

State of Nevada

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



Nevada Health Link State Based Exchange Platform Certified Enrollment Counselor (CEC) User Reference Manual

October 31, 2019

Version 1.0

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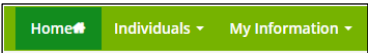
1. Overview

This manual is intended to provide a detailed description of the functions available through the Certified Enrollment Counselor (CEC) Portal of the Nevada Health Link State Based Exchange (SBE) Platform. “CECs” refers collectively to the individual Navigators or CACs within an “Entity” organization who are certified by Nevada Health Link to offer enrollment assistance to Nevada’s Affordable Care Act Exchange marketplace consumers. Throughout this document, individual Navigators or Certified Application Counselors (CACs) are referred to as “CECs.”

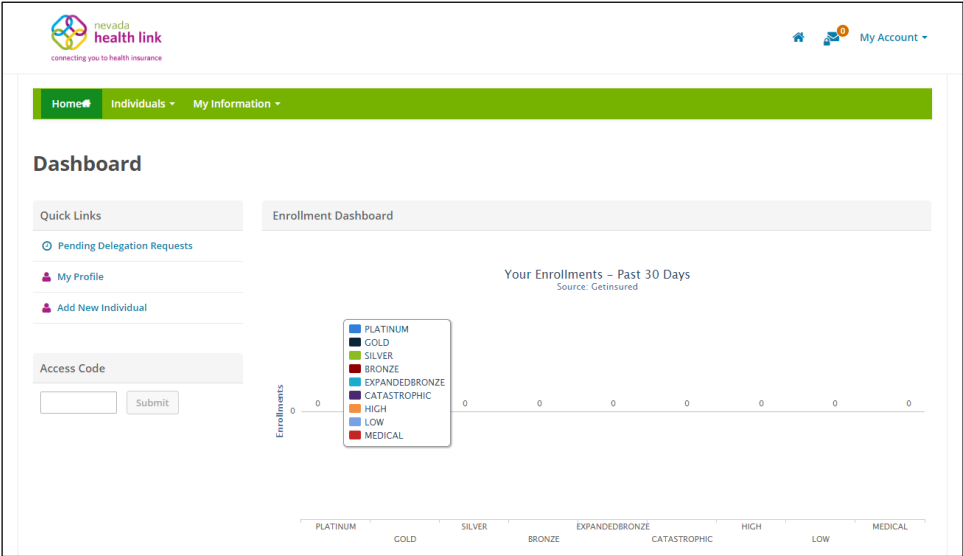
The CEC Portal is a complete solution for CECs to submit applications and enrollments and perform account maintenance transactions on behalf of existing consumers, create new user accounts on behalf of new consumers, and manage their book of business.

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

2. Home Page



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

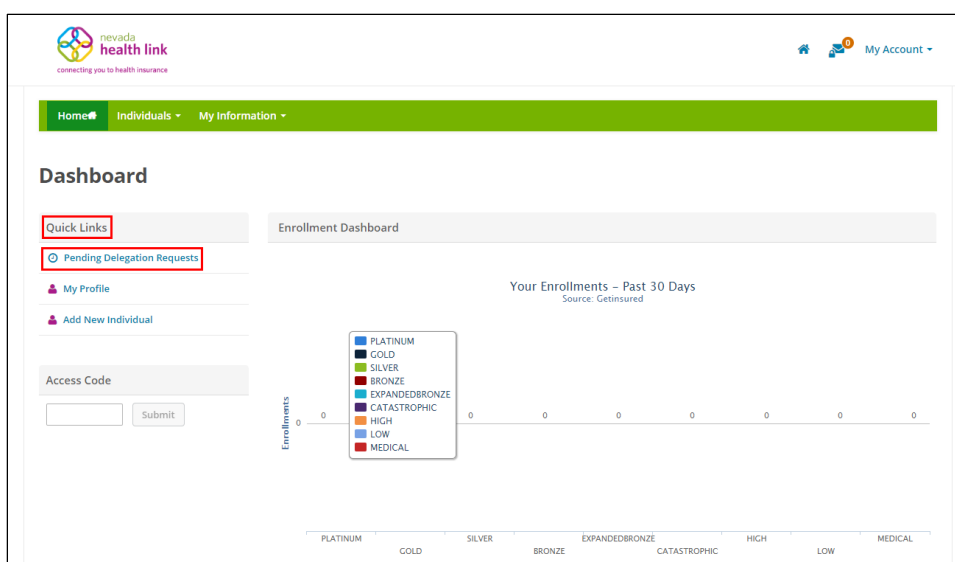


2.1 Pending Delegation Requests

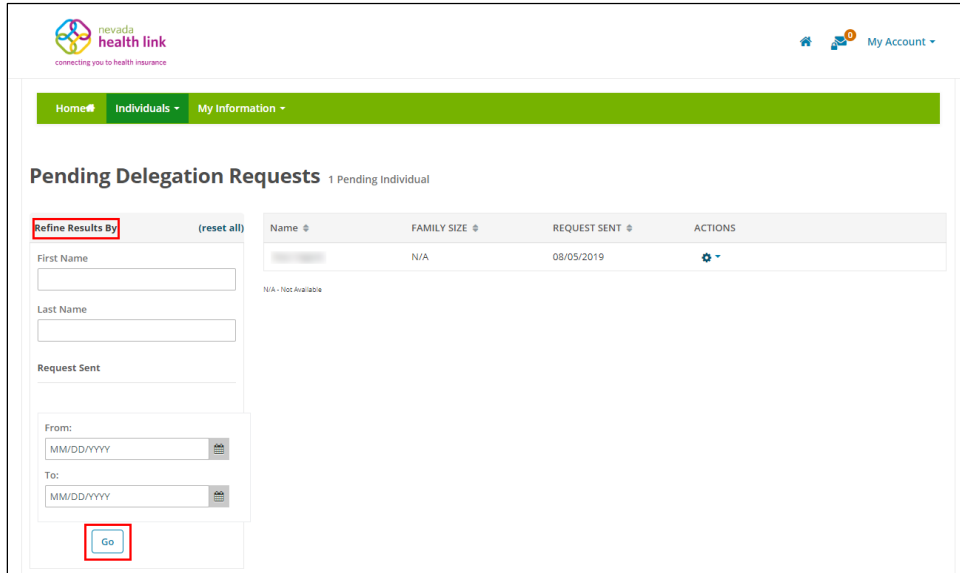
The Pending Requests page displays a list of pending individuals that have requested for CEC designation. The CEC has the option to accept or decline an individual's designation request. If a request is accepted, then the individual will move to the Active Individuals section. If the request is declined,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

2.1.1 View and search for pending designation requests

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

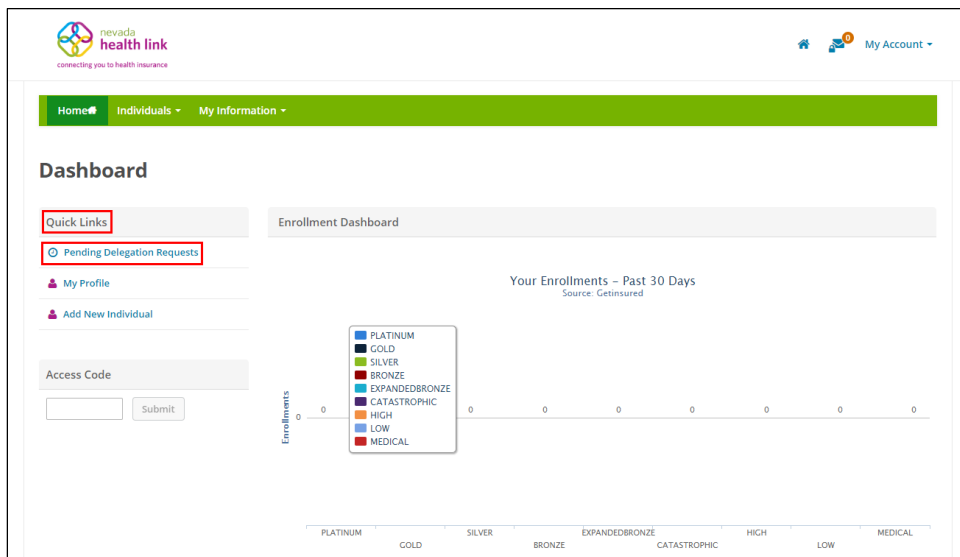



- Step-2: Enter individual's first name in the 'First Name' field or last name in the 'Last Name' field or enter the desired date range during which an individual sent the designation request in the 'Request Sent' section under the "Refine Results By" section and click on the 'Go' button.

