next Steps		Due Date		Application Year	
Select Curre	nt Status	 None 	٣	Select Due Date		Select Year	¥
							Go
					Sort by: Due	Date (first due) 🔻	Export as Ex
	HOUSEHOLD		STATUS			COVERAGE	
•	HOUSEHOLD		STATUS			COVERAGE	
1							
	Phone:		Application Year				
	Email:		Current Status:	to tage and the st			
	Address:						

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'.

Home	Individuals -	My Information 👻
	Pending Requ	iests
	Active Individ	uals
	Inactive Indiv	iduals

• Step-2: Click on the 'Export as Excel' button.

Home	Individuals - My Information -			
Individ	uals			
Q Search				e
			Sort by: Due Date (first due) 🔻	Export as Ex
•	HOUSEHOLD	STATUS	COVERAGE	
1				

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

nevada health link connecting you to health insurance		ñ	×0	
	Disclaimer			
Individuals	You are about to download customer information. You must follow Nevada Health Link privacy and security standards. Click YES to agree and continue.			
Q Search				+

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

E		HOME I		AGE LAVOUT	FORMUL	AS DATA	REVIEW VIEW			Ag	ent_Book_O	f_Business - Excel								? 00 -
Pas	te Clipb	Copy = Format Painter	Calibri B I			==	✓ Wrap Text ✓ Wrap Text ✓ H Merge & Cent Alignment	General sr = \$ = %	Forma	itional Format atting * Table *	as Chronic		Gunatory In Styles			Calculation • Note •	Insert Delete Fo	mat → Clear	Z T Sort & Fin	nd &
A1	L.		× ×	fa Numbe	21															
	A	8	c	D			a	н	1. Y.	i i	κ.	L.	M	N	0	· · · · · ·		9	5	т
	Number	First Name	Last Name	Phone Number	Email	Address	Application Date	Application Typ	e Current Status	Next Steps	Due Date	Carrier Name	Plan Name	Premium (monthly	APTC (monthly)	Individual Contribu	tion (monthly) Offic	e Visits Generic	Drugs Deductible	Application Yes
1		T	-			and the second		-	-	-	-	1000	-		-	-	-		and a	-

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.

- 😵 I	nevada health link u to health insurance				*	~ 0	Help & Support 👻	My Account 👻
Home#	Individuals - My Information	-						
Individ	luals							
Q Search								•
					Sort by: Due Da	ite (first	due) 🔻	Export as Excel
*	HOUSEHOLD		STATUS			COVE	RAGE	
1								
	Phone: Email: Address:		Application Year: Current Status:	1.1.1.1				
Account	Household Eligibility Comments	Resend Activation Email	× Mark As Inactive					

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

nevada health link	🖷 🚙 😕 Help & Support + 🛛 My Account +
connecting you to health insurance	View Member Account X
Home# Individuals - My Informa	Clicking "Member View" will take you to the Member's portal for Through this portal you will be able to take actions on behalf of the member. Proceed to Member view? Don't show this message again. Cancel Member View
Process	
Authentication Information	
Link to Application	This application has been successfully linked to your account.

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

nevacia health link connecting you to health insurance		*	~ 0	Help & Support 🝷	My Account 👻
	Viewing Individual Account My Account				Your Agent 🌞 🔻

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'.

Home	Individuals •	My Information 👻
	Pending Requ	iests
	Active Individ	uals
	Inactive Indiv	iduals

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

nevada health link connecting you to health insurance		# 🔊 Help & Support 👻 My Account 🗸
Home Individuals - My Information -		
Individuals		
Q Search		•
		Sort by: Due Date (first due)
# HOUSEHOLD	STATUS	COVERAGE
1		
Phone:	Application Year:	
Email: Address:	Current Status:	
Account Household	end Activation Email 🗙 Mark As Inactive 🖋 Contact Nevada H	kealth Link

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

	nevada <mark>health link</mark>	* 2 ⁰		
Home	Household Member Information	×		
Indivi	Household Composition for			
Q Searc	Name Relationship Date of Birth Gender SSN Information Home Address Mailing Address US Citizen?	Seeking Coverage?		
	Sort	by: Due Date (first o	lue) 🔻	

3.2.5 View individual's household eligibility information

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

Home	Individuals -	My Information +
	Pending Requ	Jests
	Active Individ	luals
	Inactive Indiv	iduals

