

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 and CEC On-Boarding Guide

August 20, 2019

Version 1.0

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1. Overview

This document is intended to assist Navigators and Certified Application Counselors (CACs) 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 a Navigator or CAC will be granted access to the SBE Platform, he or she must have completed the Silver State Health Insurance Exchange's (SSHIX's) annual Training and Certification curriculum. A link to the self-service account creation page for the SBE Platform is provided in the last module of the curriculum. 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 Rosa Alejandre, SSHIX Navigator Program Coordinator, at ralejandre@exchange.nv.gov.

2. User Roles: Entity vs. CEC

The SBE Platform provides two different type of user roles to manage Navigator and CAC functions. The first is the “**Entity**” role, which applies to Navigator or CAC organizations as a whole. The second is the Certified Enrollment Counselor or “**CEC**” role, which applies to the individual Navigators or CACs within an “Entity” organization. Throughout this document Navigator/CAC organizations are referred to as “Entities,” and individual Navigators or CACs within these organizations are referred to as “CECs.”

One of the most important functions available to the Entity role—and one of the primary reasons for the role's existence—is to manage consumer delegations within an Entity organization. The Entity user has the ability to re-assign existing consumer designations to other CECs within the organization. This function might be required in order to provide consumer assistance during an enrollment event, or to manage personnel changes within the Entity organization. Because of this ability the Entity role is considered to be a more privileged role than the CEC role, and multi-factor authentication (using a cell phone or a land line) is required when logging in to the Entity role. Please see Section 3.2 for more information on multi-factor authentication.

The Entity role is intended for use by the head of a Navigator/CAC organization, but the Entity role itself does not provide any consumer assistance functions. At least one CEC account must also be present within an Entity organization in order for consumer assistance to be provided. During the initial Entity account creation process the user can create one or more CEC accounts, though additional CEC accounts can be created at any time (see Section 3.3.6 and Section 5 for more details). It is possible for a single individual to use both user role types—Entity and CEC—but separate email addresses must be used for each account (e.g. an organizational email account for the entity role, and an individual email account for the CEC role).

PLEASE NOTE: This document is intended only to assist with the initial account creation and registration process. For a detailed overview of all functions available to the Entity role, including management of consumer designations, please refer to the Nevada Health Link Entity User Reference Manual. For a detailed overview of all functions available to the CEC user role, including consumer designations and enrollment assistance, please refer to the Nevada Health Link CEC User

Reference Manual. These documents are available for download from Nevada Health Links' [Enrollment Partners Resources page](#).

3. Entity: Account Registration and Multi-Factor Authentication Setup

This section explains the steps required for an Entity organization to create a new Entity account, set up multi-factor authentication, and complete the Entity account registration process.

3.1. Create a new Entity Organization 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 Rosa Alejandre, SSHIX Navigator Program Coordinator, at ralejandre@exchange.nv.gov.
- Step-2: Enter the basic information for the Entity user, set up a security question (the answer will be required if you need to request a password reset), and create a password. Check the box next to *I have read and agree to the Privacy Policy*, and click the “Submit” button.

PLEASE NOTE: The email address provided on this screen is unique to the Entity account and cannot also be used to create a CEC account. For security purposes each user account must be associated with a unique email address.

The screenshot shows a web form titled "New Entity Account Set-Up" with the Nevada Health Link logo in the top left and "Log In Help & Support" in the top right. The form contains the following sections and fields:

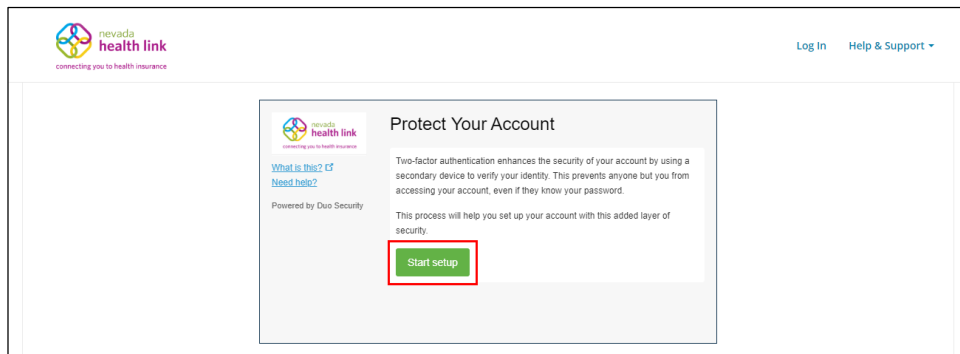
- Basic Information:** First Name *, Last Name *, Email Address *, Confirm Email Address *, and Phone Number * (with a phone icon).
- Security Question:** Security Question * (dropdown menu) and an empty text input field.
- Set Password:** Password * and Confirm Password *.
- A checkbox labeled "I have read and agree to the Privacy Policy".
- "Submit" and "Cancel" buttons at the bottom.

