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:

| nevada health link connecting you to health insurance | 🍘 🔊 Help & Support 👻 My Account 👻 |
|---|---|
| Homen Individuals - My Informat | ion - |
| Quick Links | Enrollment History |
| Pending Individuals | Your Enrollments – Past 30 Days |
| Add New Individual | Enrollment Type |
| Access Code | n 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 |
| | PLATINUM SILVER ÉXPANDEDBRONZÉ HIGH MEDICAL GOLD BRONZE CATASTROPHIC LOW |

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 | | | | | | ñ | Aelp & | Support 🕶 | My Account 👻 |
|-----------------------------------|-------------------|-----------------|--------|---------------|---------------|--------------|--------|-----------|--------------|
| Home My Informat | tion - | | | | | | | | |
| Quick Links O Pending Individuals | Enrollment Histo | ry | | | | | | | |
| My Profile Add New Individual | | Enrollment Type |) | Your Enrollme | ents – Past 3 | 0 Days | | | |
| Access Code | e o entre | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | PLATINUM | GOLD | SILVER | BRONZE | XPANDEDBRONZÉ | CATASTROPHIC | HIGH | LOW | MEDICAL |

• 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 | Des dis e te dividue | | | | | |
| nuiviuuais 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: | | | | | | |
| | | | | | | |

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 - | | | | | |
| Quick Links | Enrollment Histor | ý | | | | |
| Pending Individuals My Profile | | | Your Enrolln | nents – Past 30 Days | | |
| Add New Individual | | nrollment Type | | | | |
| Access Code Submit | o metts | 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.

| Home# Individual | s 👻 My Informa | tion 🝷 | | | | |
|-------------------|--------------------|---------------------|----------------|----------------|---------|--|
| ndividuals 1 | Pending Individual | | | | | |
| | - criang manuau | | | | | |
| Refine Results By | (Reset all) | Name \$ | FAMILY SIZE \$ | Request Sent 🖨 | Actions | |
| First Name | | | 1 | 06/27/2019 | 0 * | |
| | | N/A - Not Available | | | Accept | |
| Last Name | | | | | beenre | |
| | | | | | | |
| Request Sent | | | | | | |
| From: | | | | | | |
| MM/DD/YYYY | | | | | | |
| то: | | | | | | |
| To: | | | | | | |

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 | 桥 🔊 Help & Support 🗸 🛛 My Account |
|--|--|
| Home # Individuals - | My Information - |
| and agent | |
| Steps | Profile |
| 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 connecting you to health insurance | | | | | ñ | Nelp & | Support + | My Account |
|---|--------------------|---------------|---------------|-----------------------|-----------|--------|-----------|------------|
| Home Individuals - My Informa | ition - | | | | | | | |
| Dashboard | | | | | | | | |
| Quick Links | Enrollment History | | | | | | | |
| Pending Individuals My Profile Add New Individual | Er Er | rollment Type | Your Enroll | ments – Past 30 [| Days | | | |
| Access Code | Enrollments 0 0 | 0 | 0 0 | O | 0 | 0 | 0 | D |
| | PLATINUM | GOLD | SILVER BRONZE | ÉXPANDEDBRONZÉ CAT | ASTROPHIC | HIGH | LOW | MEDICAL |

• Step-2: Click on the 'Edit' button.

| Home Individuals - My | Information - | |
|---------------------------|--|-------|
| | | |
| and a second | | |
| 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 informatio provide, the more likely it is that potential customers will contact you. | n you |
| 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 insurance | | nn das Heip & 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, GIE or PNG file (File size limit is 5 MB). |
| | | |

• 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 - I | My Information - | |
|---------------------------|--|-----------------------------|
| | © Open | |
| | ← → ✓ ↑ → This PC → Pictures → Saved Pictures | ✓ で Search Saved Pictures , |
| | Organize 🔻 New folder | |
| Steps | > 🖈 Quick access | |
| Agent Information | Orestive Cloud Fil OneDrive | |
| | Agent Photo | |
| Certification Status | > 🗊 3D Objects > 🔲 Desktop | |
| Broker Connect | > 🗎 Documents > 🚽 Downloads | |
| Participation Information | > h Music | |
| Availability | V 📰 Pictures | |
| | Saved Pictures | |

