State of Nevada

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

Nevada Health Link State Based Exchange Platform

Entity 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 Entity Portal of the Nevada Health Link State Based Exchange (SBE) Platform. “Entity” refers collectively to the health insurance Navigator or Certified Application Counselor (CACs) organizations that offer enrollment assistance to Nevada’s Affordable Care Act, Exchange marketplace consumers. Throughout this document, Navigator/CAC organizations are referred to as “Entities or Entity.”

The Entity Portal is a complete solution to add/manage Certified Enrollment Counselors (CECs) of the organization, submit applications and enrollments and perform account maintenance transactions on behalf of the CECs for the existing consumers, change consumer designation from one CEC to another within the organization, perform account maintenance for the organization, and manage organization’s and CEC’s book of business.

PLEASE NOTE: This manual is for Entities who have already completed Nevada Health Link’s user account registration process for the SBE Platform. For information on gaining access to the SBE Platform please refer to the https://www.nevadahealthlink.com/entity-cec-on-boarding-guide/.

2. Home Page

The Home Page is the landing page for Entity organization. This section displays the list of CECs associated with the Entity Organization, allows the Entity to add new CECs, view and search for CECs associated with the organization, and edit CEC information.

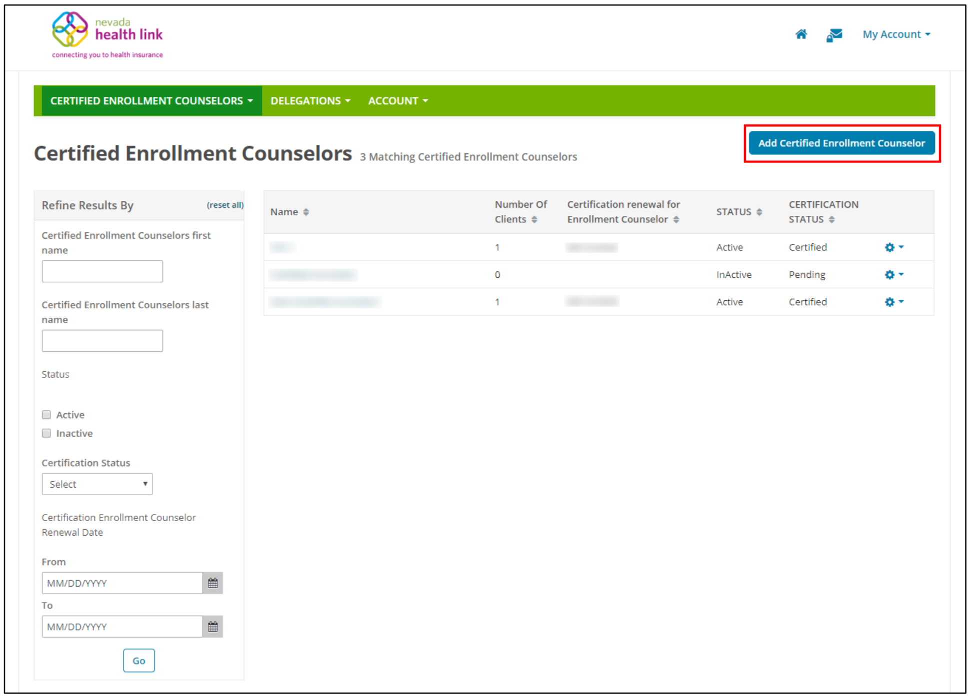
2.1 Add Certified Enrollment Counselor

This section allows the Entity to add CECs for the Entity Organization who will assist and perform actions on behalf of the consumers.

PLEASE NOTE: The CEC user accounts can be created at any time in the year, but the CECs will not receive the invitation email to claim their account until the SSHIX Navigator Program Coordinator has verified their completion of the Training and Certification curriculum and updated their Certification Status to “Certified.”

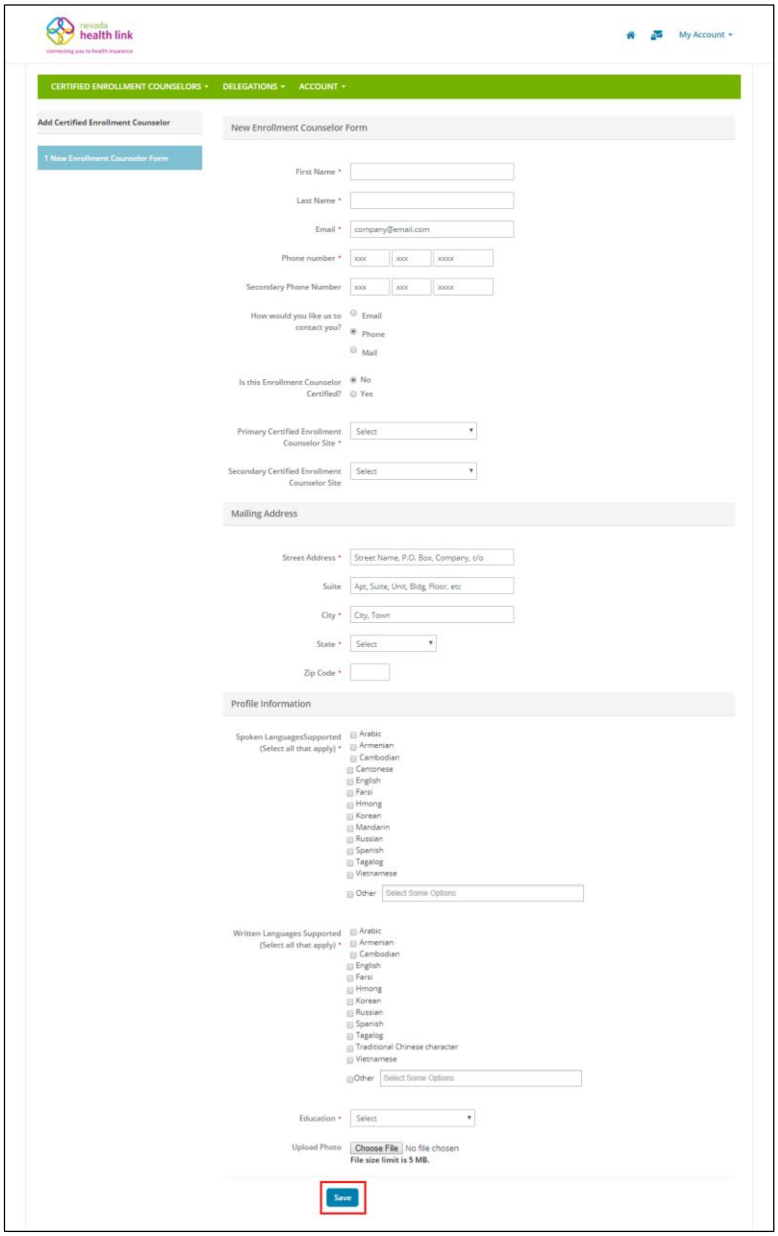
2.1.1 Add new Certified Enrollment Counselor

- Step-1: Click on the ‘Add Certified Enrollment Counselor’ button on the home page.



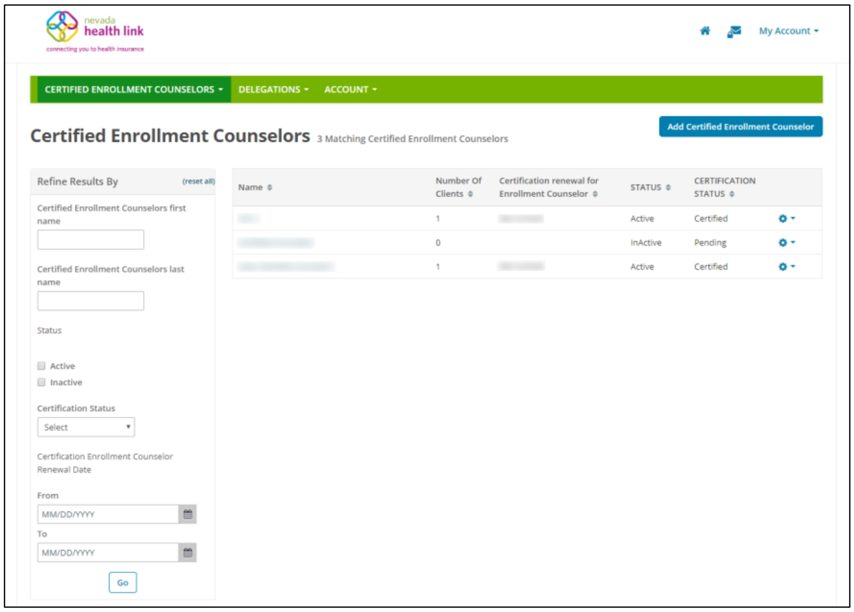
- Step-2: Fill out New Enrollment Counselor Form (e.g., "First Name" or "Primary Phone Number"), enter the Mailing Address, Profile Information (e.g., "Spoken Languages Supported" or "Written Languages Supported" or "Education") and click on the 'Save' button.

  PLEASE NOTE: The suggested value for "Is this Enrollment Counselor Certified?" field is "No" (this relates to functionality which has been disabled in the SBE Platform and will not impact Entity/CEC functionality).

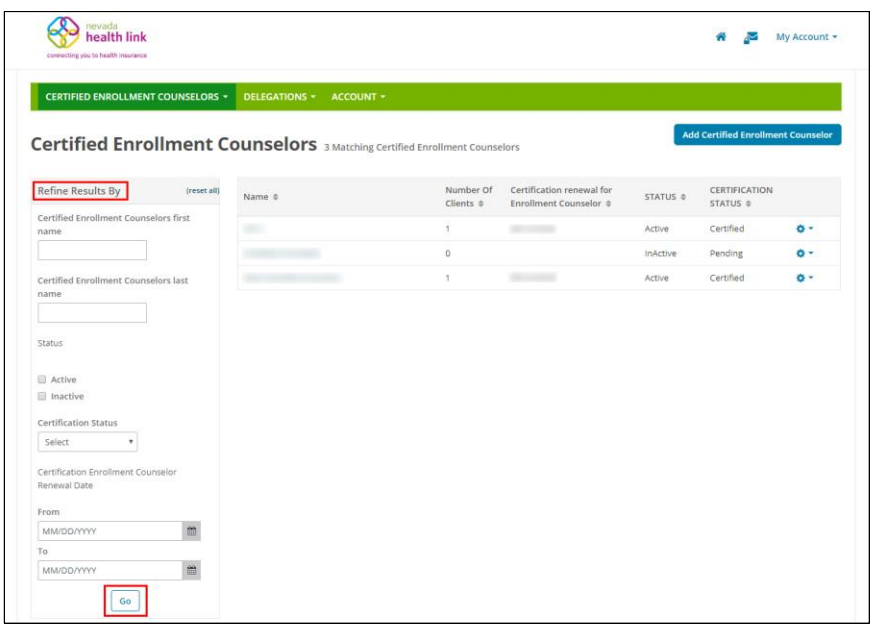


2.2 View and Search for Certified Enrollment Counselors

- Step-1: Go to Entity portal 'Home Page'.



- Step-2: Enter CEC's first name in the 'Certified Enrollment Counselors first name' field or last name in the 'Certified Enrollment Counselors last name' field or select CEC activity status from the 'Active' or 'Inactive' status or select CEC certification status from the 'Certification Status' drop-down list (e.g., "Pending" or "Certified") or select a desired date range during which the CECs certification will be renewed from the 'Certification Enrollment Counselor Renewal Date' section under "Refine Results By" section and click on the 'Go' button.

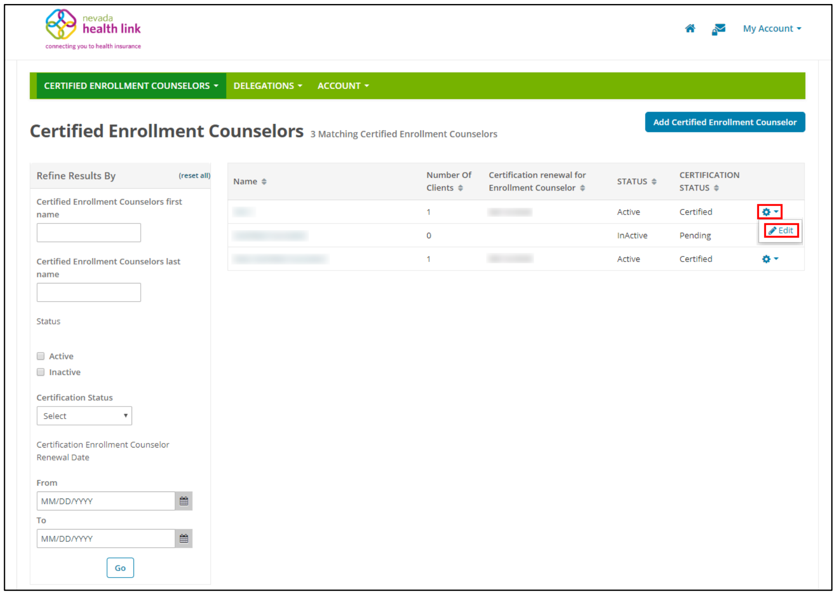


2.3 Edit Certified Enrollment Counselor (CEC) Information

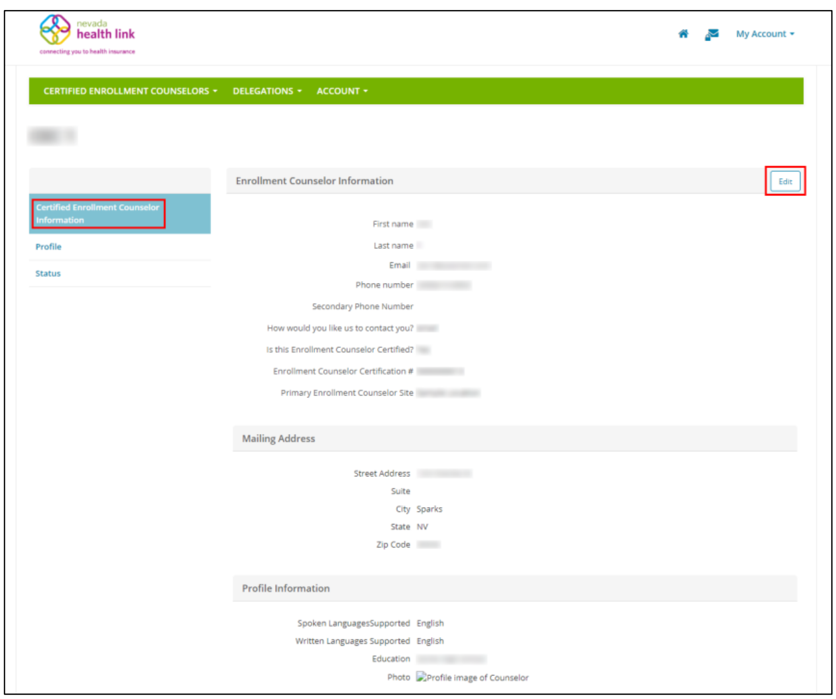
The Edit CEC information section helps the Entity in managing the CEC information, view CEC profile, and update the CEC activity status.

2.3.1 Add or update Certified Enrollment Counselor information

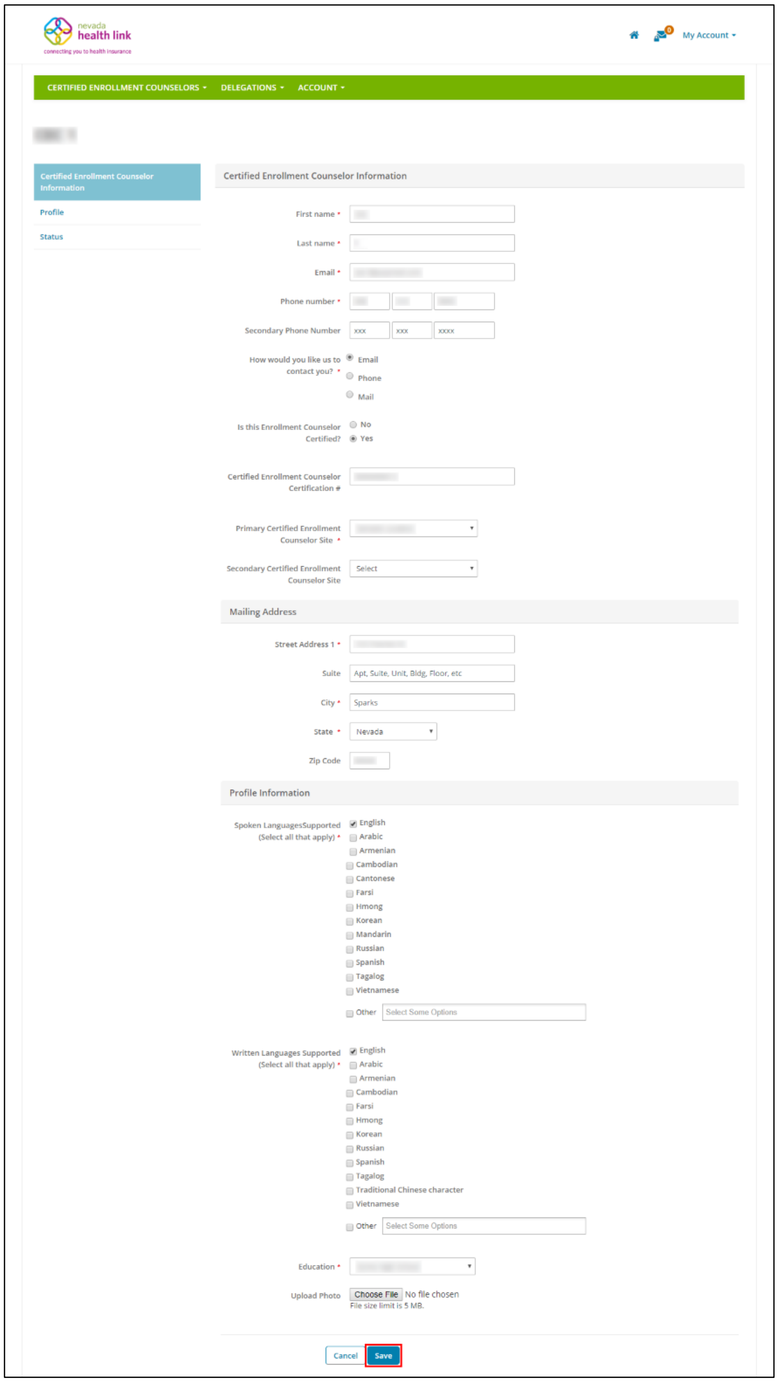
- Step-1: Click on and click on the 'Edit' button on the home page.



