

State of Nevada

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



Nevada Health Link State Based Exchange Platform

Agent Onboarding Guide

August 22, 2019

Version 1.1

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1. Overview

This document is intended to assist Agents and Brokers (referred to hereafter as “Agents”) with gaining access to the Nevada Health Link State Based Exchange (SBE) Platform. Access to the SBE Platform is required in order to assist Nevada consumers with Applications and Enrollments in Qualified Health and Dental Plans under the Affordable Care Act (ACA).

Before an Agent will be granted access to the SBE Platform he or she must have completed the Silver State Health Insurance Exchange’s (SSHIX’s) annual Agent/Broker Certification curriculum. If you have not already been enrolled in this curriculum please contact Rebecca Lomazzo, SSHIX Broker Liaison, at rlomazzo@exchange.nv.gov.

2. Account Registration and Public Profile

This section explains the steps required for Agents to create their new Agent account, complete the account registration process, and set up their public profile. The public profile allows Agents to be listed in Nevada Health Link’s “Find Local Assistance” directory tool, which is used by consumers to locate Agents, Brokers, and Navigators in their area.

2.1 Create a new Agent account

- Step-1: From the final module of the Training and Certification curriculum, click on the self-service account creation link for the SBE Platform. If you have not already been enrolled in the curriculum—or if you have completed the curriculum, but you were unable to use the self-service account creation link—please contact Rebecca Lomazzo, SSHIX Broker Liaison, at rlomazzo@exchange.nv.gov.

- Step-2: Enter the basic information, set up a security question (this is required if you need to request a password reset), and create a password. Click on the box next to *I have read and agree to the Privacy Policy*, and click the “Submit” button.

New Agent Account Set-Up

All fields on this form marked with an asterisk (*) are required.

Basic Information

First Name *

Last Name *

Email Address *

Confirm Email Address *

Phone Number *

Security Question

Security Question *

Set Password

Password *

Confirm Password *

I have read and agree to the [Privacy Policy](#)

2.2 New Agent Account Registration

This section is divided into two parts, Agent Information and Profile.

2.2.1 Agent Information

- Step-1: Enter the Agent information, Business address and Correspondence address and click on the “Next” button.

The screenshot shows the 'New Agent Registration' form on the Nevada Health Link website. The form is divided into three main sections: 'Agent Information', 'Business Address', and 'Correspondence Address'. The 'Agent Information' section includes fields for First Name, Last Name, Nevada Agent License Number (with a note '(Not your NPN)'), Agent NPN, License Renewal Date (with a calendar icon), Primary contact number, Business Contact Phone Number, Alternate Phone Number, Fax Number, Preferred Method of Communication (set to 'Email Address'), Business Name, and Federal Employer Identification Number (EIN) (with a link 'What if I dont have an EIN?'). The 'Business Address' section includes fields for Address line 1, Address line 2 (Apt, Suite, Unit, Bldg, Floor, etc), City, State (set to 'Nevada'), and Zip code. The 'Correspondence Address' section has a checkbox for 'Same as business address' (checked) and fields for Address line 1, Address line 2, City, State (set to 'Nevada'), and Zip code. A 'NEXT' button is located at the bottom of the form.

2.2.2 Profile

This information is displayed to consumers who use Nevada Health Link's "Find Local Assistance" directory tool.

PLEASE NOTE: Agents who do not select "Individuals/Families" in the *Clients Served* section will not appear in the directory.

- Step-1: Enter all of the languages that you support in the "Languages" field. Start by typing the name of each language (e.g., "English"), and then the page suggests an option for you to choose based upon the languages available in the Platform's database. Be sure to list all supported languages (including "English"), as the "Find Local Assistance" directory tool allows consumers to filter by language support.
- Step-2: Select the types of products where you can offer expertise to consumers (e.g., "Health" or "Dental").
- Step-3: Add your website, public email, and education. Please note that you can provide a different address for public use by consumers than you provided on the previous page ("Agent Information"). The email address provided with your "Profile" will be displayed to consumers using the "Find Local Assistance" directory tool; the email address provided with your "Agent Information" will be used by Nevada Health Link for business correspondence.
- Step-4: The "About Yourself" field allows you to provide a brief description of your background, experience, and expertise. You can also upload a photo. These fields are optional, but they may help capture the attention of new consumers.
- Step-5: Click on the "Finish" button.

nevada health link
connecting you to health insurance

Help & Support My Account

New Agent Registration

Steps: Agent Information, Profile

Step 2: Profile

Provide information about you and your business for your public profile. This information will be viewed by Nevada Health Link users looking for agents on exchange. The more information you provide, the more they're likely to contact you.

Clients Served Individuals / Families

Languages

Product Expertise Health
 Dental
 Vision
 Life
 Medicare
 Medicaid
 CHIP
 Workers Compensation
 Property/Casualty

Your Website Address

Your Public Email

Education

About Yourself

Upload Photo No file chosen
 You can upload a JPG, GIF or PNG file (File size limit is 5 MB).