• 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 | | 12278-4310 1063 | | | | | |
| 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 | | | | | | | |
| Add New Individual | | | collegent Trace | | 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.

| nomen manudais My In | | |
|--|--|---|
| | | |
| And a second sec | | |
| | | |
| Steps | Profile | Edit |
| Agent Information | | |
| Profile | Review and edit your public profile, which can be seen by Nevada Heal provide, the more likely it is that potential customers will contact you. | th Link users looking for Agents. The more accurate the information you |
| Certification Status | | |
| Broker Connect | The second se | The second |
| Participation Information | | Carson city, NV 89706 |
| | P. 199-2002 12 223 | |
| Availability | Phone numb | er |
| | Your Public Em | ail |
| | Areas of Experti | 3e |
| | Languages Spoke | an |

• 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 | | |
| Profile | | |
| Certification Status | | |
| Broker Connect | | rail and a shada |
| Participation Information | Ch | ange Photo Choose File No file chosen Upload |
| Availability | | You can upload a JPG, GIF or PNG file (File size limit is 5 MB). |
| | A | gent Name |
| | Business Address | |
| | | |
| | Business Addr | Iss Line 1* |
| | Ade | ress Line 2 Apt. Suite. Unit. Bldg, Floor, etc |
| | | City* Carson city |
| | | State* Nevada * |
| | | Zip Code• 89706 |
| | Clients | Served 😝 🗷 Individuals / Families |
| | | Languages Arabic X English X Urdu X |
| | | Select Some Options |
| | Product E | rpertise 😧 🗹 Health 🗹 Dental 🖉 Vision 🖉 Life 🖉 Medicare 🖉 Medicaid 🖉 CHIP |
| | | workers compensation Property/casuality |
| | Your Website | ıddress 🚱 |
| | Your Publ | c Email 📀 |
| | | Education Graduate College Degree 🔻 |
| | Abr | ut 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 | ments Doct | 20 Dave | | | |
| My Profile Add New Individual | | 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 connecting you to health insurance | om 😽 🔊 Help & Support + 🛛 My Account + | |
|---|--|---|
| Home# Individuals - My In | ormation * | I |
| About Individual | 2COTQ | |
| 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 | | Facellanat Tura | | | | | | | |
| Arrent Cada | | Enrollment Type | | | | | | | |
| Submit | Enrollments o | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | | CILLIED | | | e | | | |

• 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 | om 🕺 🖓 Help & Support 👻 My Account * |
|---|--|
| Home# Individuals - My Infor | mation - |
| 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 | 🄊 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 | ب الحالي الح x |
|-------------------------------|---|
| Homed Individuals - My Inform | View Member Account Itom 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 |
| | Link to Application |
| | This application has been successfully linked to your account. |
| | Continue |

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>nealth link</mark> a to health insurance | | · 🔏 🔊 Help & Support | My Account - |
|-----------------|---|---|---------------------------------|----------------------------------|
| Home | Individuals - My Information | • | | |
| Individ | luals | | | |
| Q 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 Comments | Resend Activation Email X Mark As Inactive Contact Neva | da 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 Individ | uals | | | | |
| | Inactive Indiv | iduals | | | | |

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

| Home | Individuals - My Information - | | | |
|-----------------|--------------------------------|-------------------|---------------------------------|--------------|
| | | | | |
| ndivid | luals | | | |
| | | | | |
| Q Search | | | | E |
| | | | Sort by: Due Date (first due) 🔻 | Export as Ex |
| | HOUSEHOLD | STATUS | COVERAGE | |
| 1 | | | | |
| | | And tractice Mana | | |
| | Phone: | Application rear: | | |

• 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 |
| | HORIGINOLD | | CTATUS | | | CONTRACT | |
| • | 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.