3.2. Multi-factor Authentication setup

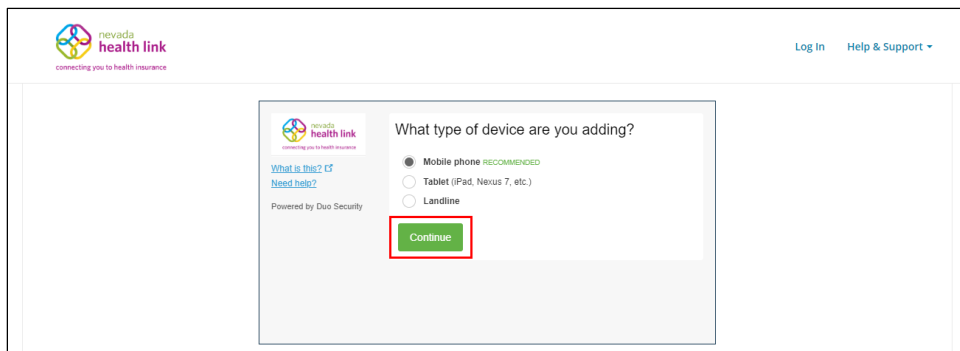
Multi-factor authentication is performed through Duo security. This process adds an additional layer of security to your Nevada Health Link Entity account.

PLEASE NOTE: Because of the privileged functions available to the Entity user, multi-factor Authentication is required for login. Multi-factor authentication is not required for individual CEC accounts.

- Step-1: Click the 'Start setup' button.



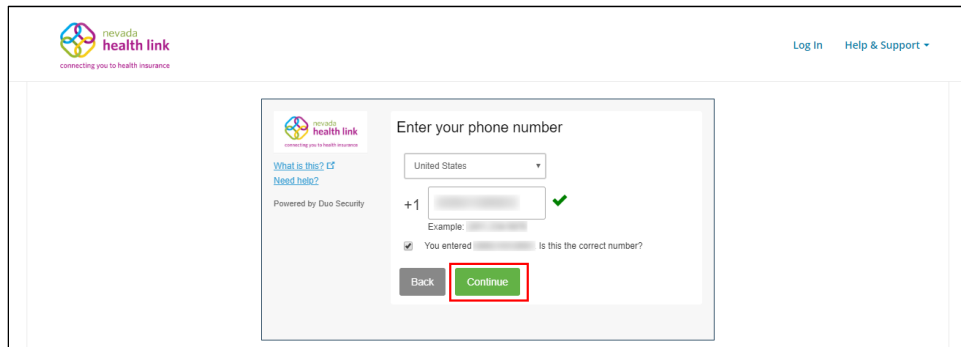
- Step-2: Select type of device to enroll for authentication (For e.g., "Mobile phone" or "Landline") and click the 'Continue' button.



- Step-3: Select your country from the drop-down list (i.e. United States), enter and confirm your phone number, and click the 'Continue' button.

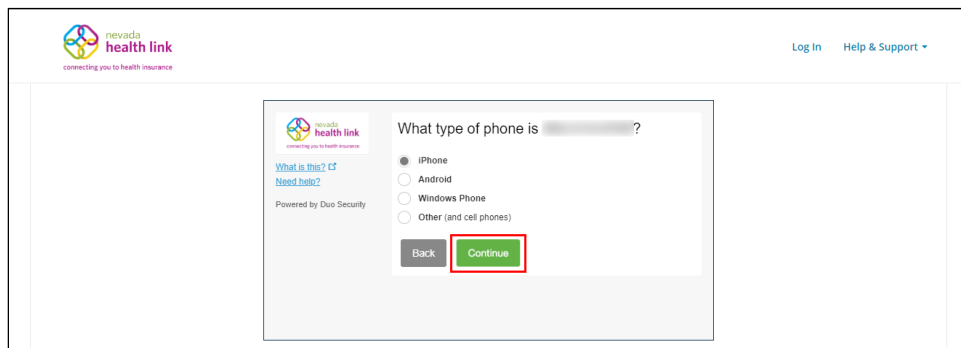
PLEASE NOTE: You must be able to access this phone each time you log in. Providing a land-line number, such as an office phone, may limit your ability to log in to the Platform from a

remote location. Nevada Health Link therefore recommends the use of a mobile phone for Duo authentication.

