

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.

nevada health link
connecting you to health insurance

[My Account](#)

CERTIFIED ENROLLMENT COUNSELORS • [DELEGATIONS](#) • [ACCOUNT](#)

Certified Enrollment Counselors 3 Matching Certified Enrollment Counselors [Add Certified Enrollment Counselor](#)

Refine Results By (reset all)

Certified Enrollment Counselors first name

Certified Enrollment Counselors last name

Status

☐ Active

☐ InActive

Certification Status

Select ▼

Certification Enrollment Counselor Renewal Date

From

MM/DD/YYYY


To

MM/DD/YYYY

[Go](#)

Name	Number Of Clients	Certification renewal for Enrollment Counselor	STATUS	CERTIFICATION STATUS
	1		Active	Certified
	0		InActive	Pending
	1		Active	Certified

- **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).


[My Account](#)

[CERTIFIED ENROLLMENT COUNSELORS](#)
[DELEGATIONS](#)
[ACCOUNT](#)

Add Certified Enrollment Counselor

1 New Enrollment Counselor Form

New Enrollment Counselor Form

First Name *

Last Name *

Email * company@email.com

Phone number * xxx xxx xxxx

Secondary Phone Number * xxx xxx xxxx

How would you like us to contact you?

☐ Email

☒ Phone

☐ Mail

Is this Enrollment Counselor Certified?

☒ No

☐ Yes

Primary Certified Enrollment Counselor Site * Select

Secondary Certified Enrollment Counselor Site * Select

Mailing Address

Street Address * Street Name, P.O. Box, Company, etc

Suite * Apt, Suite, Unit, Bldg, Floor, etc

City * City, Town

State * Select

Zip Code *

Profile Information

Spoken Languages Supported (Select all that apply) *

☐ Arabic

☐ Armenian

☐ Cambodian

☐ Cantonese

☐ English

☐ Farsi

☐ Hmong

☐ Korean

☐ Mandarin

☐ Russian

☐ Spanish

☐ Tagalog

☐ Vietnamese

☐ Other Select Some Options

Written Languages Supported (Select all that apply) *

☐ Arabic

☐ Armenian

☐ Cambodian

☐ English

☐ Farsi

☐ Hmong

☐ Korean

☐ Russian

☐ Spanish

☐ Tagalog

☐ Traditional Chinese character

☐ Vietnamese

☐ Other Select Some Options

Education * Select

Upload Photo [Choose File](#) No file chosen
File size limit is 5 MB.

[Save](#)

2.2 View and Search for Certified Enrollment Counselors

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

Certified Enrollment Counselors 3 Matching Certified Enrollment Counselors

Refine Results By (reset all)

Certified Enrollment Counselors first name

Certified Enrollment Counselors last name

Status

☐ Active

☐ InActive

Certification Status

Select

Certification Enrollment Counselor Renewal Date

From

MM/DD/YYYY

To

MM/DD/YYYY

Go

Name	Number Of Clients	Certification renewal for Enrollment Counselor	STATUS	CERTIFICATION STATUS
	1		Active	Certified
	0		InActive	Pending
	1		Active	Certified

- 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.

Certified Enrollment Counselors 3 Matching Certified Enrollment Counselors

Refine Results By (reset all)

Certified Enrollment Counselors first name

Certified Enrollment Counselors last name

Status

☐ Active

☐ InActive

Certification Status

Select

Certification Enrollment Counselor Renewal Date

From

MM/DD/YYYY

To

MM/DD/YYYY


Go

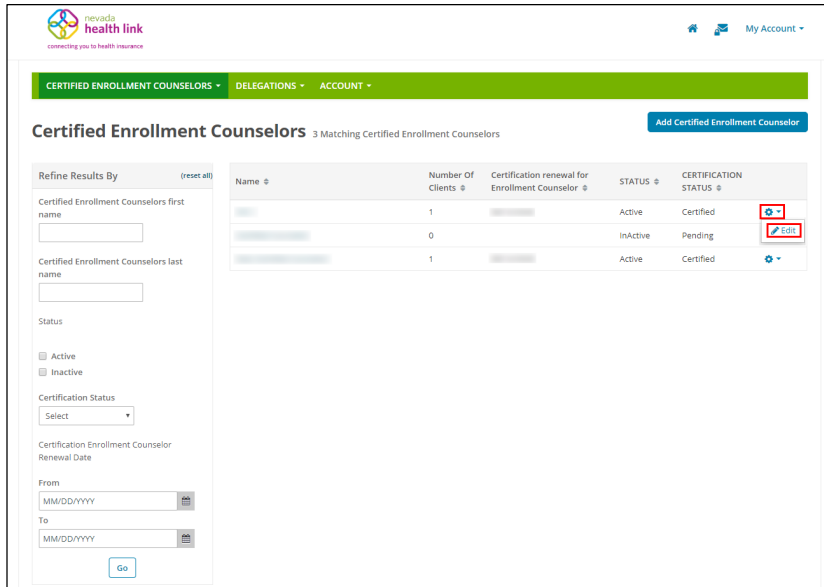
Name	Number Of Clients	Certification renewal for Enrollment Counselor	STATUS	CERTIFICATION STATUS
	1		Active	Certified
	0		InActive	Pending
	1		Active	Certified

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.



Certified Enrollment Counselors 3 Matching Certified Enrollment Counselors

[Add Certified Enrollment Counselor](#)

Refine Results By (reset all)

Certified Enrollment Counselors first name

Certified Enrollment Counselors last name

Status

☐ Active

☐ Inactive

Certification Status

Select

Certification Enrollment Counselor Renewal Date

From

MM/DD/YYYY

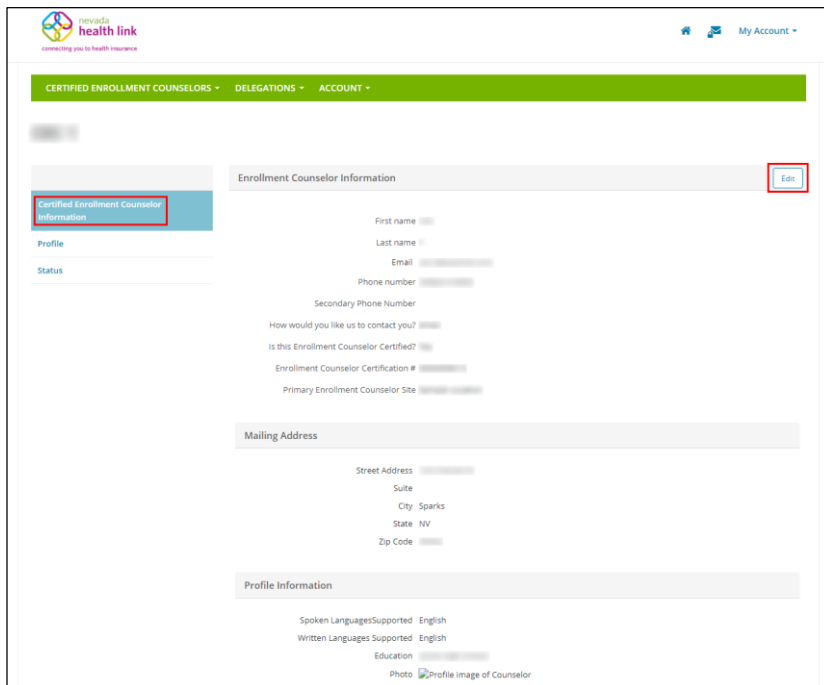
To

MM/DD/YYYY

Go

Name	Number Of Clients	Certification renewal for Enrollment Counselor	STATUS	CERTIFICATION STATUS
	1		Active	Certified
	0		InActive	Pending
	1		Active	Certified

- Step-2: Click on the “Certified Enrollment Counselor Information” section and click on ‘Edit’ button.



Certified Enrollment Counselor Information

[Edit](#)

First name

Last name

Email

Phone number

Secondary Phone Number

How would you like us to contact you?

Is this Enrollment Counselor Certified?

Enrollment Counselor Certification #

Primary Enrollment Counselor Site

Mailing Address

Street Address

Suite

City Sparks

State NV

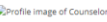
Zip Code

Profile Information

Spoken LanguagesSupported English

Written LanguagesSupported English

Education

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.