| connecting ye | nevada health link ou to health insurance | | 🐐 🛛 🔊 Help & Support 👻 | My Account 👻 |
|-----------------|--|---|---------------------------------|----------------|
| Home | Individuals 👻 My Information | • | | |
| Indivi | duals | | | |
| Q Search | 1 | | | • |
| | | | Sort by: Due Date (first due) 🔻 | Export as Exce |
| • | HOUSEHOLD | STATUS | COVERAGE | |
| 1 | | | | |
| | Phone: Email: Address: | Application Year: Current Status: | | |
| & Account | Household Eligibility Comments | Sesend Activation Email 🗙 Mark As Inactive 🖋 Contact Nevada H | Health Link | |

• 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.

| FILE HOME IN | e ISERT PA | GE LAYOUT | FORMULAS | DATA | REVIEW VI | EW | | | Ag | ent_Book_Of | f_Business - Excel | | | | | | | | | ? 🗵 - |
|-------------------------------------|------------------|--------------|----------|---------------|--------------|---------------------------|-------------------|----------------|--------------------------------------|---------------------|--------------------|-----------|------------------|------------------------------------|---------------------|------------|-------------------|------------------------------------|---|------------------|
| Paste S Cut Paste Format Painter | Calibri B I U | • 11 • | A* A* | = = | | ip Text rge & Center = | General \$ - % | * Con Form | ditional Format hatting * Table * | Normal s Chied C | Bad Explo | natory | iood N nput L | eutral a | Calculation | Insert | Delete Format | ∑ AutoSum ↓ Fill - ≪ Clear - | * Arr A Sort & Fina Filter + Sele | d & sct + |
| Al T | x v | ß Number | | | - ang mang m | | | | | | | signs | | | | | | | unity | |
| A 0 | C | D | E | | | G | н | | 1 | κ. | L | M | N | 0 | P | | Q | R | 5 | T |
| 1 Number First Name | Last Name | Phone Number | Email | Address | Applic | ation Date Ap | plication Type | Current Status | Next Steps | Due Date | Carrier Name | Plan Name | Premium (month) | APTC (monthly) | Individual Contribu | ution (mon | thly) Office Visi | ts Generic Drug | 35 Deductible | Application Year |
| 2 10 100 | - | | | | - | | · | | 1000 | - | 100 | - | 100 | | 10 | | 100 | - | 100 | 100 |

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.

| connecting you | 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: | 1.14 | | | | |
| Account | Household Eligibility Comments | Resend Activation Email | X Mark As Inactive | ✔ Contact Nevada Health Link | | | | |

• 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 - MyInforma | 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 | ma appraaon nas veen soccession ji niked to your account. |

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

| nevacia health link connecting you to health insurance | | * | 2 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 | lests | | | | |
| | Active Individuals | | | | | |
| | Inactive Indiv | iduals | | | | |

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

| nevada health link convecting you to health issurance | | 종 🔊 Help & Support - My Account - |
|---|--|-----------------------------------|
| Home# Individuals - My Information - | | |
| Individuals | | |
| Q Search | | 0 |
| | | Sort by: Due Date (first due) |
| # HOUSEHOLD | STATUS | COVERAGE |
| 1 | | |
| Phone: | Application Year: | |
| Email: | Current Status: | |
| Address: | | |
| Account Household Eligibility Comments | esend Activation Email 🗙 Mark As Inactive 🖋 Contact Nevada H | tealth Link |

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

| nevada health link connecting you to health insurance | | | ŵ | Pelp & Suppo | |
|---|--------------------------------------|--------------------------------|--------------------------|------------------|--|
| Home | Househol | d Member Information | | × | |
| Indivi Household Com | position for | | | | |
| Q Searc | Date of Birth Gender SSN Information | n Home Address Mailing Address | US Citizen? Seeking Cove | rage? ▶ | |
| | | | | te (first due) 🔻 | |

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 | iests |
| | Active Individ | uals |
| | Inactive Indiv | iduals |