3. Certification Status

Initially, the Agent account provides limited functionality, consisting only of the Agent Information, Agent Profile, and Agent Certification Status screens. The default status of a new Agent accounts is “Pending”:

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Help & Support My Account

Certification Status

Steps: Agent Information, Profile, Certification Status

Agent Number

Application Submission Date

Certification Status Pending

Certification Number

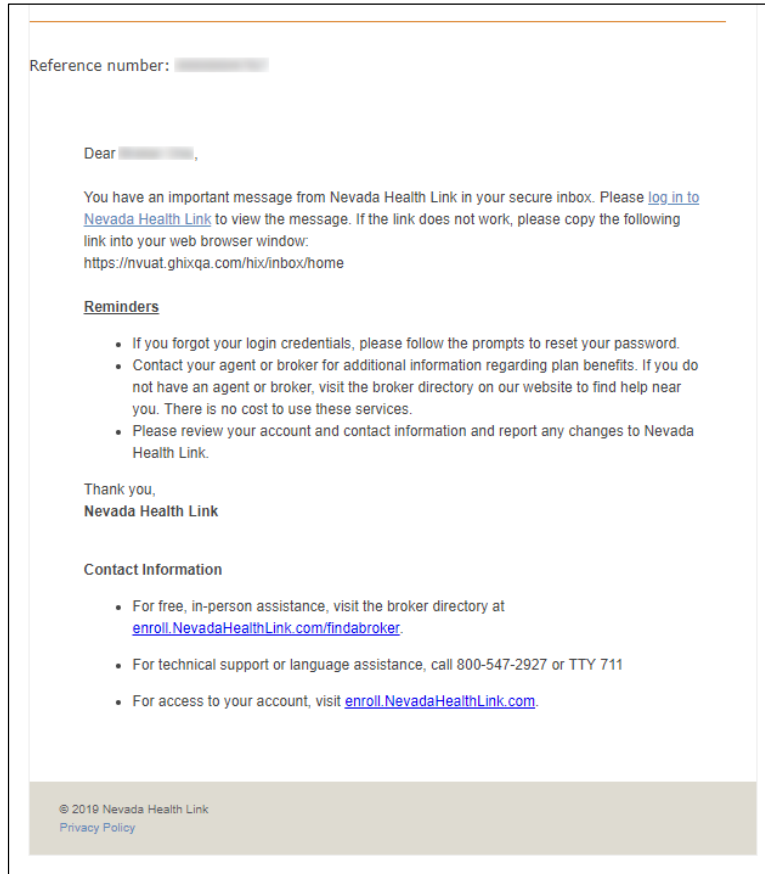
Certification Date

Renewal Date

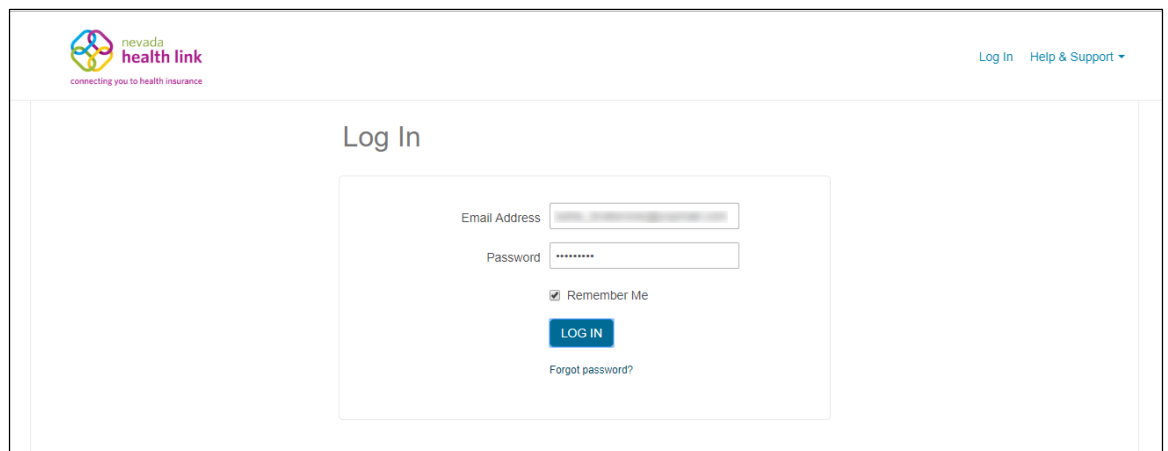
Agents can access the full functionality offered by the SBE Platform only after the SSHIX Broker Liaison verifies their current licensure status with the Nevada Division of Insurance, verifies completion of the annual certification curriculum, and updates Agent’s status in the Platform to “Certified”.