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CERTIFIED ENROLLMENT COUNSELORS • DELEGATIONS • ACCOUNT •

Certified Enrollment Counselor Information

Profile

First name *

Last name *

Email *

Phone number *

Secondary Phone Number

How would you like us to contact you? *

Is this Enrollment Counselor Certified? *

Certified Enrollment Counselor Certification #

Primary Certified Enrollment Counselor Site *

Secondary Certified Enrollment Counselor Site

Mailing Address

Street Address 1 *

Suite

City *

State *

Zip Code

Profile Information

Spoken Languages Supported (Select all that apply) *


Written Languages Supported (Select all that apply) *

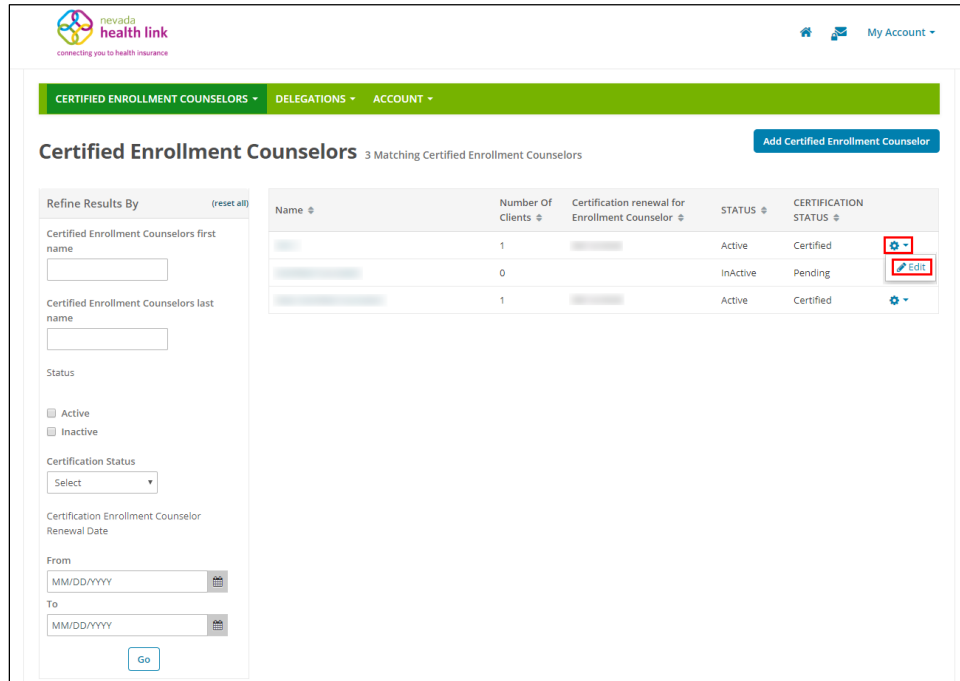
Education *

Upload Photo

Cancel Save

2.3.2 View Certified Enrollment Counselor profile

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



Certified Enrollment Counselors 3 Matching Certified Enrollment Counselors

[Add Certified Enrollment Counselor](#)

Refine Results By (reset all)

Certified Enrollment Counselors first name

Certified Enrollment Counselors last name

Status

☐ Active

☐ Inactive

Certification Status

Select

Certification Enrollment Counselor Renewal Date




From

MM/DD/YYYY

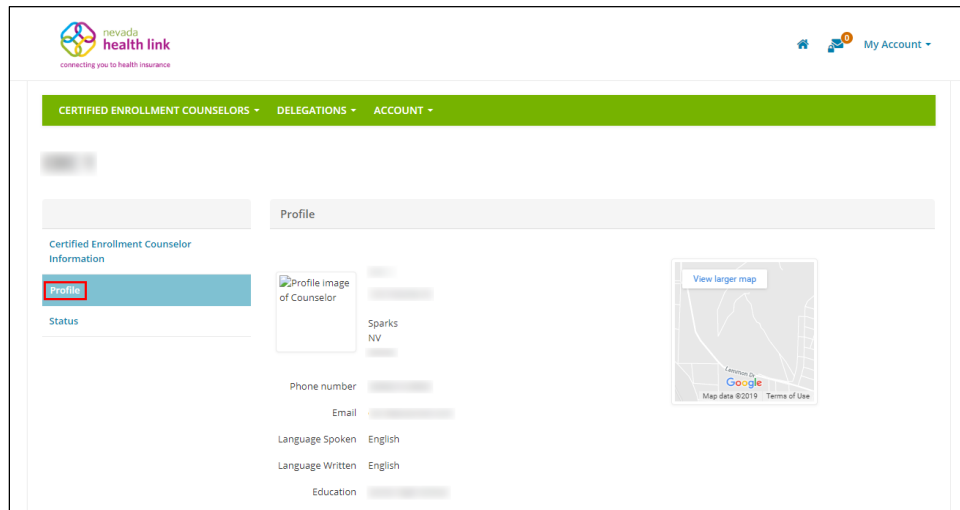
To

MM/DD/YYYY

Go

Name	Number Of Clients	Certification renewal for Enrollment Counselor	STATUS	CERTIFICATION STATUS	
	1		Active	Certified	
	0		InActive	Pending	
	1		Active	Certified	

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



Profile

Certified Enrollment Counselor Information

Profile

Status

Profile image of Counselor

Sparks NV

Phone number

Email

Language Spoken English


Language Written English

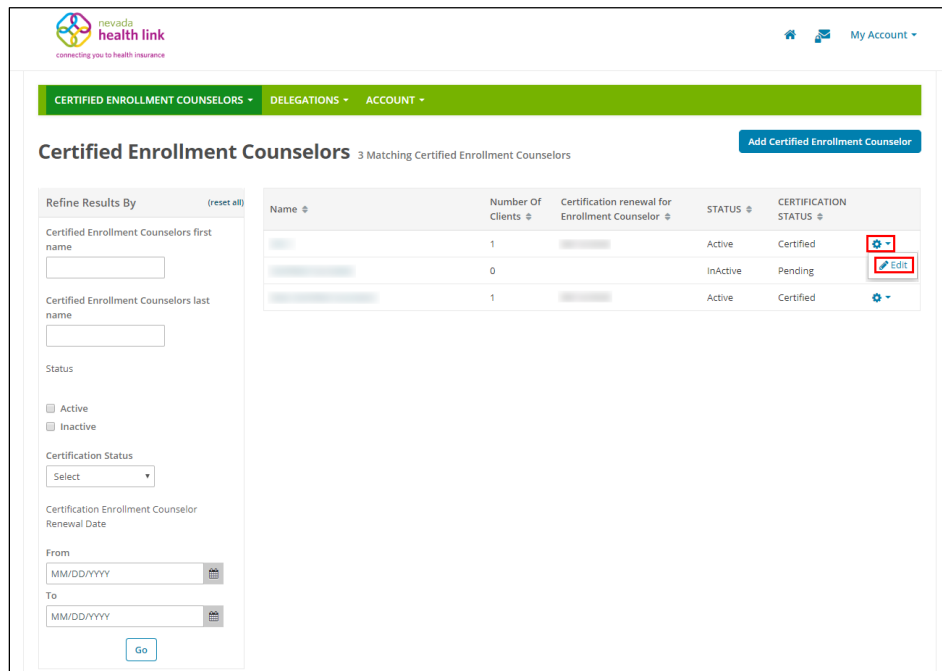
Education

View larger map

Map data ©2019 Google Terms of Use

2.3.3 Update Certified Enrollment Counselor activity status

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



Certified Enrollment Counselors 3 Matching Certified Enrollment Counselors

[Add Certified Enrollment Counselor](#)

Refine Results By (reset all)

Certified Enrollment Counselors first name

Certified Enrollment Counselors last name

Status

☐ Active

☐ Inactive

Certification Status

Select

Certification Enrollment Counselor Renewal Date

From

MM/DD/YYYY

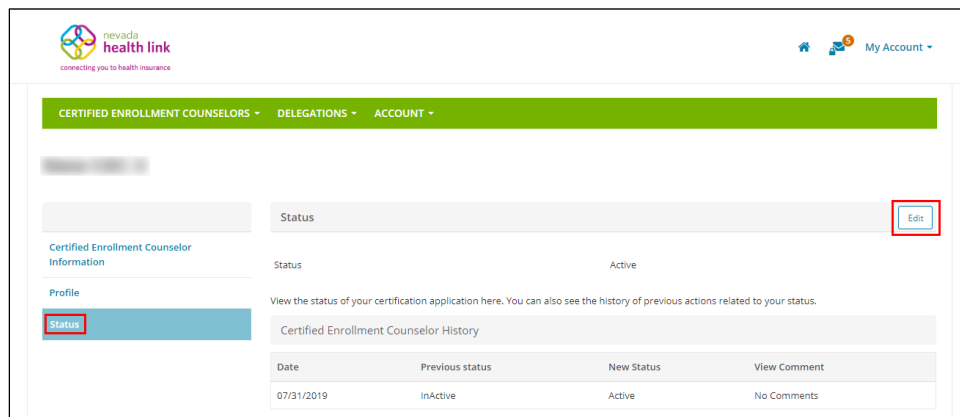
To

MM/DD/YYYY

Go

Name	Number Of Clients	Certification renewal for Enrollment Counselor	STATUS	CERTIFICATION STATUS
	1		Active	Certified
	0		InActive	Pending
	1		Active	Certified

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



Status

Active

[Edit](#)

Certified Enrollment Counselor Information

Profile

[Status](#)

View the status of your certification application here. You can also see the history of previous actions related to your status.

Certified Enrollment Counselor History

Date	Previous status	New Status	View Comment
07/31/2019	InActive	Active	No Comments

- 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.

Manage Enrollment Counselors

Certified Enrollment Counselor Information

Profile

Status

Status: Active

New Status:

Comment:

Date	Previous status	New Status	View Comment
07/31/2019	InActive	Active	No Comments

3. Certified Enrollment Counselors

CERTIFIED ENROLLMENT COUNSELORS **DELEGATIONS** **ACCOUNT**

Manage Enrollment Counselors

3.1 Manage Enrollment Counselors

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

4. Delegations

CERTIFIED ENROLLMENT COUNSELORS **DELEGATIONS** **ACCOUNT**

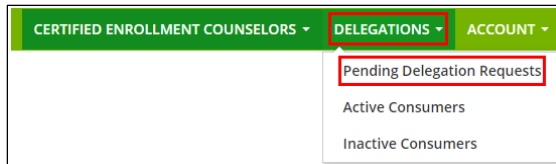
- Pending Delegation Requests
- Active Consumers
- Inactive Consumers

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'.

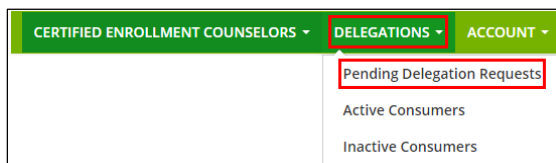



- Step-2: Enter consumer's name in the 'Consumer Name' field or CEC name in the 'Enrollment Counselor Name' field or enter the desired date range during which an individual delegation request was received in the 'Received On' section under the "Refine Results By" section and click on the 'Go' button.

