State of Nevada

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





# Nevada Health Link State Based Exchange Platform

## Certified Enrollment Counselor (CEC) User Reference Manual

October 31, 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 Certified Enrollment Counselor (CEC) Portal of the Nevada Health Link State Based Exchange (SBE) Platform. "CECs" refers collectively to the individual Navigators or CACs within an "Entity" organization who are certified by Nevada Health Link to offer enrollment assistance to Nevada's Affordable Care Act Exchange marketplace consumers. Throughout this document, individual Navigators or Certified Application Counselors (CACs) are referred to as "CECs."

The CEC Portal is a complete solution for CECs to submit applications and 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 CECs 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 refer to the <a href="https://www.nevadahealthlink.com/entity-cec-on-boarding-guide/">https://www.nevadahealthlink.com/entity-cec-on-boarding-guide/</a>.

# 2. Home Page

Individuals - My Information

Home

The Enrollment Dashboard is a landing page for the Certified Enrollment Counselor (CEC) portal. This page shows a count of the CEC's enrollments for the past 30-days as distributed across the type of plans selected.



## 2.1 Pending Delegation Requests

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

#### 2.1.1 View and search for pending designation requests

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

nevada health link connecting you to health insurance		🍘 🔊 My Account 🗸
Homen Individuals - My Inform	tion +	
Dashboard	Enrollment Dashboard	
Pending Delegation Requests     My Profile     Add New Individual	Your Enrollments - Past 30 Days Source: Cetinisured	
Access Code	PLATINUM     GOLD     SILVER     BRONZE     CATASTROPHIC     HIGH     LOW     MEDICAL	0 0 0
	PLATINUM SILVER EXPANDEDBRONZE COLD BRONZE CATASTROPHIC	HICH MEDICAL LOW

• 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.

connecting you to health linsuran						😤 🔊 My Account
Homen Individua	als - My Informa	tion <del>+</del>				
ending Dele	gation Re	quests 1 Pend	ing Individual			
Refine Results By	(reset all)	Name \$	FAMILY SIZE \$	REQUEST SENT \$	ACTIONS	
First Name			N/A	08/05/2019	0.1	
Last Name		N/A - Not Available				
Request Sent						
From:	<b>#</b>					
MM/DD/YYYY To:						
MM/DD/YYYY	*					
Go						

#### 2.1.2 Accept or decline individual designation request

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

connecting you to health link		ñ	My Account
Home My Individuals + My Infor	mation •		
Dashboard Quick Links	Enrollment Dashboard		
Pending Delegation Requests     My Profile     Add New Individual	Your Enrollments - Past 30 Days Source: Cetinsured		
Access Code	PLATINUM     GOLD     GULVER     BRONZE     D RPANDEDBRONZE     O     O     UCW     UCW     UCW     UCW     UCW     UCW	0	0 0
	E LOW MEDICAL		
	PLATINUM SILVER ÉXPANDEDBRONZÉ GOLD BRONZE CATASTROPHIC	HIGH	MEDICAL

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

Home# Individu	als - My Informa	ition <del>-</del>				
Homes Malvida	wy morna					
ending Dele	egation Re	quests 1 Pendi	ing Individual			
fine Results By	(reset all)	Name \$	FAMILY SIZE \$	REQUEST SENT \$	ACTIONS	
irst Name			N/A	08/05/2019	<b>o</b> -	
		N/A - Not Available			Accept	
ast Name					Decline	
lequest Sent						
From:						
MM/DD/YYYY	<b>#</b>					
To:						

### 2.2 My Profile

The Profile section displays the CECs public profile information. This information will be displayed to consumers who use Nevada Health Link's "Find Local Assistance" directory tool. The CEC can update their profile information and mailing address within this section.

nevada health link connecting you to health insurance			🕷 🛛 👷 Help & Support 👻 My Account	•
Home 🕷 Individuals 👻 My Inf	ormation +			
Steps	Profile		Edit	]
My information Profile Certification Status		Carson City NV 89701	View larger map	
	Phone Number Email		Google 	
	Language Spoken Language Written Education	-		