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

	nevada health link au to health insurance			*	Pelp & Si	upport - My Account
Home	Individuals - My Information -					
Individ	duals					
Q Search	1					e
			Sort by	Due Date	e (first due) 🔻	Export as Exc
	HOUSEHOLD	STATUS			COVERAGE	
1						
	Phone: Email: Address:	Application Year: Current Status:	1.1.1.1			
& Account	Household	Resend Activation Email X Mark As Inactive	🖋 Contact Nevada Health Link			

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

			🗰 🔊 Help & Support = My Account =
Household Eligibility Informa	tion		×
Household Eligibi	ility for		
	Eligibility Status	5.	
	Available Advance Premium Tax Credit for household	d:	
	Cost Sharing Reduction	 No cost sharing available 	
Applicant Eligibili	ty		
Name	Eligibility Status	Advance Premium Tax Credit	Cost Sharing Reduction

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.

	nevada health link ou to health insurance		🐐 🔊 Help & Support + My Account +
Home	Individuals • My Information •		
Individ	duals		
Q Search	1		•
			Sort by: Due Date (first due)
*	HOUSEHOLD	STATUS	COVERAGE
1			
	Phone: Email: Address:	Application Year: Current Status:	
& Account	Household VEligibility Comments	l Activation Email 🛛 🗙 Mark As Inactive 🧳 Contact Nevada Hea	lth Link

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

nevada health link correcting you to health issurance		*	2 0	Help & Support 👻	My Account 👻
Home Individuals - My Inform	nation -				
New York Hard					
	Summary				Edit
Summary Comments	Primary Applicant Address				
Actions	Phone Number Email				
New Comment	Eligibility Status				
View Individual Account	Application Status				
Resend Activation Email					

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

🕷 🚙 Help & Support - 🛛 My Account -
Save

3.2.6.2 Provide comments on individual profile

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



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

~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	nevada <b>health link</b> u to health issuance		术 🐉 Help & Support ↔	My Account 👻
Home#	Individuals - My Information -			
Individ	luals			
<b>Q</b> Search	I			•
			Sort by: Due Date (first due) 🔻	Export as Excel
*	HOUSEHOLD	STATUS	COVERAGE	
1				
	Phone: Email: Address:	Application Year: Current Status:		
Account	Household VEligibility Comments	send Activation Email 🛛 🗙 Mark As Inactive 🕜 Contact Nevada Healt	th Link	

• Step-3: Go to "Comments" section and click on the 'Add Comments' button.

nevada health link		*	<b>~</b> 0	Help & Support 🔻	My Account 👻
Home <b>n</b> Individuals <del>-</del> My I	nformation -				
Parage William					
Summary	Comments No comments				
Comments	Add Comments				
Actions     New Comment					
<ul> <li>View Individual Account</li> <li>Resend Activation Email</li> </ul>					

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

connecting you to health link		om 😽 🙇 Help & Support 👻 My Account 👻
Home# Individuals + My I	nformation •	
Parase William		
	Comments	
Summary	No comments	
Comments	Add Comments	
& Actions		
New Comment		Characters left: 4000
View Individual Account		Characters left: 4000 Cancel Post Comment
Resend Activation Email		

• 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.

nevada health link		ň	<b>~</b> 0	Help & Support 👻	My Account 👻
Home M Individuals - My Informa	ion <del>-</del>				
Person William					
	Comments				
Summary Comments	No comments Add Comments				
Actions					
New Comment					
View Individual Account     See Resend Activation Email					

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

nevada health link connecting you to health insurance		#	2 ⁰	
Home Individuals - My Information	Enter comments here			
Summary	Cancel Save Characters left: 400	0		
Comments				

### 3.2.6.3 Update comments on individual profile

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



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

	nevada <b>health link</b> u to health insurance		om 🛪 🔊 Help & Support 👻 My Accou
Home	Individuals - My Information -		
Indivic	luals		
<b>Q</b> Search	I.		(
			Sort by: Due Date (first due) • Export as
	HOUSEHOLD	STATUS	COVERAGE
1			
	Phone:	Application Year:	
	Email:	Current Status:	
	Address:		
Account	Household ↓Eligibility Comments ■ R	esend Activation Email 🛛 🗙 Mark As Inactive 🕜 Contact Nevada Hea	lth Link

• 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.

nevada health link connecting you to health insurance		ñ	2	Help & Support 👻	My Account 👻
Home# Individuals - My Informa	ition •				
Parase William					
	Comments				
Summary	added a comment - 09 Aug, 2019 04:08 PM				1
Comments					
Actions					
🗩 New Comment	Cancel Update Comment				
View Individual Account					
Resend Activation Email	Add Comments				