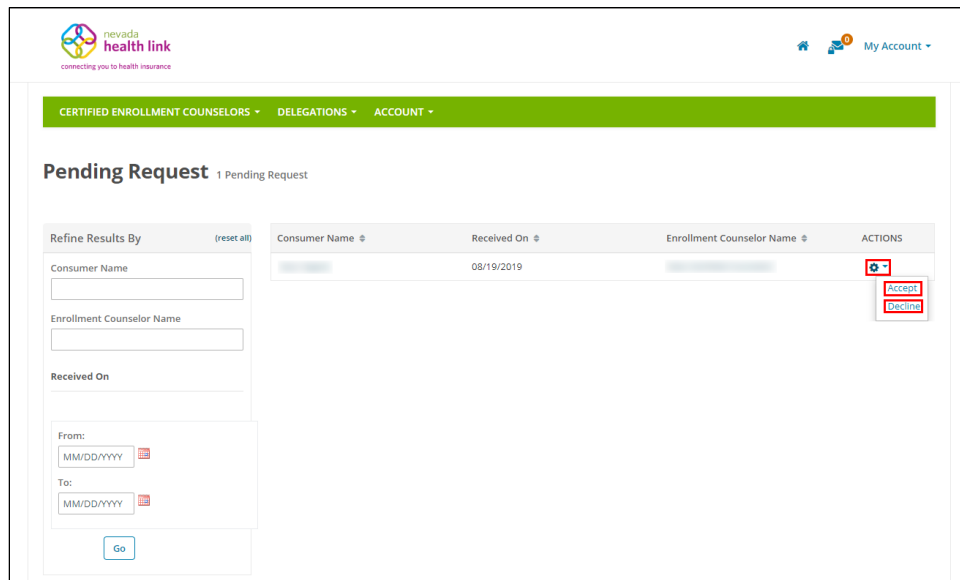
A screenshot of the 'Pending Request' search interface. At the top, there's a green navigation bar with 'CERTIFIED ENROLLMENT COUNSELORS', 'DELEGATIONS', and 'ACCOUNT' tabs. Below this, the page title is 'Pending Request' followed by '1 Pending Request'. On the left, there's a 'Refine Results By' section with a '(reset all)' link. It contains four input fields: 'Consumer Name', 'Enrollment Counselor Name', 'Received On', and a date range selector with 'From' and 'To' fields. The 'Go' button at the bottom of this section is highlighted with a red box. On the right, there's a table with columns: 'Consumer Name', 'Received On', 'Enrollment Counselor Name', and 'ACTIONS'. The table contains one row with a consumer name, the date '08/19/2019', and an enrollment counselor name. The 'ACTIONS' column has a gear icon.

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.



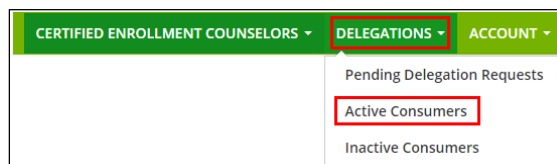
4.2 Active Consumers (Existing Designations)

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.

Active Delegations 1 Active Delegations(s)

Refine Results By (reset all)

Consumer Name

Enrollment Counselor Name

Eligibility Status

Select

Application Status

Select

Active Since

From: MM/DD/YYYY

To: MM/DD/YYYY

Go

Consumer Name	Active Since	Enrollment Counselor Name	ELIGIBILITY STATUS	Application Status	Action
	08/23/2019		Eligible	Signed	

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'.

CERTIFIED ENROLLMENT COUNSELORS **DELEGATIONS** **ACCOUNT**

Pending Delegation Requests

Active Consumers

Inactive 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.

Active Delegations 1 Active Delegations(s)

Refine Results By (reset all)

Consumer Name

Enrollment Counselor Name

Eligibility Status

Application Status

Active Since

From: MM/DD/YYYY

To: MM/DD/YYYY

Go

Consumer Name	Active Since	Enrollment Counselor Name	ELIGIBILITY STATUS	Application Status	Action
[Redacted]	08/23/2019	[Redacted]	Eligible	Signed	Change Delegation

- 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.

Change consumer delegation to other Enrollment Counselor

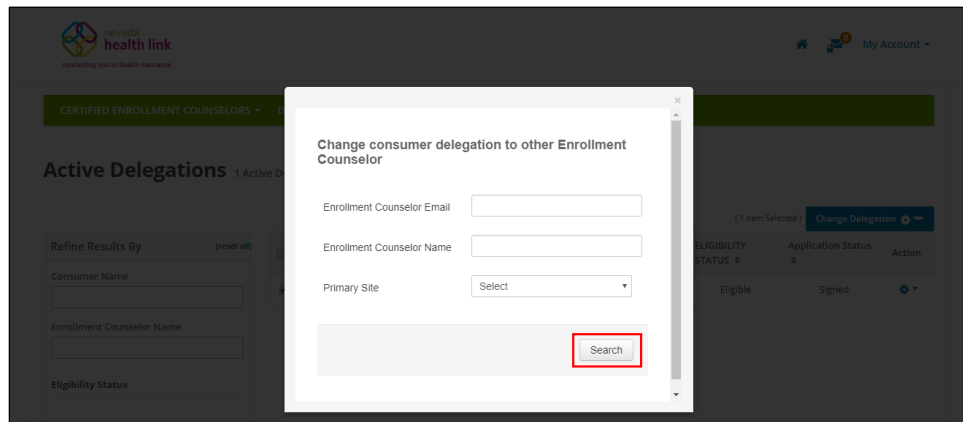
Enrollment Counselor Email

Enrollment Counselor Name

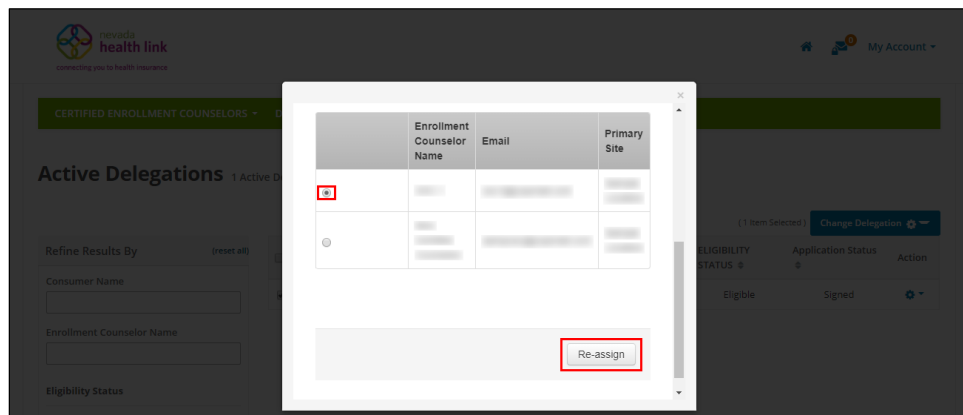
Primary Site

Search

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

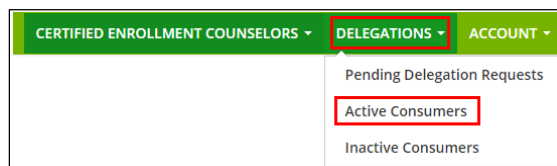


- Step-4: Scroll down and select a CEC that the Entity wants to change the designation using a radio button and click on the 'Re-assign' button.



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.

Active Delegations 2 Active Delegations(s)

(2 Items Selected) [Change Delegation](#)

<input checked="" type="checkbox"/>	Consumer Name	Active Since	Enrollment Counselor Name	ELIGIBILITY STATUS	Application Status	Action
<input checked="" type="checkbox"/>	[Redacted]	08/23/2019	[Redacted]	Eligible	Signed	Change Delegation
<input checked="" type="checkbox"/>	[Redacted]	08/23/2019	[Redacted]			Change Delegation

Refine Results By (reset all)

Consumer Name

Enrollment Counselor Name

Eligibility Status

Select

Application Status

Select

Active Since

From: MM/DD/YYYY

To: MM/DD/YYYY

Go

- 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.