#### 2.2.1 Add or update Certified Enrollment Counselor profile photo

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

connecting you to health link		1	* 🔊	/ly Account
Home Individuals - My Info	mation •			
Dashboard				
Quick Links	Enrollment Dashboard			
<ul> <li>Pending Delegation Requests</li> <li>My Profile</li> <li>Add New Individual</li> </ul>	Your Enrollments – Past 30 Days Source: Getinsured			
Access Code	PLATNINM     GOLD     SUVER     BRONZE     EPCANDEDBRONZE     CATASTROPHIC     O     HIGH     HIGH     HOPICAL	0	0	0
	.≊ ■ MEDICAL			

• Step-2: Click on the 'Edit' button.

connecting you to health link			*	Account 🗸
Homen Individuals - My Information -				
	ofile			Edit
My Information Profile Certification Status		Cerson City NV 89701	View larger map	
Pł	Phone Number Email		Google Eandance Map Data Terms of Use	
	iguage Spoken iguage Written			
	Education	College Graduate		

• Step-3: Click on 'Choose File'.

exercise years to health link		🐐 🔊 My Account -
Home <b>n</b> Individuals - My Infor	nation +	
	Assister Profile	
My Information	Upload Photo Choose File No file chosen	
Profile	File size limit is 5 MB.	
Certification Status	First name •	
	Last 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.



• Step-4: Click on the 'Save' button.

Written Languages Supported	🖉 English
(Select all that apply)	a Arabic
	Armenian
	Cambodian
	Farsi
	Hmong
	E Korean
	Russian     Spanish
	Tagalog
	Traditional Chinese character
	Vietnamese
	Other Select Some Options
Education	College Graduate
	ancel Save

#### 2.2.2 Add or update Certified Enrollment Counselor profile information

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

nevada health link connecting you to health insurance		*	<b>~</b> 0	My Account
Home My Individuals - My Infor	nation +			
Dashboard				
Quick Links	Enrollment Dashboard			
Pending Delegation Requests     My Profile     Add New Individual	Your Enrollments – Past 30 Days Source: Cetinsured			
Access Code	COLD     COLD	0	0	0
	PLATINIM SLVER EXPANDEDBONZÉ	нісн		MEDICAL

• Step-2: Click on the 'Edit' button.

nevada health link connecting you to health insurance			*	My Account 🗸
Home Individuals - My Information	•			
Base 100				
Steps	Profile			Edit
My Information				
Profile Certification Status		Carson City NV 89701	View larger map	
	Phone Number Email		Google Candiana Map Data Terms of Use	
l	anguage Spoken.	English		
L	anguage Written.	English		
	Education	College Graduate		

• Step-3: Enter CEC's mailing address and profile information (e.g., "Spoken Languages Supported" or "Written Languages Supported") in the "Mailing Address" section and click on the 'Save' button.

Street Address *	
Street Address	
Suite	Apt, Suite, Unit, Bldg, Floor, etc
Suite	ript, batte, onit, blog, noor, etc
City •	Carson City
city	conson city
State *	Nevada 🔻
Zip Code *	89701
Phone number *	
Email •	
Spoken LanguagesSupported	English
(Select all that apply) *	Arabic Armenian
	Cambodian
	Cantonese
	Farsi
	Hmong
	Korean
	Mandarin
	Russian
	Spanish
	Tagalog
	Uietnamese
	Other Select Some Options
Weber I Constant	🖉 English
Written Languages Supported (Select all that apply) *	Arabic
(beleec an char apply)	Armenian
	Cambodian
	Farsi
	Hmong
	🔲 Korean
	🔲 Russian
	Spanish
	Tagalog
	Traditional Chinese character
	Uietnamese
	Other Select Some Options
Education *	College Graduate
	ncel Save

## 2.3 Add New Individual

The CEC can create a new consumer account on behalf of a consumer through the Add New Individual section. Once the new consumer is added, the CEC can act as proxy to the consumer account and perform activities on behalf of them. (To learn how to be a proxy to an individual account and further steps, please refer to Section 3.2.2.5)