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

| connecting ye | 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 | | x |
| Household Eligibi | ility for | | |
| | Eligibility Status | E | |
| | Available Advance Premium Tax Credit for household | d: | |
| | Cost Sharing Reduction | 1: 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.

| connecting ye | nevada health link ou to health insurance | | 🐐 🚙 Pelp & Support 👻 My Account 👻 |
|-----------------|--|--|---|
| Home | Individuals 👻 My Information 👻 | | |
| Indivi | duals | | |
| Q Search | 1 | | • |
| | | | Sort by: Due Date (first due) * Export as Exce |
| * | HOUSEHOLD | STATUS | COVERAGE |
| 1 | | | |
| | Phone: Email: Address: | Application Year: Current Status: | |
| Account | Household VEligibility Comments | cctivation Email 🗙 Mark As Inactive 🕜 Contact Nevada H | tealth 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.

| connecting you to health linux | | | * | 🔊 Help & Support - | My Account + |
|--------------------------------|-------------|---|---|--------------------|--------------|
| Home# Individuals - My Ir | formation + | | | | |
| New York Hand | | | | | |
| | Summary | | | | Save |
| | | | | | |
| Comments | Primary Ap | ess | | | |
| & Actions | Phone Nun | ber internet | | | |
| P New Comment | | | | | |
| View Individual Account | | | | | |
| Resend Activation Email | | | | | |
| | | | | | |

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.

| connecting yo | nevada health link u to health insurance | | 😤 🥵 Help & Support 🗸 | My Account 👻 |
|-----------------|---|--|---------------------------------|-----------------|
| Home# | Individuals - My Information - | | | |
| Individ | luals | | | |
| Q Search | L. C. | | | H |
| | | | Sort by: Due Date (first due) 🔻 | Export as Excel |
| * | HOUSEHOLD | STATUS | COVERAGE | |
| 1 | | | | |
| | Phone: Email: Address: | Application Years Current Status: | | |
| Account | Household VEligibility Comments | Resend Activation Email 🛛 🗙 Mark As Inactive 🖋 Contact Nevada Heal | th Link | |

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

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

• 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 | | |
| View Individual Account | | Criefacters Jeff: 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 | ~ 0 | Help & Support 👻 | My Account 👻 |
|---|------------------|---|------------|------------------|--------------|
| Home M Individuals - My Informa | ion - | | | | |
| Person William | | | | | |
| | Comments | | | | |
| Summary | No comments | | | | |
| A Artions | | | | | |
| 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 correcting you to health insurance | | 🐐 🔊 Help & Support + My Account + |
|---|-----------------------------------|-----------------------------------|
| Home# Individuals ~ My Information | | |
| Party Miles | Enter comments here | |
| | | |
| Summary | Cancel Save Characters left: 4000 | |
| 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.

| connecting yo | nevada health link u to health insurance | | om 🛪 🔊 Help & Support 👻 My Accou |
|-----------------|---|--|---|
| Home | Individuals - My Information - | | |
| Indivic | luals | | |
| Q 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.

| connecting you | nevada health link u to health insurance | | 🏶 🔊 Help & Support 👻 My Account 👻 |
|-----------------|---|--|-----------------------------------|
| Home | Individuals • My Information • | | |
| Individ | luals | | |
| Q Search | | | E |
| | | | Sort by: Due Date (first due) |
| * | HOUSEHOLD | STATUS | COVERAGE |
| 1 | | | |
| | Phone: Email: Address: | Application Year: Current Status: | |
| Account | # Household VEligibility Comments Second | Activation Email 🗙 Mark As Inactive 🖋 Contact Nevada Hea | ith 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 Infor | nation - | |
| Participant William | | |
| | Comments | |
| Summary | added a comment - 09 Aug. 2019 04:08 PM | |
| Comments | Apple controls | · · |
| 4 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.

| nevada health link connecting you to health insurance | | * | 2 ⁰ | Help & Support + | My Account + |
|---|---|---|----------------|------------------|--------------|
| | Are you sure you wish to delete this comment? This action cannot be undone. Cancel Delete | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