3.1 Notification of “Certified” Status

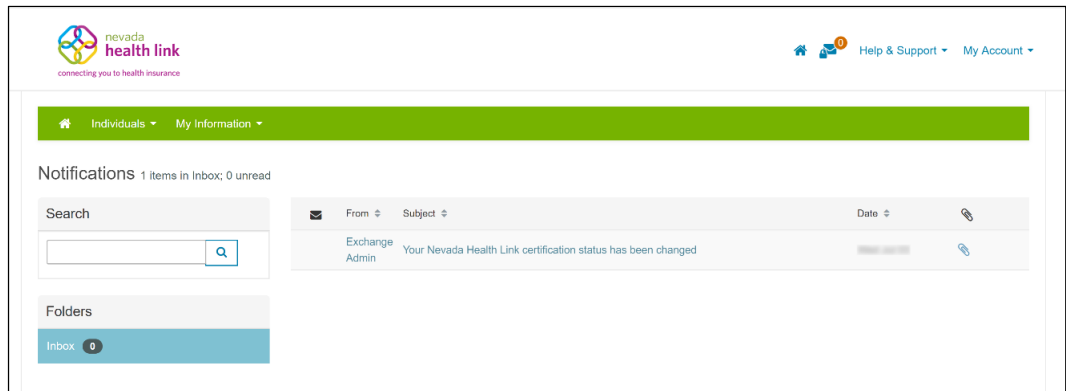
- Step-1: When the Agent’s status gets updated to “Certified”, they receive a notification via email. Open the new email received from noreply@exchange.nv.gov on the Agent’s email account and click on “login to Nevada Health Link” link. If the link does not work, copy and paste that link into a new web browser window.



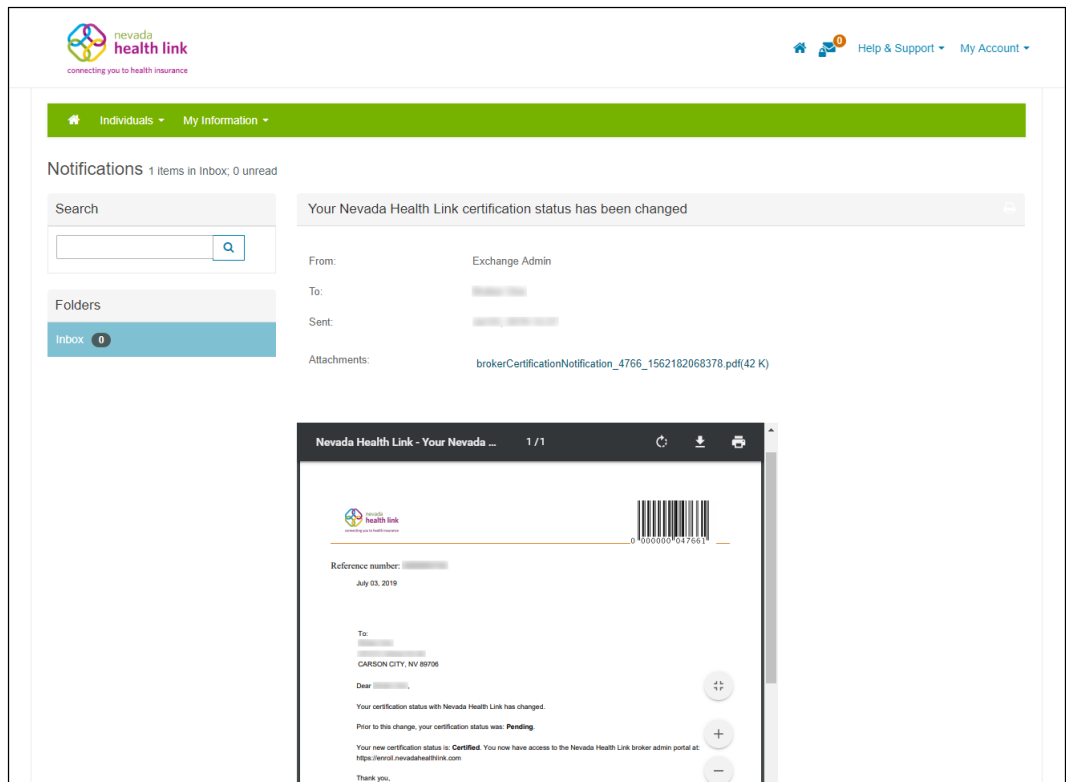
- Step-2: Enter login credentials and click on the “Log in” button.