• 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		ñ	2 <b>0</b>	My Account 👻
Home Maindividuals • My Inform	ation •			
Quick Links O Pending Delegation Requests	Enrollment Dashboard			
Add New Individual	Your Enrollments – Past 30 Days Source: Cetinsured			
Access Code	SUVER     BRONZE     EXPANDEDBRONZE     catastrophic	0	0	0
	PLATINUM SILVER EXPANDEDBRONZE HIG COLD BRONZE CATASTROPHIC		.ow	MEDICAL

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

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

nevada health link connecting you to health insurance	<b># 2</b> 5 My	Account 👻
Home 🏶 Individuals 👻 My Inform	ntion +	
Create Individual Rec	ord	
About Individual	Individual Information	
Enter information for the individual to create a record prior to acting on the individual's behalf.	First Name •	
	Email Address	
	SSN • SSN is required SSN is not required. Select Reason Select Reason Religous Exception Just Applied Clitzer Exception	

• Step-3: A pop-up box will appear. Click on 'Individual View' to proxy a consumer account or click on 'Cancel' to cancel the process.



For detailed information on how to act as a proxy to an individual account please refer to Section 3.2.2.5.

## 2.4 Access Code

The Access Code section helps the CECs to create or claim a migrated consumer user account on the Nevada Health Link SBE platform. Consumers whose accounts were 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 CECs may use this code to claim and be a proxy to their account.

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

• Step-1: Go to 'Home Page' and enter the access code in the "Access Code" section and click on the 'Submit' button.



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

nevada health link connecting you to health insurance	<b>ж "2<sup>9</sup> м</b> у	/ Account <del>+</del>
Home# Individuals - My Infor	mation -	
Referral Linking		
Process	Authentication Information	
Authentication Information		
Link to Application	<ul> <li>Before we can link your application to your account, you will need to enter information to confirm your identity.</li> <li>Once you have successfully entered this information, you can view your eligibility results and shop for plans.</li> </ul>	
	First Name • Last Name • Last Name • Last Name • Last Name • Cender • Male @ Female County • Lander	
	Submit	

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

nevada health link			🐐 🔊 My Account -
Home# Individuals - My Inform	nation <del>-</del>		
Referral Linking			
Process	Link to Application		
Authentication Information		This application has been successfully linked to your account.	
Link to Application		Continue	

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



For detailed information on how to act as proxy to an individual account please refer to Section 3.2.2.5.

# 3. Individuals

Home	Individuals -	My Information +			
	Pending Requ	iests			
	Active Individuals				
	Inactive Indiv	iduals			

## 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 complete list of individuals assigned to the CEC. The individuals' list displays their name, family size, household income, eligibility status, application status and an action button that assists a CEC in performing actions on an individual account.

The Active Individuals section helps a CEC to search for an active individuals' list, edit individual summary, provide comments on an individual's profile, act as a proxy to a consumer's application, resend the activation email to an individual, and mark an individual as inactive.

Home# Individ	uals - My Informa	ation <del>-</del>					
Active Indivi	duals 1 Active	Individual					
efine Results By	(reset all)	Name \$	FAMILY SIZE \$	HOUSEHOLD INCOME \$	ELIGIBILITY STATUS \$	Application Status 🖨	ACTIONS
First Name			N/A	0.0			o -
Last Name		N/A - Not Available					
Eligibility Status							
Select	¥						
Application Status							

#### 3.2.1 View and search for active individuals

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

Home	Individuals -	My Information +
	Pending Requ	lests
	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 select individual eligibility status (e.g., "Pending" or "Conditional") from the 'Eligibility Status' drop-down list or select individual application status (e.g., "Open" or "Submitted") from the 'Application Status' drop-down list and click on the 'Go' button.

Home Individua	ils - My Informat	tion <del>-</del>					
Active Individ	uals 1 Active I	ndividual					
efine Results By	(reset all)	Name \$	FAMILY SIZE \$	HOUSEHOLD INCOME \$	ELIGIBILITY STATUS \$	Application Status 🖨	ACTIONS
First Name			N/A				٥٠
Last Name		N/A - Not Available					
Eligibility Status							
Select	•						
Application Status							

#### 3.2.2 Perform actions on designated consumer account

The CECs can perform actions on consumer accounts which includes each individual summary, provides comments on an individual's profile, act as a proxy to an individual account, resends the account activation email, and marks an individual as inactive.