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.

| connecting yo | nevada health link u to health insurance | | 🀐 🛛 🔊 Help & Support 👻 | My Account 👻 |
|-----------------|---|---|---------------------------------|-----------------|
| Home | Individuals - My Information - | | | |
| Individ | luals | | | |
| Q Search | | | | • |
| | | | 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# 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.

| nevada health link connecting you to health insurance | Success! Help & Support - My Account - | |
|---|---|--|
| | A new activation email has been sent to | |
| | OK . | |
| | | |
| | | |
| | No comments | |
| | | |
| | | |
| P 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.

| connecting ye | health link but to health linsurance | | 🌸 🔊 Help & Support 👻 My | Account - |
|-----------------|---|-------------------|---------------------------------|--------------|
| Home | Individuals - My Information - | | | |
| Indivio | duals | | | |
| Q Search | 1 | | | Đ |
| | | | Sort by: Due Date (first due) • | port as Exce |
| * | HOUSEHOLD | STATUS | COVERAGE | |
| 1 | | | | |
| | Phone: | Application Year: | | |
| | Email: | Current Status: | | |
| | Address: | | | |
| | | | | |

• 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 Mark As Inactive button present below an Active individual.

| connecting ye | nevada health link ou to health insurance | | 🐐 🔊 Help & Support 👻 My Account |
|-----------------|--|---|--|
| Home | Individuals + My Information + | | |
| Indivio | duals | | |
| Q Search | 1 | | C |
| | | | Sort by: Due Date (first due) • Export as Ex |
| | HOUSEHOLD | STATUS | COVERAGE |
| 1 | | | |
| | Phone: Email: Address: | Application Year: Current Status: | |
| Account | # Household \Eligibility Domments Resend | d Activation Email 🗙 Mark As Inactive 🖋 Contact Nevada He | alth Link |

• 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.

| connecting you | ievada iealth link to health insurance | | | | s <u>s</u> 0 | Help & Support 👻 | My Account 👻 |
|-----------------------------------|--|--------------------------------|----------------------------------|--------------|--------------|------------------|-----------------|
| Home | Individuals • My Information • | | | | | | |
| Individ Q Search | uals | | | | | | Ŧ |
| | | | | Sort by: Due | Date (first | due) 🔻 | Export as Excel |
| * | HOUSEHOLD | STA | rus | | COVER | RAGE | |
| 1 | | | | | | | |
| | Phone: | App | sation Year: | | | | |
| | Email: | Curr | nt Status: | | | | |
| | Address: | | | | | | |
| Account 1 | 🖷 Household 🛛 Eligibility 🌩 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 | iests |
| | Active Individ | uals |
| | 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.

| Name 🌲 | Inactive Since 🎄 | |
|--------|------------------|---|
| | 05/29/2019 | |
| | 06/27/2019 | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | vame ə | aame e inactive since e 05/29/2019 06/27/2019 |

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.

| health link | | | # 2 | Help & Support + | My Accou |
|------------------------------|--|--|-----|------------------|----------|
| Home® Individuals • My | Information + | | | | |
| north agent | | | | | |
| Steps | Agent Information | | | | Edit |
| | | | | | |
| Profile | First Name | 1000 | | | |
| FIGHT | Last Name | 1000 | | | |
| Certification Status | Nevada Agent License Number | | | | |
| Broker Connect | Agent NPN | | | | |
| Production in the second sec | License Renewal Date | 1.000 | | | |
| Participation information | Primary phone number | 1000 | | | |
| Availability | Preferred Method of Communication | The second secon | | | |
| | Business Name | and a second | | | |
| | Federal Employer Identification Number (EIN) | | | | |
| | Business Address | | | | |
| | Business Address | 10-10-00 | | | |
| | | Carson city. NV 89706 | | | |
| | Correspondence Address | | | | |
| | Same as business address | • | | | |
| | Correspondence Address | - | | | |
| | | | | | |