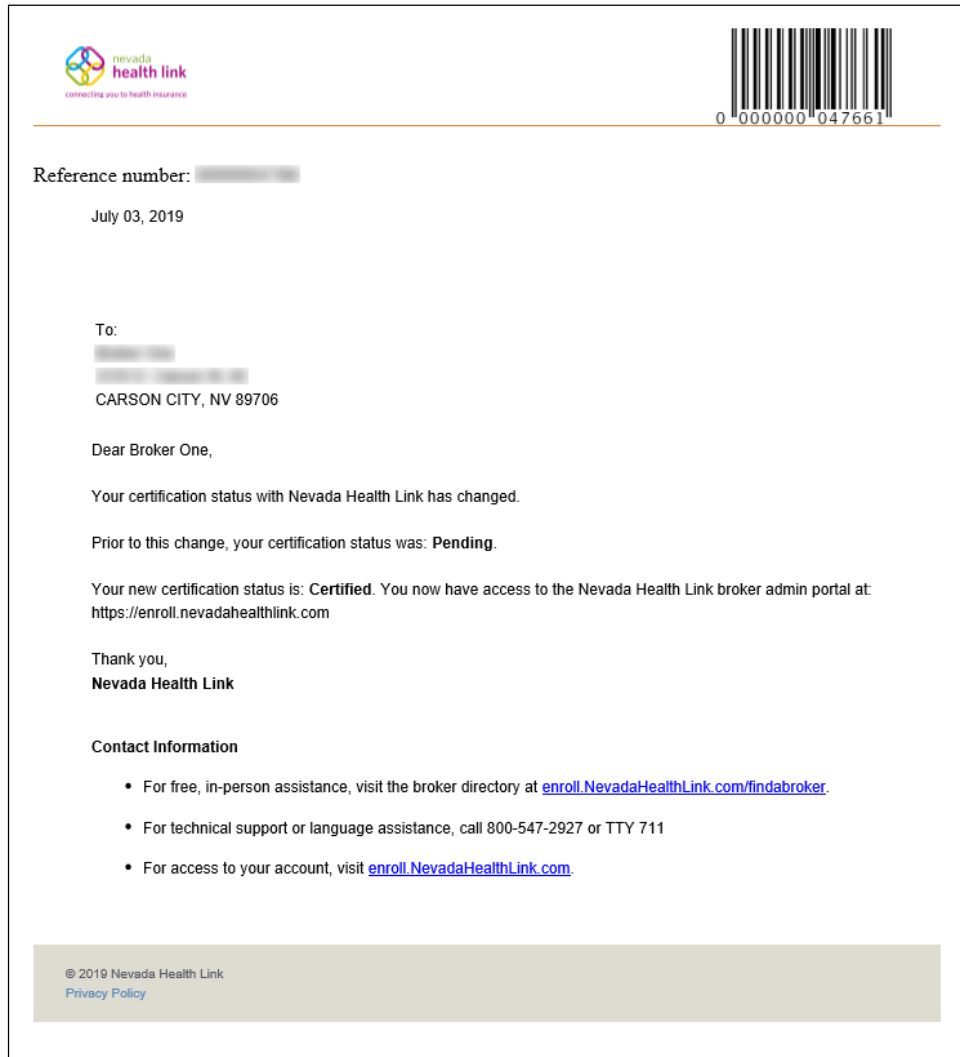
- Step-3: Click on the  icon and open the message from Exchange Admin in your Secure Inbox (for more information regarding the Secure Inbox please see Section 4.2).



- Step-4: Scroll down or click on the attached pdf file to check the new Certification status.



- Step-5: The following screen displays new Agent Certification Status pdf file.



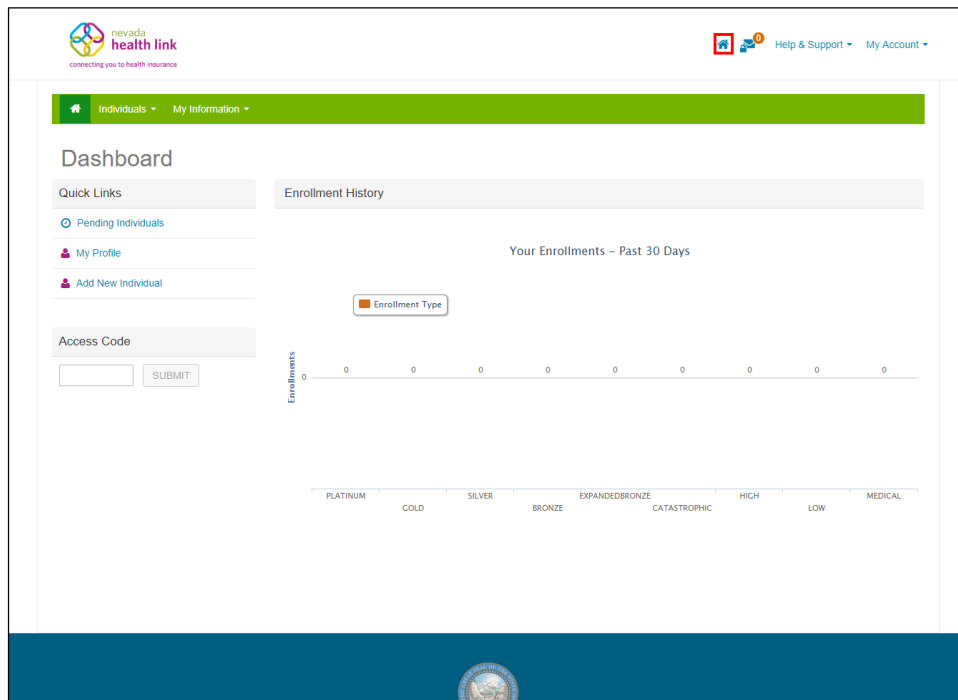
4. Agent Portal Navigation

This section describes the navigation options located on the top-right corner of the Agent portal. It contains a Home page button, Secure Inbox button, Help & Support section and My Account section:




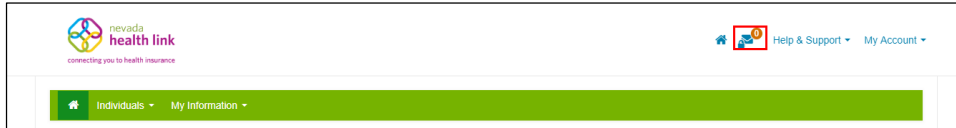
4.1 Home page

The Home page icon  redirects an agent to the home page of the Agent portal.



4.2 Secure Inbox

The Secure Inbox icon  provides a centralized location for system-generated updates or messages associated with an Agent account, some of which may require additional action from the Agent. Checking the Secure Inbox often ensures that Agents stay up to date with these notifications.