- Step-2: Click on the "Certified Enrollment Counselor Information" section and click on 'Edit' button.

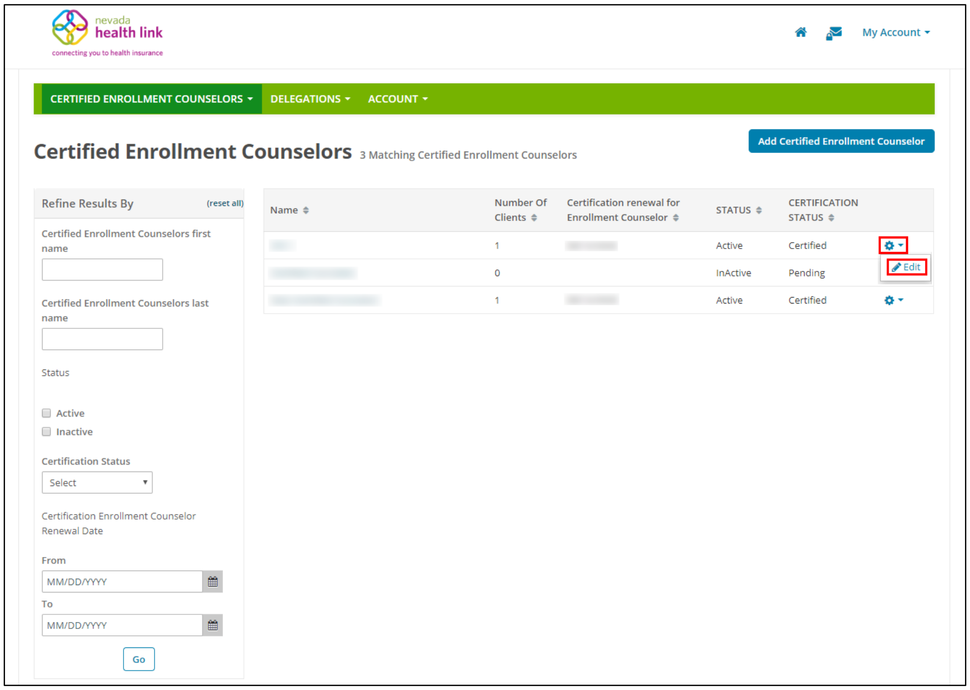


- Step-3: Enter CEC Information (e.g., “First Name” or “Phone Number”), Mailing Address and Profile Information (e.g., “Spoken Languages Supported” or “Written Languages Supported”) and click on the ‘Save’ button.

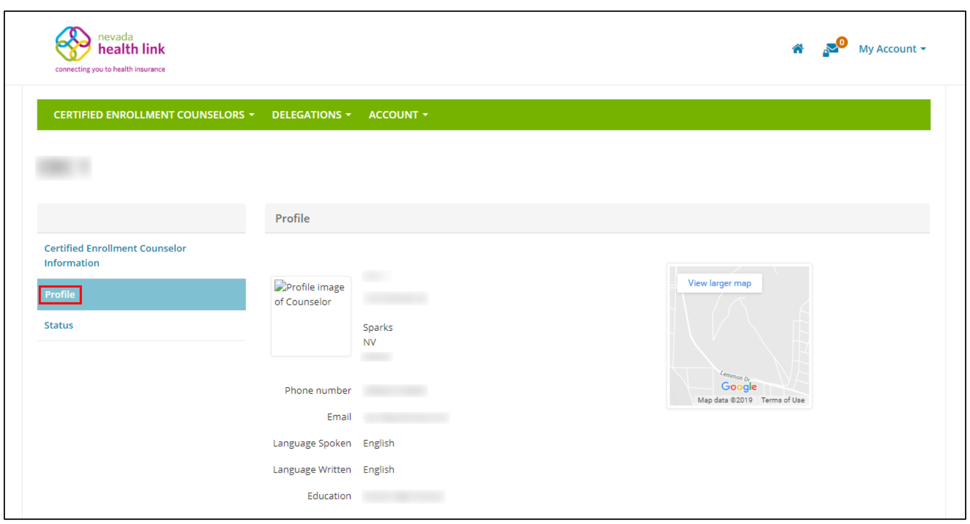


2.3.2 View Certified Enrollment Counselor profile

- Step-1: Click on ⚙ ▾ and click on the ‘Edit’ button on the home page.

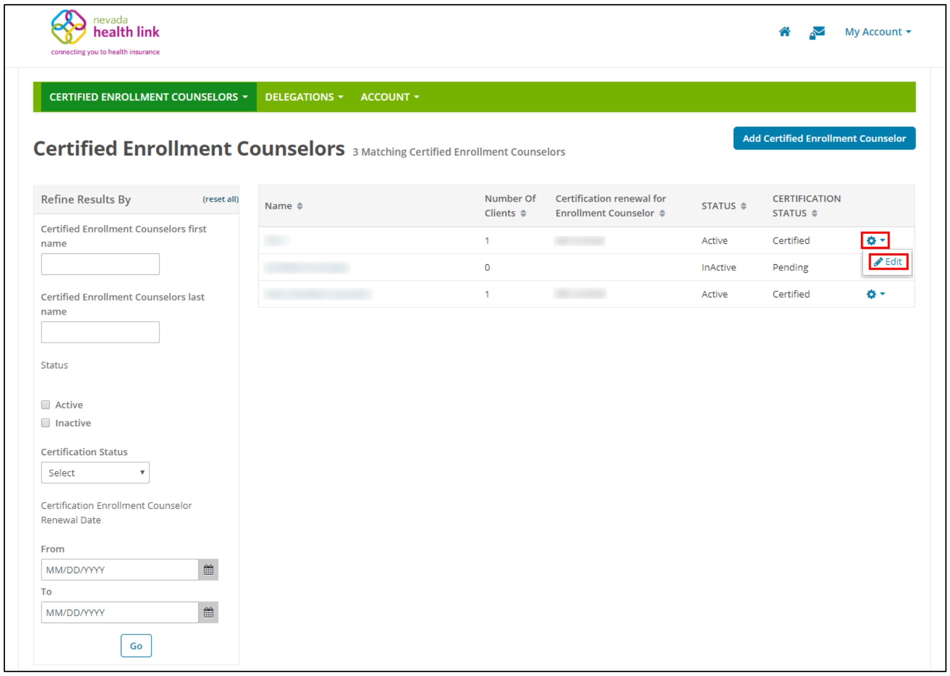


- Step-2: Click on the “Profile” section and the following screen will display CEC profile information.

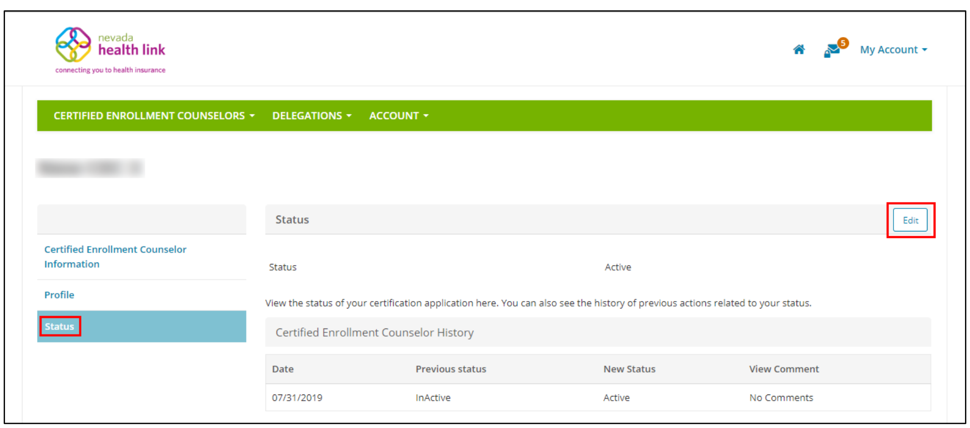


2.3.3 Update Certified Enrollment Counselor activity status

- Step-1: Click on  and click on the ‘Edit’ button on the home page.

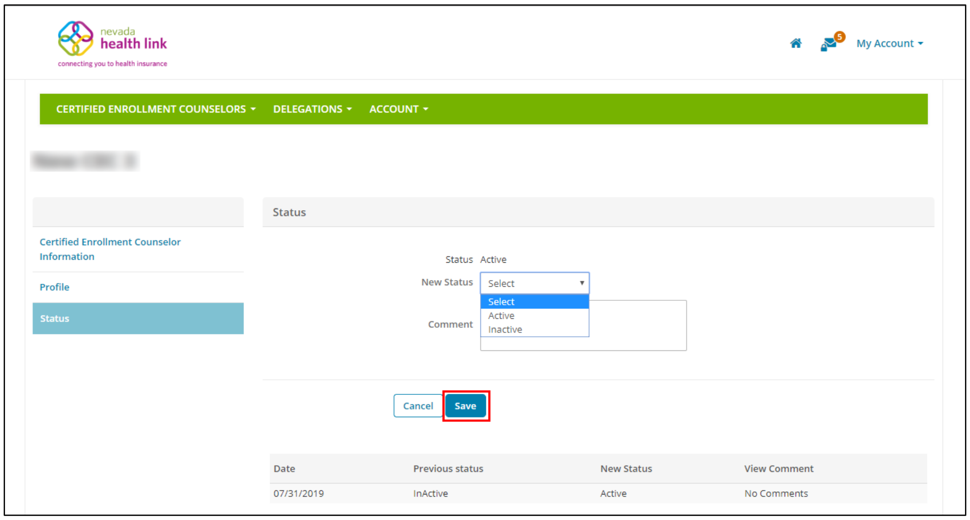


- Step-2: Click on the “Status” section and click on ‘Edit’ button.

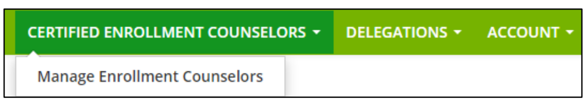


- Step-3: Select a new CEC activity status (e.g., “Active” or “Inactive”) from the ‘New Status’ drop down list and provide comments in the ‘Comment’ section, and click on the ‘Save’ button.

  PLEASE NOTE: The CEC must be in “Active” activity status in order to appear in the “Find Local Assistance” directory tool and appear in the CEC search list while the Entity is changing consumer delegation from one CEC to another CEC within the Entity Organization.



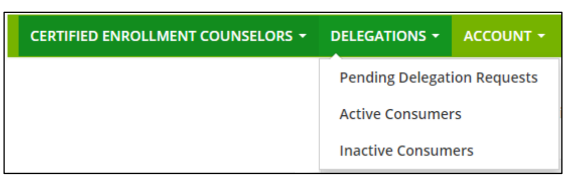
3. Certified Enrollment Counselors



3.1 Manage Enrollment Counselors

For detailed information on Manage Enrollment Counselors please refer to Section 2.

4. Delegations

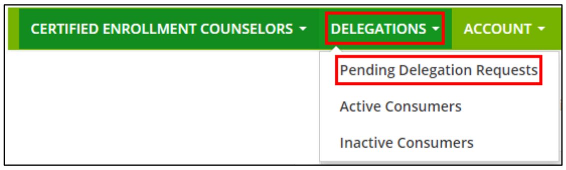


4.1 Pending Delegation Requests (New Designation Request)

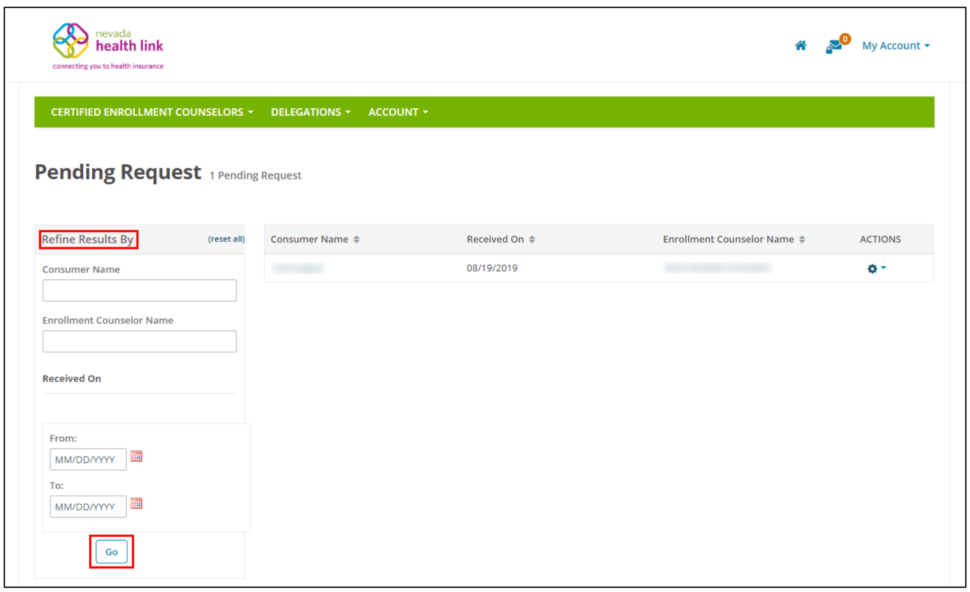
The Pending Delegation Requests section displays a list of pending consumer designation requests for a CEC associated with the Entity Organization. The Entity has an option to accept or decline an individual’s designation request on behalf of the CEC. If the request is accepted, then the individual will move to the Active Consumers section. If the request is declined the consumer will automatically move to the Inactive consumers section. The Entity can view and search for the list of pending consumer designation requests filtered by Consumer Name, CEC name, and request received date range.

4.1.1 *View and search for pending delegation requests*

- Step-1: Click on the ‘Delegations’ tab and select ‘Pending Delegation Requests’.

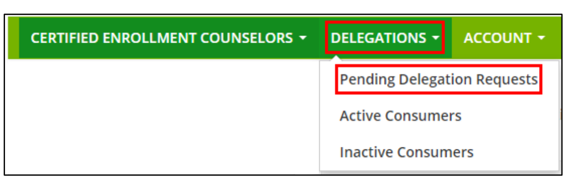


- Step-2: Enter consumer’s name in the ‘Consumer Name’ field or CEC name in the ‘Enrollment Counselor Name’ field or enter the desired date range during which an individual delegation request was received in the ‘Received On’ section under the “Refine Results By” section and click on the ‘Go’ button.

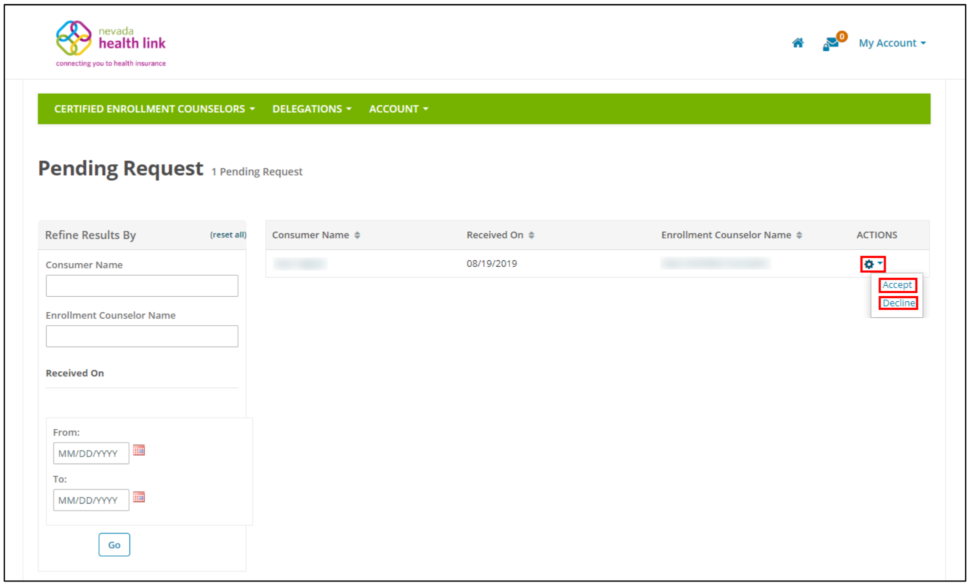


4.1.2 *Accept or decline individual delegation request*

- Step-1: Click on the ‘Delegations’ tab and select ‘Pending Delegation Requests’.