#### 3.2.2.1 Update individual summary

**PLEASE NOTE:** CECs can edit individual each 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 🍄 🔹 button and click on 'Details'.

connecting you to health line						🆀 🔊 My Acco	unt 🕶
Home 🖶 Individu	als - My Informa	ation <del>-</del>					
Active Indivi	duals 2 Active	Individuals					
Refine Results By	(reset all)	Name 🌢	FAMILY SIZE \$	HOUSEHOLD INCOME \$	ELIGIBILITY STATUS	Application Status  AC	TIONS
First Name		Name 🗸	PAMIET SIZE 🛡	HOUSEHOLD INCOME \$	Eligible		¢ -
Last Name			N/A			Details Mark as In	_
Eligibility Status		N/A - Not Available					
Select	Ŧ						
Application Status							
Select	¥						
Go							

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

nevada health link connecting you to health inswance		🖀 🛛 🜌 My Account 👻
Home <b>#</b> Individuals <del>-</del> My Inf	ormation -	
Trace Trappeter		
Summary	Summary	Edit
Comments	Primary Applicant	
© Actions	Address	
New Comment	Phone Number	
View Consumer Application	Email Address	
Resend Activation Email	Eligibility Status	
	Application Status	

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

connecting you to health link		🛪 🔊 My Account 🗸
Home 🕷 Individuals 👻 My Informa	tion -	
Summary	Summary	Save
Comments © Actions	Primary Applicant	
New Comment	Email Address •	
<ul> <li>View Consumer Application</li> <li>Resend Activation Email</li> </ul>		

#### 3.2.2.2 Provide comments on individual profile

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



• Step-2: Click on the 🔅 button and click on 'Details'.

Home 🖶 Individe	uals 👻 My Informa	tion <del>*</del>					
Active Indivi	duals 2 Active	Individuals					
Refine Results By	(reset all)	Name \$	FAMILY SIZE \$	HOUSEHOLD INCOME \$	ELIGIBILITY STATUS \$	Application Status 🖨	ACTION
First Name					Eligible	Signed	٥.
Last Name			N/A			Details Mark as	s Inactive
		N/A - Not Available					
Eligibility Status							
Select	•						
Application Status							

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

cenecting you to health link		🎓 🔊 My Account 🗸
Home <del>st</del> Individuals - My Informa	ition +	
Paul Tagette		
About this Consumer	Comments	Add Comments
Summary Comments	No comments Add Comments	
<b>⇔</b> Actions		
P New Comment		
View Consumer Application		
Resend Activation Email		

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

nevada health link correcting you to health insurance		of a a My Account -
Home Individuals - My Inform	ation +	
1000		
About this Consumer	Comments	Add Comments
Summary Comments	No comments Add Comments	
¢Actions		
<ul> <li>New Comment</li> <li>View Consumer Application</li> </ul>		Characters left 4000 Cancel Post Comment
Resend Activation Email		

• Step-5 (Another way): Perform Step-1 and Step-2 from Section 3.2.2.2 and go to "Actions" section and click on the 'New Comment' button.

nevada health link		🐐 🛛 🛃 My Account 🗸
Home <del>d</del> Individuals - My Inf	formation +	
Teaching and		
Summary	Summary	Edit
Comments		
	Primary Applicant	
© Actions	Address	
P New Comment	Phone Number	
View Consumer Application	Email Address	
Resend Activation Email	Eligibility Status	
The sector rectron of criticity		

• 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			🖀 🔊 My Account +
Home Individuals - My Information	10000		
The Part of	Enter comments here		
Summary			Edit
Comments	Cancel Save Characters	left: 4000	
© Actions A			
Diver	Number		

#### 3.2.2.3 Update comments on individual profile

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



• Step-2: Click on the 🔅 button and click on 'Details'.