• 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 bear its manance | |
|------------------------------------|---|
| Home# Individuals - My Ind | formation + |
| tort agen | |
| Steps | Agent Information |
| Agent information | 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 | vine nangy wine har to a second se |
| Broker Connect | Hirst Name [®] |
| Participation Information | Last Name* |
| Availability | Nevada Agent License Number* (Not your NPN) |
| | Agent NPN |
| | License Reneval Date* |
| | Primary contact number* |
| | Business Contact Phone Number |
| | Alternate Phone Number |
| | Fax Number |
| | Preferred Method of Communication* Phone T |
| | Business Name* |
| | Federal Employer Identification Number (EIN)* What it cont have an DIO |
| | Business Arhress |
| | Dusiness Aduress |
| | Address line 1* |
| | Address line 2 Apt, Suite, Unit, Bidg, Floor, etc |
| | City* Carson city |
| | State* Nevada * |
| | Zip code * 99705 |
| | Correspondence Address |
| | Same as business address |
| | Address line 1* |
| | Address line 2 Apt. Suite. Unit. Bidg. Floor, etc |
| | City* Carson city |
| | State* Nevada * |
| | Zin code* 99705 |

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 | | | |
| Castification 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 | |
| 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 <u>Broker Connect Terms and Conditions</u> |
| | 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. |
| | Larges 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'.