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



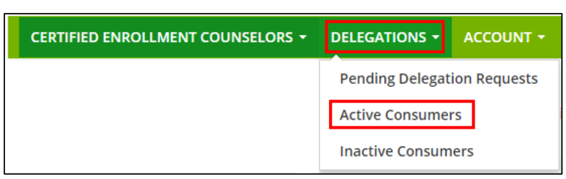
4.2 Active Consumers (Existing Designations)

The Active Consumers section displays a complete list of consumer designations to the CECs. The consumers list displays their name, date since their designation is active, designated CEC name, eligibility status, application status, and an action button that assists an Entity in performing actions on an individual account on behalf of the designated CEC.

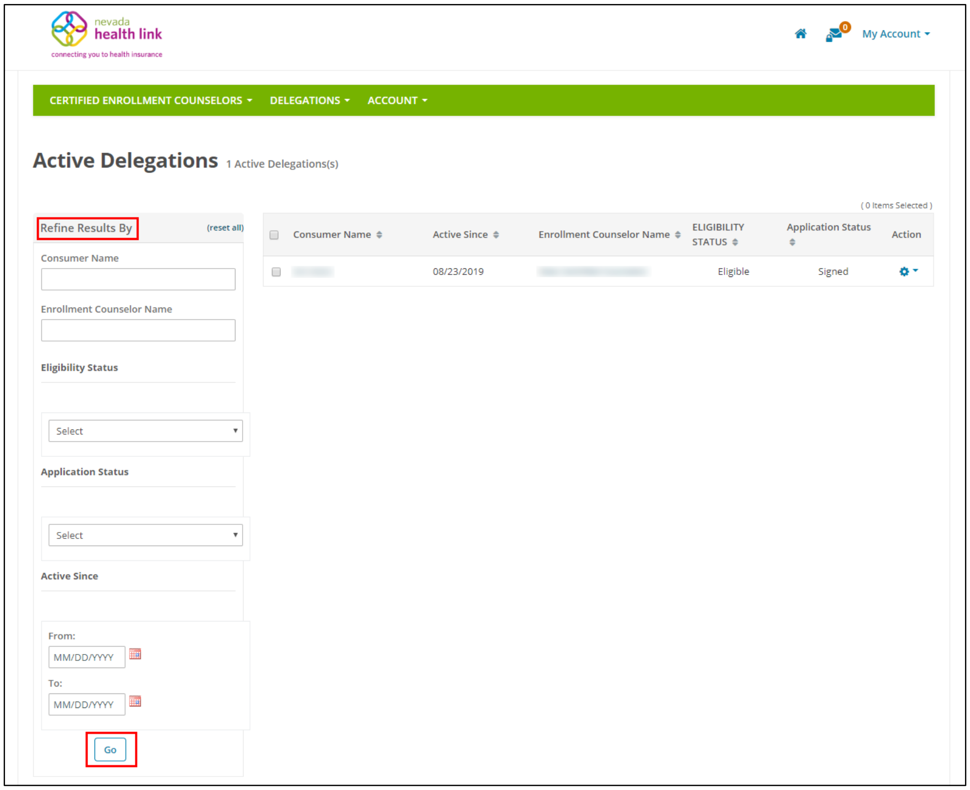
The Active Consumers section helps an Entity to view and search for active individuals list, transfer consumer delegation from one CEC to another within the Entity Organization, view individual summary, provide comments on an individual's profile, and mark an individual as inactive.

4.2.1 View and search for active designations

- Step-1: Click on the 'Delegations' tab and select 'Active Consumers'.



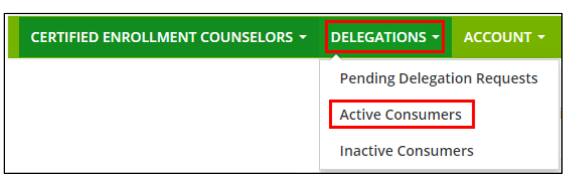
- Step-2: Enter consumer's name in the 'Consumer Name' field or CEC name in the 'Enrollment Counselor Name' field or select individual eligibility status (e.g., "Pending" or "Conditional") from the 'Eligibility Status' drop-down list or select individual application status (e.g., "Open" or "Submitted") from the 'Application Status' drop-down list or enter the desired date range since the consumer designation is active in the 'Active Since' section under the "Refine Results By" section and click on the 'Go' button.



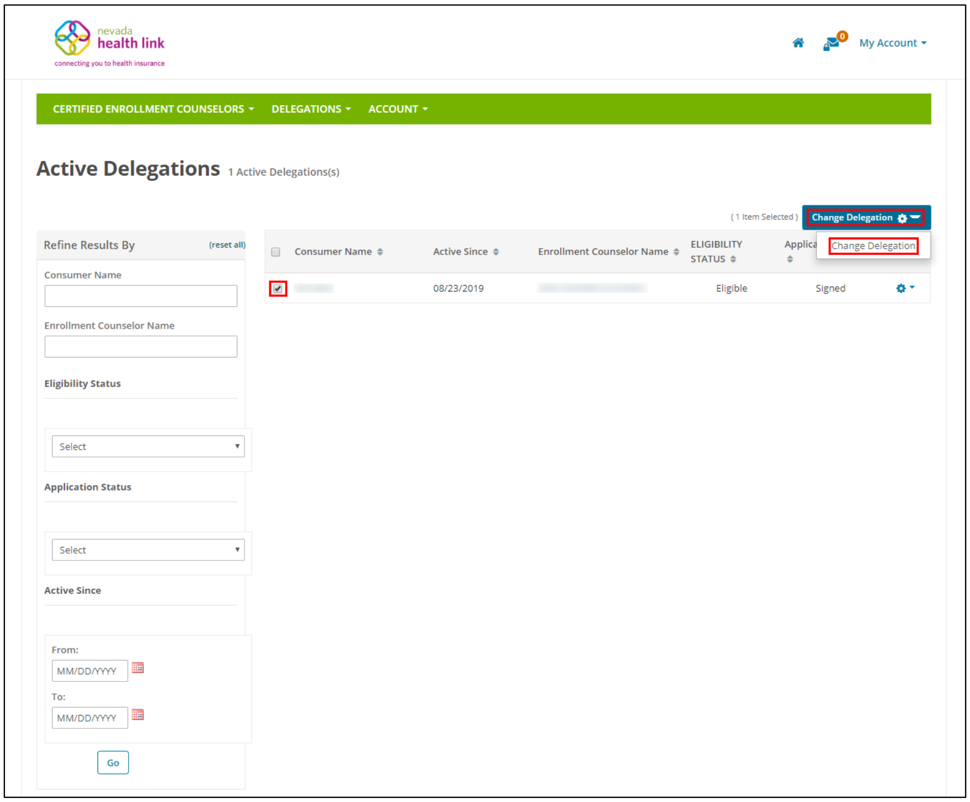
4.2.2 Change consumer delegation from one CEC to another CEC

This section helps the Entity in changing a consumer delegation from one Certified Enrollment Counselor to another within the Entity Organization. This step is performed when a CEC is no longer associated with the Entity organization.

- Step-1: Click on the 'Delegations' tab and select 'Active Consumers'.

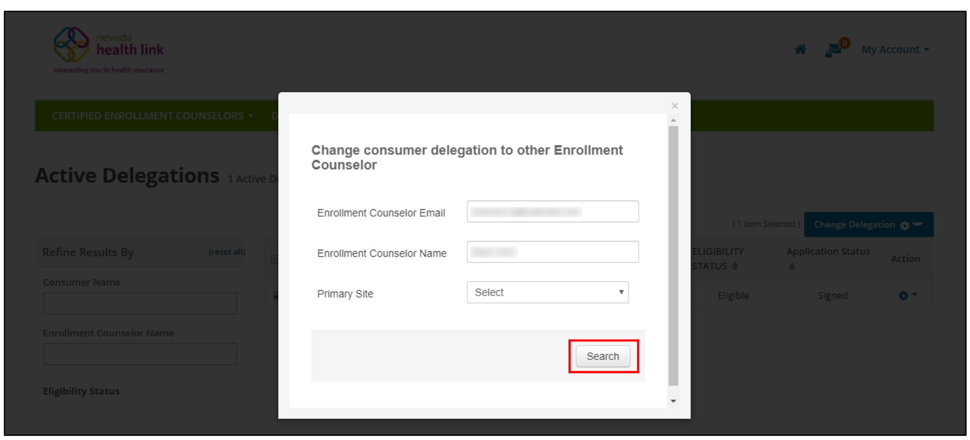


- Step-2: Select checkbox next to a consumer's name, click on the 'Change Delegation' button and select the 'Change Delegation'.
  PLEASE NOTE: The 'Change Delegation' button is only activated when the Entity selects the checkbox next to the consumer's name.

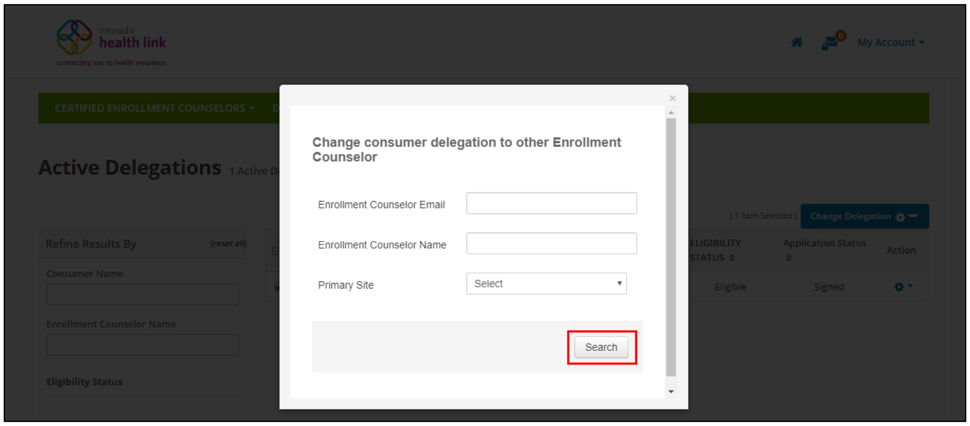


- Step-3: Enter CEC email in the 'Enrollment Counselor Email' field or CEC name in the 'Enrollment Counselor Name' or select primary site address from the 'Primary Site' drop-down list and click on the 'Search' button.

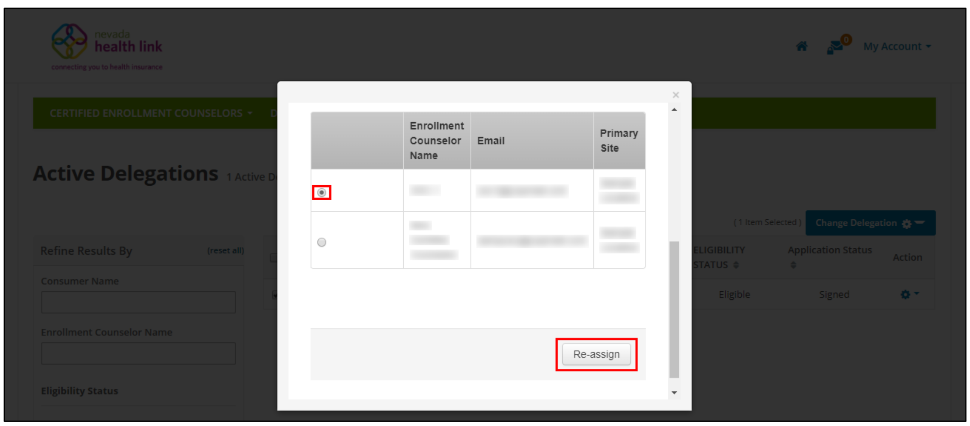
  PLEASE NOTE: Only the CECs with "Active" activity status will appear in the CEC search list.



- If the Entity wants to see all the active CECs present in the Entity organization, just click on the ‘Search’ button.

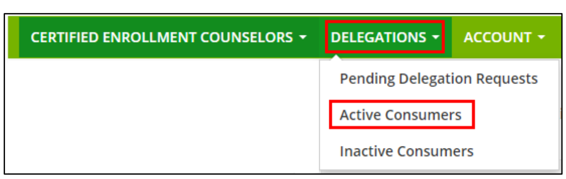


- Step-4: Scroll down and select a CEC that the Entity wants to change the designation using a radio button and click on the ‘Re-assign’ button.

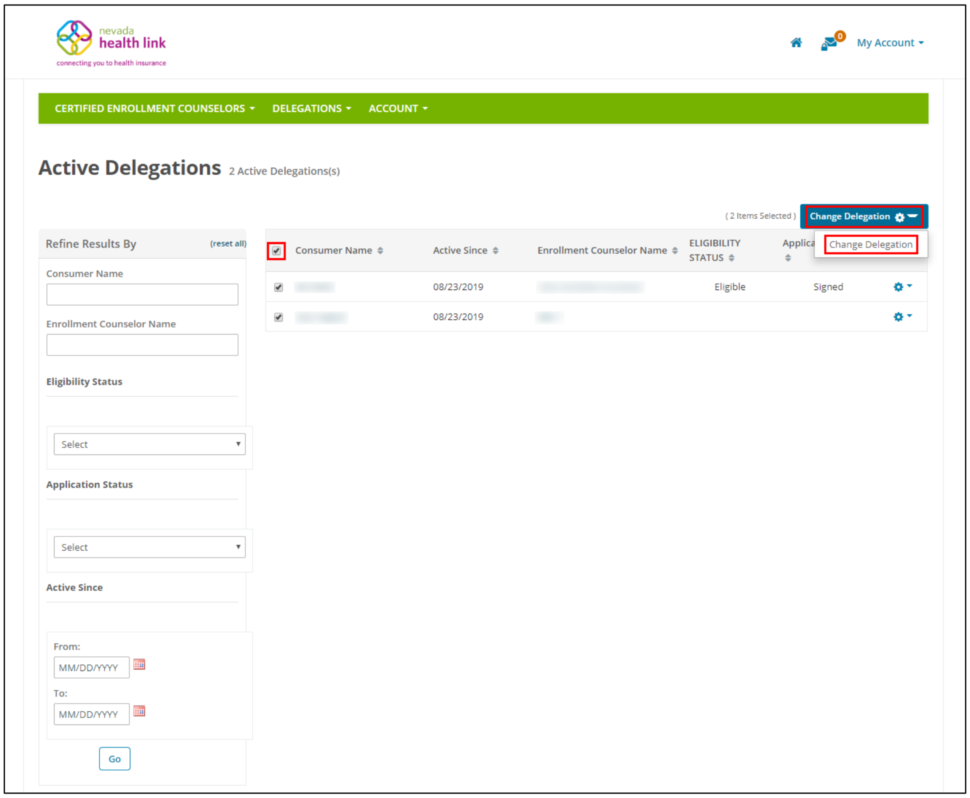


4.2.3 *Change multiple consumer delegations from one CEC to another CEC*

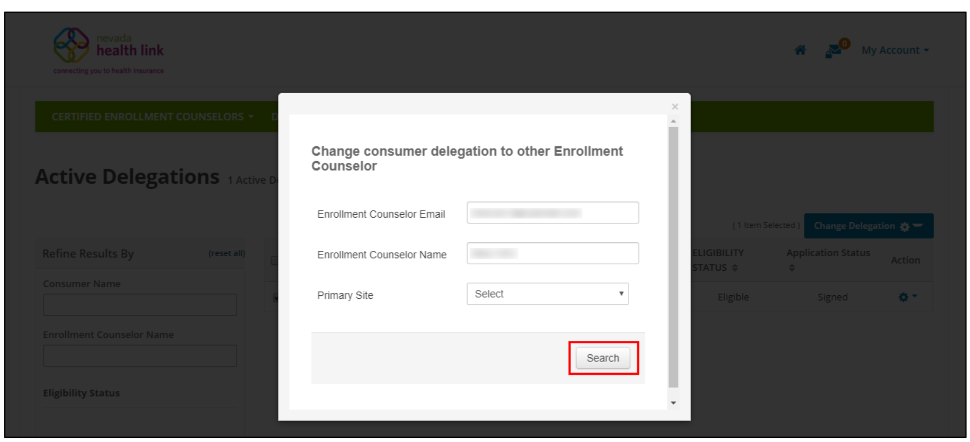
- Step-1: Click on the ‘Delegations’ tab and select ‘Active Consumers’.