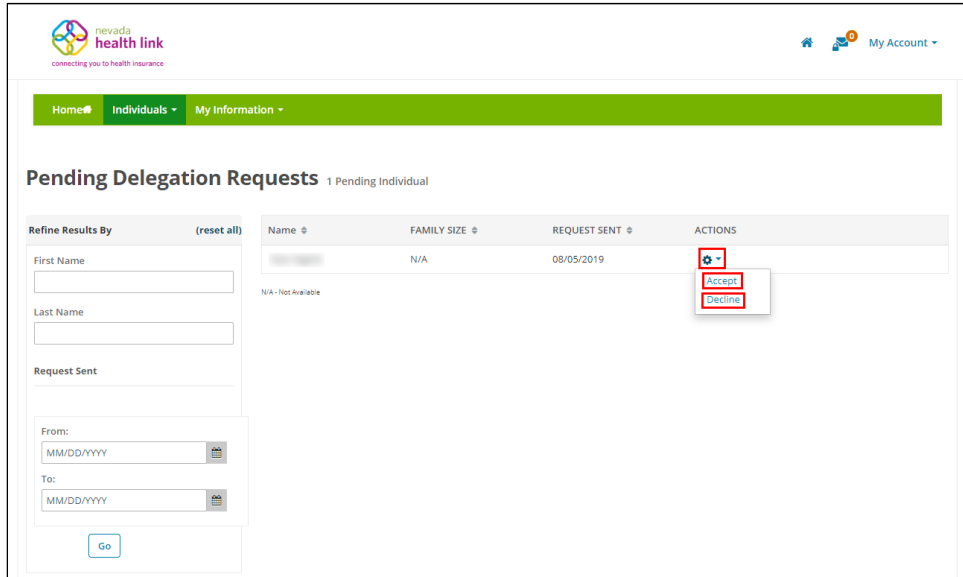


2.1.2 Accept or decline individual designation request

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

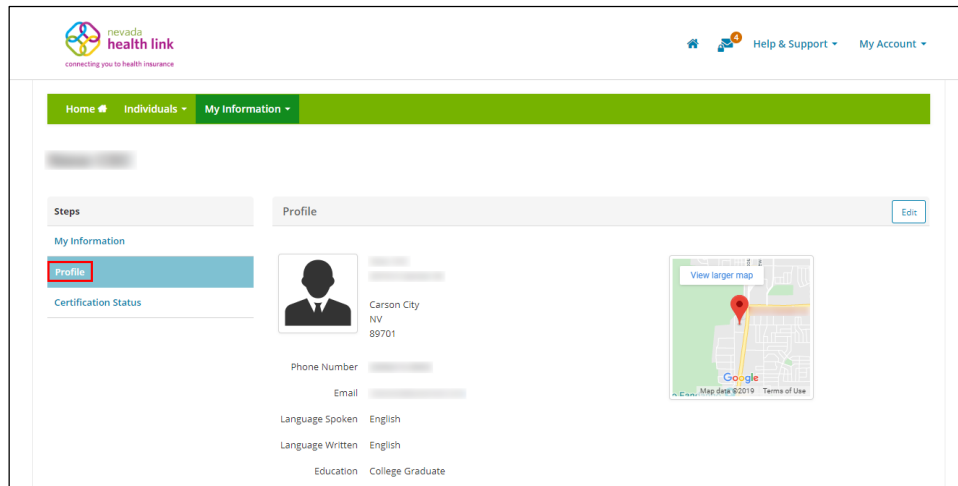


- Step-2: Click on  and click on 'Accept' to accept an individual's delegation request or click on 'Decline' to decline the request.



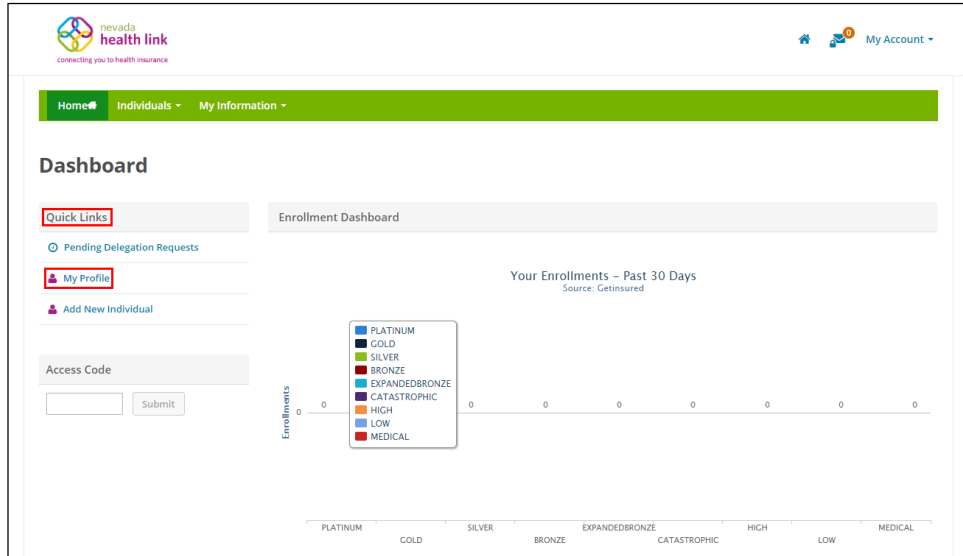
2.2 My Profile

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

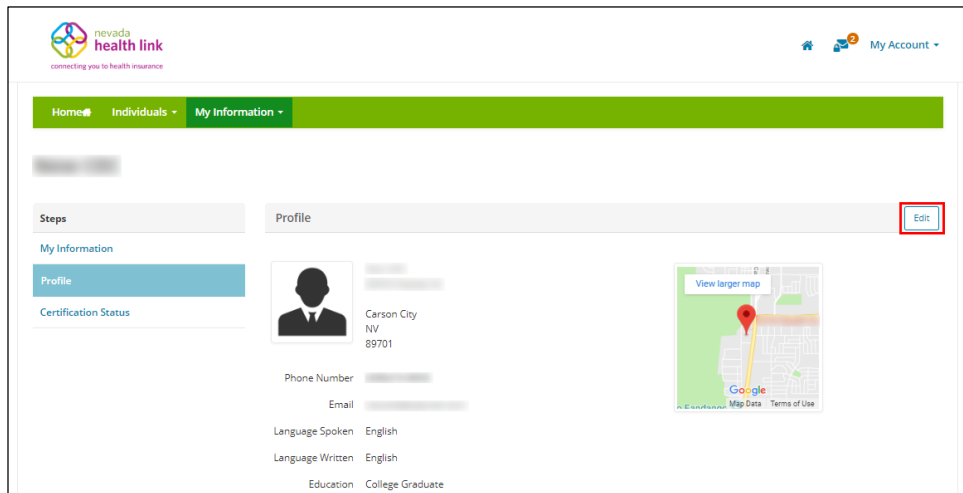


2.2.1 Add or update Certified Enrollment Counselor profile photo

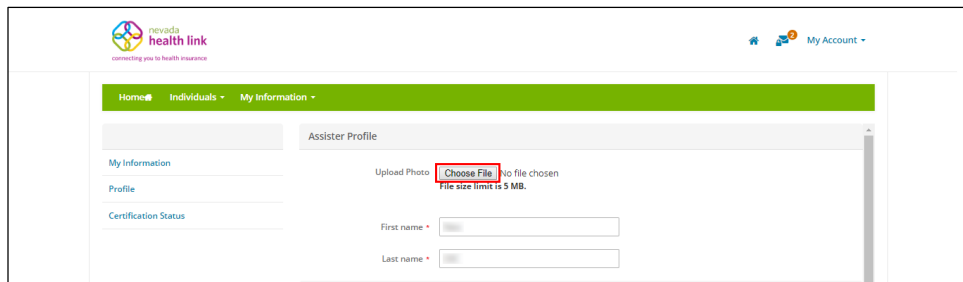
- Step-1: Go to ‘Home Page’ and click on ‘My Profile’ tab under “Quick Links” section.



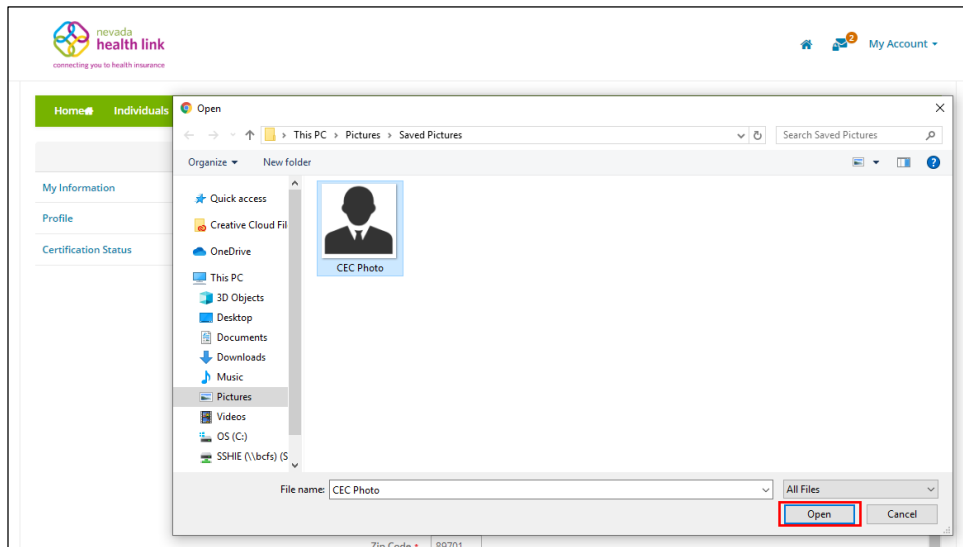
- Step-2: Click on the 'Edit' button.