| ion ker connect program. By clicking the button below your participation will be removed from this program with |
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| ion sker connect program. By clicking the button below your participation will be removed from this program with |
| ion ker connect program. By clicking the button below your participation will be removed from this program with |
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| from broker connect program |
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| 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 0 |
|--------------------------------------|--|--|--|--|--|---|---|
| Please, select h select 'Closed'. | ours during which you | are available | to take I | the calls each day. Fo | or days when | you don't plan to tak | e any consumer calls, please |
| | | | | | | | |
| On certain days if you would like | when you are not ava to take calls beyond y | iilable to take your working l | calls dui hours oi | ring your working ho n certain days, you c | urs, please us an turn the av | e the button above ailability button ON | o turn your availability OFF. Also to make yourself available for |
| the calls. | | | | | | | |
| Note: Please e | 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 | ٠ | То | 6:00 PM | ٥ | Closed | |
| Saturday | Select | ٥ | То | Select | ٥ | Closed | |
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| | Broker Conn Please, select h select 'Closed'. On certain days if you would like the calls. Note: Please er Monday Tuesday Wednesday Thursday Friday Saturday | Broker Connect Availability Please, select hours during which you select 'Closed'. On certain days when you are not availity or 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 Saturday 5:00 AM | Broker Connect Availability 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 Saturday Select | Broker Connect Availability Plesse 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: Plesse enter Pacific Time Monday 6:00 AM To Tuesday 6:00 AM To Wednesday 6:00 AM To Thursday 6:00 AM To Friday 6:00 AM To Saturday Select To | Broker Connect Availability Plesse, select hours during which you are available to take the calls each day. For select 'Closed'. On certain days when you are not available to take calls during your working hours on certain days, you control the calls. Note: Please enter Pacific Time Monday £:00 AM 0 Tuesday £:00 AM 0 Wednesday £:00 AM 0 Thursday £:00 AM 0 Friday £:00 AM 0 Saturday Select 0 Saturday Select 0 | Broker Connect Availability 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 avay the calls. Note: Please enter Pacific Time Monday 6:00 AM 0 10 6:00 PM 0 Tuesday 6:00 AM 0 10 6:00 PM 0 Thursday 6:00 AM 0 10 6:00 PM 0 Friday 6:00 AM 0 10 6:00 PM 0 Saturday Select 0 70 Select 0 | Broker Connect Availability Plasse select hours during which you are available to take the calls each day. For days when you don't plan to tak select 'Closed'. On certain days when you are not available to take calls during your working hours, please use the button above ti f'you would like to take calls beyond your working hours on certain days, you can turn the availability button ON the calls. Note: Please enter Pacific Time Monday 6:00 AM To 6:00 PM I Closed Tuesday 6:00 AM To 6:00 PM I Closed Thursday 6:00 AM To 6:00 PM I Closed Friday 6:00 AM To 6:00 PM I Closed Saturday Select To 5elect I 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 |
|--------------------------------------|---|---|--|---|--|--|--|
| Please, select ho | 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 |
| Scient closed. | | | | | | | |
| On certain days if you would like | when you are not av to take calls beyond | ailable to take your working l | calls dur hours or | ing your working hours, ple n certain days, you can turn | ease use t h the availa | he button above t ability button ON t | o turn your availability OFF. Also o make yourself available for |
| the calls. | | | | | | | |
| Note: Please er | ter 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 | |
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| | Broker Conn Please, select hi select 'Closed'. On certain days if you would like the calls. Note: Please er Monday Tuesday Wednesday Thursday Friday Saturday | Broker Connect Availability Please, select hours during which yo 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 Friday 6:00 AM Saturday Select | Broker Connect Availability 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 Saturday Select | Broker Connect Availability Please, select hours during which you are available to take the select 'Closed'. On certain days when you are not available to take calls during 'you would like to take calls beyond your working hours or the calls. Note: Please enter Pacific Time Monday 6:00 AM To Tuesday 6:00 AM To Wednesday 6:00 AM To Friday 6:00 AM To Saturday 5elect To | Broker Connect Availability 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 if you would like to take calls beyond your working hours on certain days, you can turr 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 Saturday 6:00 AM To 6:00 PM Thursday 6:00 AM To 6:00 PM Thursday 6:00 AM To 6:00 PM Saturday Select | Broker Connect Availability 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. you can turn the available to take calls during your working hours on certain days. you can turn the available to take calls during your working hours on certain days. you can turn the available to take calls during your working hours on certain days. you can turn the available to take calls during your working hours on certain days. you can turn the available to take calls during your working hours on certain days. you can turn the available to take calls during your working hours on certain days. you can turn the available to take calls during your working hours on certain days. you can turn the available to take calls during your working hours on certain days. you can turn the available to take calls during 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 To Monday 6:00 AM To 6:00 PM I Wednesday 6:00 AM To 6:00 PM I Friday 6:00 AM To 6:00 PM I Saturday Select To Select To | Broker Connect Availability 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 I Closed Tuesday 6:00 AM To 6:00 PM I Closed Thursday 6:00 AM To 6:00 PM I Closed Thursday 6:00 AM To 6:00 PM I Closed Thursday 6:00 AM To 6:00 PM I Closed Friday 6:00 AM To 6:00 PM I Closed Saturday Select To Select II 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.

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| 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 | 50000 00000 | | | | | | | |
| Certification Status | On certain day: if you would lik | s when you are not avai e to take calls beyond y | lable to take c our working h | alls du ours o | ring your working hours, plea n certain days, you can turn | ase use the bu the availability | tton above to turn button ON to mak | your availability OFF. Also e yourself available for |
| 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 | \$ □ 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.

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| Steps | Broker Conn | nect Availability | | | | | | OFF 3 |
| Agent Information | Please, select h select 'Closed'. | 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' | | | | | | |
| Profile | | | | | | | | |
| Certification Status | On certain days 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. | | | | | | | |
| articipation Information | Note: Please e | nter Pacific Time | | | | | | |
| Availability | Monday | 6:00 AM | ٠ | То | 6:00 PM | ÷ | Closed | WEEKDAY HOURS |
| | Tuesday | 6:00 AM | ٤ | то | 6:00 PM | \$ | Closed | Click the button above to apply |
| | Wednesday | 6:00 AM | ٠ | То | 6:00 PM | ٥ | 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 | • | Closed | |
| | Saturday | Select | • | То | Select | ÷ | Closed | |
| | Sunday | Select | ¢ | То | Select | \$ | Closed | |
| | , | | | | | | | |

Document Revision History

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