### 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 **Comments** button present below an Active individual.

	nevada <b>health link</b> u to health insurance		🐐 🔊 Help & Support ۲۰ My Account ۲
Home	Individuals • My Information •		
Individ	luals		
<b>Q</b> Search			•
			Sort by: Due Date (first due) • Export as Exce
*	HOUSEHOLD	STATUS	COVERAGE
1			
	Phone: Email: Address:	Application Year: Current Status:	
Account	Household Eligibility Comments	d Activation Email 🛛 🗙 Mark As Inactive 🕜 Contact Nevada Health	1 Link

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

nevada health link connecting you to health insurance		🐐 🔊 Help & Support 👻 My Account 👻
Home# Individuals - My In	formation -	
And and a second second		
	Comments	
Summary	added a comment - 09 Aug, 2019 04:08 PM	
Comments		· ·
& Actions	Add Comments	
New Comment		
View Individual Account		
Resend Activation Email		

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

Reveals health link concerting you to health insurance Home® Individuals - My Information	Are you sure you wish to delete this comment? This action cannot be undone. Cancel Delete	🛪 🔊 Help & Support -	

#### 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.

	nevada <b>health link</b> u to health insurance		🀐 🛛 🔊 Help & Support 👻	My Account 👻
Home	Individuals - My Information -			
Individ	luals			
<b>Q</b> Search				Đ
			Sort by: Due Date (first due) 🔻	Export as Excel
*	HOUSEHOLD	STATUS	COVERAGE	
1				
	Phone: Email: Address:	Application Year: Current Status:		
Account	Household VEligibility	Resend Activation Email 🗙 Mark As Inactive 🖋 Contact Nevada H	ealth Link	

• Step-3: Go to "Actions" section and click on the 'Resend Activation Link' tab.

connecting you to health link		🐐 🔊 Help & Support 👻 My Account 👻
Home My Individuals 👻 My Info	ormation +	
Name Wilson		
	Comments	
Summary	added a comment - 09 Aug, 2019 04:08 PM	
Comments		
& Actions	Add Comments	
P New Comment		
View Individual Account		
Resend Activation Email		

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

connecting you to health linux	Success!	🛊 🔊 Help & Support + My Account +
	A new activation email has been sent to	
	Ok	
New Comment		
View Individual Account		
Resend Activation Email		

#### 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.

	nevada <b>health link</b> ou to health insurance		🕷 🔊 🕺 Help & Support 🗸	My Account 👻
Home	Individuals - My Information -			
Indivio	duals			
<b>Q</b> Search	1			Ŧ
			Sort by: Due Date (first due) 🔻	Export as Exce
	HOUSEHOLD	STATUS	COVERAGE	
1				
	Phone:	Application Year:		
	Email:	Current Status:		
	Address:			
	# Household Eligibility Comments	Activation Email 🗙 Mark As Inactive 🕜 Contact Nevada He		

• 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.

nevada health link connecting you to health insurance	Resend Activation Email!	م المعالم Help & Support + My Account + المح
	Primary Applicant Email Address •	
Individuals Q Search	Phone Number •	+
HouseHold	Cancel Send	Date (first due)   Export as Excel  COVERAGE

#### 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 K Mark As Inactive button present below an Active individual.

Home	Individuals - My Information -			
Indivic	luals			
<b>Q</b> Search				Đ
- Jocar en				
			Sort by: Due Date (first due) 🔻	Export as Excel
	HOUSEHOLD	STATUS	COVERAGE	
1				
1	Phone:	Application Year:		

• 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'.

Home	Individuals -	My Information 🝷
	Pending Requ	iests
	Active Individ	uals
	Inactive Indiv	iduals

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

	nevada nealth link a to health insurance				s <u>s</u> 0	Help & Support 👻	My Account 👻
Home	Individuals • My Information •						
<b>Individ</b> <b>Q</b> Search							Ð
				Sort by: Due	Date (first	due) 🔻	Export as Excel
*	HOUSEHOLD	STA	rus		COVE	RAGE	
1							
	Phone:	App	cation Year:				
	Email:	Curr	ent Status:				
	Address:						
Account 1	# Household VEligibility 🗭 Comments	Resend Activation Email X Mark	As Inactive 🖌 Contact Nevada Hea	alth Link			

• 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. <u>PLEASE NOTE:</u> 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'.