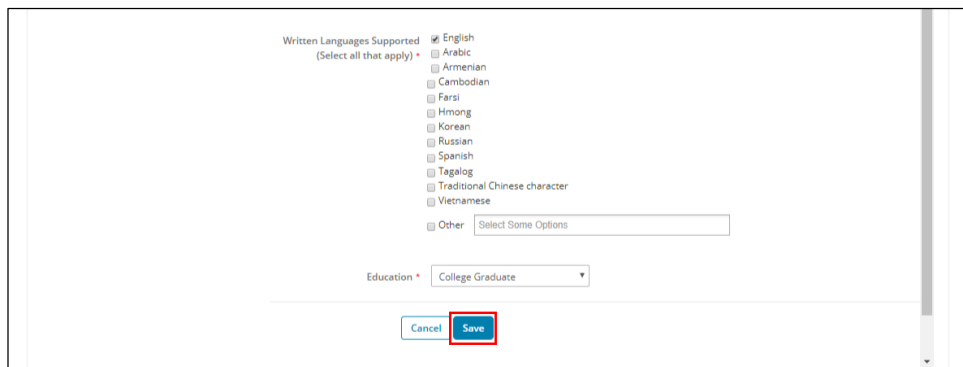
- Step-3: Click on 'Choose File'.



- Step-4: A file browser opens. Navigate to the file on your computer of the photo that you wish to use and double click on the photo or select it and click on the 'Open' button.

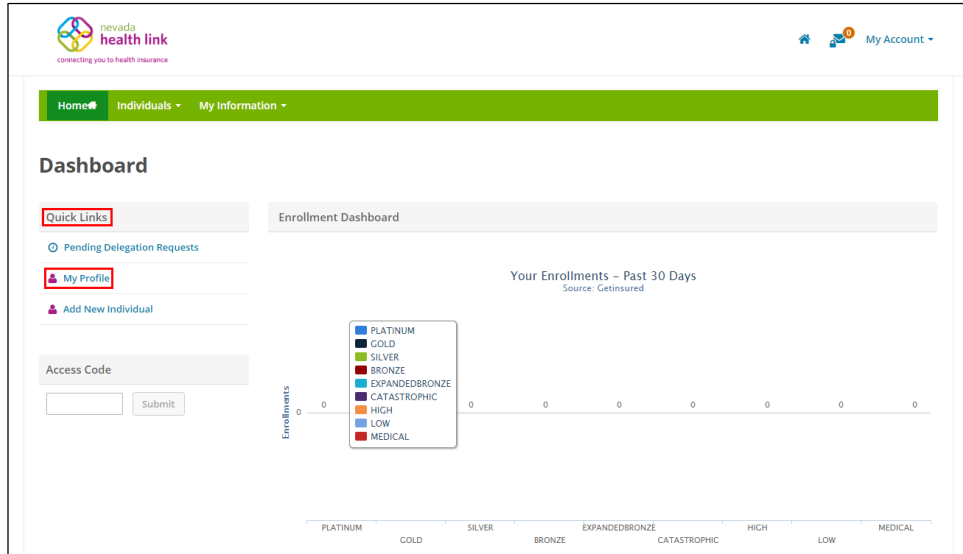


- Step-4: Click on the 'Save' button.

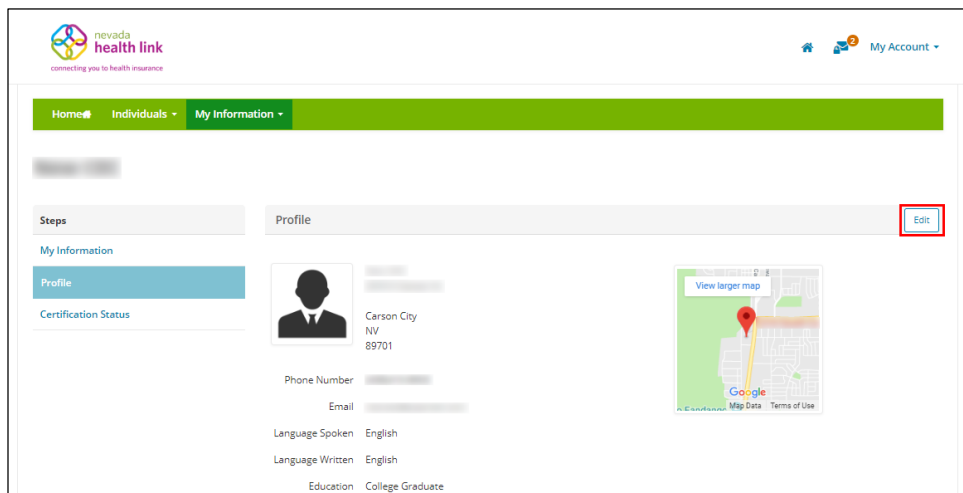


2.2.2 Add or update Certified Enrollment Counselor profile information

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



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



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

Mailing Address

Street Address *

Suite

City *

State * ▼

Zip Code *

Phone number *

Email *

Spoken Languages Supported
(Select all that apply) *

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

Written Languages Supported
(Select all that apply) *

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

Education * ▼

2.3 Add New Individual

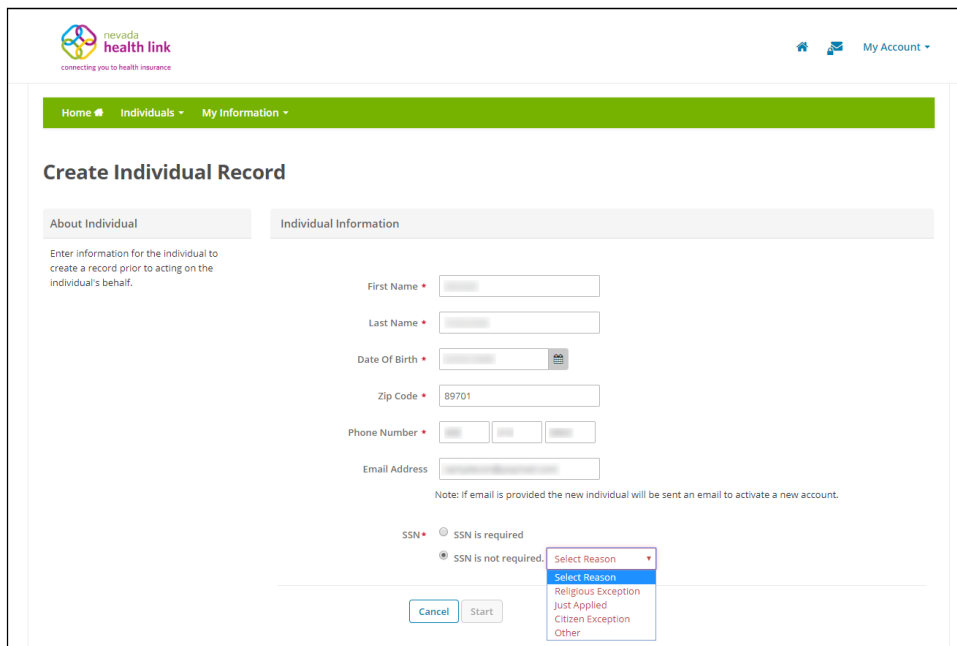
The CEC can create a new consumer account on behalf of a consumer through the Add New Individual section. Once the new consumer is added, the CEC can act as proxy to the consumer account and perform activities on behalf of them. (To learn how to be a proxy to an individual account and further steps,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

- Step-1: Go to 'Home Page' and click on 'Add New Individual' tab under "Quick Links" section.

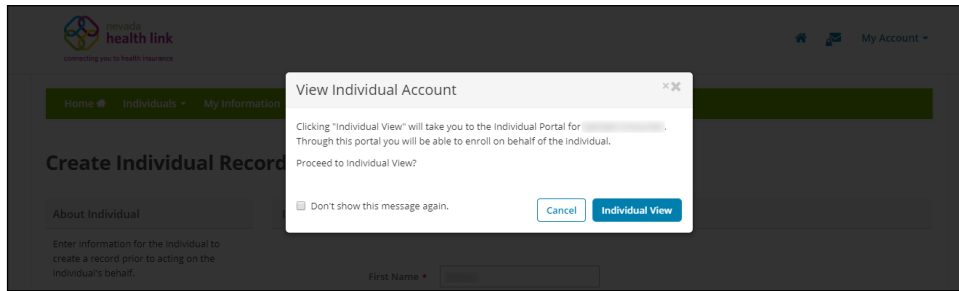


- Step-2: Enter new consumer’s information (e.g., “First Name” or “Email Address”) and click on the ‘Start’ button.

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



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



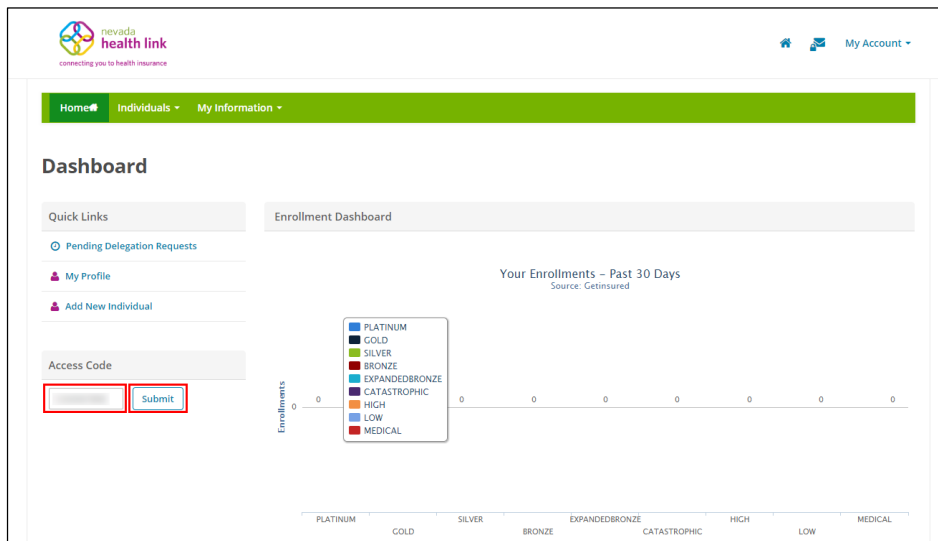
For detailed information on how to act as a proxy to an individual account please refer to Section 3.2.2.5.