Ø.*
Details Mark as Inactive

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

connecting you to health link		🐐 🖉 My Account -
Home# Individuals + My Info	ormation +	
1000		
About this Consumer	Comments	Add Comments
Summary	added a comment - 15 Aug, 2019 02:51 PM	
Comments		
<b>\$</b> Actions	Add Comments	
New Comment		
View Consumer Application		

• Step-5: Enter the updated comment in the text area and click on the 'Update Comment' button.

connecting you to health link		术 🔊 My Account -
Home <b>st</b> Individuals • My Informa	tion •	
About this Consumer	Comments	Add Comments
Summary Comments	added a comment - 15 Aug, 2019 02:51 PM	<b>2 a</b>
©Actions	Cancel Update Comment	
<ul> <li>♥ View Consumer Application</li> <li>■ Resend Activation Email</li> </ul>	Add Comments	

#### 3.2.2.4 Delete a comment on individual profile

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



• Step-2: Click on the 🔅 button and click on 'Details'.

	als - My Informa						
Active Indivi	duals 2 Active	Individuals					
Refine Results By	(reset all)						
	(reset all)	Name 🌩	FAMILY SIZE \$	HOUSEHOLD INCOME \$	ELIGIBILITY STATUS	Application Status 🌻	ACTIONS
First Name					Eligible	Signed	0.1
Last Name			N/A			Deta	as Inactive
Last Name		N/A - Not Available				Mark	as macuve
Flinikilian Canada							
Eligibility Status							
Select	Ŧ						
Application Status							

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

nevada health link connecting you to health insurance		🆀 🔝 My Account -
Home# Individuals + My Info	rmation +	
Nucl Togeth		
About this Consumer	Comments	Add Comments
Summary	added a comment - 15 Aug. 2019 02:51 PM	
Comments		
✿Actions	Add Comments	
New Comment		
View Consumer Application		
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.

Exercise provide Exercise processors Home@ Individuals - My information	Are you sure you wish to delete this comment? This action cannot be undone. Cancel Delete	My Account •
Summary Comments	added a comment - 15 Aug. 2019 02:51 PM	

#### 3.2.2.5 View consumer application

The CECs can view an Individual consumer's account and can perform actions on behalf of them. They can perform actions such as report qualifying life events, shop for new health and dental plans, start a 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 CEC profile, and de-designate a CEC.

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



• Step-2: Click on the 🍄 📩 button and click on 'Details'.

	uals - My Informa	ition *					
Active Indivi	duals 2 Active	Individuals					
		mannadals					
Refine Results By	(reset all)	Name \$	FAMILY SIZE \$	HOUSEHOLD INCOME \$	ELIGIBILITY STATUS \$	Application Status 🖨	ACTIONS
First Name					Eligible	Signed	٥.
Last Name			N/A			Details Mark a	s Inactive
		N/A - Not Available					
Eligibility Status							
Select	¥						
Application Status							

• Step-3: Go to "Actions" section and click on 'View Consumer Application'.

connecting you to health insurance		🐐 📓 My Account 🗸
Home <b>s</b> Individuals • My Info	rmation +	
Summary	Summary	Edit
Comments	Primary Applicant	
© Actions	Address	
🗩 New Comment	Phone Number	
View Consumer Application	Email Address	
Resend Activation Email	Eligibility Status	
	Application Status	

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

nevada health link		🖀 🔊 My Account -
	View Individual Account	
	Click on Consumer Application to go to the consumer portal for You will be able to complete the application, make changes, or select a plan on behalf of the consumer, Proceed to the consumer portal?	
	Proceed to individual view?	
	Cancel     Individual View	

• Step-5: The following screen displays consumer account.

nevada health link covercing you to halth insurance		ñ	M	Help & Support 🝷	My Account 🝷
	Viewing Individual Account My Account			Your Enrollme	ent Counselor 🌣 🔻

For detailed information on how to perform actions on behalf of the consumer, please visit <u>https://www.nevadahealthlink.com/consumer-transition/</u> and refer to the Application and Enrollment Guide.