Home	Individuals -	My Information 👻
	Pending Requ	Jests
	Active Individ	luals
	Inactive Indiv	iduals

• 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.

Home# Individuals - My Information -								
Individuals 2 Inactive Individuals								
Refine Results By	(Reset all)	Name \$	Inactive Since 🌲					
First Name			05/29/2019					
			06/27/2019					
Last Name								
Inactive Since								
From:								
MM/DD/YYYY								
To:								
MM/DD/YYYY								

# 4. My Information

Home	Individuals 👻	My Information 👻
		Agent Information
		Profile
		Certification Status
		Broker Connect

## 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'.

Home	Individuals 👻	My Information 🔻
		Agent Information
		Profile
		Certification Status
		Broker Connect

• Step-2: Click on the 'Edit' button.

econsecting you to health insurance			# 2	Help & Support +	My Accou
Home® Individuals - My	Information +				
north agent					
Steps	Agent Information				Edit
Profile	First Name				
	Last Name				
Certification Status	Nevada Agent License Number				
Broker Connect	Agent NPN				
Participation Information	License Renewal Date				
Participation information	Primary phone number				
Availability	Preferred Method of Communication				
	Business Name				
	Federal Employer Identification Number (EIN)				
	Business Address				
	Business Address	10-10-00 A			
		Carson city. NV 89706			
	Correspondence Address				
	Same as business address	•			
	Correspondence Address	-			
		Carson city, NV 89706			

• 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).

contexting you to beal it insurance	
Home® Individuals - My Inl	nformation +
tort agent	
Steps	Agent Information
Agent information Profile	Provide the following information so we can certify you to make your services available on Nevada. After a quick review, we'll send you an email letting you know when your application has been approved.
Certification Status	when sump you must many an approximation and specific actions
Broker Connect	Hrst Name*
Participation Information	Last Name*
Availability	Nevada Agent License Number* (Not your NPN)
	Agent NPN
	License Renewal Date*
	Primary contact number*
	Business Contact Phone Number
	Alternate Phone Number
	Fax Number
	Preferred Method of Communication* Phone •
	Business Name*
	Federal Employer Identification Number (EIN)* What if i cont have an DIP
	Business Address
	Address line 1*
	Address line 2 Apt. Suite. Unit. Bldg. Floor, etc.
	Address line z Pour Suite, onic blog, nour, etc.
	State* Nevada *
	State* revisoa * Zip code* 80705
	Correspondence Address
	Same as business address
	Address line 1*
	Address line 2 Apt. Suite. Unit. Bidg. Floor, etc
	City* Carson city
	State* Nevada *
	Zlp code* 99706

## 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.

#### <u>Withdrawn</u>

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.

connecting you to health linurance		*	🔊 Help & Support 🗸	My Account 👻
Home# Individuals - My Ind	ormation +			
torft agent				
Steps	Certification Status			
Agent Information				
Profile	Agent Number			
Certification Status	Application Submission Date			
certification status	Certification Status	Iertified		
Broker Connect	Certification Number			
Participation Information	Certification Date			
Availability	Renewal Date			
Availability				

## 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.

**<u>PLEASE NOTE</u>**: 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 Infor	mation -
Real Property lines	
Steps	Participation Information
Agent Information	Broker Connect is a program where brokers can join to receive leads for consumers that need help with completing their health insurance application or shop for a plan.
Profile	Please provide a phone number below on which you would like to receive calls.
Certification Status	Please provide a prone number below on which you would like to receive calls.
Broker Connect	Broker Connect Phone Number
Participation Information	Please note that this number will be called only during business hours that you will provide on the next screen.
Availability	I agree to Broker Connect Terms and Conditions
	CONFIRM PARTICIPATION IN BROKER CONNECT

• 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.

Home Individuals - My	Information -
to all the local	
Steps	Participation Information
Agent Information	Broker Connect is a program where brokers can join to receive leads for consumers that need help with completing their health insurance
Profile	application or shop for a plan.
Certification Status	Please provide a phone number below on which you would like to receive calls.
Broker Connect	Broker Connect Phone Number
Participation Information	Please note that this number will be called only during business hours that you will provide on the next screen.
Availability	I agree to Broker Connect Terms and Conditions

#### 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'.

Reality in the		
Steps	Participation Information	
Agent Information	You are currently in the broker connect program. By clicking the button below your participation will be removed from this program with	h
Profile	immediate effect.	
Certification Status	Remove participation from broker connect program	