2.4 Access Code

The Access Code section helps the CECs to create or claim a migrated consumer user account on the Nevada Health Link SBE platform. Consumers whose accounts were migrated from HealthCare.gov to Nevada Health Link or the Division of Welfare and Supportive Services (DWSS) will receive an access code to claim their migrated account. Once an individual receives the Access Code from one of these agencies the CECs may use this code to claim and be a proxy to their account.

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

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



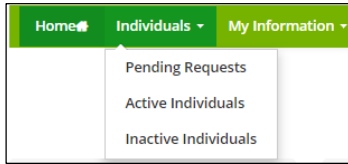
- Step-2: Enter consumer information (e.g., “First Name” or “Date of Birth”) to confirm their identity and click on the ‘Submit’ button.

- Step-3: Click on the ‘Continue’ button.

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

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

3. Individuals



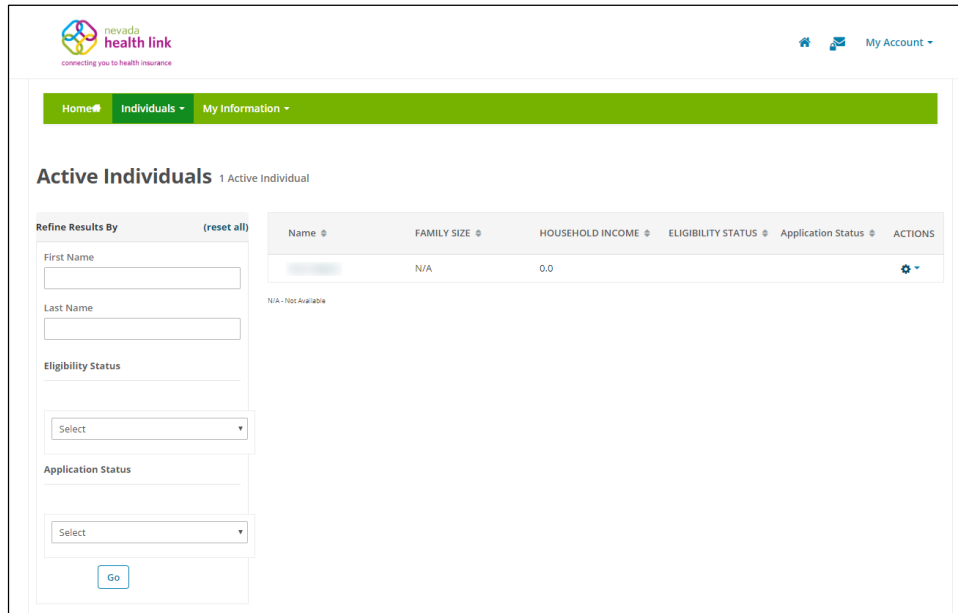
3.1 Pending Requests (New Designation Requests)

For detailed information on Pending Requests please refer to Section 2.1.

3.2 Active Individuals (Existing Designations)

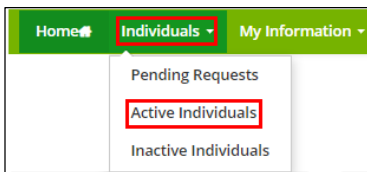
An Active Individuals page displays a complete list of individuals assigned to the CEC. The individuals' list displays their name, family size, household income, eligibility status, application status and an action button that assists a CEC in performing actions on an individual account.

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

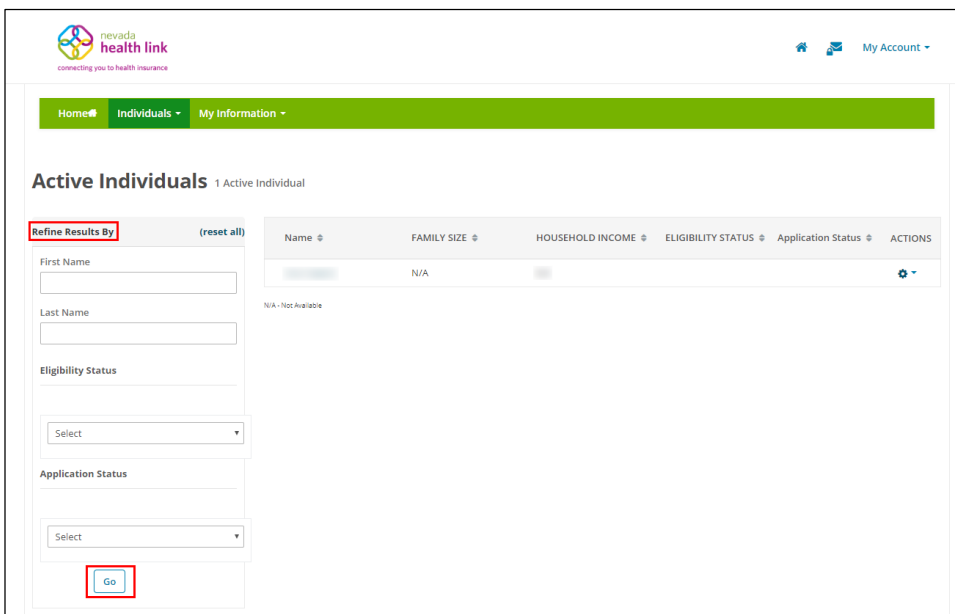


3.2.1 View and search for active individuals

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



- Step-2: Enter individual's first name in the 'First Name' field or last name in the 'Last Name' field or select individual eligibility status (e.g., "Pending" or "Conditional") from the 'Eligibility Status' drop-down list or select individual application status (e.g., "Open" or "Submitted") from the 'Application Status' drop-down list and click on the 'Go' button.



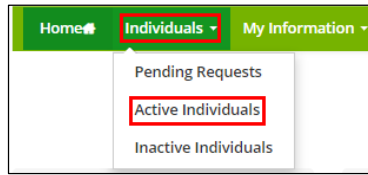
3.2.2 Perform actions on designated consumer account

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

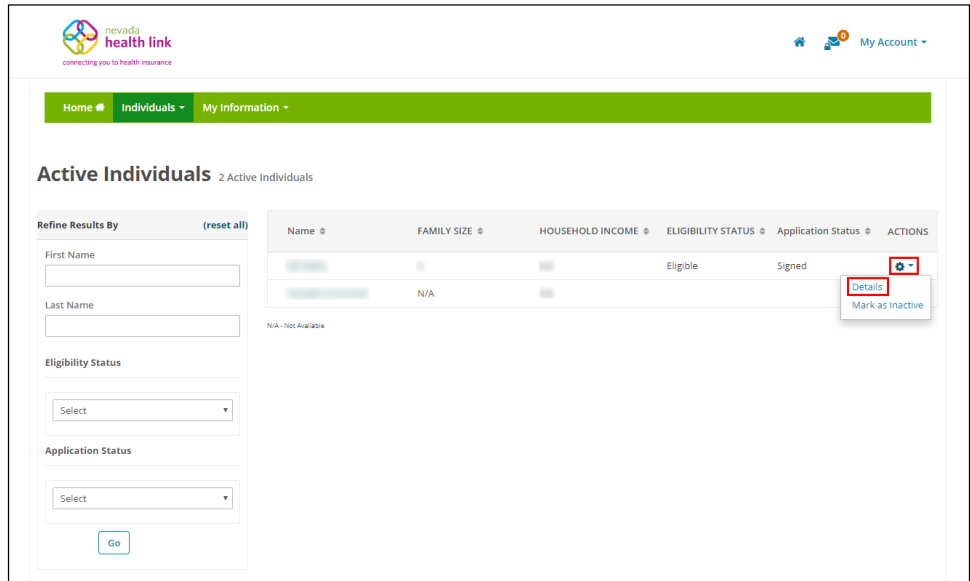
3.2.2.1 Update individual summary

PLEASE NOTE: CECs can edit individual each summary only for the individuals who have not yet completed their sign-up process.

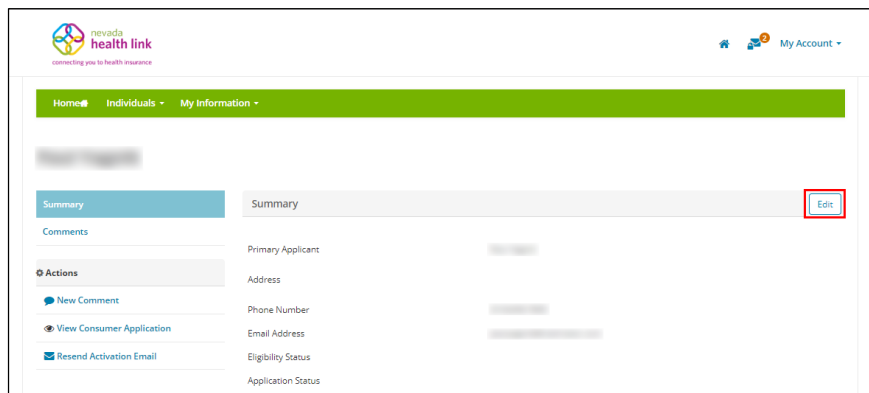
- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.