#### 3.2.2.6 Resend activation email

**PLEASE NOTE:** The Resend Activation Email feature is only available for consumers who have not completed the sign-up process. This step will allow CECs 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 🔅 button and click on 'Details'.

connecting you to health insure						• •	ccount •
Home <table-row> Individu</table-row>	als - My Inform	ation <del>-</del>					
Active Indivi	duala						
Active maivi	uudis 2 Active	e Individuals					
Refine Results By	(reset all)	Name \$	FAMILY SIZE \$	HOUSEHOLD INCOME \$	ELIGIBILITY STATUS	Application Status 🏾	ACTIONS
First Name					Eligible	Signed	<u>ه</u> -
Last Name			N/A			Details Mark a	s Inactive
		N/A - Not Available					
Eligibility Status							
Select	T						
Application Status							
Select	v						
Select							

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

nevada health link connecting you to health insurance		🐐 ず My Account 🗸
Home# Individuals - My In	formation +	
Teaching and		
Summary	Summary	Edit
Comments	Primary Applicant	
& Actions	Address	
New Comment	Phone Number	
Wiew Consumer Application	Email Address	
Resend Activation Email	Eligibility Status	

• Step-5: A pop-up screen will appear with a 'Success!' message.



#### 3.2.3 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 CEC and Consumer. The marked inactive individual will be listed in the "Inactive Individuals" section. For detailed information on how a consumer designates a CEC, please visit <u>https://www.nevadahealthlink.com/consumer-transition/</u> and refer to the Application

and Enrollment Guide.

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



• Step-2: Click on the <sup>\*</sup> button and click on 'Mark as Inactive'.

Home 🖶 Individu	uals - My Inform	ation -					
Active Indivi	duals 2 Active	e Individuals					
Refine Results By	(reset all)	Name \$	FAMILY SIZE \$	HOUSEHOLD INCOME \$	ELIGIBILITY STATUS	Application Status 🗢	ACTIONS
First Name					Eligible	Signed	٥٠
Last Name			N/A			Detail	s as Inactive
		N/A - Not Available					
Eligibility Status							
Select	٣						
Application Status							

• Step-3: A pop-up screen will appear. Click on 'Confirm' to inactive current individual account and click on 'Cancel' to cancel the process.

**PLEASE NOTE:** If you mark an individual account as Inactive then you will no longer have access to their account. The individual has to send you another designation request to you to perform actions on behalf of them.

Are You Sure?	×
Are you sure you want to mark this account as inactive? If you confirm, you will no longer have access to this account.	
Should you change your mind in the future, this person will have to send you another designation request before you can access their account again.	
Cancel	

## 3.3 Inactive Individuals (Undesignated Consumers)

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

The CECs 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 account has been inactive in the 'Inactive Since' section under the "Refine Results By" section and click on the 'Go' button.

Home 🖶 🛛 Individu	als 👻 My Informa	ition <del>-</del>		
nactive Indiv	viduals 1 in/	Active Individual		
efine Results By	(reset all)	Name 🗢	Inactive Since 🗢	
First Name			08/30/2019	
Last Name				
Inactive Since				
From:				
MM/DD/YYYY	<b>#</b>			
To: MM/DD/YYYY	<b>m</b>			

# 4. My Information



## 4.1 Counselor Information

The Counselor Information section displays CECs information, which includes CEC Information, Mailing Address, and Profile Information. They can update this information within this section.

#### 4.1.1 Add or update Certified Enrollment Counselor information

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

Home	Individuals 🕇	My Information •	
		Counselor Information	
		My Profile	
		Certification Status	

• Step-2: Click on the 'Edit' button.

nevada health link connecting you to health insurance		🌴 📓 My Account 🚽
Home# Individuals - My Inform	nation 👻	
Steps	Certified Enrollment Counselor Information	Edit
My Information		
Profile	First name	
Certification Status	Last name	
	Email	
	Phone number	
	Secondary Phone Number	
	How would you like us to contact you? Is this Enrollment Counselor Certified?	
	Enrollment Courselor Certification #	
	Primary Certified Enrollment Counselor Site	
	Secondary Certified Enrollment Counselor Site	
	Mailing Address	
	Street Address 1	
	Suite	
	City Carson City	
	State NV	
	Zip Code 89701	
	Profile Information	
	Spoken LanguagesSupported English	
	Written Languages Supported English	
	Education College Graduate	
	Photo	