4.3 Help & Support

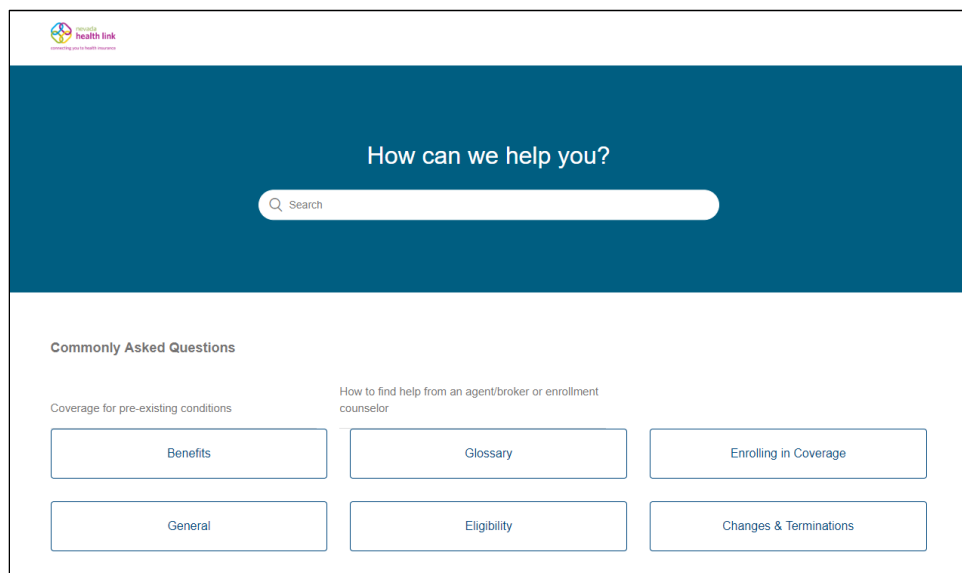
4.3.1 Frequently Asked Questions

The Frequently Asked Questions section helps in searching for common questions and answers that are asked by the Nevada Health Link users on a specific topic.

- Step-1: Click on “Help & Support” on the top-right corner and click on “Frequently Asked Questions”.



- Step-2: Search for questions in the Search box, or select an option from the “Commonly Asked Questions” tabs.



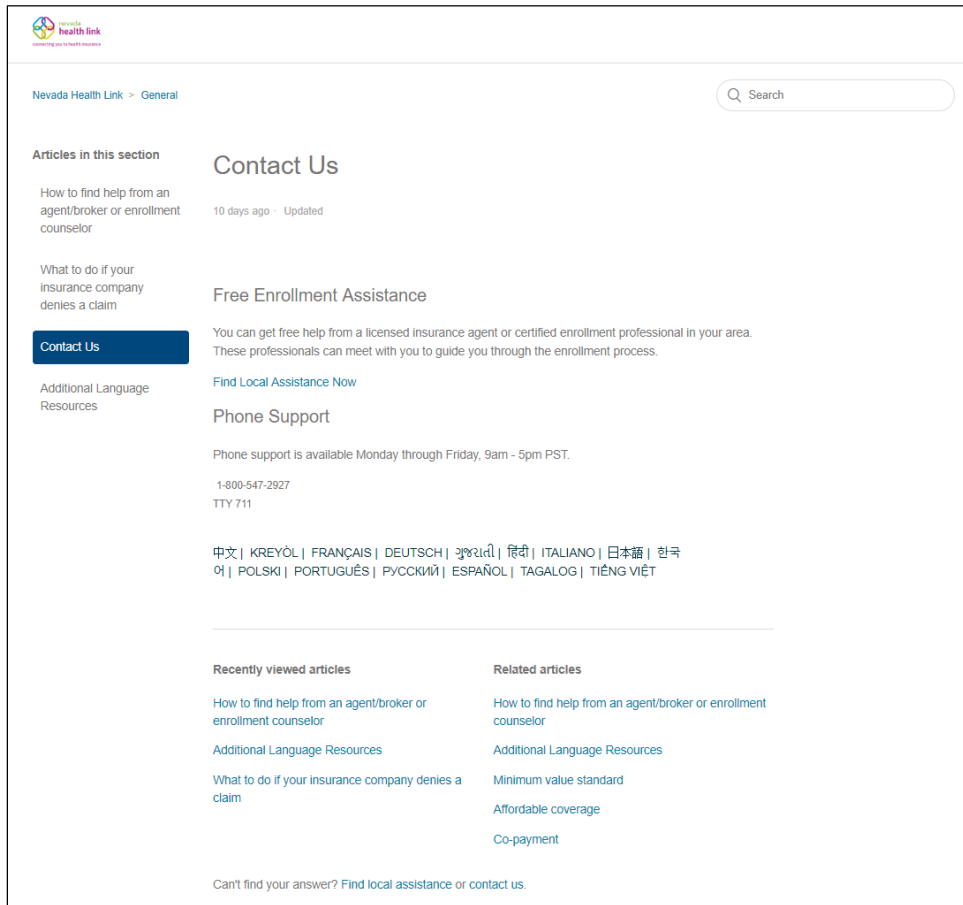
4.3.2 Contact Us

The Contact Us section provides Nevada Health Link contact information.