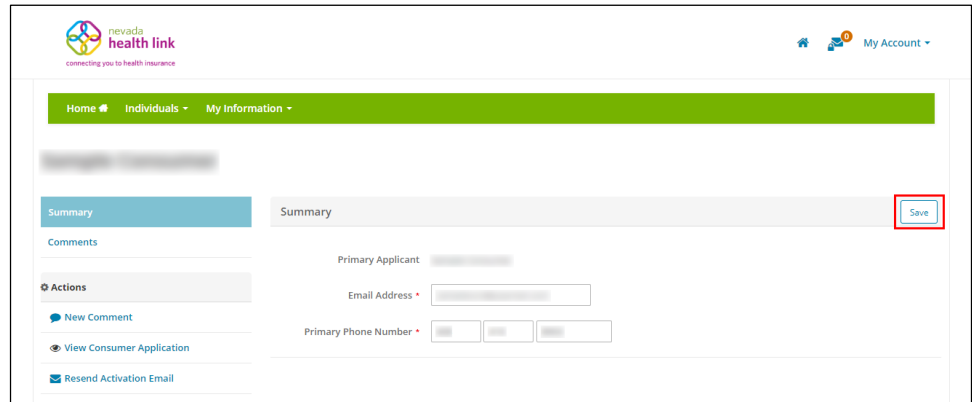
- Step-2: Click on the  button and click on 'Details'.



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

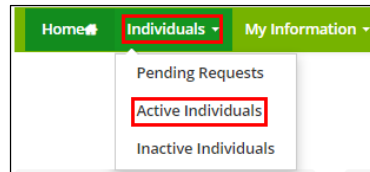


- Step-4: Enter the individual information and click on the 'Save' button.

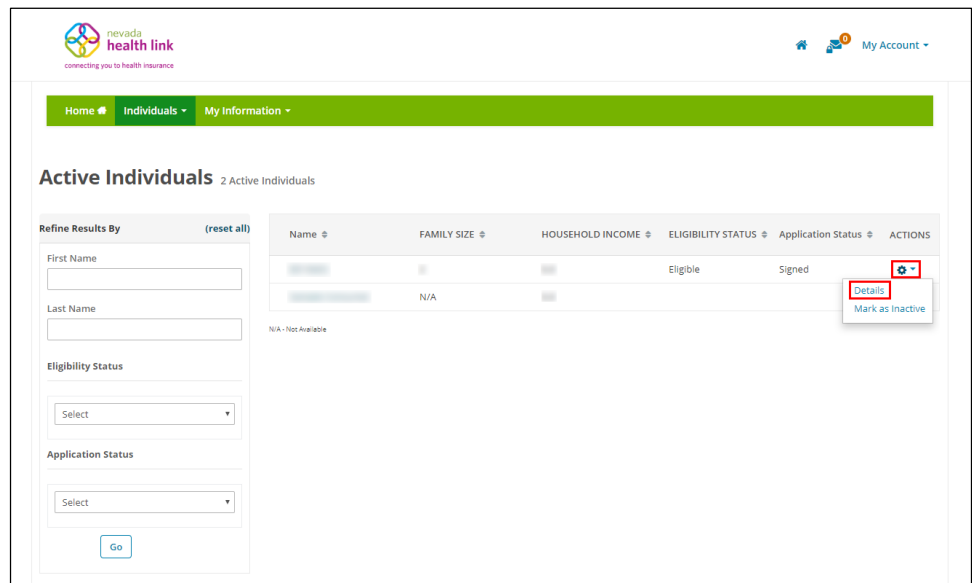


3.2.2.2 Provide comments on individual profile

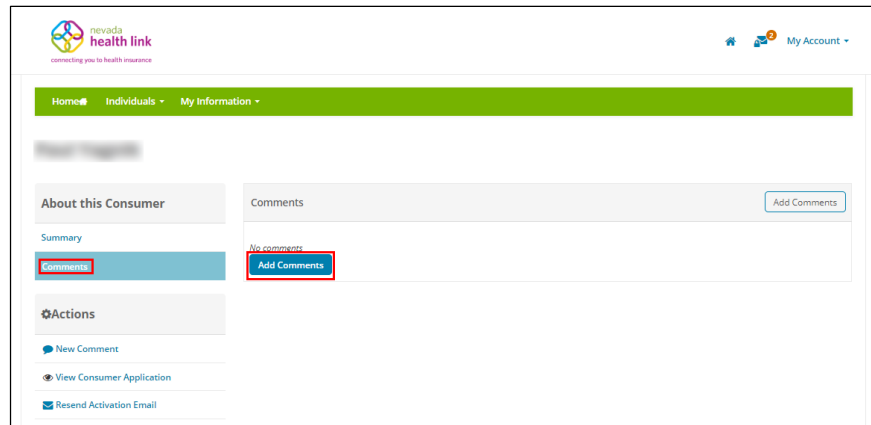
- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.



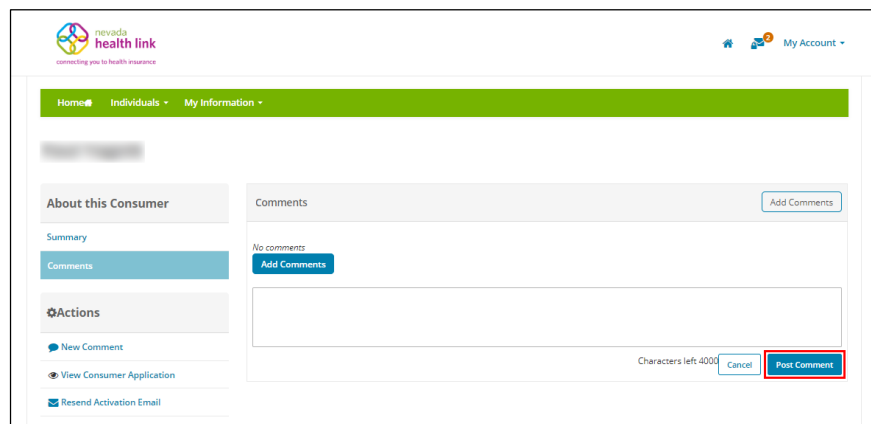
- Step-2: Click on the  button and click on 'Details'.



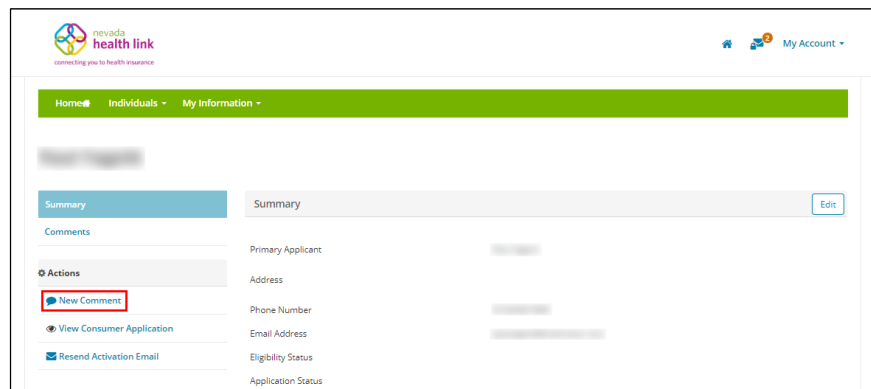
- Step-3: Go to “Comments” section and click on the ‘Add Comments’ button.



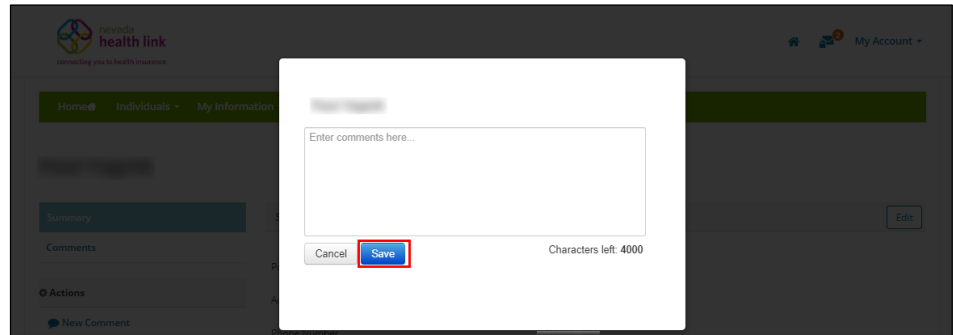
- Step-4: Provide comments in the text area and click on the ‘Post Comment’ button.



- Step-5 (Another way): Perform Step-1 and Step-2 from Section 3.2.2.2 and go to “Actions” section and click on the ‘New Comment’ button.

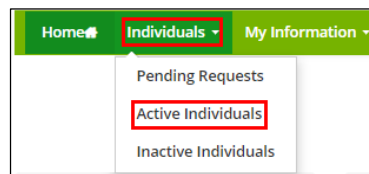


- Step-6 (Another way): A pop-up screen will appear. Enter comments in the text area and click on the 'Save' button.