Change consumer delegation to other Enrollment Counselor

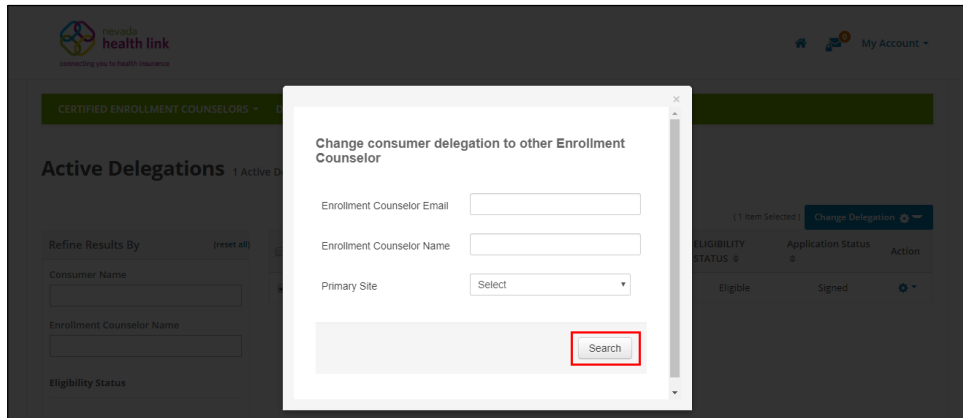
Enrollment Counselor Email

Enrollment Counselor Name

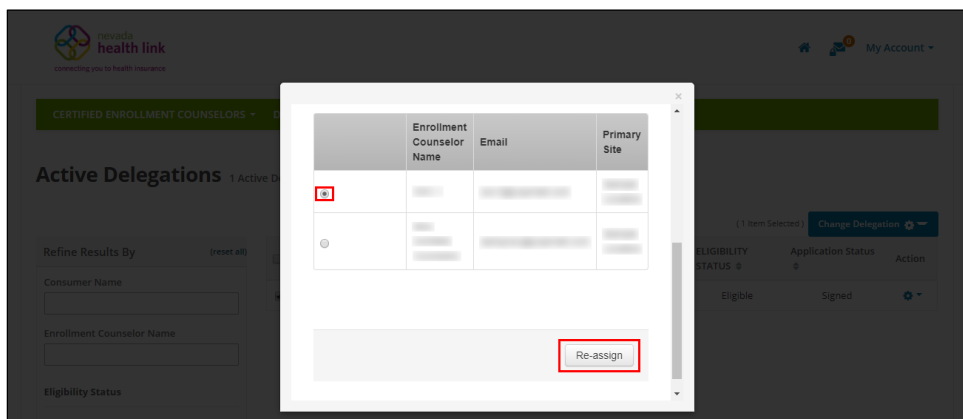
Primary Site

Search

- 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.

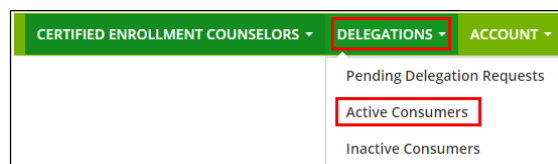


4.2.4 Perform actions on consumer profile

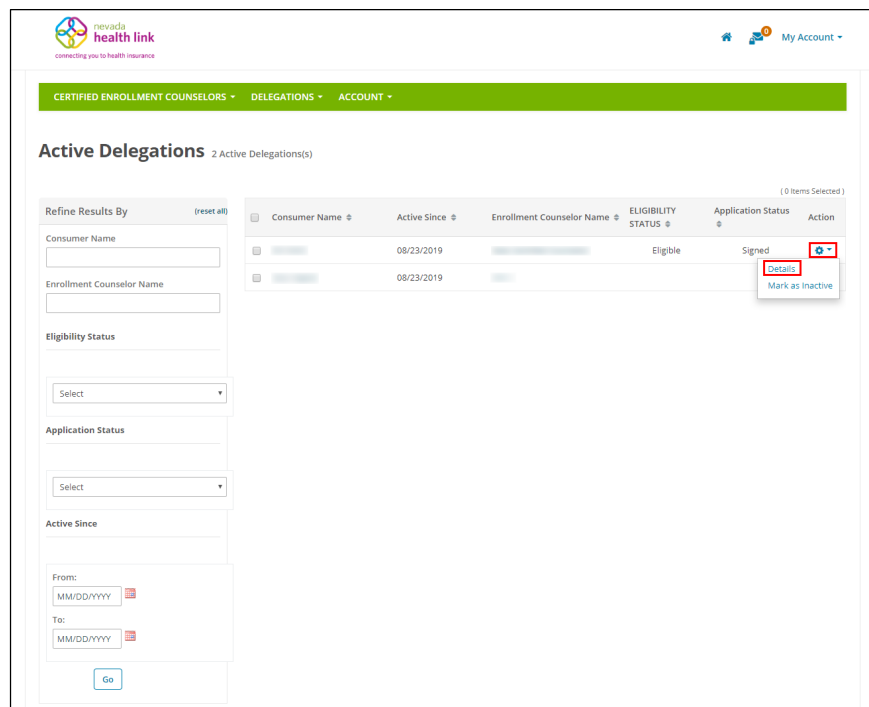
The Entities can perform actions on consumer accounts which includes view consumer summary, provide comments on a consumer's profile, resend activation email to a consumer and mark an individual as inactive.

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'.



Active Delegations 2 Active Delegations(s)

Refine Results By (reset all)

Consumer Name

Enrollment Counselor Name

Eligibility Status

Application Status

Active Since

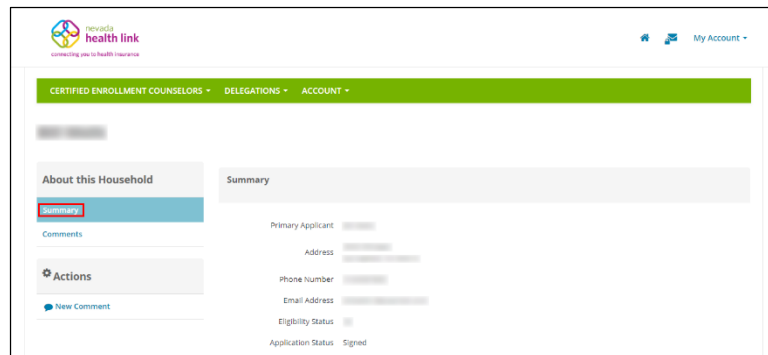
From: MM/DD/YYYY

To: MM/DD/YYYY

Go

Consumer Name	Active Since	Enrollment Counselor Name	ELIGIBILITY STATUS	Application Status	Action
	08/23/2019		Eligible	Signed	Details
	08/23/2019				Mark as Inactive

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



About this Household

Summary

Primary Applicant

Address

Phone Number

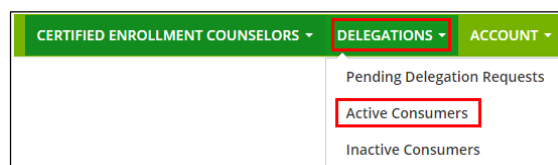
Email Address

Eligibility Status

Application Status Signed

4.2.4.2 Provide comments on individual profile

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



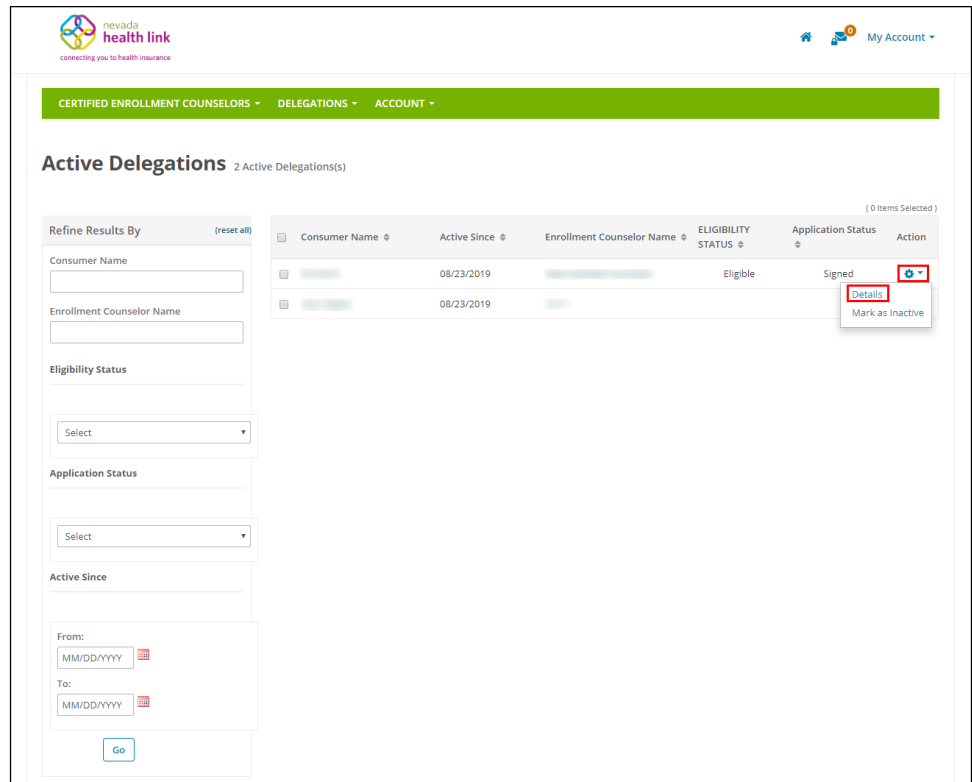
CERTIFIED ENROLLMENT COUNSELORS **DELEGATIONS** **ACCOUNT**

Pending Delegation Requests

Active Consumers

Inactive Consumers

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




nevada health link
connecting you to health insurance

[CERTIFIED ENROLLMENT COUNSELORS](#) [DELEGATIONS](#) [ACCOUNT](#)

Active Delegations

 2 Active Delegations(s)

(0 Items Selected)

Consumer Name	Active Since	Enrollment Counselor Name	ELIGIBILITY STATUS	Application Status	Action
[Redacted]	08/23/2019	[Redacted]	Eligible	Signed	 <ul style="list-style-type: none"> Details Mark as Inactive
[Redacted]	08/23/2019	[Redacted]			

Refine Results By (reset all)

Consumer Name
[Text Input]

Enrollment Counselor Name
[Text Input]