- Step-1: Click on “Help & Support” on the top-right corner and click on “Contact Us”.

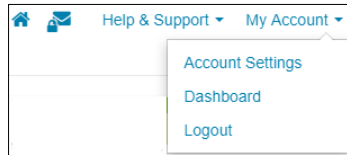


- Step-2: A new page opens with Nevada Health Link contact information.



4.4 My Account

The “My Account” menu provides access to account maintenance functions.



4.4.1 Account Settings

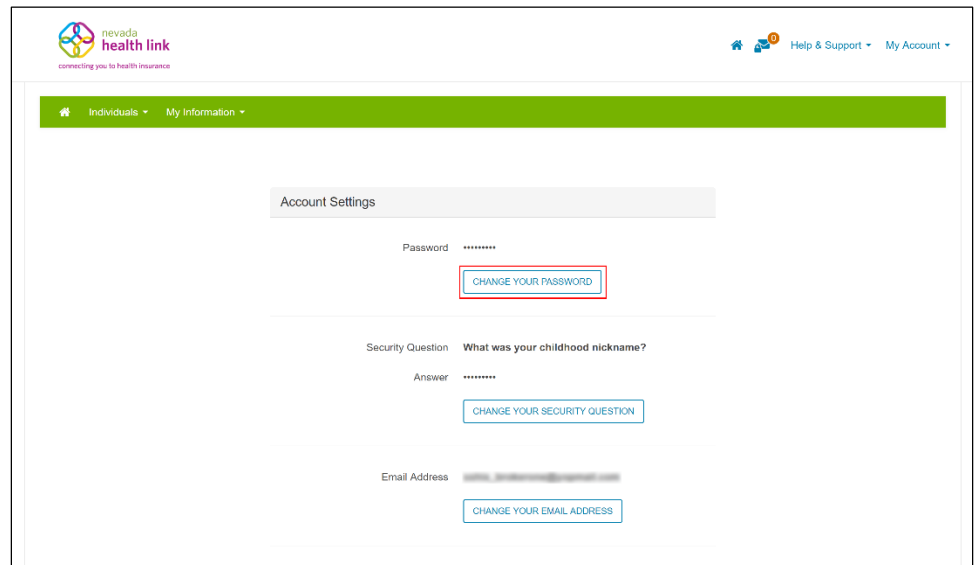
The Account Settings helps an Agent with updating a password, security question, or email address.

4.4.1.1 Change Password

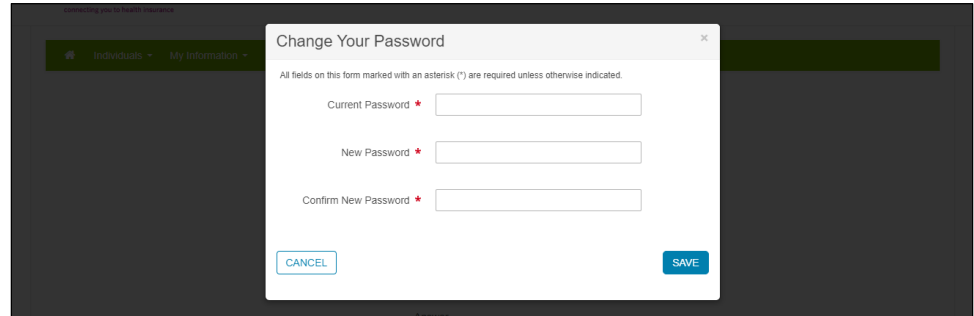
- Step-1: Click on “My Account” on the top-right corner and click on “Account Settings”.



- Step-2: Click on “Change Your Password”.



- Step-3: Provide the current password, new password and confirm the new password, and click on the “Save” button.