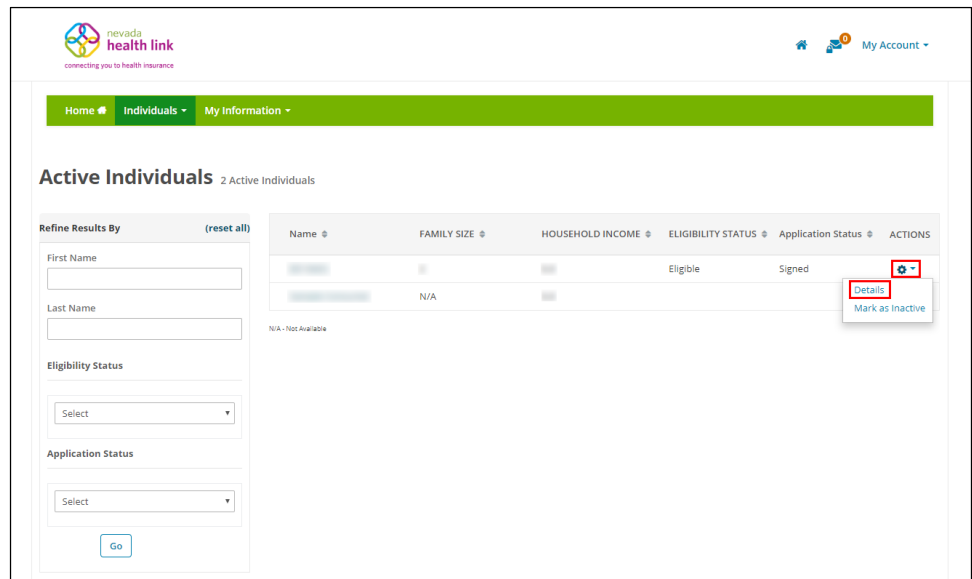



3.2.2.3 Update comments on individual profile

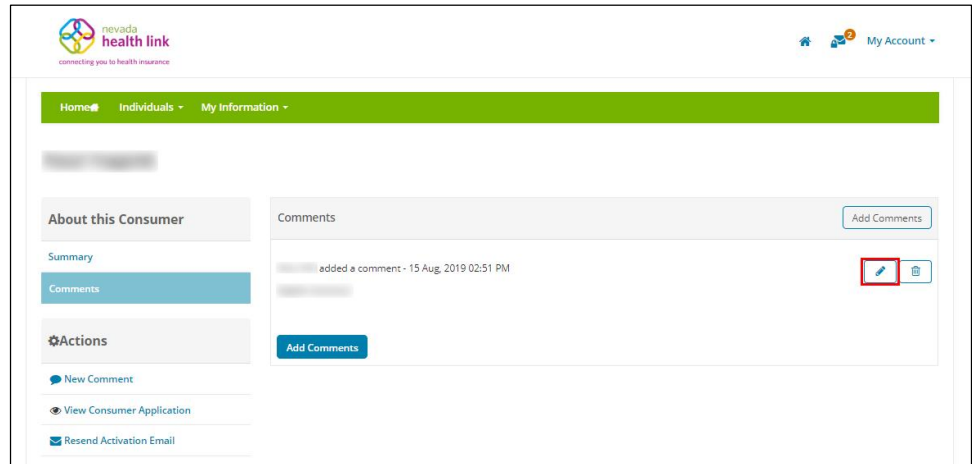
- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.



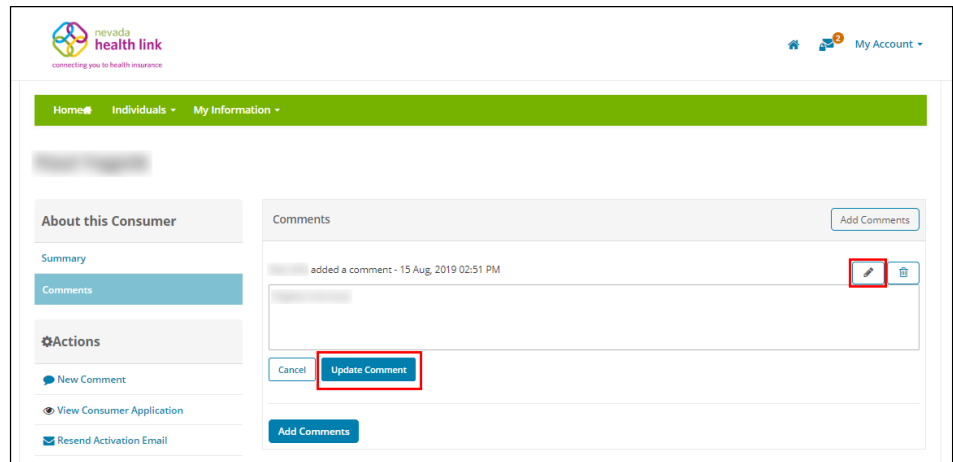
- Step-2: Click on the  button and click on 'Details'.



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

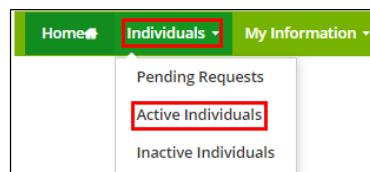


- Step-5: Enter the updated comment in the text area and click on the ‘Update Comment’ button.

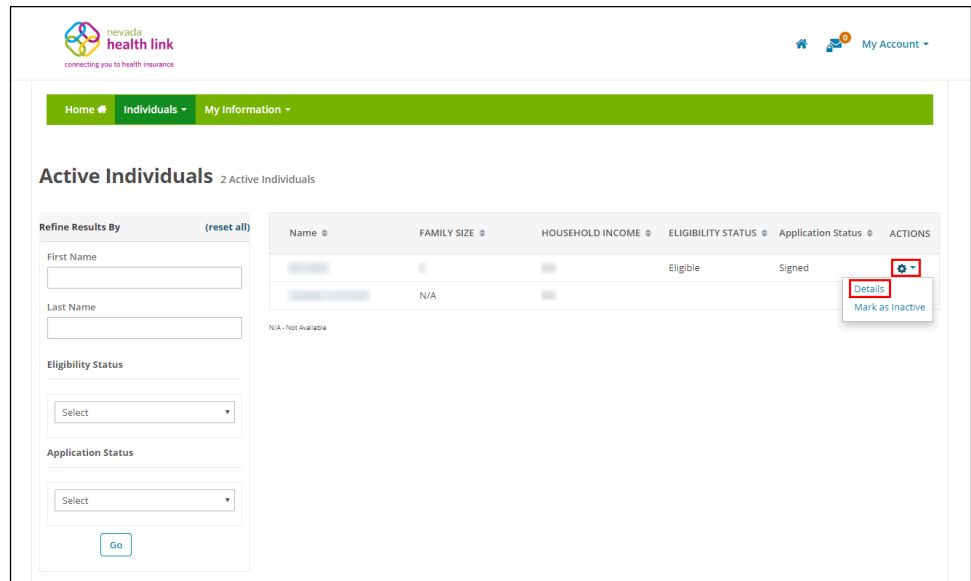



3.2.2.4 Delete a comment on individual profile

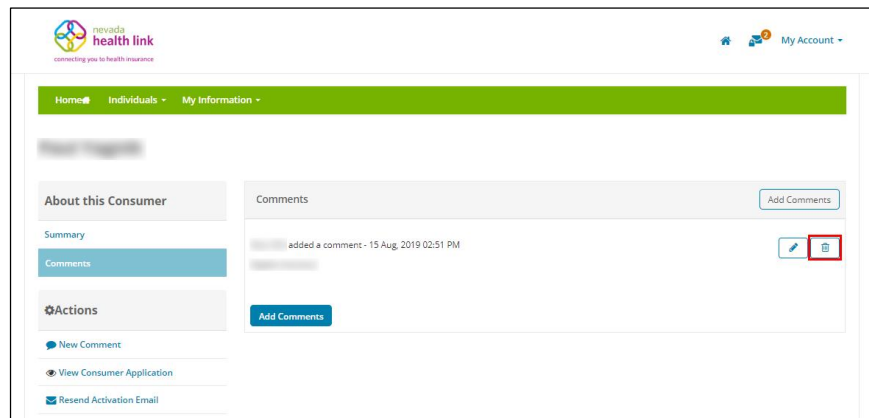
- Step-1: Click on ‘Individuals’ tab and select ‘Active Individuals’.



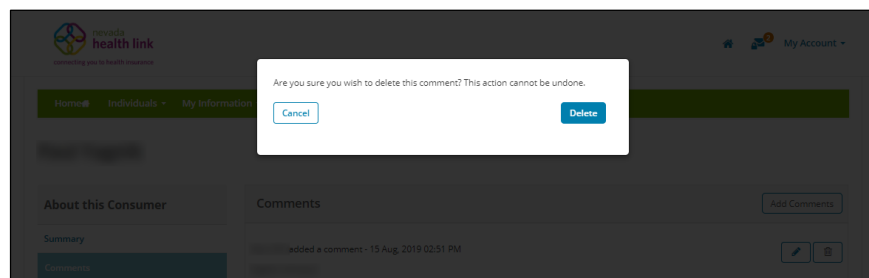
- Step-2: Click on the  button and click on 'Details'.



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



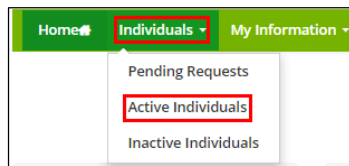
- Step-4: A pop-up box will appear. Click on 'Delete' to delete the comment or click on 'Cancel' to cancel this process.