#### 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.

Broker Conn	ect Availability						OFF 7
	ours during which you	are available	to take I	the calls each day. F	or days when	you don't plan to take	any consumer calls, please
if you would like							
the calls.							
Note: Please er	nter Pacific Time						
Monday	6:00 AM	٥	То	6:00 PM	٥	Closed	WEEKDAY HOURS
Tuesday	6:00 AM	٠	То	6:00 PM	٠	Closed	Click the button above to apply
Wednesday	6:00 AM	٠	То	6:00 PM	٠	Closed	Monday hours to a weekdays
Thursday	6:00 AM	٠	То	6:00 PM	٠	Closed	
Friday	6:00 AM	٥	То	6:00 PM	٠	Closed	
Saturday	Select	٥	То	Select	٠	Closed	
		•	То	Select	٠	Closed	
	Please select h select 'Closed'. On certain days if you would like the calls. Note: Please er Monday Tuesday Wednesday Thursday Friday	select 'Closed'. On certain days when you are not ava if you would like to take calls beyond y the calls. Note: Please enter Pacific Time Monday 6:00 AM Tuesday 6:00 AM Wednesday 6:00 AM Thursday 6:00 AM Thursday 6:00 AM	Please, select hours during which you are available select 'Closed'.         On certain days when you are not available to take if you would like to take calls beyond your working the calls.         Note: Please enter Pacific Time         Monday       6:00 AM         Tuesday       6:00 AM         Wednesday       6:00 AM         Thursday       6:00 AM         Friday       6:00 AM	Please, select hours during which you are available to take select 'Closed'.         On certain days when you are not available to take calls during which you working hours or the calls.         Note: Please enter Pacific Time         Monday       6:00 AM         Tuesday       6:00 AM         Wednesday       6:00 AM         Thursday       6:00 AM         Friday       6:00 AM	Please, select hours during which you are available to take the calls each day, Fi select 'Closed'.         On certain days when you are not available to take calls during your working he if you would like to take calls beyond your working hours on certain days, you or the calls.         Note: Please enter Pacific Time         Monday       6:00 AM         Tuesday       6:00 AM         Wednesday       6:00 AM         Thursday       6:00 AM         Thursday       6:00 AM         Thursday       6:00 AM         Thursday       6:00 AM         To       6:00 PM         Thursday       6:00 AM         To       6:00 PM	Please, select hours during which you are available to take the calls each day. For days when select Closed.         On certain days when you are not available to take calls during your working hours, please ut if you would like to take calls beyond your working hours on certain days, you can turn the available to take.         Note: Please enter Pacific Time         Monday       6:00 AM         Tuesday       6:00 AM         Wednesday       6:00 AM         Thursday       6:00 AM         Thursday       6:00 AM         Thursday       6:00 AM         Thursday       6:00 AM         To       6:00 PM         Thursday       6:00 AM         To       6:00 PM         Finday       6:00 AM	Please, select hours during which you are available to take the calls each day. For days when you don't plan to take select 'Closed'.         On certain days when you are not available to take calls during your working hours, please use the button above to if you would like to take calls beyond your working hours on certain days, you can turn the availability button ON to the calls.         Note: Please enter Pacific Time         Monday       6:00 AM       0       6:00 PM       0       Closed         Yednesday       6:00 AM       0       70       6:00 PM       0       Closed         Thursday       6:00 AM       0       70       6:00 PM       0       Closed         Thursday       6:00 AM       0       70       6:00 PM       0       Closed