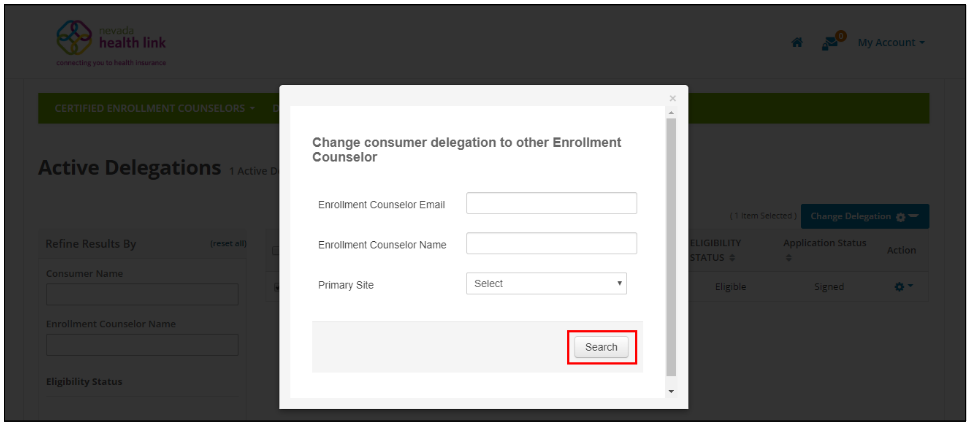
- Step-2: Select the main checkbox next to the ‘Consumer Name’ title, click on the ‘Change Delegation’ button and select ‘Change Delegation’.
  PLEASE NOTE: The ‘Change Delegation’ button is only activated when the Entity selects the checkbox next to the ‘Consumer Name’ title.



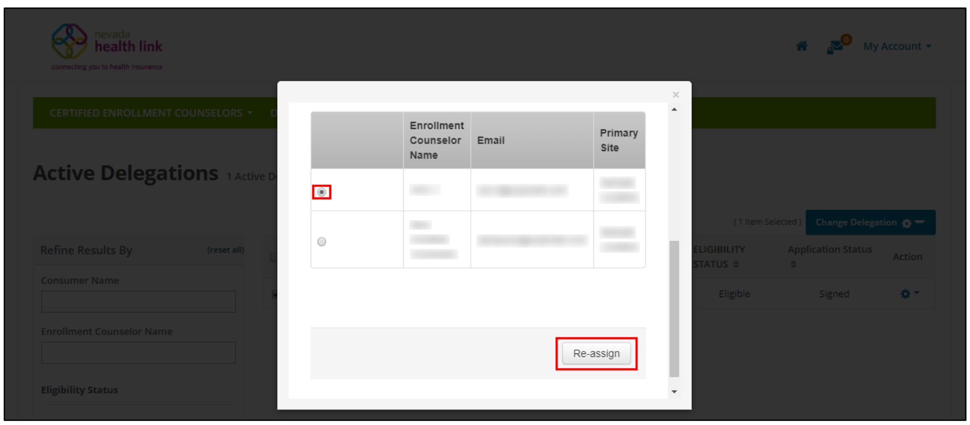
- Step-3: Enter CEC email in the ‘Enrollment Counselor Email’ field or CEC name in the ‘Enrollment Counselor Name’ or select primary site address from the ‘Primary Site’ drop-down list and click on the ‘Search’ button.
  PLEASE NOTE: Only the CECs with “Active” activity status will appear in the CEC search list.



- If the Entity wants to see all the active CECs present in the Entity organization, just click on the ‘Search’ button.



- Step-4: Scroll down and select a CEC that the Entity wants to change the designation using a radio button and click on the 'Re-assign' button.

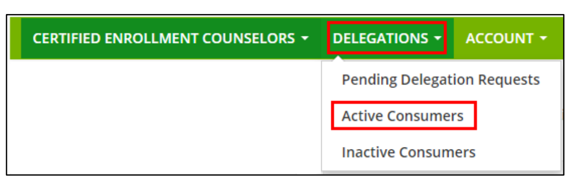


4.2.4 *Perform actions on consumer profile*

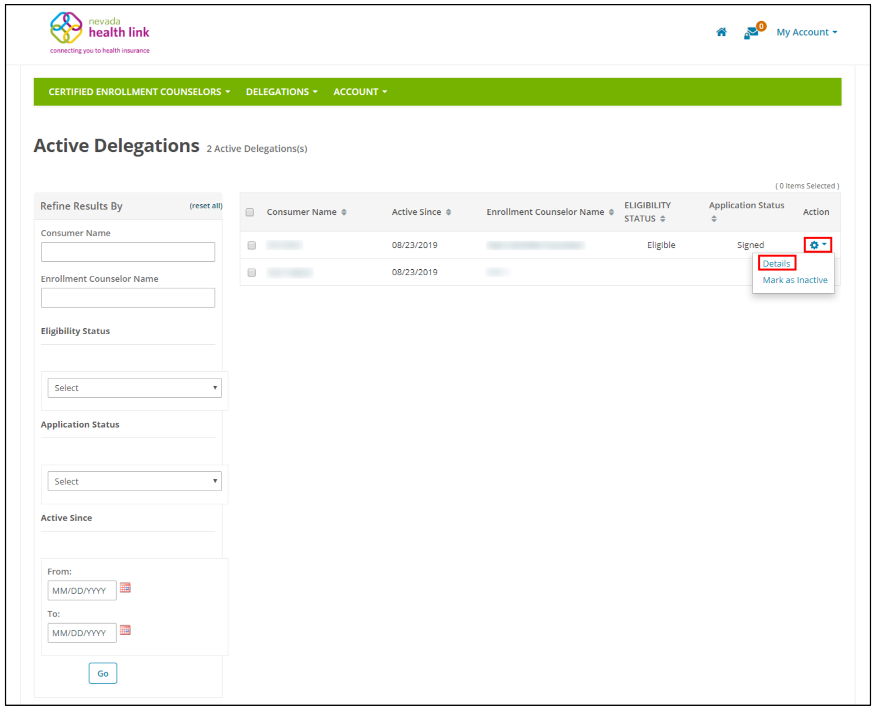
The Entities can perform actions on consumer accounts which includes view consumer summary, provide comments on a consumer's profile, resend activation email to a consumer and mark an individual as inactive.

4.2.4.1 *View individual summary*

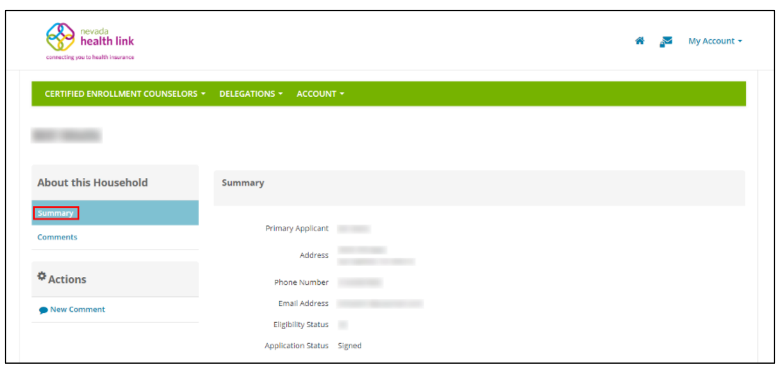
- Step-1: Click on the 'Delegations' tab and select 'Active Consumers'.



- Step-2: Click on the button and click on ‘Details’.

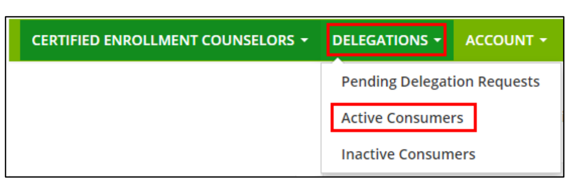


- Step-3: Go to “Summary” section and the following screen will display Individual summary.

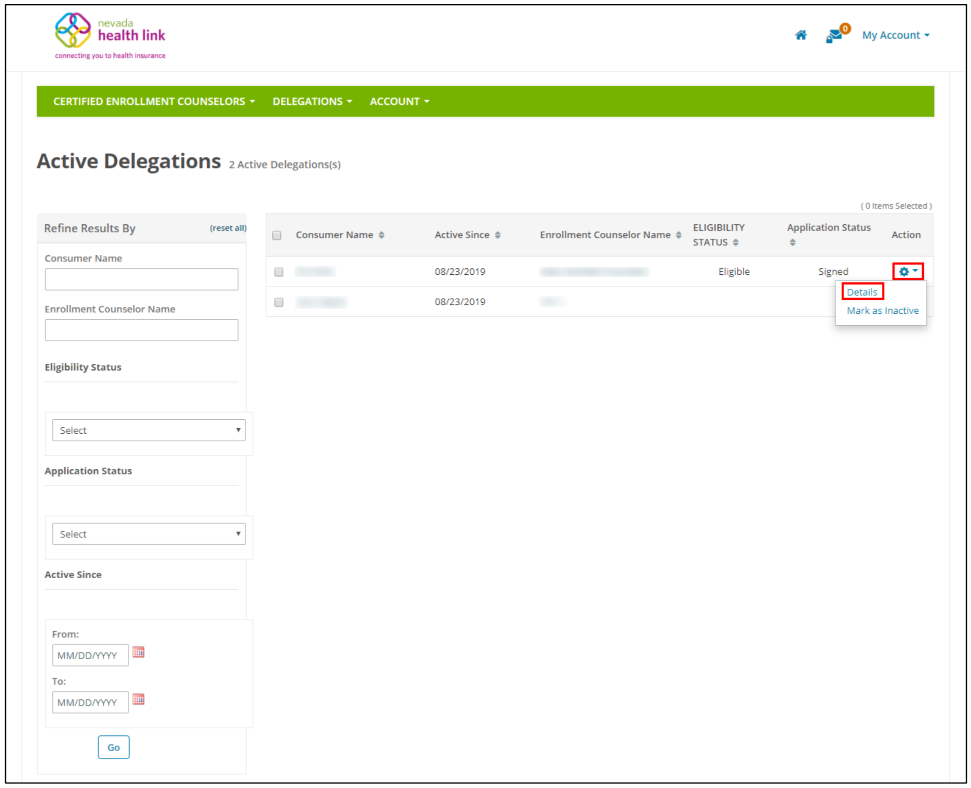


4.2.4.2 Provide comments on individual profile

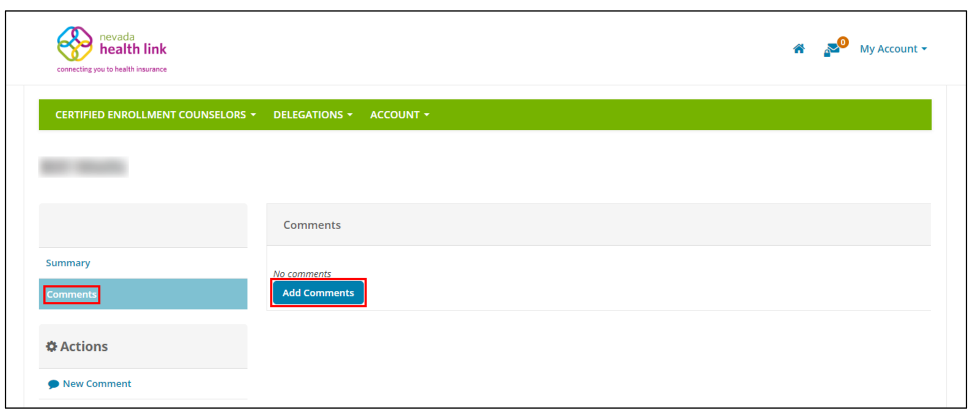
- Step-1: Click on the ‘Delegations’ tab and select ‘Active Consumers’.



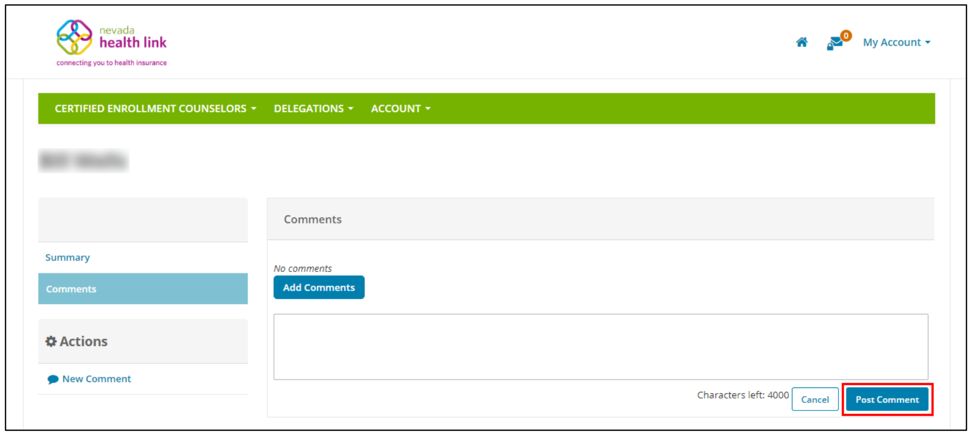
- Step-2: Click on the button and click on ‘Details’.



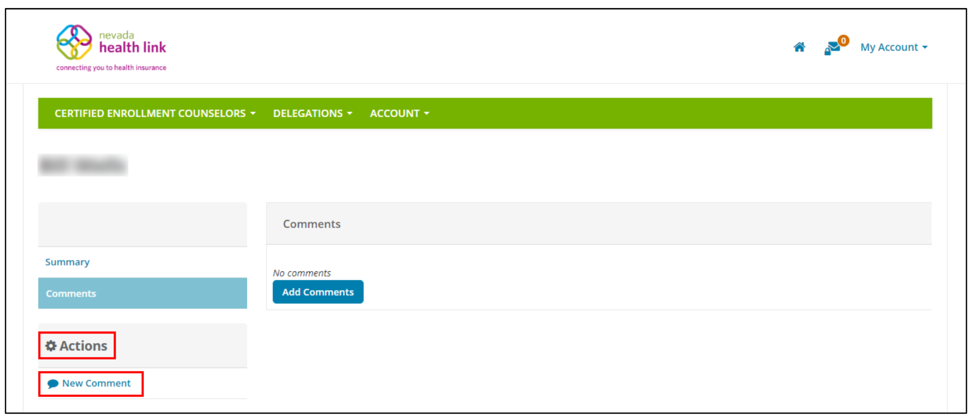
- Step-3: Go to “Comments” section and click on the ‘Add Comments’ button.



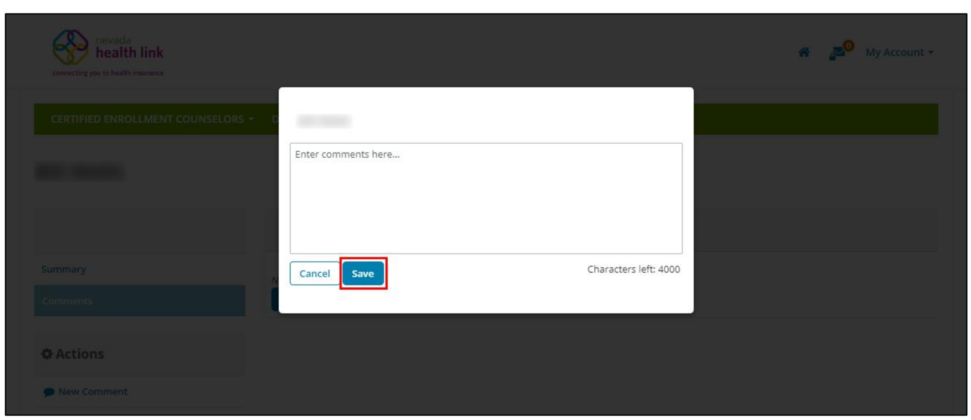
- Step-4: Provide comments in the text area and click on the ‘Post Comment’ button.



- Step-5 (Another way): Perform Step-1 and Step-2 from Section 4.2.4.2 and click on ‘New Comment’ under the “Actions” section.

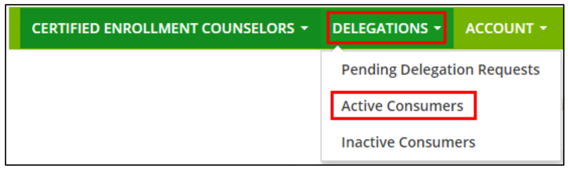


- Step-6 (Another way): A pop-up screen will appear. Enter comments in the text area and click on the ‘Save’ button.