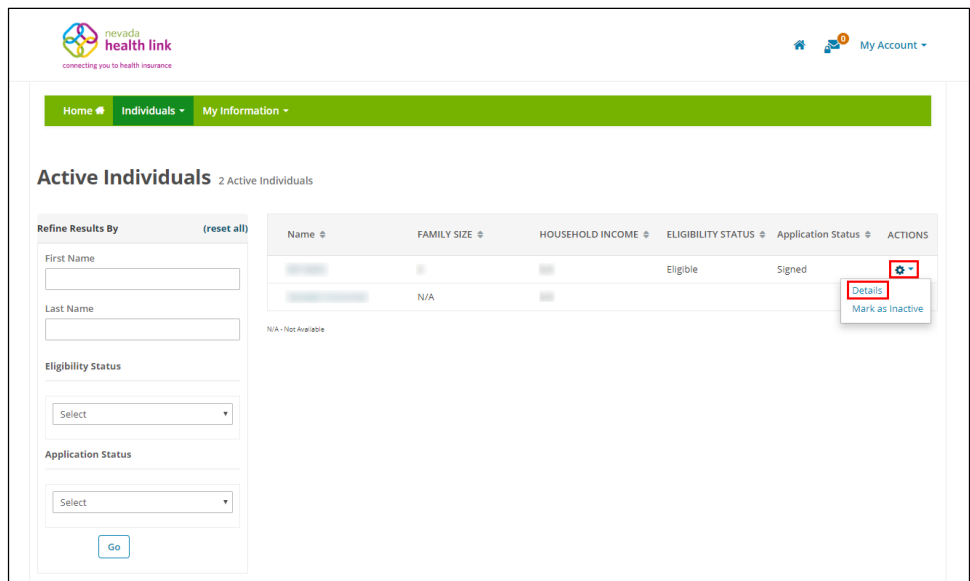
3.2.2.5 View consumer application

The CECs can view an Individual consumer’s account and can perform actions on behalf of them. They can perform actions such as report qualifying life events, shop for new health and dental plans, start a new individual application, view application status, view household eligibility, view current health and dental plans, view current and past enrollments, check inbox messages, update communication preferences, use find local assistance tool, view CEC profile, and de-designate a CEC.

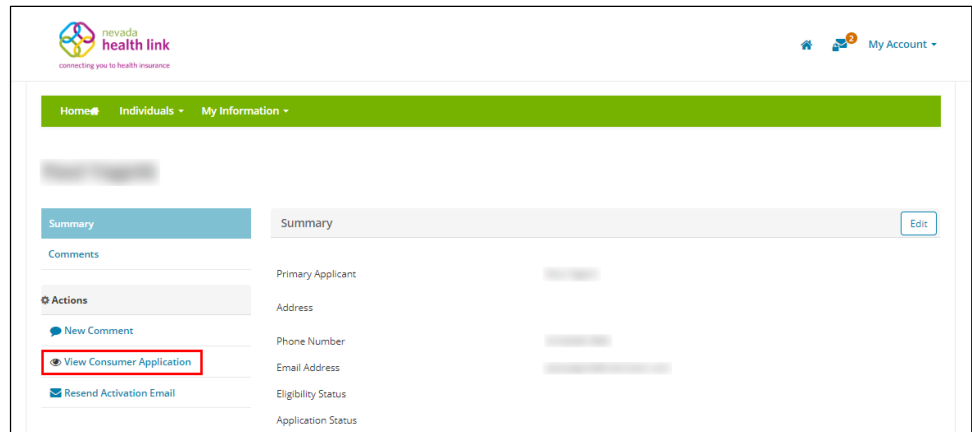
- Step-1: Click on ‘Individuals’ tab and select ‘Active Individuals’.



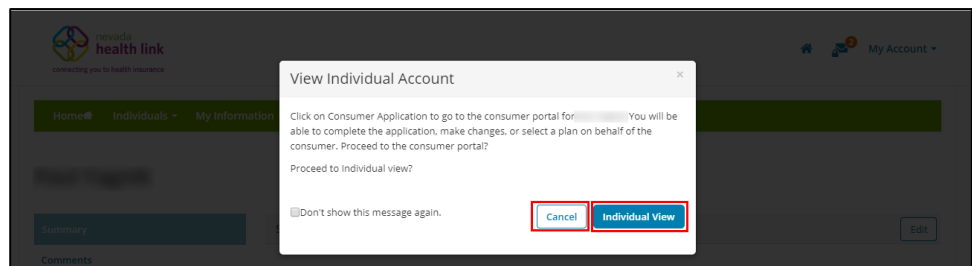
- Step-2: Click on the  button and click on ‘Details’.



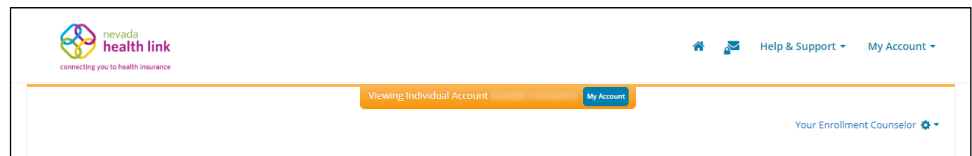
- Step-3: Go to “Actions” section and click on ‘View Consumer Application’.



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



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

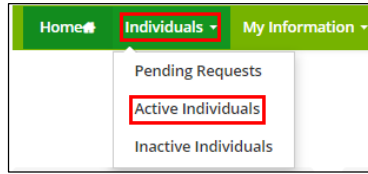


For detailed information on how to perform actions on behalf of the consumer, please visit <https://www.nevadahealthlink.com/consumer-transition/> and refer to the Application and Enrollment Guide.

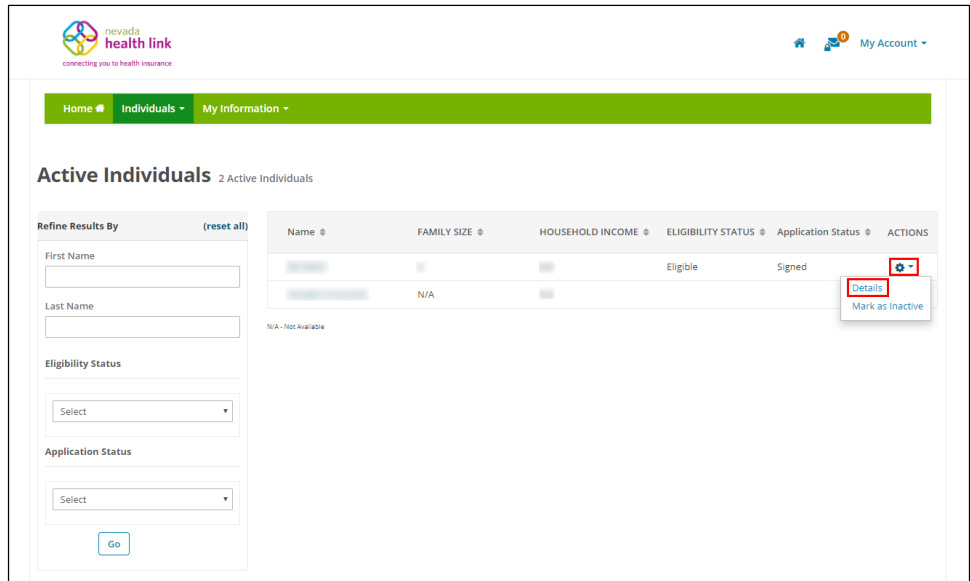
3.2.2.6 Resend activation email

PLEASE NOTE: The Resend Activation Email feature is only available for consumers who have not completed the sign-up process. This step will allow CECs to edit the individual email address and phone number before resending the activation link.

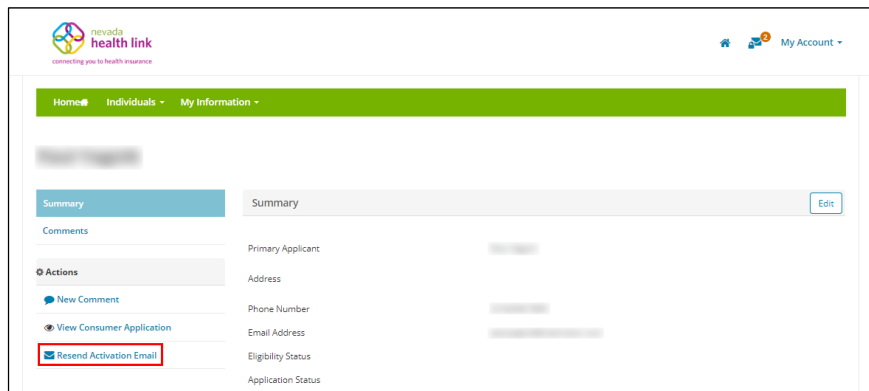
- Step-1: Click on 'Individuals' tab and select 'Active Individuals'.



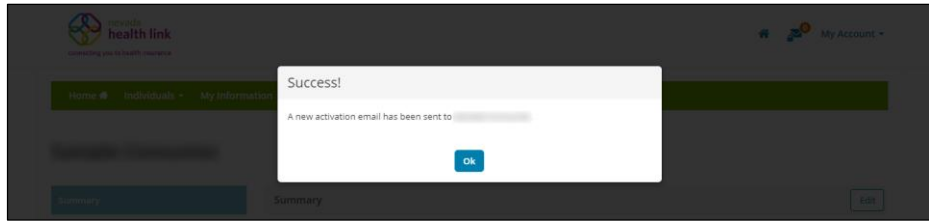
- Step-2: Click on the  button and click on 'Details'.