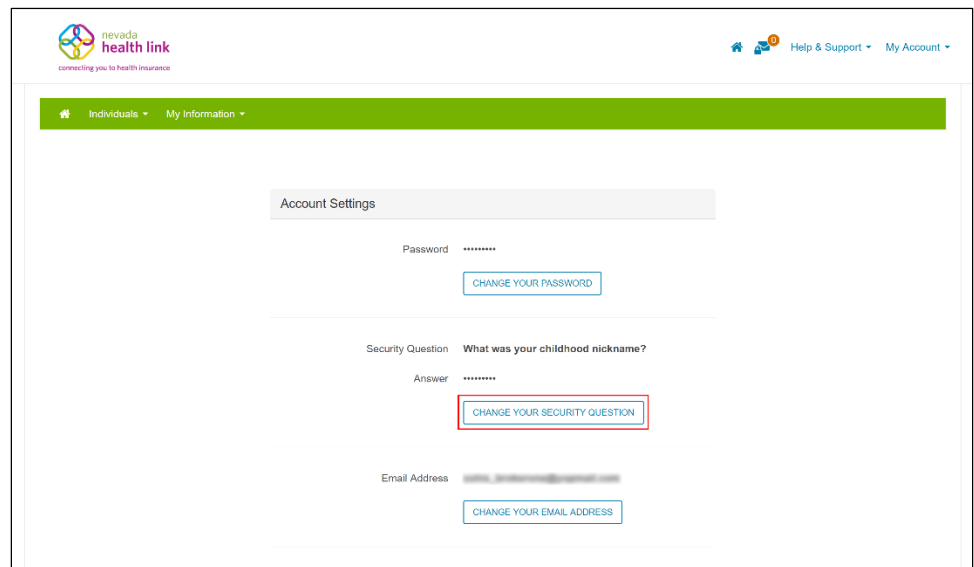


4.4.1.2 Change Security Question

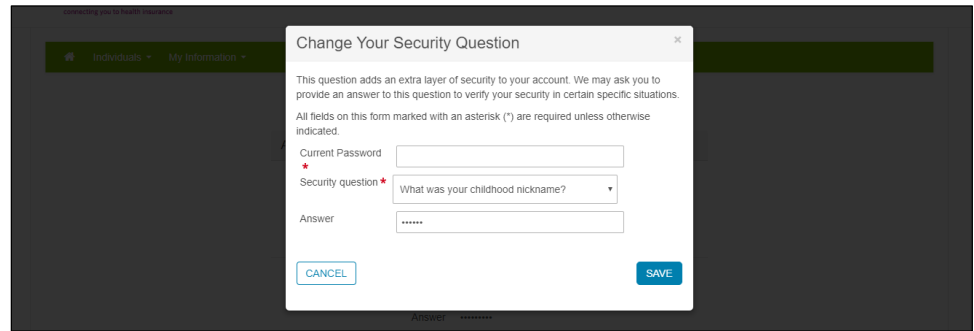
- Step-1: Click on “My Account” on the top-right corner and click on “Account Settings”.



- Step-2: Click on “Change Your Security Question”.



- Step-3: Provide current password and set-up a new security question, and click on the “Save” button.

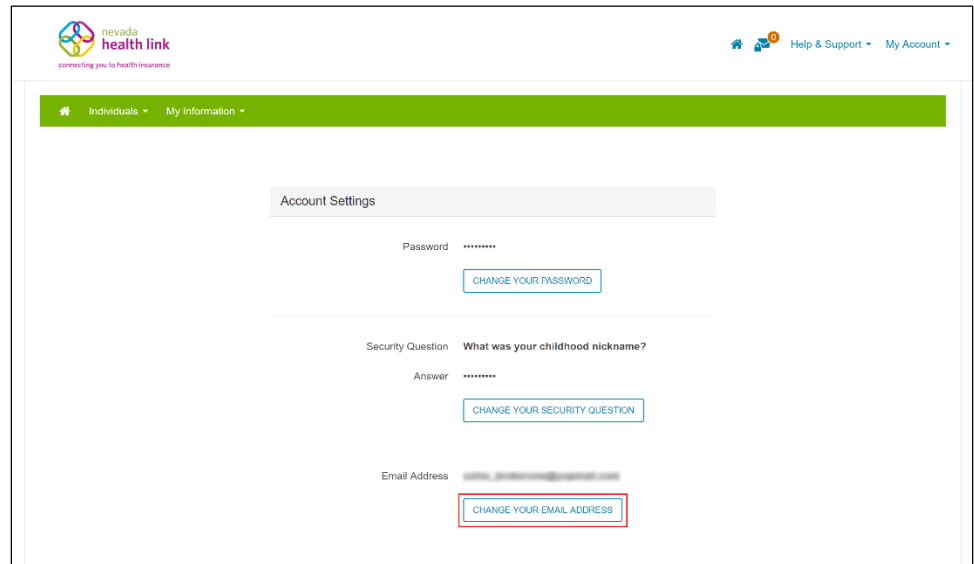


4.4.1.3 Change Email Address

- Step-1: Click on “My Account” on the top-right corner and click on “Account Settings”.



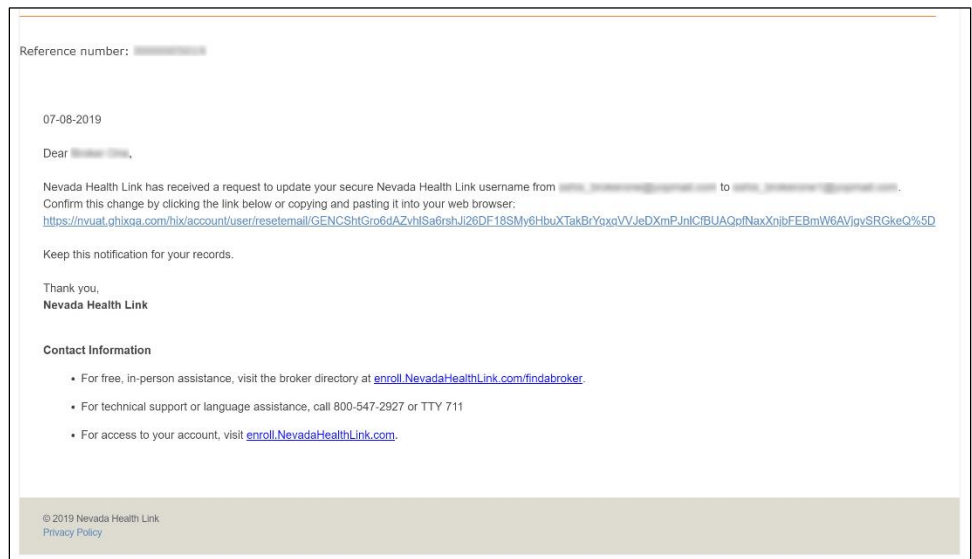
- Step-2: Click on “Change Your Email Address”.