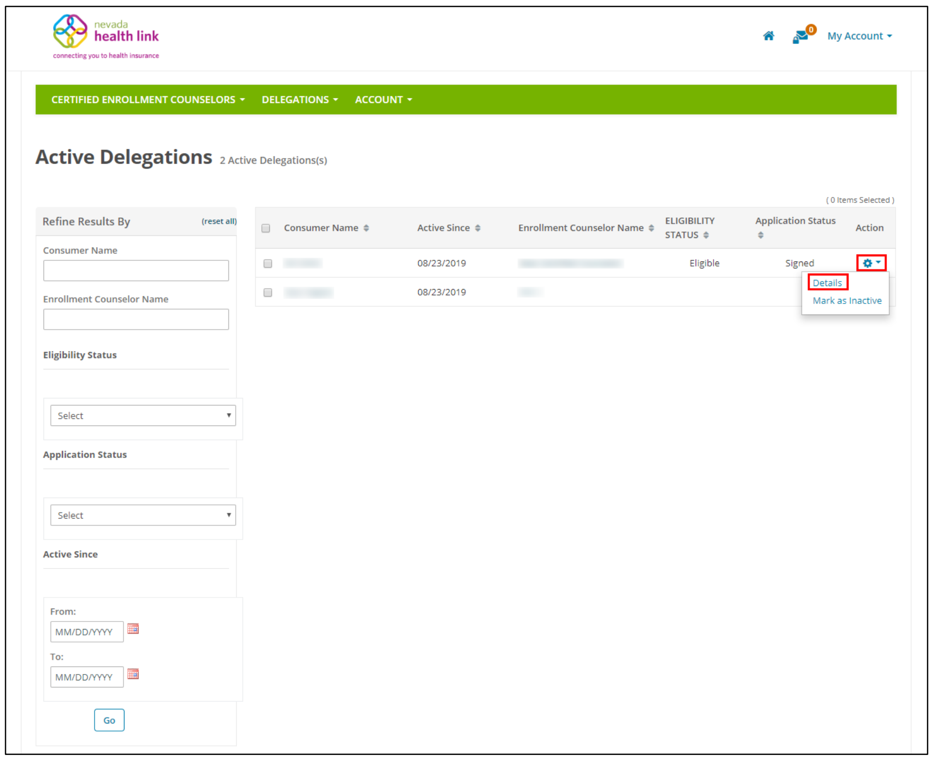


4.2.4.3 Update comments on individual profile

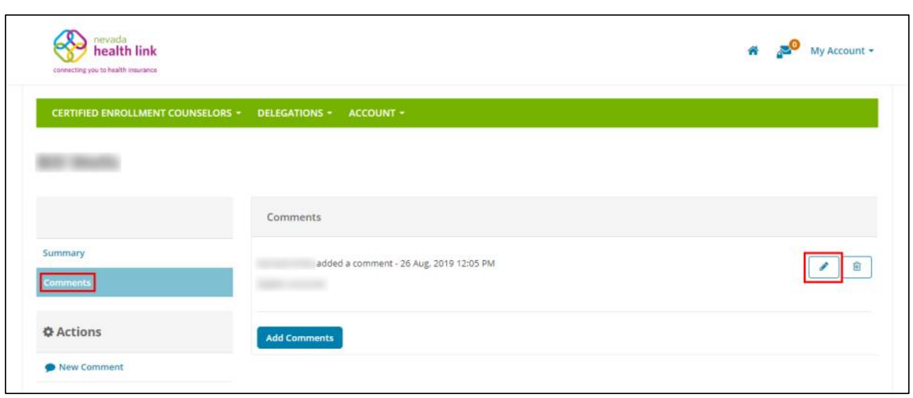
- Step-1: Click on the 'Delegations' tab and select 'Active Consumers'.



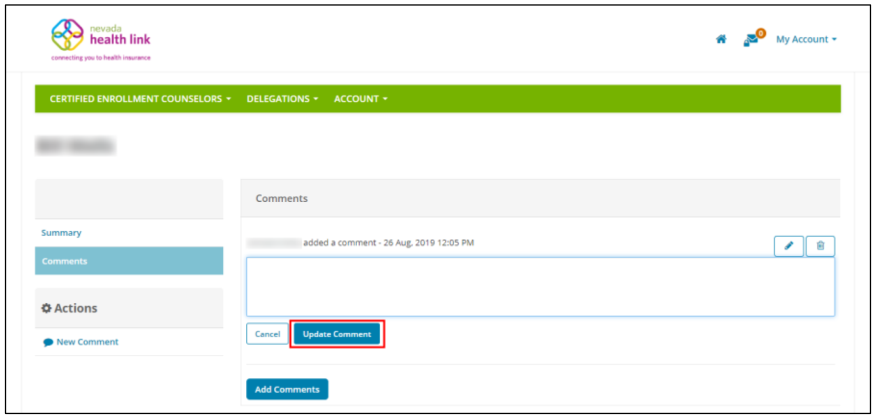
- Step-2: Click on the  button and click on 'Details'.



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

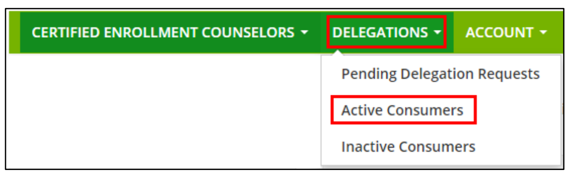


- Step-4: Enter the updated comment in the text area and click on the 'Update Comment' button.

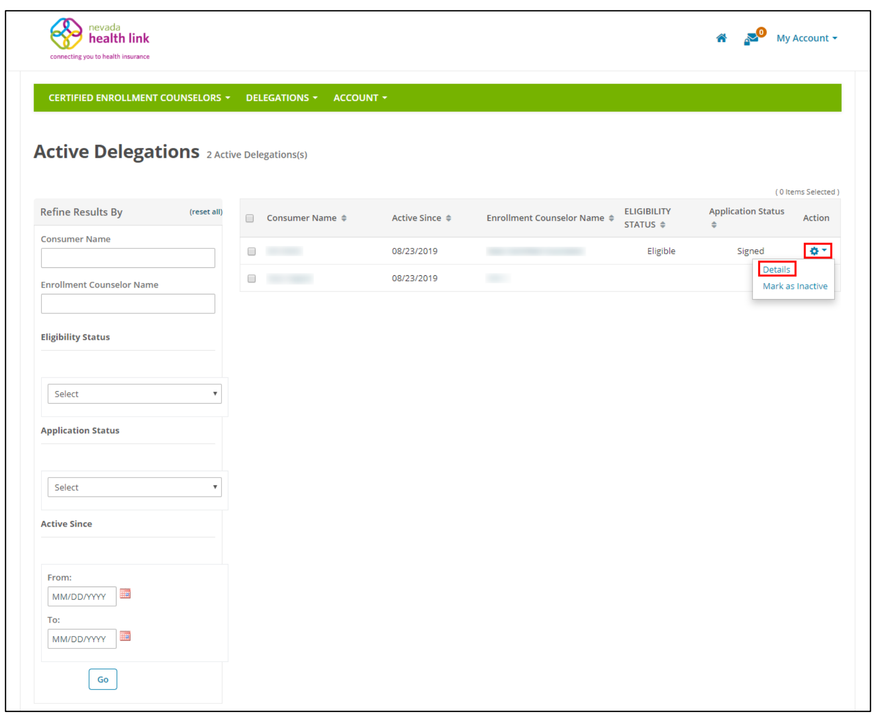


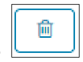
4.2.4.4 Delete a comment on individual profile

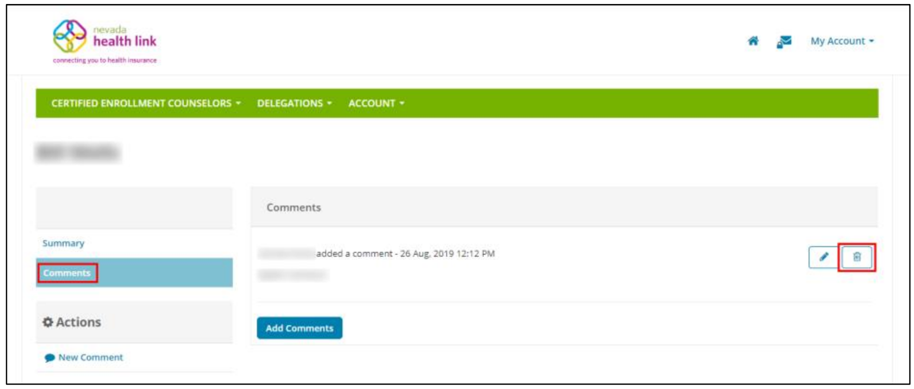
- Step-1: Click on the 'Delegations' tab and select 'Active Consumers'.



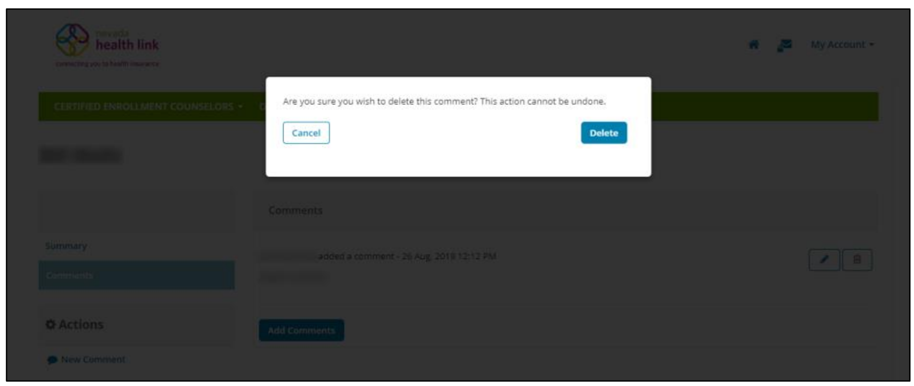
- Step-2: Click on the button and click on 'Details'.



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



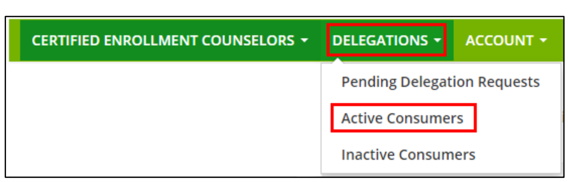
- Step-4: Step-4: A pop-up box will appear. Click on ‘Delete’ to delete the comment or click on ‘Cancel’ to cancel this process.



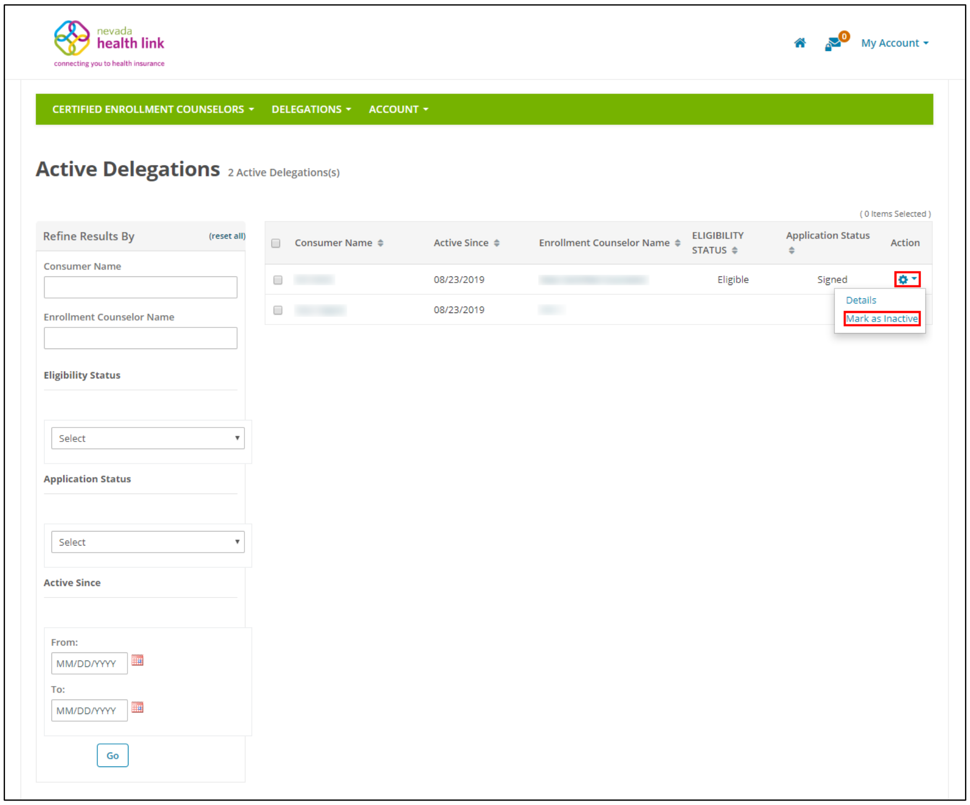
4.2.5 Mark an individual as inactive

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 Consumers” section. For detailed information on how a consumer designates a CEC, please visit https://www.nevadahealthlink.com/consumer-transition/ and refer to the Application and Enrollment Guide.

- Step-1: Click on the ‘Delegations’ tab and select ‘Active Consumers’.

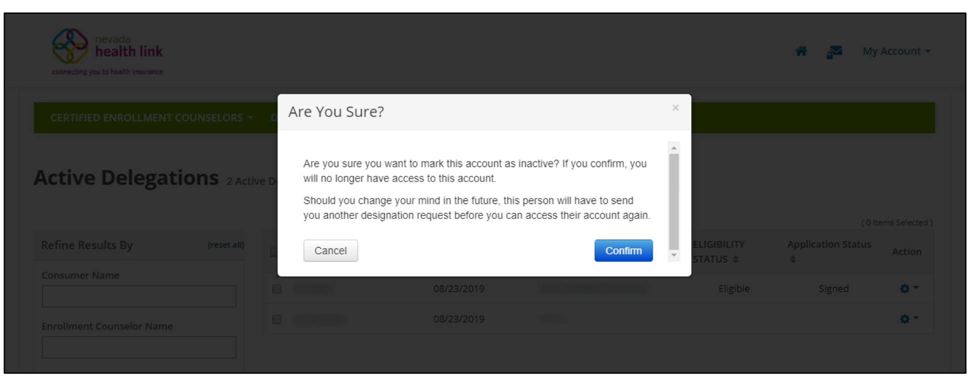


- Step-2: Click on the button and click on ‘Mark as Inactive’.



- 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 delegation request before you to perform actions on behalf of them.

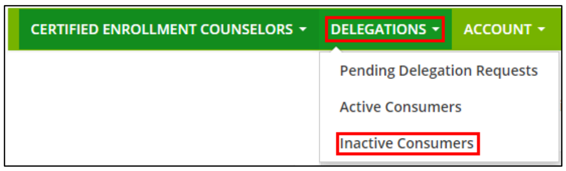


4.3 Inactive Consumers (Undesignated Consumers)

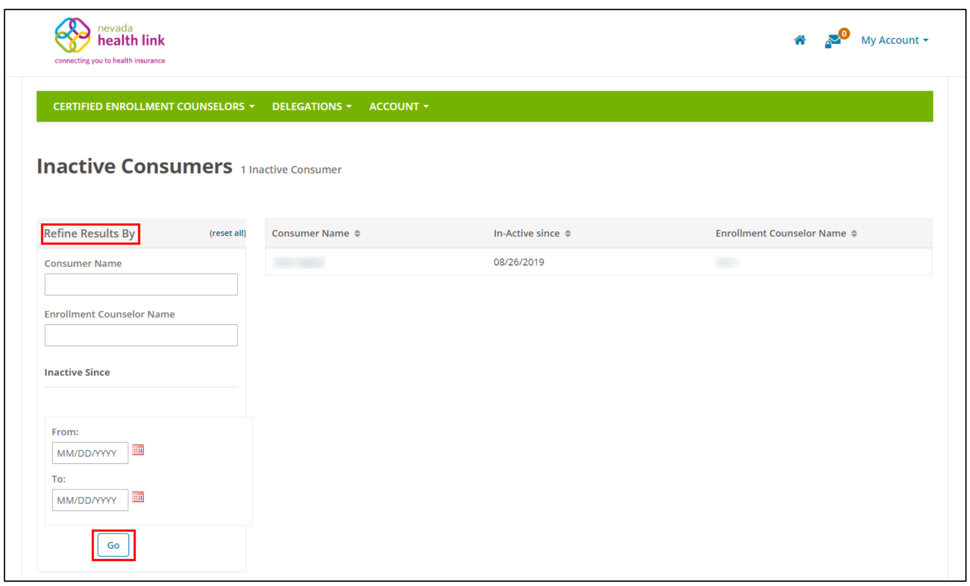
The Inactive Consumers section displays the list of individuals whose delegation request has been declined or are marked as inactive by their Entity organization or CEC, or the individual has de-designated the CEC. The Entity can view and search for the list of inactive individuals filtered by Consumer Name, Enrollment Counselor Name, and an Inactive date range.

4.3.1 View and search for inactive consumers

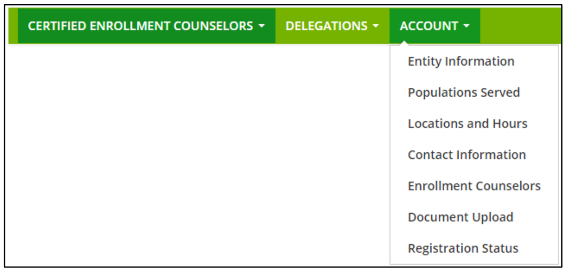
- Step-1: Click on the ‘Delegations’ tab and select ‘Inactive Consumers’.



- Step-2: Enter individual’s first name in the ‘Consumer Name’ field or CEC name in the ‘Enrollment Counselor Name’ field or enter the desired date range since an individual designation has been inactive in the ‘Inactive Since’ section under the “Refine Results By” section and click on the ‘Go’ button.