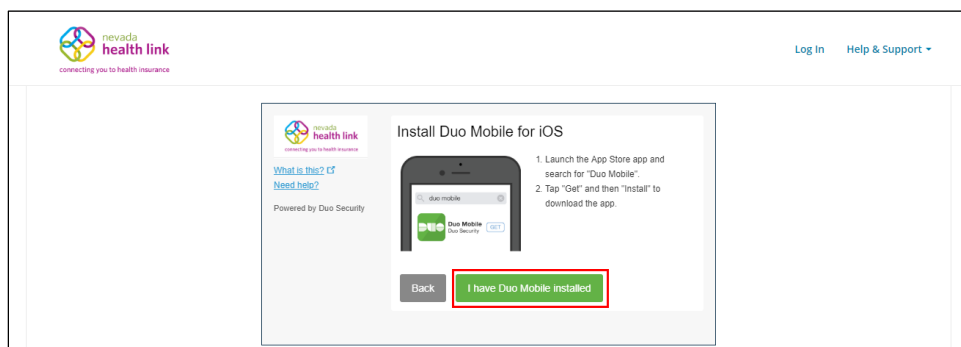


Steps 4-7 apply only if you have chosen to use a mobile phone for Duo registration:

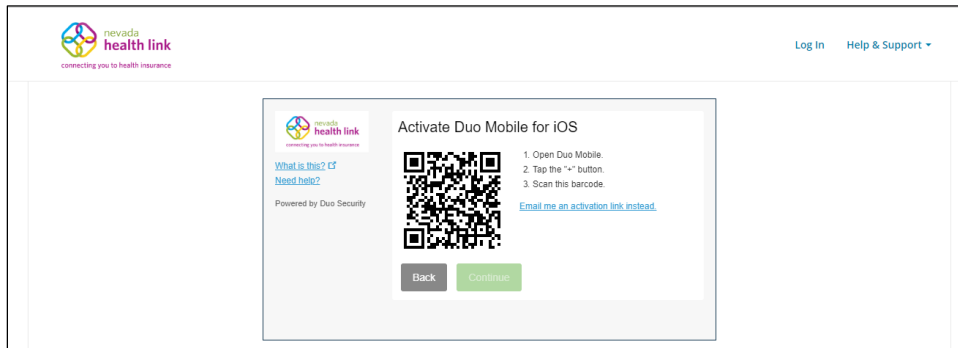
- Step-4: Select your phone’s operating system and click the ‘Continue’ button.



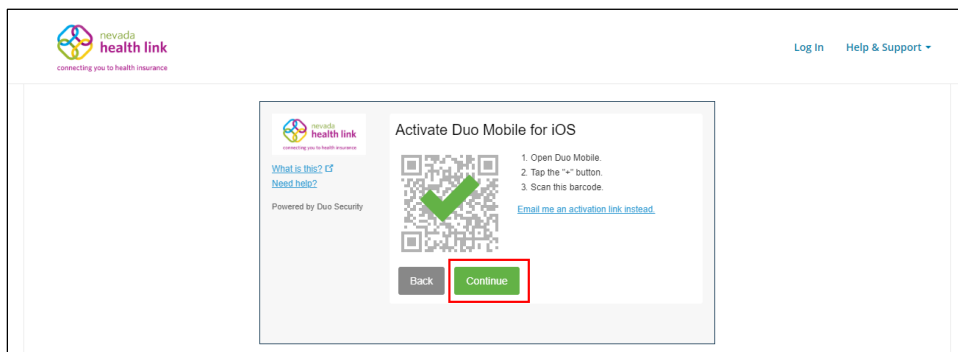
- Step-5: Install the Duo mobile app on your smartphone from the platform-specific application marketplace (For e.g., “App Store” or “Google Play Store”) and click the ‘I have Duo Mobile installed’ button.