• Step-3: Enter CEC Information (e.g., "First Name" or "Phone Number"), Mailing Address and Profile Information (e.g., "Spoken Languages Supported" or "Written Languages Supported") and click on the 'Save' button.

cenecting yes to health insurance			of the second the second the second the second test the second se
Home# Individuals * My Informa	tion -		
Steps	Certified Enrollment Counse	lor Information	
My Information	First name *		
Profile			
Certification Status	Last name *		
	Email *		
	Phone number *		
	Secondary Phone Number		
	How would you like us to contact you? *	Email     Phone	
		I Mail	
	Is this Enrollment Counselor Certified?	© No ⊛ Yes	
	Certified Enrollment Counselor		
	Certification #		
	Primary Certified Enrollment Counselor Site *	and an and a second sec	
	Secondary Certified Enrollment Counselor Site	and the particular data	
	Mailing Address		
	Street Address 1 *		
	Suite	Apt, Suite, Unit, Bldg, Floor, etc	
	City *	Carson City	
	State *	Nevada 🔻	
	Zip Code	89701	
	Profile Information		
	Spoken LanguagesSupported	✓ English	
	(Select all that apply) *	Armenian	
		Cantonese	
		Earsi Hmong	
		🔄 Korean	
		🔲 Mandarin 📄 Russian	
		Spanish     Tagalog	
		Uietnamese	
		Other Select Some Options	
	Written Languages Supported	☑ English	
	(Select all that apply) *	Arabic Armenian	
		🔲 Cambodian	
		Earsi Hmong	
		🔲 Korean	
		🔄 Russian 🔟 Spanish	
		Tagalog	
		Traditional Chinese character     Vietnamese	
		Other Select Some Options	
		College Graduate	
	Upload Photo	Choose File No file chosen File size limit is 5 MB.	

## 4.2 Profile

For detailed information on the CEC Profile please refer to Section 2.2.

## 4.3 Certification Status

The Certification Status section provides a read-only listing to CEC Number, Certification Status, Enrollment Counselor Certification Number, CEC Start Date, Certification Renewal Date, and Activity Status.

**PLEASE NOTE:** The Certification Status of a CEC must be "Certified" to gain access to the CEC portal and the Activity status must be "Active" to appear in the "Find Local Assistance" directory tool.

There are two possible Certification Statuses for the CECs, which are described below:

#### Pending

The Pending status is the default status assigned to a new CEC whose account has been created by their Entity Organization on the Nevada Health Link platform and the Entity administrator is reviewing their information.

#### **Certified**

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

#### **Denied**

The Denied certification status is assigned when CECs certification is rejected.

There are two Activity Status for the CECs, which is described below:

#### <u>Active</u>

The Active status is assigned to a CEC by the Entity Organization or Entity administrator. A CEC with active status will be listed in Nevada Health Link's "Find Local Assistance" directory tool, which is used by consumers to locate CECs in their area. The CEC will appear in the CEC search list which is used by the Entity to change consumer delegation from one CEC to another CEC within the Entity Organization.

#### **Inactive**

The Inactive status is assigned to a CEC by the Entity Organization or Entity administrator. A CEC with inactive status won't be listed in Nevada Health Link's "Find Local Assistance" directory tool, which is used by consumers to locate CECs in their area. The CEC will not appear in the CEC search list which is used by the Entity to change consumer delegation from one CEC to another CEC within the Entity Organization.

newada health link		🐐 🔊 My Account -
Home Individuals - My	Information +	
Name (191		
	Certification Status	
My Information		
Profile	Certified Enrollment Counselors Number	
Certification Status	Certification Status Certified	
	Certification Enrollment Counselor Start Date	
	Certification Renewal Date	
	Activity Status Active	

# **Document Revision History**

Version	Issue Date	Changes	Drafted	Approved
1.0	10/31/2019	Initial Release	Vinit Yagnik	Heather Korbulic