5. Account

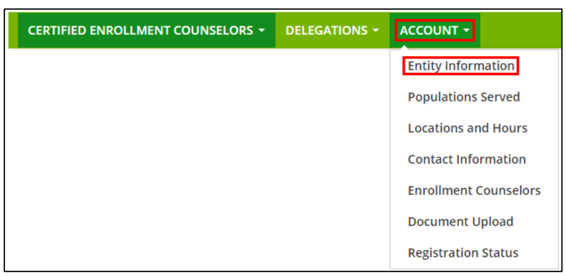


The Account section provides all the Entity organization information that we entered while creating an Entity account. This section allows the Entity to update the Entity information, Populations served, Location and hours, Contact information, add and update Certified Enrollment Counselor, and view current Entity organization registration status.

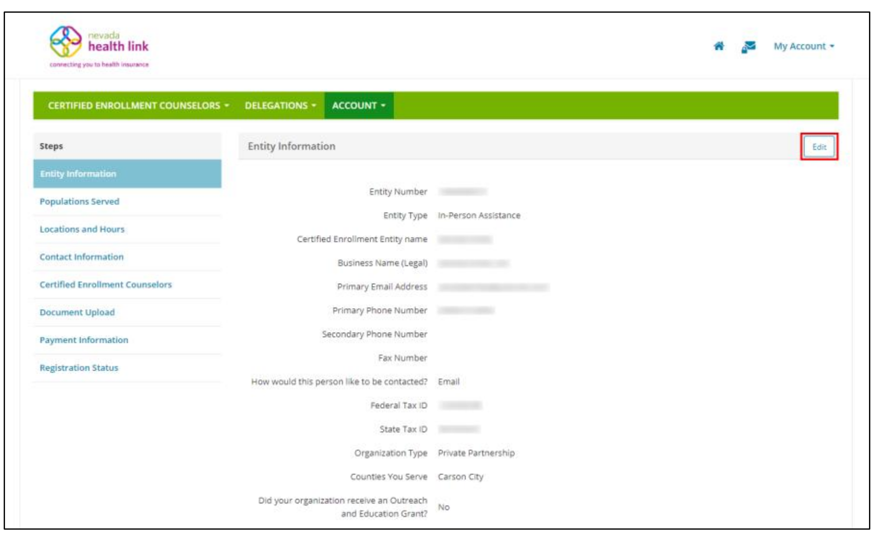
5.1 Entity Information

5.1.1 *Edit entity information*

- Step-1: Click on the 'Account' tab and select 'Entity Information'.

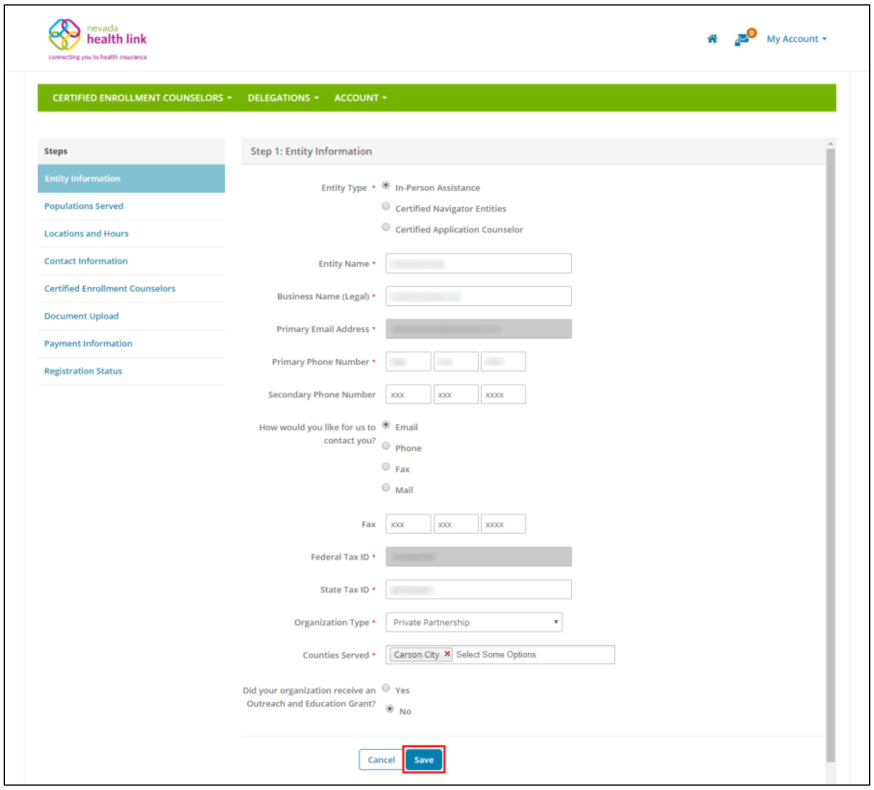


- Step-2: Go to "Entity Information" section and click on the 'Edit' button.



- Step-3: Edit Entity information (e.g., “Entity Name” or “Primary Phone Number” or “State Tax ID” number) and click on the ‘Save’ button.

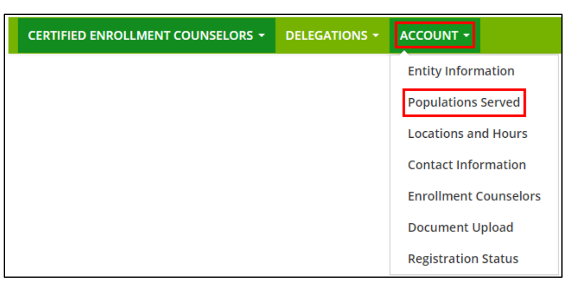
  PLEASE NOTE: Many of the options on this screen, including information related to grant funding, relate to functions that SSHIX has chosen not enable on the SBE Platform. For the options here we have provided suggested values like for Entity Type is “In-person Assistance”, Organization Type is “Private Partnership”, and Did your organization receive an Outreach and Education Grant? is “No”.



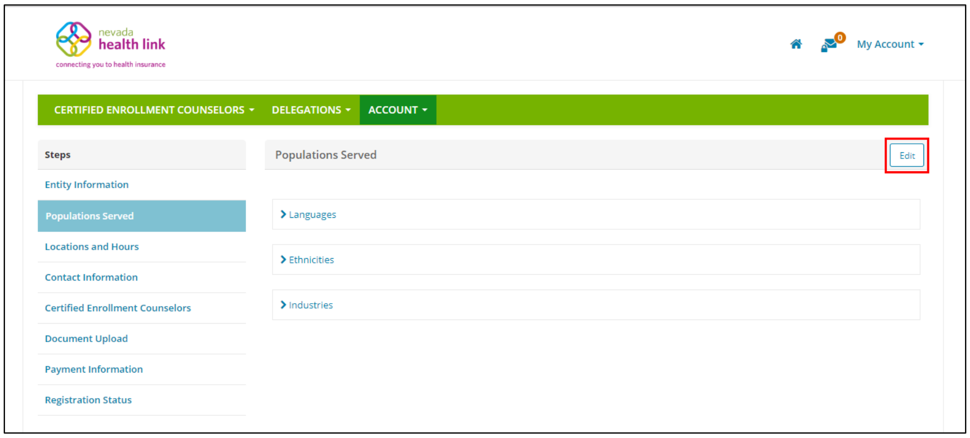
5.2 Populations Served

5.2.1 Edit populations served information

- Step-1: Click on the ‘Account’ tab and select ‘Populations Served’.



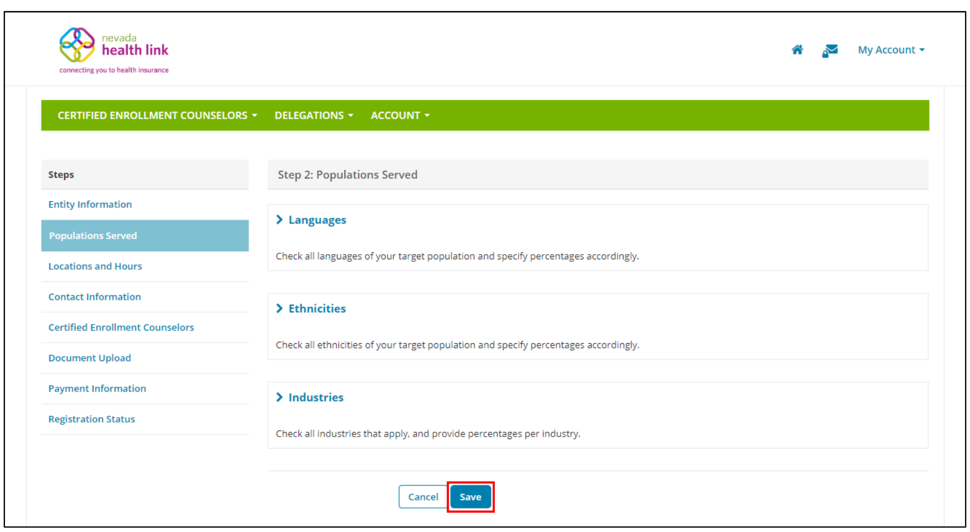
- Step-2: Click on the ‘Edit’ button.



- Step-3: Update languages (e.g., “English” or “Spanish”), Ethnicities (e.g., “African” or “Chinese”), and Industries (e.g., “Health Care” or “Agriculture”) information of the populations you intend to serve, enter an estimated percentage of assistance provided in each section, and click on the ‘Save’ button.

  If your Entity organization does not target specific Ethnicities or Industries you can choose “Other,” type in a value of “All,” and mark “100” in the “Estimated Percent” columns.

  PLEASE NOTE: The total “Estimated Percent” value in each section must add up to 100%.

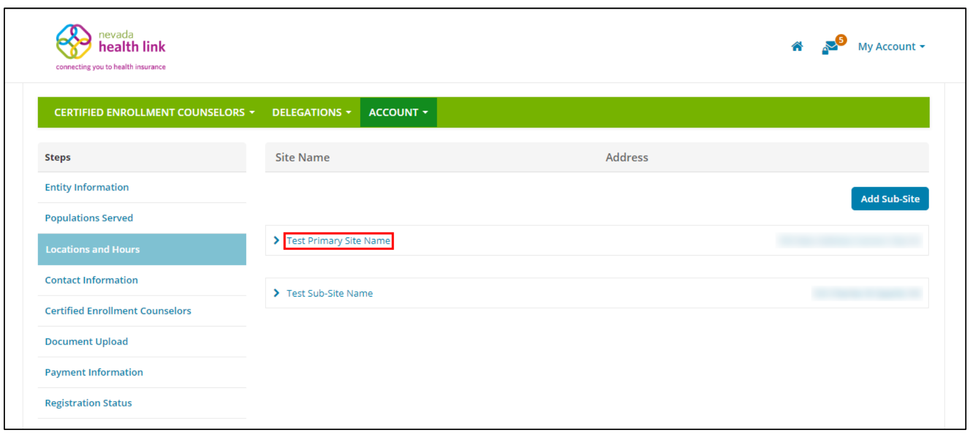


5.3 Location and Hours

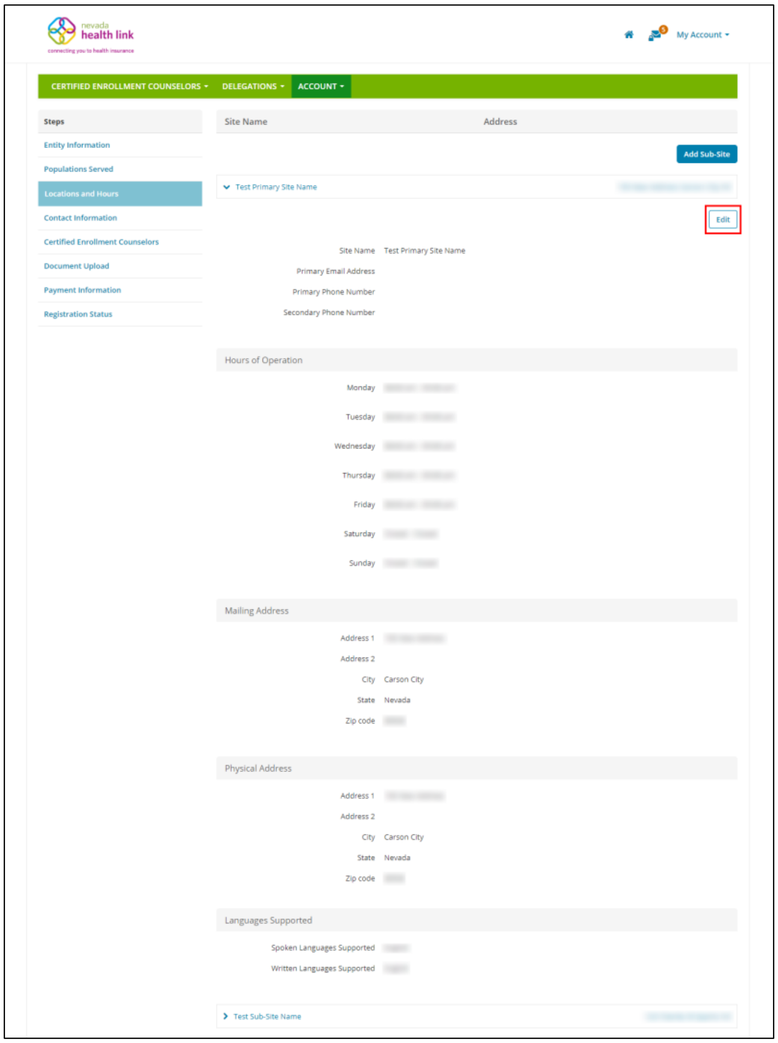
5.3.1 Edit Primary Site information

- Step-1: Click on the 'Account' tab and select 'Locations and Hours'.

- Step-2: Click on the Entity organization's primary site name.

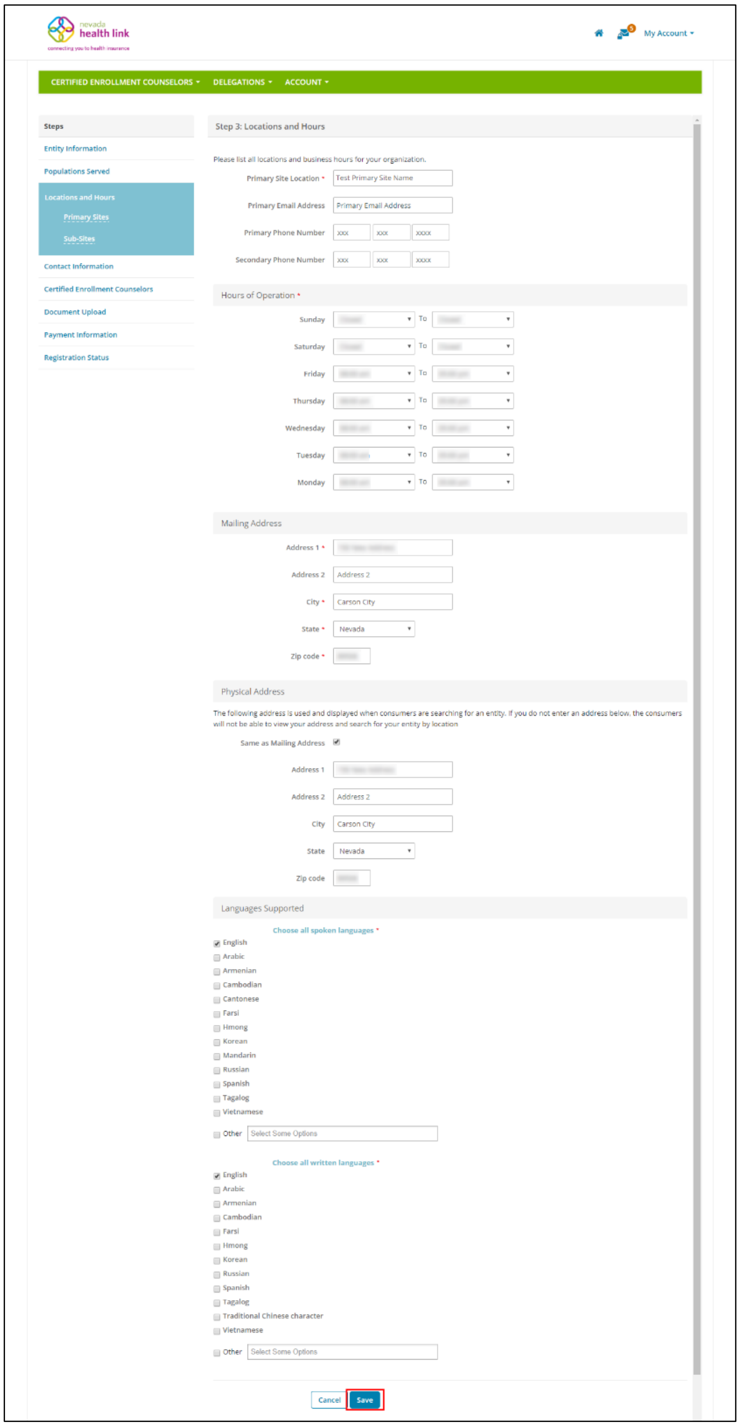


- Step-3: Click on the 'Edit' button.