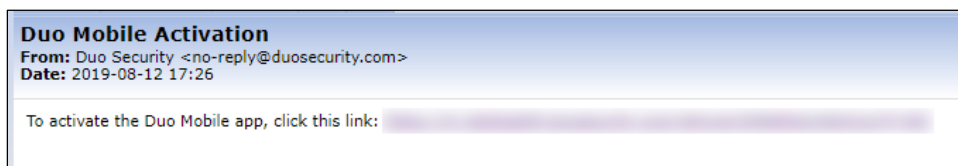
- Step-6: Open Duo mobile on your phone, tap on the “+” button, scan the barcode on your screen.



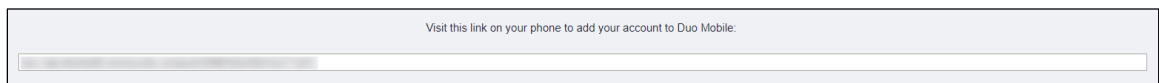
- Step-7: Click the ‘Continue’ button.



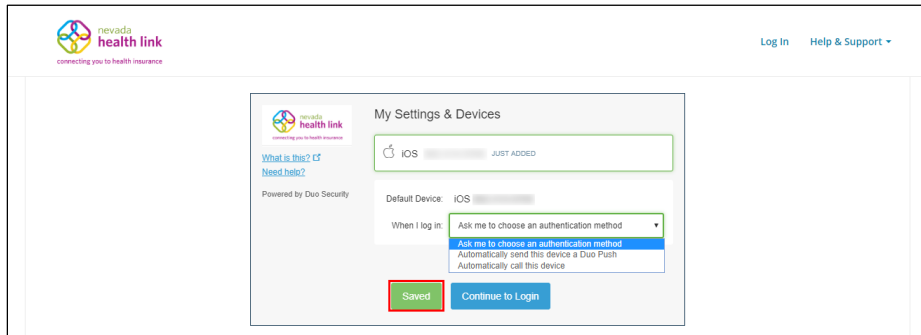
If you cannot scan the barcode, click on the hyperlink that reads “Email me an activation link instead”. Open the email received from no-reply@duosecurity.com and click on the hyperlink.



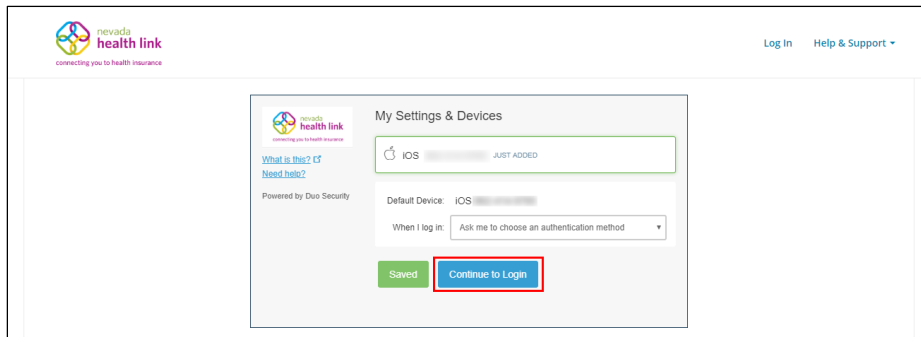
A window opens, visit that link on your phone to add your account to Duo mobile.



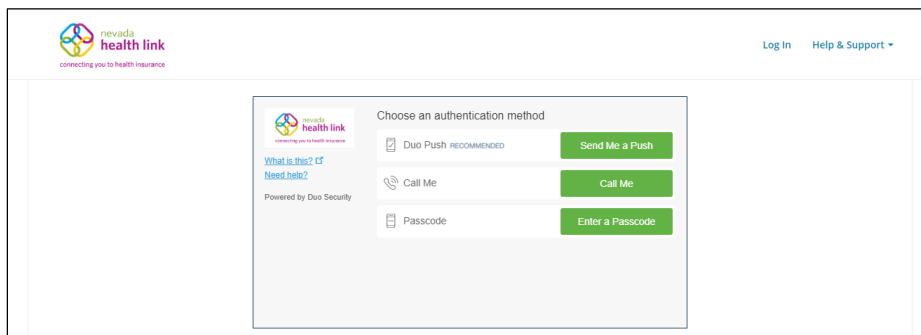
- Step-8: Select the authentication settings from the drop-down list, click the 'Saved' button.