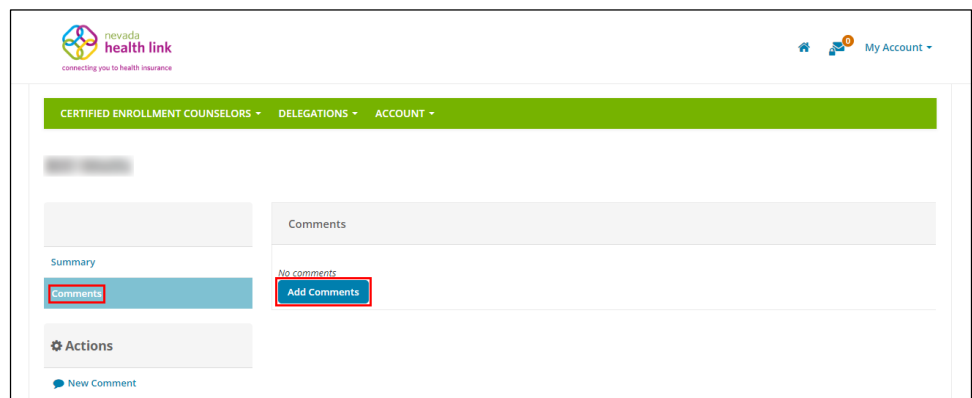
Eligibility Status
[Select]

Application Status
[Select]

Active Since
From: [MM/DD/YYYY] To: [MM/DD/YYYY]

[Go](#)

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



nevada health link
connecting you to health insurance

[CERTIFIED ENROLLMENT COUNSELORS](#) [DELEGATIONS](#) [ACCOUNT](#)

[Redacted]

Summary

[Comments](#)

No comments

[Add Comments](#)

Actions

[New Comment](#)

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

The screenshot shows the Nevada Health Link interface. At the top, there is a navigation bar with the logo and the text "connecting you to health insurance". Below this, there is a green header bar with the text "CERTIFIED ENROLLMENT COUNSELORS • DELEGATIONS • ACCOUNT •". The main content area is divided into two columns. The left column contains a "Summary" section with a "Comments" button and an "Actions" section with a "New Comment" button. The right column contains a "Comments" section with a "No comments" message and an "Add Comments" button. Below the "Add Comments" button is a large text area for entering comments. At the bottom right of the text area, there is a "Characters left: 4000" indicator and two buttons: "Cancel" and "Post Comment". The "Post Comment" button is highlighted with a red box.

- 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.

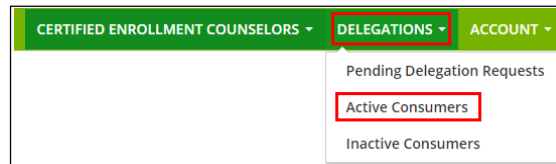
The screenshot shows the Nevada Health Link interface. At the top, there is a navigation bar with the logo and the text "connecting you to health insurance". Below this, there is a green header bar with the text "CERTIFIED ENROLLMENT COUNSELORS • DELEGATIONS • ACCOUNT •". The main content area is divided into two columns. The left column contains a "Summary" section with a "Comments" button and an "Actions" section with a "New Comment" button. The right column contains a "Comments" section with a "No comments" message and an "Add Comments" button. Below the "Add Comments" button is a large text area for entering comments. At the bottom right of the text area, there is a "Characters left: 4000" indicator and two buttons: "Cancel" and "Post Comment". The "New Comment" button in the "Actions" section is highlighted with a red box.


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

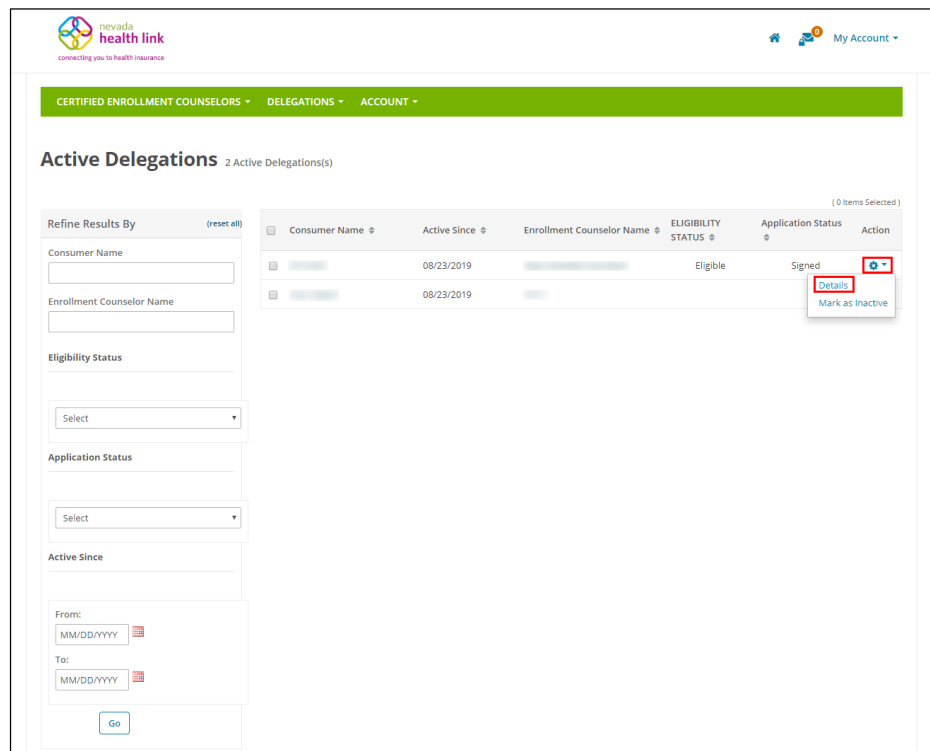
The screenshot shows the Nevada Health Link interface with a pop-up screen for entering comments. The pop-up screen has a text area with the placeholder text "Enter comments here...". Below the text area are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a red box. The background of the interface is dimmed.


4.2.4.3 Update comments on individual profile

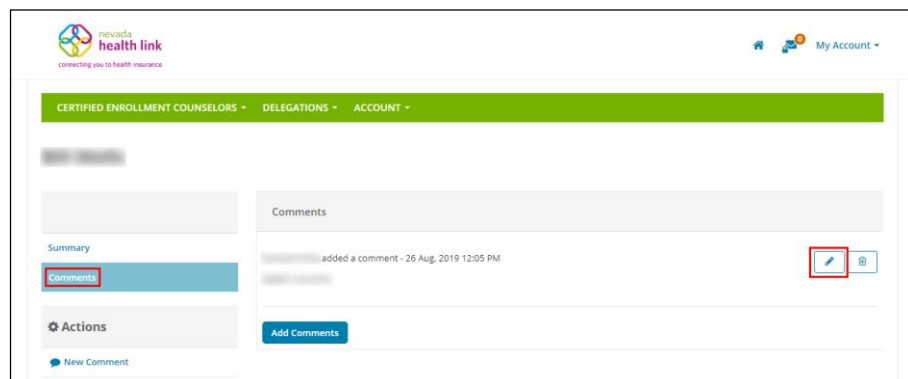
- Step-1: Click on the 'Delegations' tab and select 'Active Consumers'.



- 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.

The screenshot shows the 'Comments' section of the Nevada Health Link interface. On the left, there is a sidebar with 'Summary', 'Comments', and 'Actions'. The 'Comments' section on the right shows a text area for entering a comment, a 'Cancel' button, and an 'Update Comment' button which is highlighted with a red box. Below the text area is an 'Add Comments' button.


4.2.4.4 Delete a comment on individual profile

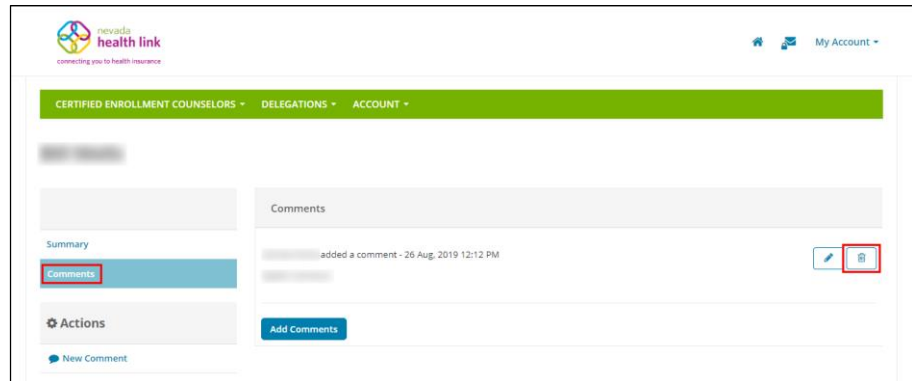
- Step-1: Click on the 'Delegations' tab and select 'Active Consumers'.

The screenshot shows the navigation bar of the Nevada Health Link interface. The 'DELEGATIONS' tab is highlighted with a red box. Its dropdown menu is open, showing three options: 'Pending Delegation Requests', 'Active Consumers' (highlighted with a red box), and 'Inactive Consumers'.

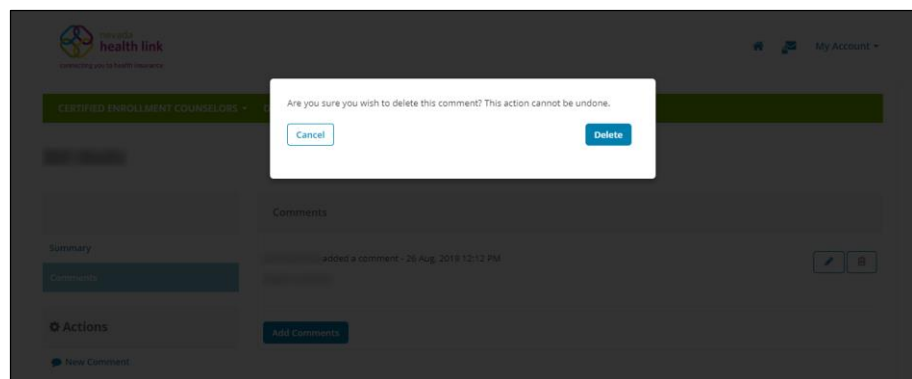
- Step-2: Click on the  button and click on 'Details'.