- Step-4: Update primary site information including Hours of Operation, Mailing Address, Physical Address, and written and spoken languages supported, then click on the ‘Save’ button.

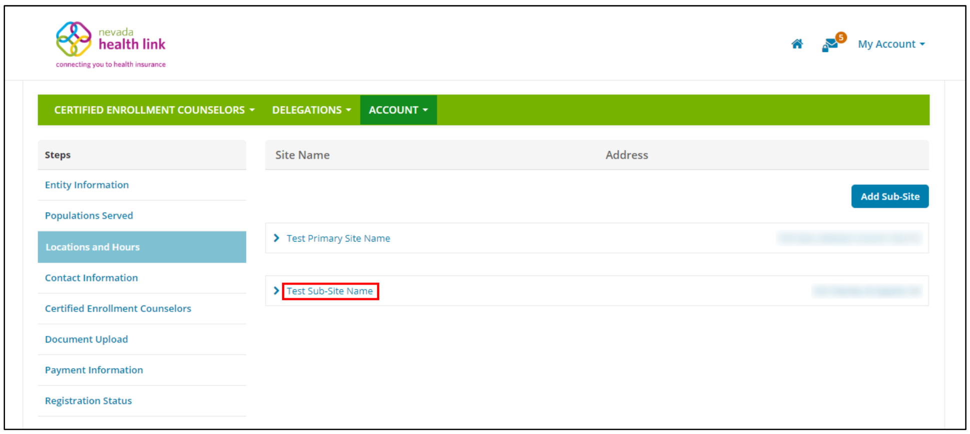
  PLEASE NOTE: If you do not enter the Physical Address then the “Find Local Assistance” directory tool will not be able to provide geographic search results (i.e. by Zip code and distance) for your location.



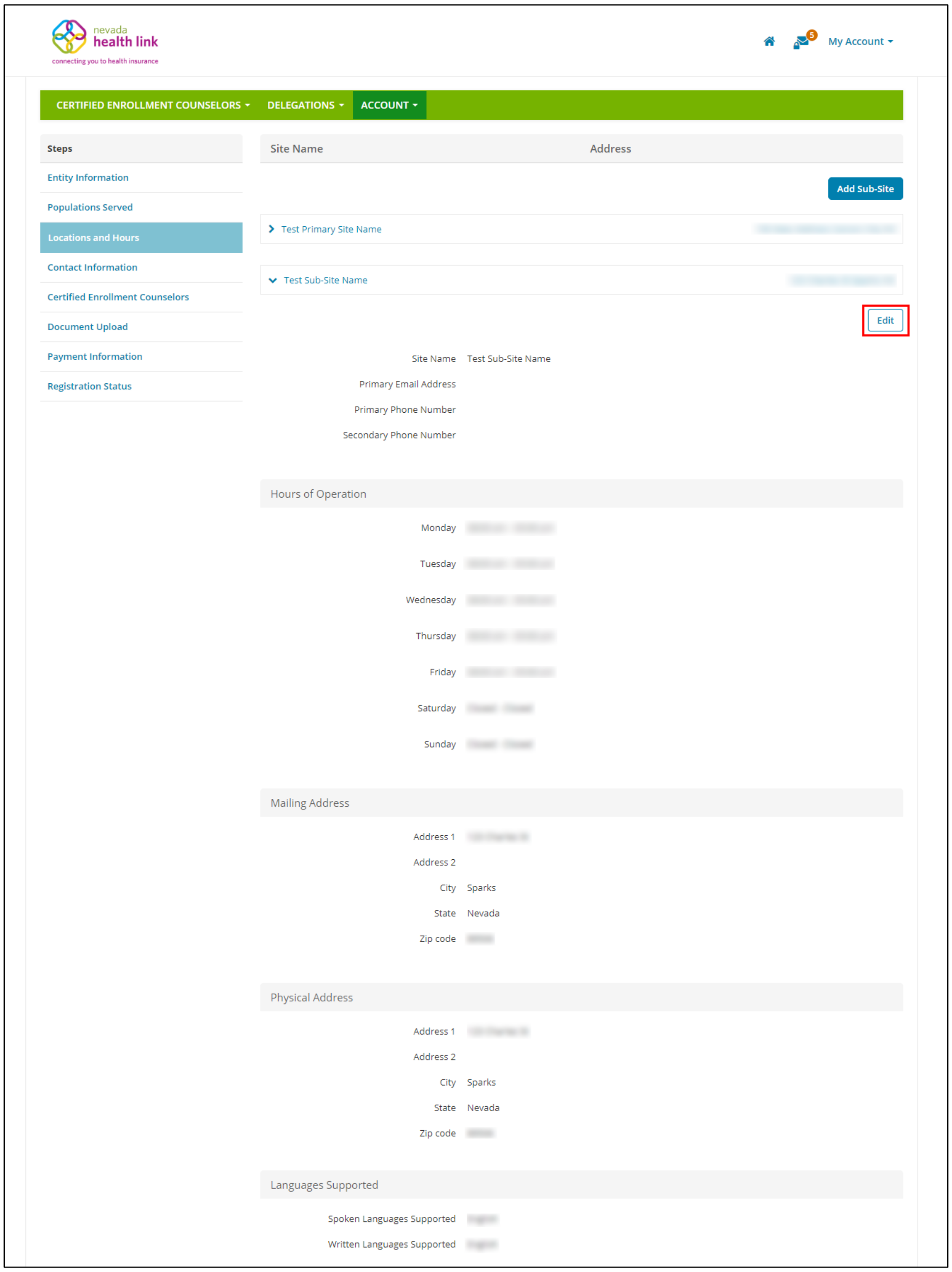
5.3.2 Edit Sub-Site information

- Step-1: Click on the 'Account' tab and select 'Locations and Hours'.

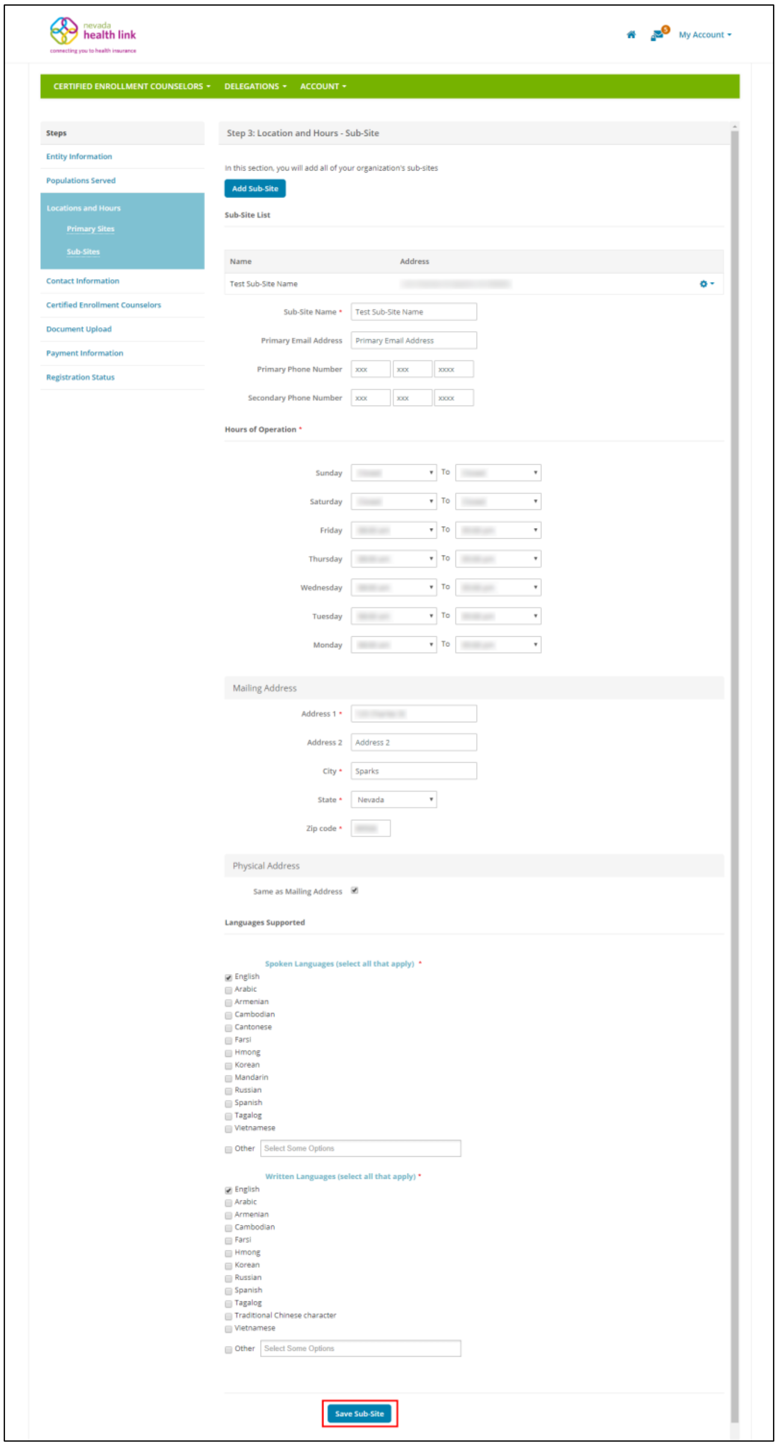
- Step-2: Click on the Entity organization's sub-site name.



- Step-3: Click on the 'Edit' button.



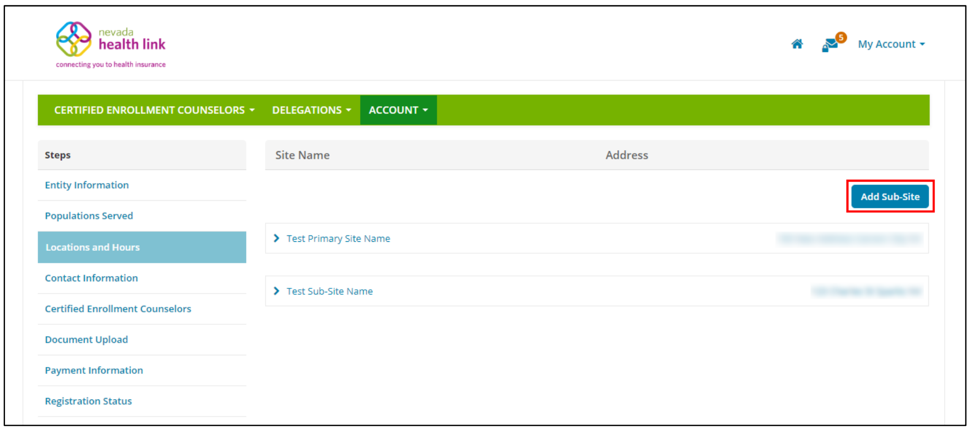
- Step-4: Update sub-site information including Hours of Operation, Mailing Address, Physical Address, and written and spoken languages supported, then click on the 'Save Sub-Site' button.



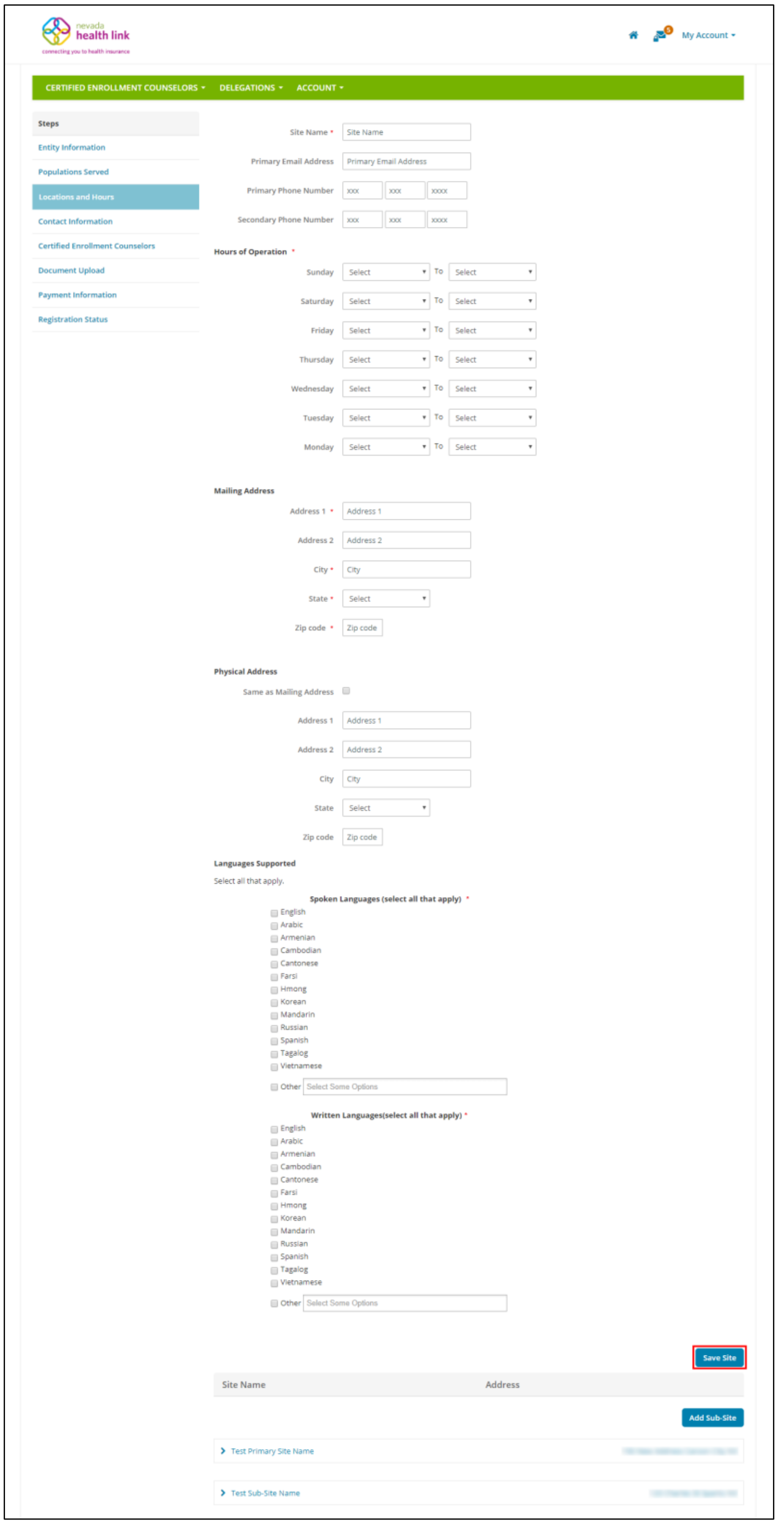
5.3.3 Add sub-site information

- Step-1: Click on the ‘Account’ tab and select ‘Locations and Hours’.

- Step-2: Click on the 'Add Sub-Site' button.



- Step-3: Enter sub-site information including Hours of Operation, Mailing Address, Physical Address, and written and spoken languages supported, then click on the 'Save Site' button.