- Step-9: Click the 'Continue to Login' button.



- Step-10: Select an authentication method (e.g., "Send Me a Push" or "Call Me").



The three authentication methods are described below:

Duo Push: This option pushes a login request to your smartphone or tablet. Review the request using the app and tap 'approve' to log in. **PLEASE NOTE:** DUO Mobile is required to be installed and activated on your smartphone.

Call Me: You receive a phone call, and you must follow the steps provided on the phone call.

Passcode: Duo sends a passcode either via SMS or voice call.

3.3. Entity Account Registration

The information on the following screens will impact the search results that are provided to consumers using the SBE Platform’s “Find Local Assistance” directory tool.

PLEASE NOTE: Many of the options on the following screens, including information related to grant funding, relate to functions that SSHIX has chosen not enable on the SBE Platform. However, many of these data fields are required for the Entity account creation process. For these options we have provided suggested values (below) which will not impact the critical functionality of the Entity and CEC roles.

3.3.1. Entity Information

This section is designed to capture general information for an Entity organization.

The screenshot shows the 'Step 1: Entity Information' registration form on the Nevada Health Link website. The form includes a sidebar with steps 1 through 7, with '1. Entity Information' selected. The main form fields are: Entity Type (radio buttons for In-Person Assistance, Certified Navigator Entities, and Certified Application Counselor), Entity Name, Business Name (Legal), Primary Email Address, Primary Phone Number, Secondary Phone Number, How would you like for us to contact you? (radio buttons for Email, Phone, Fax, Mail), Fax, Federal Tax ID, State Tax ID, Organization Type (dropdown), Counties Served (dropdown), Did your organization receive an Outreach and Education Grant? (radio buttons for Yes, No), Tell us about the grant: Grant Contract Number, and Grant Award Amount. A 'Next' button is highlighted with a red box at the bottom right.

Entity Type: Suggested value = “In-Person Assistance” (this choice will not impact Entity/CEC functionality)

Entity Name: This name will be displayed to consumers who use the “Find Local Assistance” directory tool.

Business Name (Legal): The legal business name of the Entity organization (this can be the same as the Entity name).

Primary Email Address: This address will be used by SSHIX for business correspondence. It will not be displayed to consumers.

Primary Phone Number: This number will be used by SSHIX for business correspondence. It will not be displayed to consumers.

Secondary Phone Number: Optional

How would you like for us to contact you?: Please select your preference.

Fax: Optional. SSHIX will not use Fax for ordinary business correspondence.

Federal Tax ID: Federal Tax ID for the Entity Organization

State Tax ID: State Tax ID for the Entity Organization

Organization Type: Suggested value = "Private Partnership" (this choice will not impact Entity/CEC functionality)

Counties Served: Please choose one or more counties where your Entity organization offers in-person assistance.

Did you organization receive an Outreach and Education Grant?: Suggested value = "No" (this choice will not impact Entity/CEC functionality or grant eligibility—SSHIX does not use the SBE Platform to administer grant funding to Entity organizations)

3.3.2. Populations Served

The information provided on this page will not impact search results for the "Find Local Assistance" directory tool. It is collected for demographic purposes only.

Check all the languages (e.g., "English" or "Spanish"), Ethnicities (e.g., "African" or "Chinese"), and Industries (e.g., "Health Care" or "Agriculture") of the populations you intend to serve, enter an estimated percentage of assistance provided in each section, and click the 'Next' 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%.

The screenshot shows the 'Step 2: Populations Served' section of the Nevada Health Link application. On the left, a 'Steps' sidebar lists: 1. Entity Information, 2. Populations Served (highlighted), 3. Locations and Hours, 4. Contact Information, 5. Certified Enrollment Counselors, 6. Document Upload, and 7. Payment Information. The main content area is titled 'Step 2: Populations Served' and contains three sections: 'Languages', 'Ethnicities', and 'Industries'. Each section has a heading with a right-pointing arrow and a sub-heading: 'Check all languages of your target population and specify percentages accordingly.', 'Check all ethnicities of your target population and specify percentages accordingly.', and 'Check all industries that apply, and provide percentages per industry.' At the bottom of the form are 'Back' and 'Next' buttons, with the 'Next' button highlighted in red.