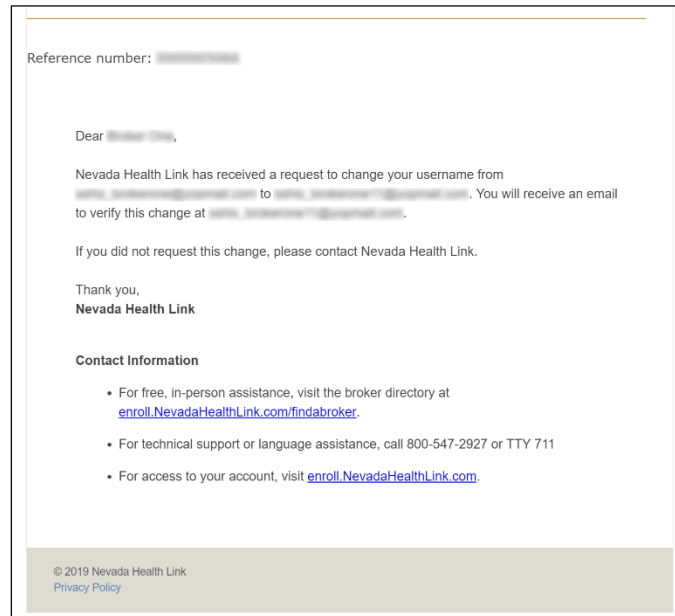
- Step-3: Provide the current password, new email address and confirm the new email address, and click on “Send Confirmation Email”.

The screenshot shows a web form titled "Change Your Email Address". At the top, it states: "All fields on this form marked with an asterisk (*) are required unless otherwise indicated." The form contains four input fields: "Current Email Address", "Current Password", "New Email Address", and "Confirm New Email Address". Each field has a small red asterisk to its left. Below the fields are two buttons: "CANCEL" on the left and "SEND CONFIRMATION MAIL" on the right.

- Step-4: Changing an email address requires a confirmation email to be sent to the new address. Open the new email received from noreply@exchange.nv.gov and click on the provided link, or copy and paste that link in a new web browser to confirm the change of email address.



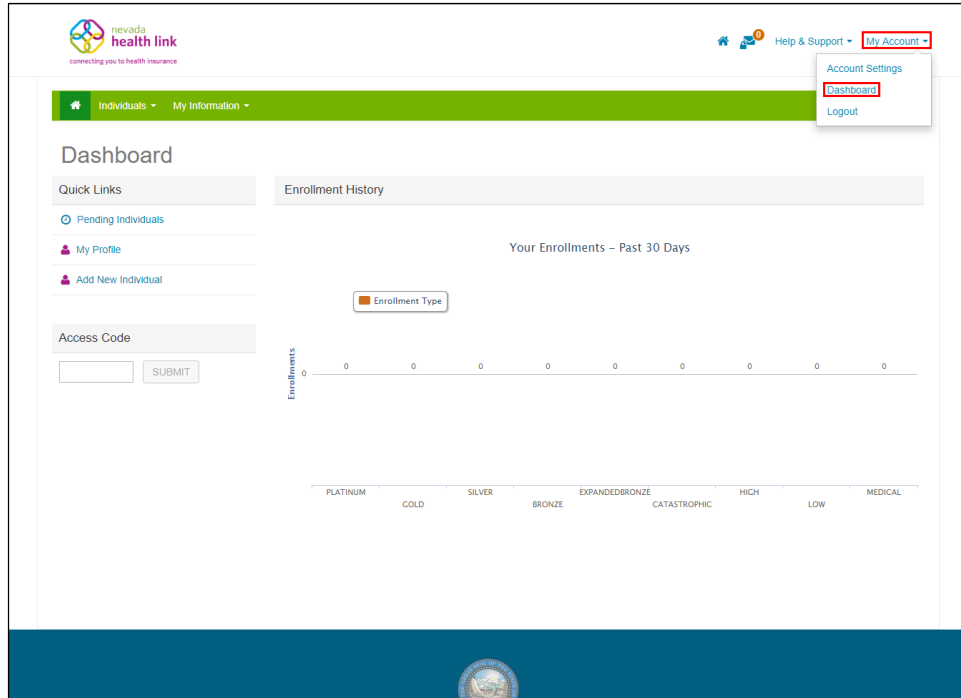
- Step-5: For security purposes, a verification email is also sent on the old email address to notify the Agent of the change.



4.4.2 Dashboard

The Dashboard tab guides an agent to their Enrollment History dashboard. This dashboard shows a count of the Agent’s enrollment for the past 30 days as distributed across the type of plan selected.

PLEASE NOTE: No enrollment activity will be displayed on this screen before the upcoming Open Enrollment Period (November 1—December 15, 2019).



4.4.3 Log out

The Log out tab helps an agent to sign out from their Agent account.



Document Revision History

Version	Issue Date	Changes	Drafted	Approved
1.0	8/5/2019	Initial Release	Vinit Yagnik	Russell Cook
1.1	8/22/2019	Revised Section 1.1 to reference Training and Certification Curriculum	Vinit Yagnik	Russell Cook