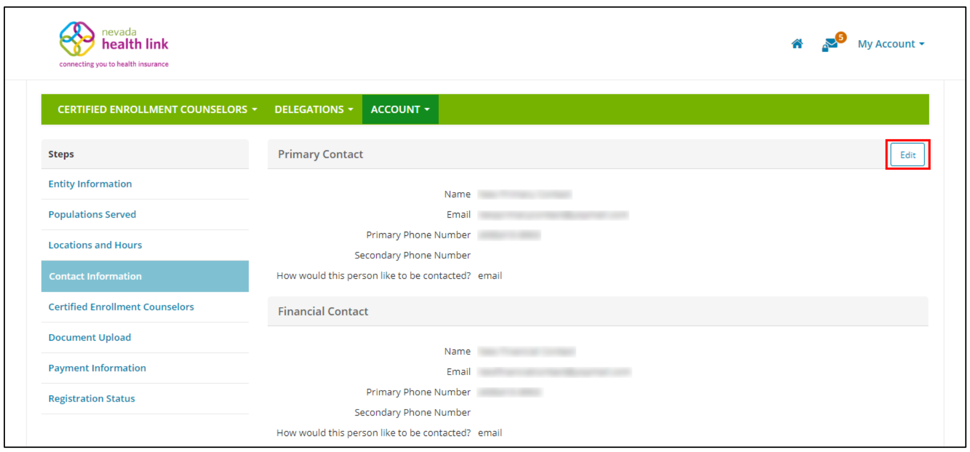


5.4 Contact Information

5.4.1 Add or update primary contact and financial contact information

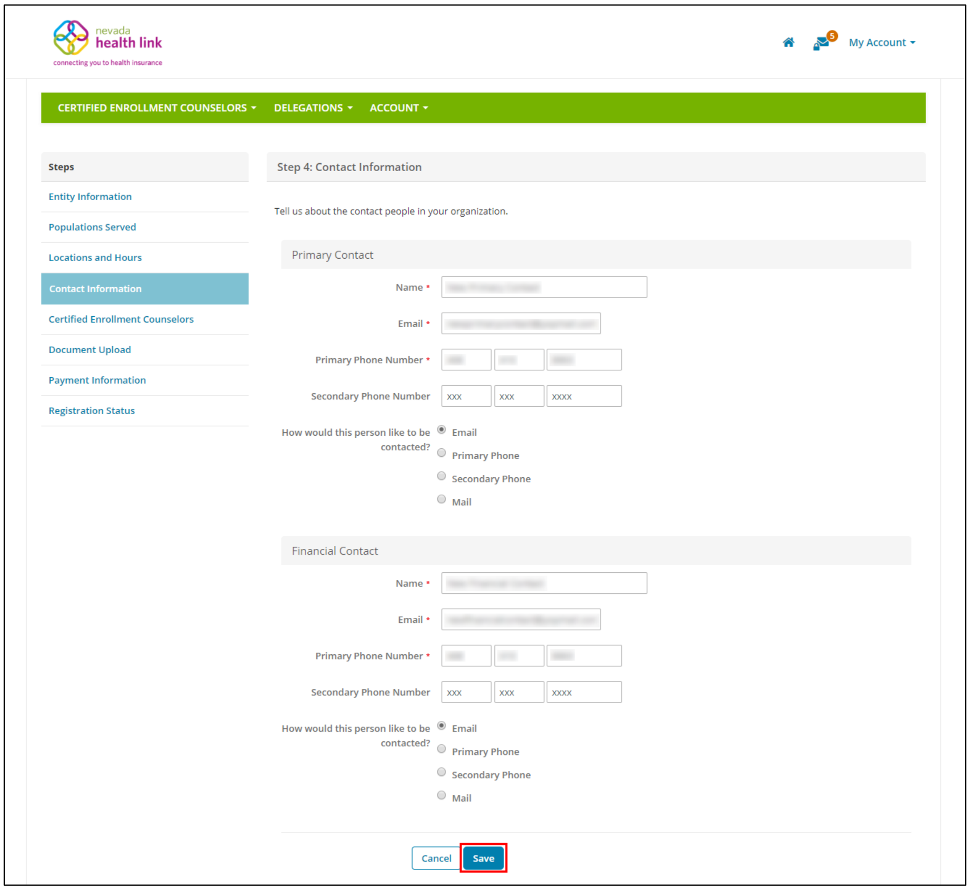
- Step-1: Click on the ‘Account’ tab and select ‘Contact Information’.

- Step-2: Click on the ‘Edit’ button.



- Step-3: Enter Primary Contact information and Financial Contact information and click on the ‘Save’ button.

  PLEASE NOTE: The Primary Contact and Financial Contact can be the same person.

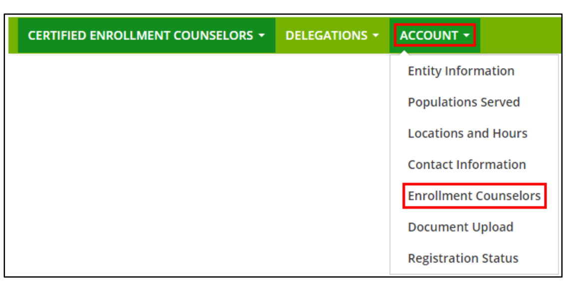


5.5 Enrollment Counselors

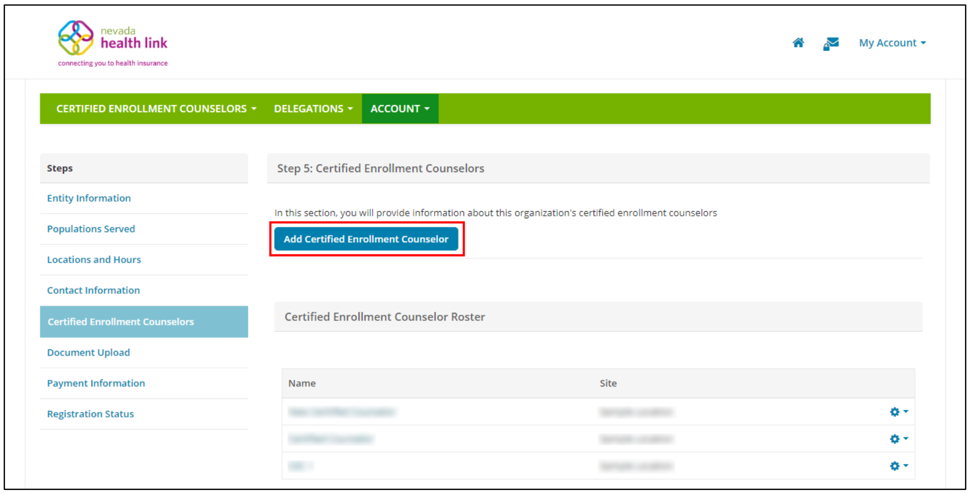
5.5.1 Add Certified Enrollment Counselors

PLEASE NOTE: The CEC user accounts can be created at any time in the year, but the CECs won't receive the invitation email to claim their account until the SSHIX Navigator Program Coordinator has verified their completion of the Training and Certification curriculum and updated their Certification Status to "Certified."

- Step-1: Click on the 'Account' tab and select 'Enrollment Counselors'.

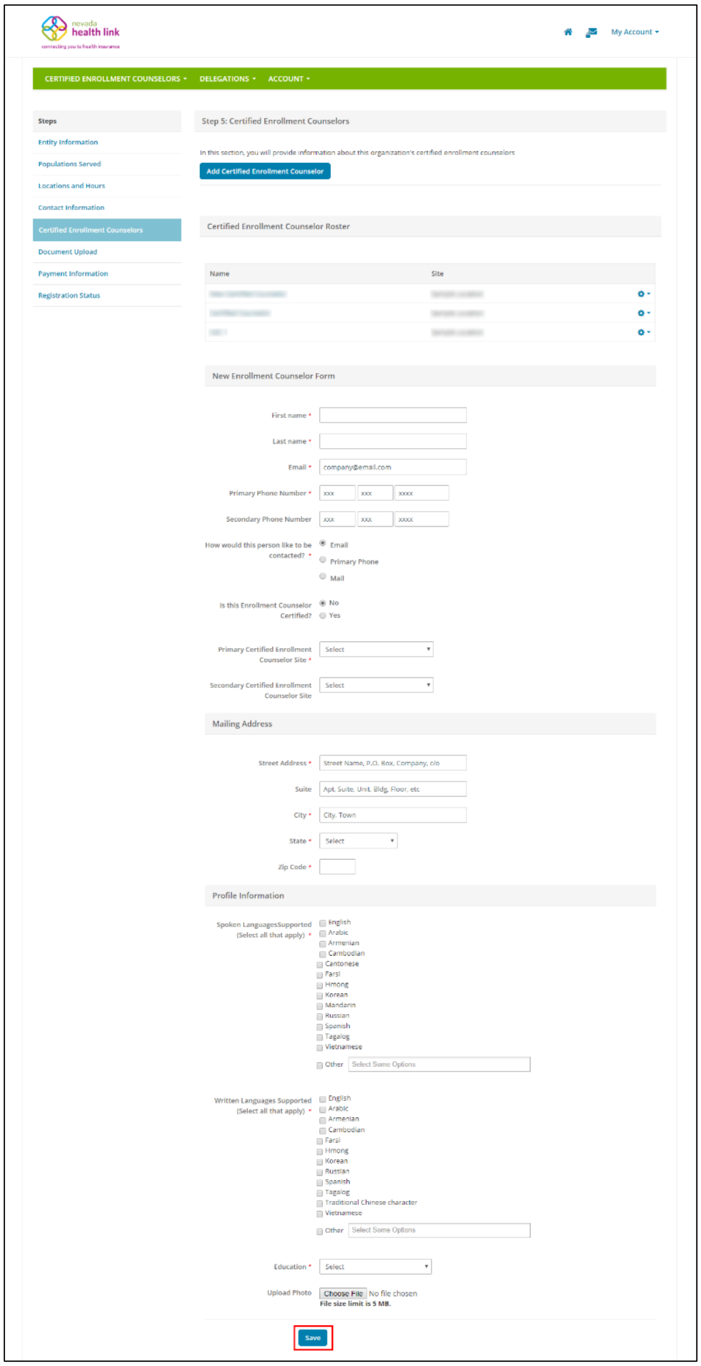


- Step-2: Click on the ‘Add Certified Enrollment Counselor’ button.



- Step-3: Fill out New Enrollment Counselor Form (for e.g., “First Name” or “Primary Phone Number”), enter the Mailing Address, Profile Information (For e.g., “Spoken Languages Supported” or “Written Languages Supported” or “Education”) and click on the ‘Save’ button.

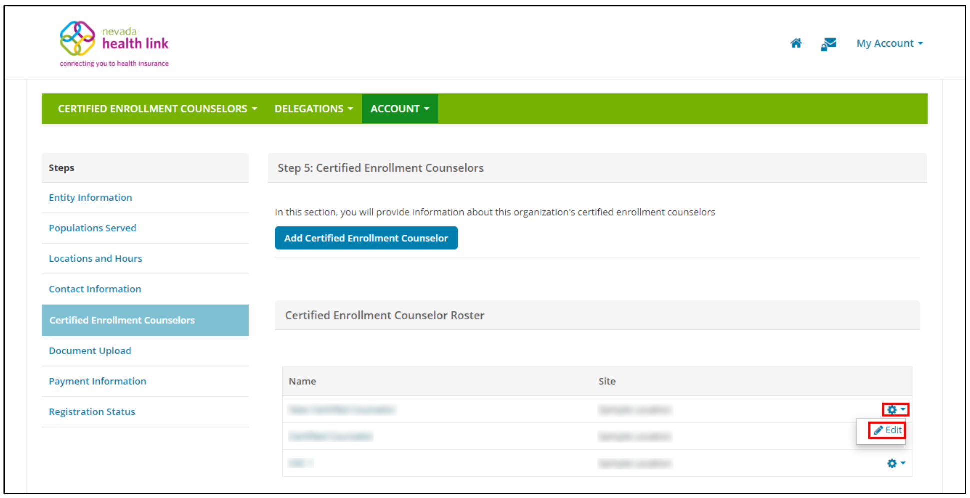
  <u>PLEASE NOTE:</u> The suggested value for “Is this Enrollment Counselor Certified?” field is “No” (this relates to functionality which has been disabled in the SBE Platform and will not impact Entity/CEC functionality).



5.5.2 Add or update Certified Enrollment Counselors information

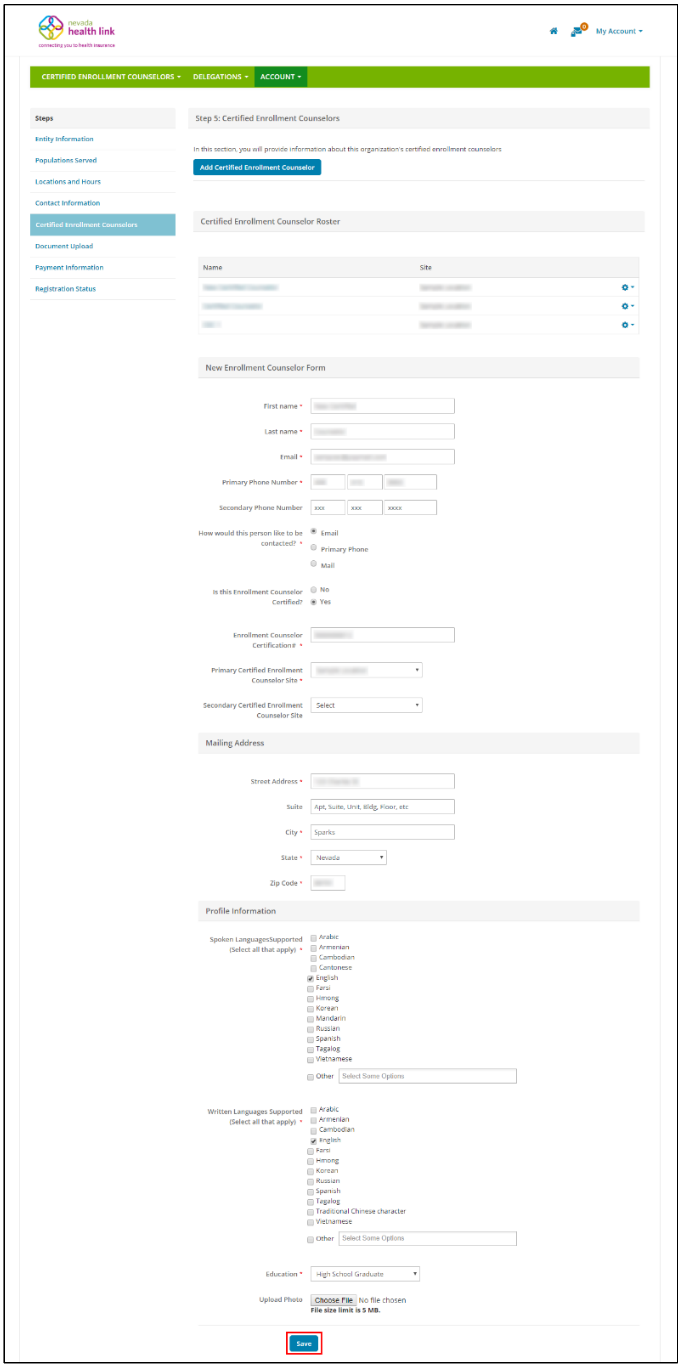
- Step-1: Click on the ‘Account’ tab and select ‘Enrollment Counselors’.

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



- Step-3: Enter CEC information in the New Enrollment Counselor Form (for e.g., "First Name" or "Primary Phone Number"), enter the Mailing Address, Profile Information (For e.g., "Spoken Languages Supported" or "Written Languages Supported" or "Education") and click on the 'Save' button.

  <u>PLEASE NOTE:</u> The suggested value for "Is this Enrollment Counselor Certified?" field is "No" (this relates to functionality which has been disabled in the SBE Platform and will not impact Entity/CEC functionality).



5.6 Document Upload

PLEASE NOTE: This section can be ignored; SSHIX does not require any documents to be uploaded by Entity organizations.

5.7 Payment Information

PLEASE NOTE: This section can be ignored; SSHIX does not use the SBE Platform to administer grant payments. Please choose a value of "No".

5.8 Registration Status

The Registration Status section provides a read-only listing to Entity organization's registration status and registration history.

There are two possible Registration Statuses for the Entity organizations, which are described below:

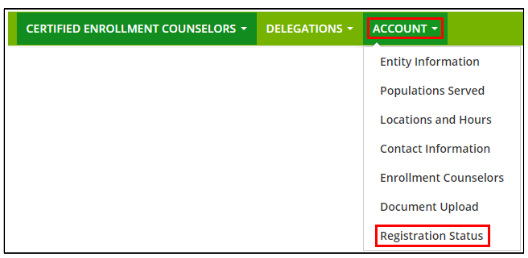
Pending

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

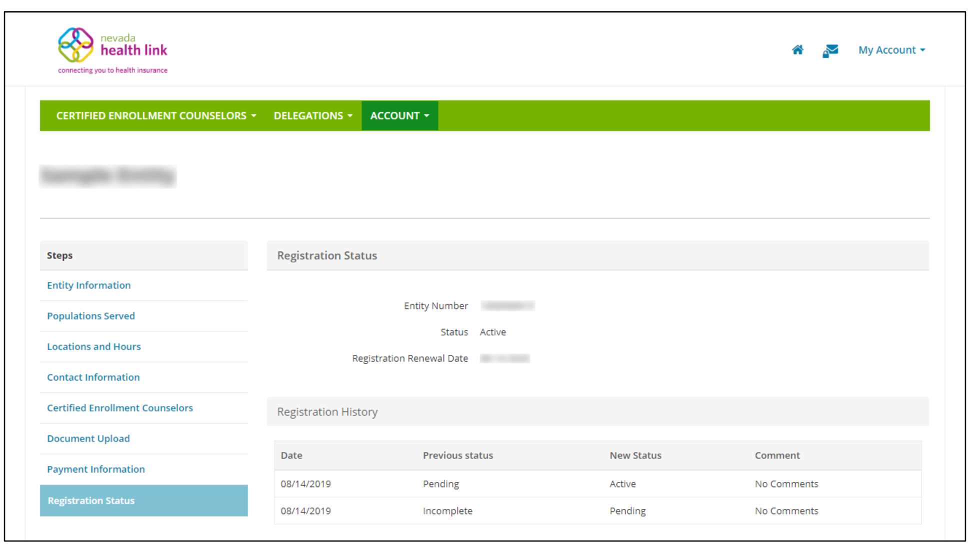
Active

The Active registration status is assigned once the Entity administrator has reviewed and verified the Entity organization information. The Entity account must be in "Active" status in order for the organization's individual CECs to be eligible for inclusion in the "Find Local Assistance" directory tool and to gain full-access to the Entity portal.

- Step-1: Click on the 'Account' tab and select 'Registration Status'.



- Step-2: The following screen displays the Registration Status for the Entity Organization.



Document Revision History

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