The screenshot shows the 'Active Delegations' page of the Nevada Health Link interface. On the left, there is a sidebar with 'Refine Results By' (Consumer Name, Enrollment Counselor Name, Eligibility Status, Application Status, Active Since) and a 'Go' button. The main area displays a table of active delegations. The table has columns: Consumer Name, Active Since, Enrollment Counselor Name, ELIGIBILITY STATUS, Application Status, and Action. The 'Action' column contains a 'Details' button (highlighted with a red box) and a 'Mark as Inactive' button. The table shows two rows of data, both with 'Active Since' dates of 08/23/2019.

- 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.



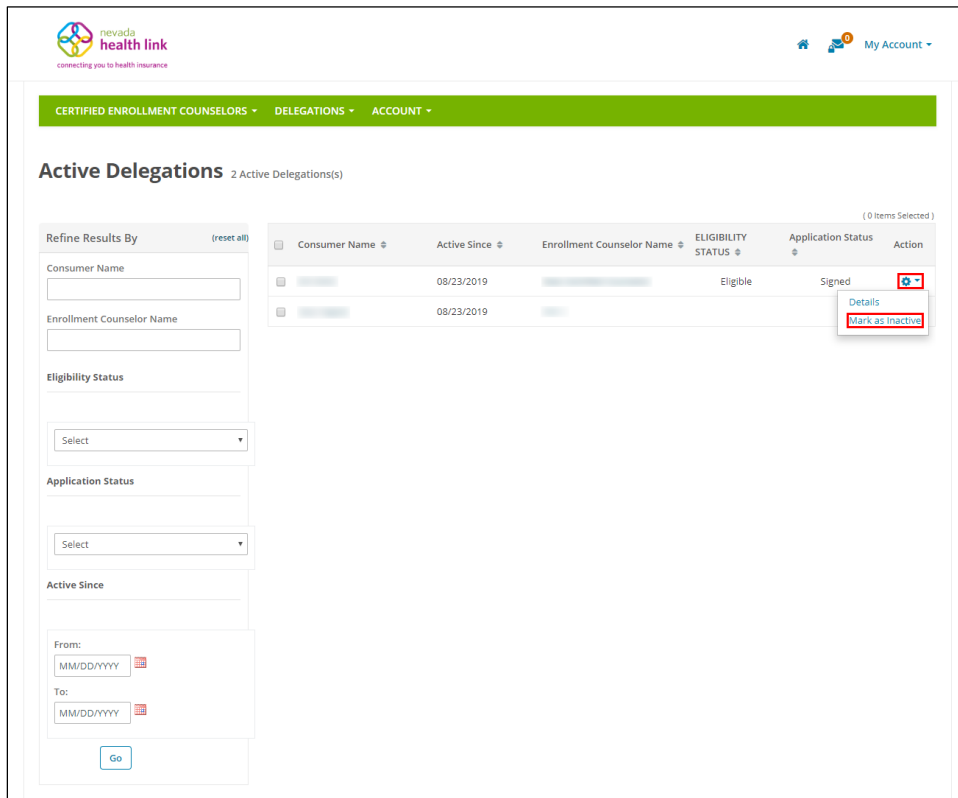
4.2.5 Mark an individual as inactive

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'.

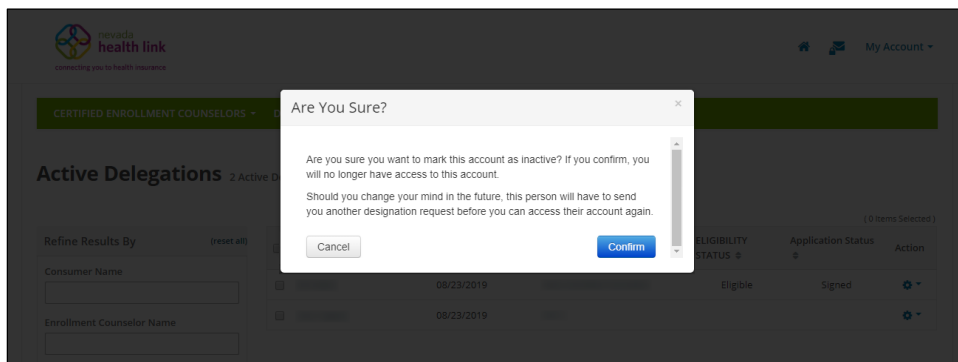


The screenshot shows the 'Active Delegations' page in the Nevada Health Link system. On the left, there are filters for 'Refine Results By' including Consumer Name, Enrollment Counselor Name, Eligibility Status, Application Status, and Active Since. The main table lists two active delegations. The first row is selected, and a dropdown menu is open for the 'Action' column, showing options 'Details' and 'Mark as Inactive'.

Consumer Name	Active Since	Enrollment Counselor Name	ELIGIBILITY STATUS	Application Status	Action
[Redacted]	08/23/2019	[Redacted]	Eligible	Signed	Details, Mark as Inactive
[Redacted]	08/23/2019	[Redacted]			

- 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.



The screenshot shows the same 'Active Delegations' page, but with a confirmation pop-up displayed. The pop-up asks 'Are You Sure?' and provides instructions on the consequences of marking an account as inactive. The background shows the same table as the previous screenshot.

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](#) [Confirm](#)

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.

A screenshot of the 'Inactive Consumers' search page. The page header includes the 'nevada health link' logo and a 'My Account' link. Below the header is a navigation bar with 'CERTIFIED ENROLLMENT COUNSELORS', 'DELEGATIONS', and 'ACCOUNT' tabs. The main heading is 'Inactive Consumers' with a subtext '1 Inactive Consumer'. On the left, there is a 'Refine Results By' section with a '(reset all)' link. This section contains three input fields: 'Consumer Name', 'Enrollment Counselor Name', and 'Inactive Since'. The 'Inactive Since' field is expanded, showing 'From:' and 'To:' date pickers with 'MM/DD/YYYY' placeholders. A 'Go' button is located at the bottom of this section. On the right, there is a table with three columns: 'Consumer Name', 'In-Active since', and 'Enrollment Counselor Name'. The 'In-Active since' column contains the date '08/26/2019'. The 'Refine Results By' label is highlighted with a red box, and the 'Go' button is also highlighted with a red box.

5. Account

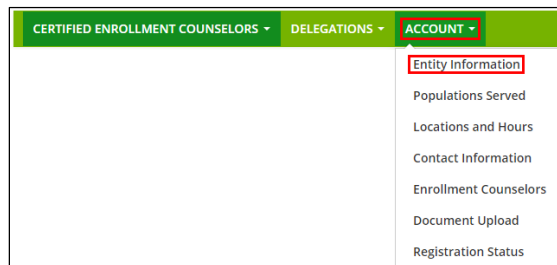


The Account section provides all the Entity organization information that we entered while creating an Entity account. This section allows the Entity to update the Entity information, Populations served, Location and hours, Contact information, add and update Certified Enrollment Counselor, and view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

A screenshot of the 'Entity Information' form. The form is titled 'Entity Information' and has an 'Edit' button in the top right corner, highlighted with a red box. The form contains various fields for entity information, including Entity Number, Entity Type, Certified Enrollment Entity name, Business Name (Legal), Primary Email Address, Primary Phone Number, Secondary Phone Number, Fax Number, How would this person like to be contacted?, Federal Tax ID, State Tax ID, Organization Type, Counties You Serve, and Did your organization receive an Outreach and Education Grant? The 'Entity Information' section is highlighted in blue.

- 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”.

The screenshot shows the 'Step 1: Entity Information' form in the Nevada Health Link system. The form is divided into several sections with radio buttons and text input fields. The 'Entity Type' section has three options: 'In-Person Assistance' (selected), 'Certified Navigator Entities', and 'Certified Application Counselor'. The 'Entity Name' and 'Business Name (Legal)' fields are empty. The 'Primary Email Address' field is empty. The 'Primary Phone Number' field has three input boxes for area code, prefix, and number. The 'Secondary Phone Number' field has three input boxes for area code, prefix, and number. The 'How would you like for us to contact you?' section has four radio buttons: 'Email' (selected), 'Phone', 'Fax', and 'Mail'. The 'Fax' field has three input boxes for area code, prefix, and number. The 'Federal Tax ID' field is empty. The 'State Tax ID' field is empty. The 'Organization Type' dropdown menu is set to 'Private Partnership'. The 'Counties Served' field has a dropdown menu with 'Carson City' selected and a 'Select Some Options' link. The 'Did your organization receive an Outreach and Education Grant?' section has two radio buttons: 'Yes' and 'No' (selected). At the bottom of the form, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red box.

5.2 Populations Served

5.2.1 Edit populations served information

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

The screenshot shows the 'ACCOUNT' dropdown menu in the Nevada Health Link system. The 'ACCOUNT' tab is highlighted with a red box. The dropdown menu lists several options: 'Entity Information', 'Populations Served' (highlighted with a red box), 'Locations and Hours', 'Contact Information', 'Enrollment Counselors', 'Document Upload', and 'Registration Status'.

- 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.