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



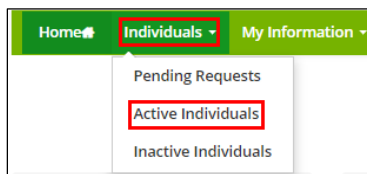
- Step-5: A pop-up screen will appear with a 'Success!' message.



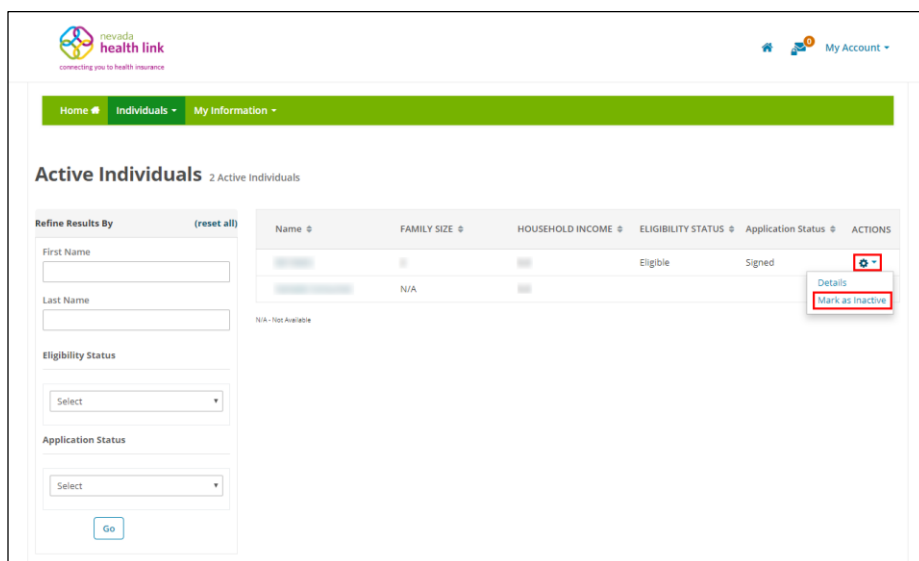
3.2.3 Mark an individual as inactive

PLEASE NOTE: This action cannot be undone. If an individual is marked as inactive, then it will terminate the existing relationship between the CEC and Consumer. The marked inactive individual will be listed in the “Inactive Individuals” section. For detailed information on how a consumer designates a CEC, please visit <https://www.nevadahealthlink.com/consumer-transition/> and refer to the Application and Enrollment Guide.

- Step-1: Click on ‘Individuals’ tab and select ‘Active Individuals’.

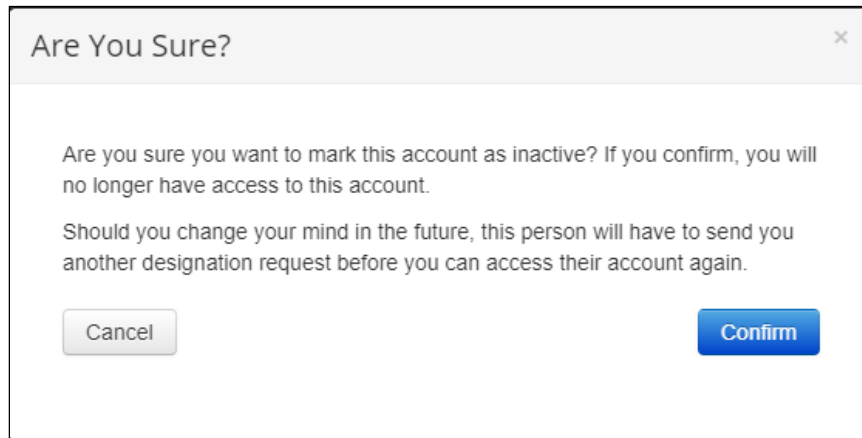


- Step-2: Click on the  button and click on ‘Mark as Inactive’.



- 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 designation request to you to perform actions on behalf of them.



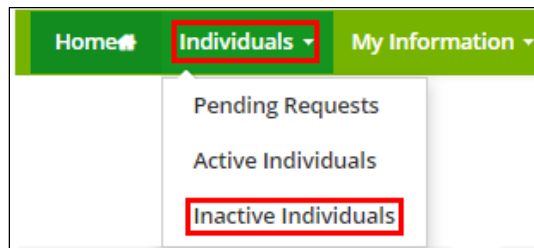
3.3 Inactive Individuals (Undesignated Consumers)

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

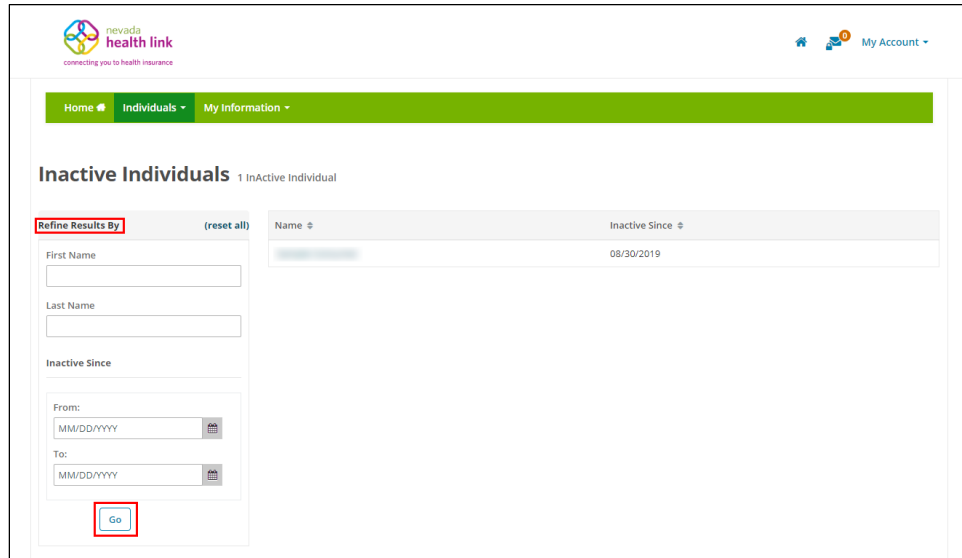
The CECs can view and search for the list of inactive individuals filtered by their First name, Last name, and an Inactive date range.

3.3.1 View and search for Inactive Individuals

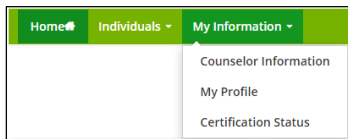
- Step-1: Click on the 'Individuals' tab and select 'Inactive Individuals'.



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



4. My Information

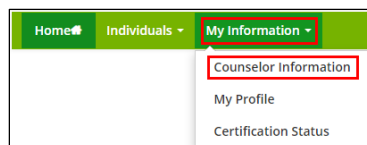


4.1 Counselor Information

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

4.1.1 Add or update Certified Enrollment Counselor information

- Step-1: Click on ‘My Information’ tab and select ‘Counselor Information’.



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

The screenshot shows the Nevada Health Link user interface. At the top left is the logo with the text "nevada health link" and "connecting you to health insurance". At the top right is a "My Account" link with a notification icon. Below the logo is a navigation bar with "Home", "Individuals", and "My Information" (selected). The main content area is titled "Certified Enrollment Counselor Information" and contains several sections:

- Steps:** A sidebar menu with "My Information" selected.
- Profile:** A section with "Certification Status" as a sub-section.
- Certified Enrollment Counselor Information:** A form with fields for:
 - 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 Certified Enrollment Counselor Site
 - Secondary Certified Enrollment Counselor Site
- Mailing Address:** A form with fields for:
 - Street Address 1
 - Suite
 - City (pre-filled with "Carson City")
 - State (pre-filled with "NV")
 - Zip Code (pre-filled with "89701")
- Profile Information:** A form with fields for:
 - Spoken Languages Supported (pre-filled with "English")
 - Written Languages Supported (pre-filled with "English")
 - Education (pre-filled with "College Graduate")
 - Photo (pre-filled with a silhouette icon)

An "Edit" button is located at the top right of the "Certified Enrollment Counselor Information" section, highlighted with a red box.

- 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.

nevada health link
connecting you to health resources

Home Individuals My Information

Steps

My Information
Profile
Certification Status

Certified Enrollment Counselor Information

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

4.2 Profile

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

4.3 Certification Status

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

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

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

Pending

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

Certified

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

Denied

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

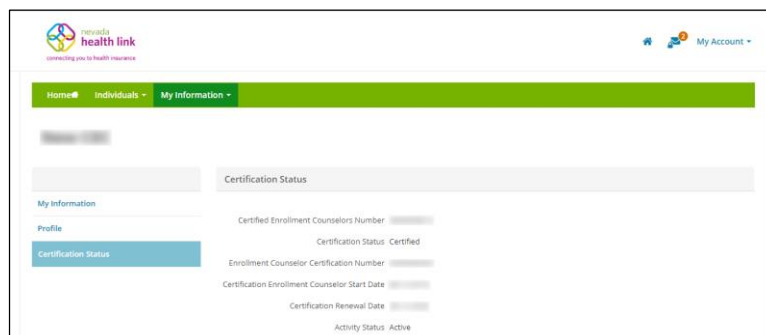
There are two Activity Status for the CECs, which is described below:

Active

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

Inactive

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



Document Revision History

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