#### 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.

Broker Conn	ect Availability						OFF 0
	ours during which yo	u are available	to take t	he calls each day. For days	when you	u don't plan to take	any consumer calls, please
if you would like							
the calls.							
Note: Please enter Pacific Time							
Monday	6:00 AM	٠	То	6:00 PM	•	Closed	WEEKDAY HOURS
Tuesday	6:00 AM	٠	То	6:00 PM	•	Closed	Click the button above to apply
Wednesday	6:00 AM	٠	То	6:00 PM	•	Closed	Monday hours to al weekdays
Thursday	6:00 AM	٠	То	6:00 PM	•	Closed	
Friday	6:00 AM	٠	То	6:00 PM	•	Closed	
Saturday	Select	٠	То	Select	•	Closed	
	Please select h select 'Closed'. On certain days if you would like the calls. Note: Please er Monday Tuesday Wednesday Thursday Friday	select 'Closed'. On certain days when you are not an if you would like to take calls beyond the calls. Note: Please enter Pacific Time Monday 6:00 AM Tuesday 6:00 AM Wednesday 6:00 AM Thursday 6:00 AM Friday 6:00 AM	Please. select hours during which you are available select 'Closed'.         On certain days when you are not available to take if you would like to take calls beyond your working the calls.         Note: Please enter Pacific Time         Monday       6:00 AM         Tuesday       6:00 AM         Wednesday       6:00 AM         Thursday       6:00 AM         Friday       6:00 AM	Please. select hours during which you are available to take to select 'Closed'.         On certain days when you are not available to take calls during you working hours or the calls.         Note: Please enter Pacific Time         Monday       6:00 AM         Tuesday       6:00 AM         Wednesday       6:00 AM         Thursday       6:00 AM         Friday       6:00 AM	Please, select hours during which you are available to take the calls each day. For days select 'Closed'.         On certain days when you are not available to take calls during your working hours, pl f you would like to take calls beyond your working hours on certain days, you can ture the calls.         Note: Please enter Pacific Time         Monday       6:00 AM         Tuesday       6:00 AM         Wednesday       6:00 AM         Thursday       6:00 AM         Thursday       6:00 AM         To       6:00 PM         Thursday       6:00 AM         To       6:00 PM	Please. select hours during which you are available to take the calls each day. For days when you select 'Closed'.         On certain days when you are not available to take calls during your working hours, please use tif you would like to take calls beyond your working hours on certain days, you can turn the available to take calls during your working hours on certain days.         Note: Please enter Pacific Time         Monday       6:00 AM         Tuesday       6:00 AM         Wednesday       6:00 AM         Thursday       6:00 AM         To       6:00 PM         Friday       6:00 AM	Please. select hours during which you are available to take the calls each day. For days when you don't plan to take select 'Closed'.         On certain days when you are not available to take calls during your working hours, please use the button above to if you would like to take calls beyond your working hours on certain days, you can turn the availability button ON to 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         Thursday       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

#### 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.

Home Individuals - M	y Information 👻							
Real Property lines								
Steps	Broker Conr	nect Availability						OFF 3
Agent Information	Please, select h select 'Closed'.	ours during which you	are available t	o take I	the calls each day. For days v	vhen you don'	t plan to take any o	consumer calls, please
Profile								
Certification Status	if you would lik				ring your working hours, plea n certain days, you can turn			
Broker Connect	the calls.							
Participation Information	Note: Please e	Note: Please enter Pacific Time						
Availability	Monday	6:00 AM	¢	То	6:00 PM	¢ 🗌 Cl	osed	WEEKDAY HOURS
	Tuesday	6:00 AM	٠	То	6:00 PM	¢ 🔲 Cl	osed	Click the button above to apply
	Wednesday	6:00 AM	٠	То	6:00 PM	¢ 🔲 Cl	osed	Monday hours to al weekdays
	Thursday	6:00 AM	٥	То	6:00 PM	¢ 🗌 Cl	osed	
	Friday	6:00 AM	\$	То	6:00 PM	<b>\$</b> □ C	osed	
	Saturday	Select	÷	То	Select	¢ ∉ ci	osed	
	Sunday	Select	÷	То	Select	¢	osed	

#### 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.

Home	Individuals 🗸	My Information +	
		Agent Information	
		Profile	
		Certification Status	
		Broker Connect	

• 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.

Home Individuals - My	/Information 👻							
Steps	Broker Conn	Broker Connect Availability						OFF 3
Agent Information	Please, select h select 'Closed'.	ours during which you	are available t	to take t	he calls each day. Fo	r days when	i you don't plan to	take any consumer calls, please
Profile								
Certification Status	if you would like	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						
Broker Connect	the calls.							
Participation Information	Note: Please e	enter Pacific Time						
Availability	Monday	6:00 AM	\$	То	6:00 PM	÷	Closed	WEEKDAY HOURS
	Tuesday	6:00 AM	\$	То	6:00 PM	÷	Closed	Click the button above to apply
	Wednesday	6:00 AM	٥	То	6:00 PM	٠	Closed	Monday hours to all weekdays
	Thursday	6:00 AM	٠	То	6:00 PM	٠	Closed	
	Friday	6:00 AM	٠	То	6:00 PM	٠	Closed	
	Saturday	Select	÷	То	Select	÷	Closed	
	Sunday	Select	÷	То	Select	¢	✔ Closed	
								SAVE AVAILABILITY

# **Document Revision History**

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