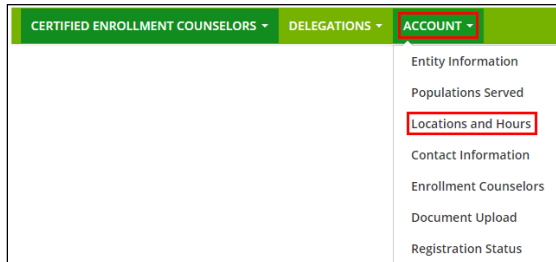
If your Entity organization does not target specific Ethnicities or Industries you can choose “Other,” type in a value of “All,” and mark “100” in the “Estimated Percent” columns.

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

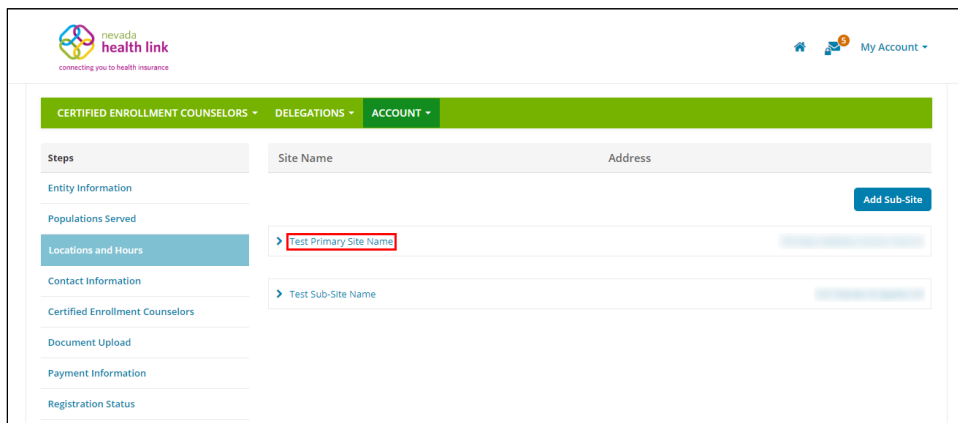
5.3 Location and Hours

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.

My Account

CERTIFIED ENROLLMENT COUNSELORS

DELEGATIONS

ACCOUNT

Steps

Entity Information

Populations Served

Locations and Hours

Primary Sites

Sub-Sites

Contact Information

Certified Enrollment Counselors

Document Upload

Payment Information

Registration Status

Step 3: Locations and Hours

Please list all locations and business hours for your organization.

Primary Site Location

Test Primary Site Name

Primary Email Address

Primary Email Address

Primary Phone Number

xxx xxx xxxx

Secondary Phone Number

xxx xxx xxxx

Hours of Operation

Sunday

From

To

Saturday

From

To

Friday

From

To

Thursday

From

To

Wednesday

From

To

Tuesday

From

To

Monday

From

To

Mailing Address

Address 1

Address 2

City

Canton City

State

Nevada

Zip code

Physical Address

The following address is used and displayed when consumers are searching for an entity. If you do not enter an address below, the consumers will not be able to view your address and search for your entity by location.

Same as Mailing Address

Address 1

Address 2

City

Canton City

State

Nevada

Zip code

Languages Supported

Choose all spoken languages

English

Arabic

Armenian

Cambodian

Cantonese

Farsi

Hmong

Korean

Mandarin

Russian

Spanish

Tagalog

Vietnamese

Other

Select Some Options

Choose all written languages

English

Arabic

Armenian

Cambodian

Farsi

Hmong

Korean

Russian

Spanish

Tagalog

Traditional Chinese character

Vietnamese

Other

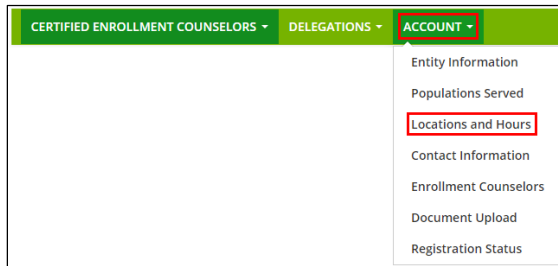
Select Some Options

Cancel

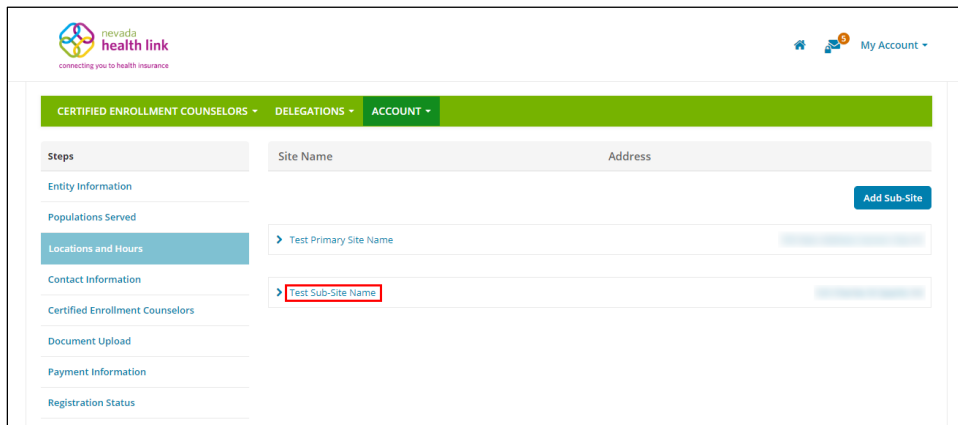
Save

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.



CERTIFIED ENROLLMENT COUNSELORS

DELEGATIONS

ACCOUNT



My Account

Steps

Entity Information

Populations Served

Locations and Hours

Contact Information

Certified Enrollment Counselors

Document Upload

Payment Information

Registration Status

Site Name

Address

Test Primary Site Name

Test Sub-Site Name

Site Name

Test Sub-Site Name

Primary Email Address

Primary Phone Number

Secondary Phone Number

Hours of Operation

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Mailing Address

Address 1

Address 2

City Sparks

State Nevada

Zip code

Physical Address

Address 1

Address 2

City Sparks

State Nevada

Zip code

Languages Supported

Spoken Languages Supported

Written Languages Supported

Add Sub-Site


Edit

- 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.

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Entity User Reference Manual

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CERTIFIED ENROLLMENT COUNSELORS

DELEGATIONS

ACCOUNT

Steps

Entity Information

Populations Served

Locations and Hours

Primary Sites

Sub-Sites

Contact Information

Certified Enrollment Counselors

Document Upload

Payment Information

Registration Status

Step 3: Location and Hours - Sub-Site

In this section, you will add all of your organization's sub-sites

Add Sub-Site

Sub-Site List

Name	Address
Test Sub-Site Name	

Sub-Site Name

Test Sub-Site Name

Primary Email Address

Primary Email Address

Primary Phone Number

xxx

xxx

xxxx

Secondary Phone Number

xxx

xxx

xxxx

Hours of Operation

Sunday

From

To

Saturday

From

To

Friday

From

To

Thursday

From

To

Wednesday

From

To

Tuesday

From

To

Monday

From

To

Mailing Address

Address 1

123 Main St

Address 2

Address 2

City

Sparks

State

Nevada

Zip code

89101

Physical Address

Same as Mailing Address

☒

Languages Supported

Spoken Languages (select all that apply)

☒ English
 ☐ Arabic
 ☐ Armenian
 ☐ Cambodian
 ☐ Cantonese
 ☐ Farsi
 ☐ Hmong
 ☐ Korean
 ☐ Mandarin
 ☐ Russian
 ☐ Spanish
 ☐ Tagalog
 ☐ Vietnamese
 ☐ Other

Select Some Options

Written Languages (select all that apply)

☒ English
 ☐ Arabic
 ☐ Armenian
 ☐ Cambodian
 ☐ Farsi
 ☐ Hmong
 ☐ Korean
 ☐ Russian
 ☐ Spanish
 ☐ Tagalog
 ☐ Traditional Chinese character
 ☐ Vietnamese
 ☐ Other

Select Some Options

Save Sub-Site

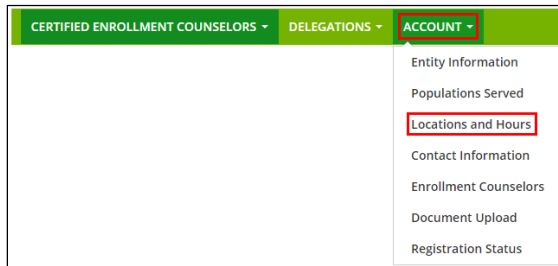
5.3.3 Add sub-site information

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

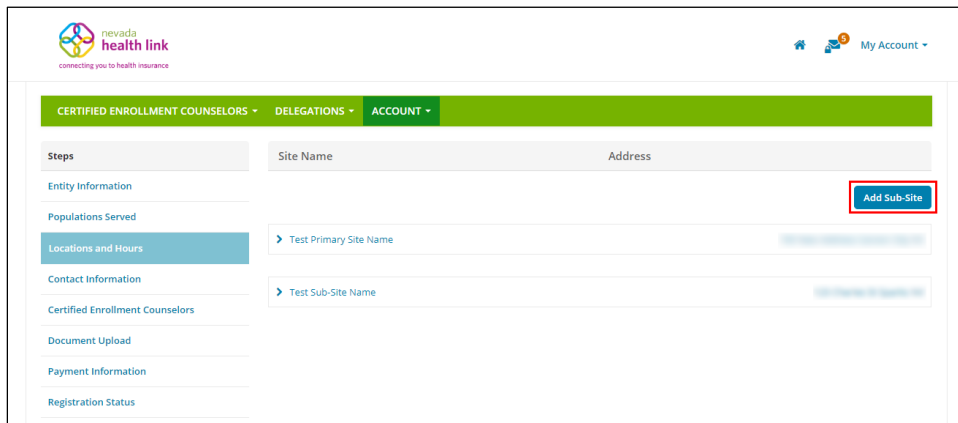
October, 2019 v1.0

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- 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.



My Account

CERTIFIED ENROLLMENT COUNSELORS

DELEGATIONS

ACCOUNT

Steps

Entity Information

Populations Served

Locations and Hours

Contact Information

Certified Enrollment Counselors

Document Upload

Payment Information

Registration Status

Site Name

Primary Email Address

Primary Phone Number

Secondary Phone Number

Hours of Operation

Mailing Address

Physical Address

Languages Supported

Spoken Languages (select all that apply)

Written Languages (select all that apply)

Save Site

Add Sub-Site

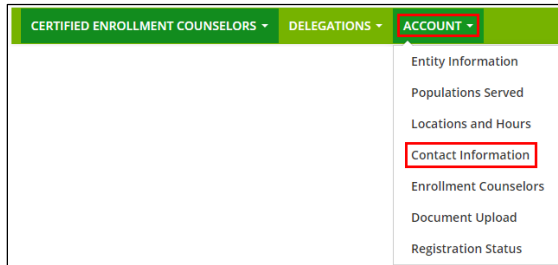
Test Primary Site Name

Test Sub-Site Name

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.

 A screenshot of the 'Contact Information' form in the web application. The form is titled 'Primary Contact' and includes fields for 'Name', 'Email', 'Primary Phone Number', 'Secondary Phone Number', and 'How would this person like to be contacted? email'. Below this is a section for 'Financial Contact' with similar fields. On the left side, there is a 'Steps' sidebar with links to 'Entity Information', 'Populations Served', 'Locations and Hours', 'Contact Information' (which is highlighted), 'Certified Enrollment Counselors', 'Document Upload', 'Payment Information', and 'Registration Status'. In the top right corner of the form area, there is an 'Edit' button highlighted with a red rectangular box.

- 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.

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CERTIFIED ENROLLMENT COUNSELORS **DELEGATIONS** **ACCOUNT**

Steps

- Entity Information
- Populations Served
- Locations and Hours
- Contact Information**
- Certified Enrollment Counselors
- Document Upload
- Payment Information
- Registration Status

Step 4: Contact Information

Tell us about the contact people in your organization.

Primary Contact

Name *

Email *

Primary Phone Number *

Secondary Phone Number

How would this person like to be contacted?

- ☒ Email
- ☐ Primary Phone
- ☐ Secondary Phone
- ☐ Mail

Financial Contact

Name *

Email *

Primary Phone Number *

Secondary Phone Number

How would this person like to be contacted?

- ☒ Email
- ☐ Primary Phone
- ☐ Secondary Phone
- ☐ Mail

Cancel Save

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'.

CERTIFIED ENROLLMENT COUNSELORS **DELEGATIONS** **ACCOUNT**

- Entity Information
- Populations Served
- Locations and Hours
- Contact Information
- Enrollment Counselors**
- Document Upload
- Registration Status

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

The screenshot shows the 'Nevada Health Link' interface. At the top, there's a navigation bar with 'CERTIFIED ENROLLMENT COUNSELORS', 'DELEGATIONS', and 'ACCOUNT'. The left sidebar lists steps: Entity Information, Populations Served, Locations and Hours, Contact Information, Certified Enrollment Counselors (highlighted), Document Upload, Payment Information, and Registration Status. The main content area is titled 'Step 5: Certified Enrollment Counselors'. It includes a description: 'In this section, you will provide information about this organization's certified enrollment counselors'. Below this is a red-bordered button labeled 'Add Certified Enrollment Counselor'. Further down is a table titled 'Certified Enrollment Counselor Roster' with columns 'Name' and 'Site'. The table contains three rows of placeholder text, each with a gear icon for editing.

- 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.

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).

Steps

- Entity Information
- Populations Served
- Locations and Hours
- Contact Information
- Certified Enrollment Counselors**
- Document Upload
- Payment Information
- Registration Status

Step 5: Certified Enrollment Counselors

In this section, you will provide information about this organization's certified enrollment counselors.

[Add Certified Enrollment Counselor](#)

Certified Enrollment Counselor Roster

Name	Site	
John Doe	Site 1	✖
Jane Smith	Site 2	✖
...	...	✖

New Enrollment Counselor Form

First name *

Last name *

Email *

Primary Phone Number *

Secondary Phone Number

How would this person like to be contacted? * ☒ Email ☐ Primary Phone ☐ Mail

Is this Enrollment Counselor Certified? * ☒ No ☐ Yes

Primary Certified Enrollment Counselor Site *

Secondary Certified Enrollment Counselor Site

Mailing Address

Street Address *

Suite

City *

State *

Zip Code *

Profile Information

Spoken Languages Supported (Select all that apply) * ☐ English ☐ Arabic ☐ Armenian ☐ Cantonese ☐ Chinese ☐ Farsi ☐ Hindi ☐ Korean ☐ Mandarin ☐ Russian ☐ Spanish ☐ Tagalog ☐ Vietnamese ☐ Other

Written Languages Supported (Select all that apply) * ☐ English ☐ Arabic ☐ Armenian ☐ Cantonese ☐ Chinese ☐ Farsi ☐ Hindi ☐ Korean ☐ Mandarin ☐ Russian ☐ Spanish ☐ Tagalog ☐ Traditional Chinese character ☐ Vietnamese ☐ Other

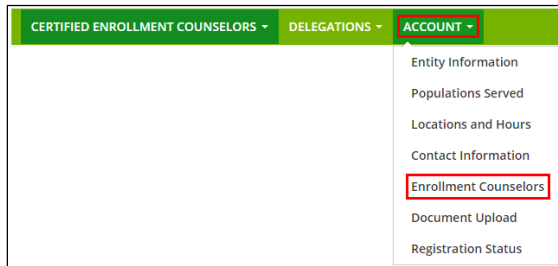
Education *

Upload Photo no file chosen
File size limit is 5 MB.

[Save](#)

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.

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).

Step 5: Certified Enrollment Counselors

In this section, you will provide information about this organization's certified enrollment counselors.

[Add Certified Enrollment Counselor](#)

Certified Enrollment Counselor Roster

Name	Site

New Enrollment Counselor Form

First name *

Last name *

Email *

Primary Phone Number *

Secondary Phone Number

How would this person like to be contacted?

☒ Email
☐ Primary Phone
☐ Mail

Is this enrollment counselor certified?

☐ No
☒ Yes

Enrollment Counselor Certification *

Primary Certified Enrollment Counselor Site *

Secondary Certified Enrollment Counselor Site *

Mailing Address

Street Address *

Suite

City *

State *

Zip Code *

Profile Information

Spoken Languages supported (Select all that apply):

- ☐ Arabic
- ☐ Armenian
- ☐ Cambodian
- ☐ Cantonese
- ☒ English
- ☐ Farsi
- ☐ Hmong
- ☐ Korean
- ☐ Mandarin
- ☐ Russian
- ☐ Spanish
- ☐ Tagalog
- ☐ Vietnamese
- ☐ Other

Written Languages Supported (Select all that apply):

- ☐ Arabic
- ☐ Armenian
- ☐ Cambodian
- ☒ English
- ☐ Farsi
- ☐ Hmong
- ☐ Korean
- ☐ Russian
- ☐ Spanish
- ☐ Tagalog
- ☐ Traditional Chinese character
- ☐ Vietnamese
- ☐ Other

Education *

Upload Photo No file chosen. File size limit is 5 MB.

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:

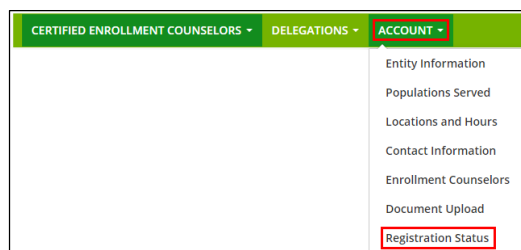
Pending

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.

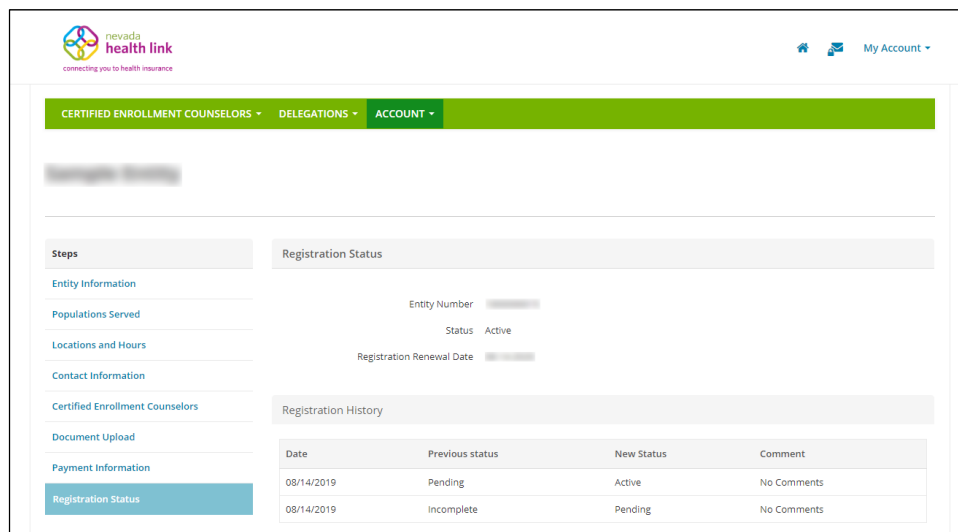
Active

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