3.3.3. Locations and Hours – Primary Site

This section is intended to represent the primary physical location where the Entity organization offers In-Person Assistance. This location is referred to as the “Primary Site.” Additional locations (referred to as “Sub-Sites”) can be added using the instructions in the following section, below.

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.

The screenshot shows the 'Step 3: Locations and Hours' section of the Nevada Health Link application. The 'Steps' sidebar on the left includes: 1. Entity Information, 2. Populations Served, 3. Locations and Hours (highlighted), 4. Contact Information, 5. Certified Enrollment Counselors, 6. Document Upload, and 7. Payment Information. Under 'Locations and Hours', there are sub-sections for 'Primary Sites' and 'Sub-Sites'. The main content area is titled 'Step 3: Locations and Hours' and contains the instruction: 'Please list all locations and business hours for your organization.' It includes fields for: 'Primary Site Location' (with a 'Site Name' input), 'Primary Email Address' (with a 'Primary Email Address' input), 'Primary Phone Number' (with three 'xxx xxx xxx' inputs), and 'Secondary Phone Number' (with three 'xxx xxx xxx' inputs). Below these is the 'Hours of Operation' section, which lists days from Sunday to Monday, each with a 'Select' dropdown and a 'To' dropdown. At the bottom is the 'Mailing Address' section, with fields for 'Address 1', 'Address 2', 'City', 'State' (a dropdown), and 'Zip Code' (with a 'Zip Code' input).

Primary Site Location: This value will be displayed to consumers who use the “Find Local Assistance” directory tool. SSHIX recommends incorporating the name of your city/location, e.g. “Carson City Office.”

Primary Email Address: Optional. SSHIX will typically use the contact information provided on the “Entity Information” page for business correspondence.

Primary/Secondary Phone Numbers: Optional. SSHIX will typically use the contact information provided on the “Entity Information” page for business correspondence.

Hours of Operation: Enter your organization’s daily hours of business. If you organization is closed on certain days of the week (e.g. Saturday and Sunday) you must choose “Closed” from the drop-down menu next to the appropriate day(s).

Mailing Address: This address will not be displayed to consumers, but it may be used by SSHIX for business correspondence.

Physical Address: This address is displayed to consumers who use the “Find Local Assistance” directory tool. A physical address must be provided in order to allow consumers to search for your Entity organization by location.

Languages Supported: Select all spoken and written languages supported at this location.

3.3.4. Location and Hours – Sub Sites

This section, which is optional, is provided for Entity organizations who offer In-Person Assistance from multiple locations. If your Entity organization operates additional locations besides the primary location entered in the previous section, click the ‘Add Sub-Site’ button and enter the appropriate information, then click the ‘Save Sub-Site’ button. If your organization has multiple Sub-Sites, repeat as necessary. When all Sub-Sites have been entered (or if no Sub-Sites are required), click the ‘Done’ button.

3.3.5. Contact Information

Enter the Organization’s Primary Contact information and Financial Contact information and click the ‘Next’ button. This information will not be displayed to consumers—it is requested only for business correspondence.

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

The screenshot shows a web form for 'Step 4: Contact Information'. The form is part of a multi-step process, as indicated by the 'Steps' sidebar on the left. The sidebar lists steps from 1 to 7, with '4. Contact Information' currently selected. The main form area is titled 'Step 4: Contact Information' and contains two sections: 'Primary Contact' and 'Financial Contact'. Each section has the following fields: 'Name' (text input), 'Email' (text input, pre-filled with 'company@email.com'), 'Primary Phone Number' (three digit input boxes), and 'Secondary Phone Number' (three digit input boxes). Below these fields are radio buttons for 'How would this person like to be contacted?' with options for 'Email', 'Primary Phone', 'Secondary Phone', and 'Mail'. At the bottom of the form are 'Back' and 'Next' buttons, with the 'Next' button highlighted in red.

3.3.6. Certified Enrollment Counselors

As mentioned in Section 2, the Entity user role does not provide any consumer assistance functions. Consumer assistance functions are only provided to the Certified Enrollment Counselor (CEC) role, and each Entity organization must have at least one CEC account associated with it in order to assist consumers.

To create a CEC account, click the ‘Add Certified Enrollment Counselor’ button, and fill out New Enrollment Counselor Form. When you have completed the form click the ‘Save’ button.

PLEASE NOTE: Although CEC user accounts can be created at any time, individual CECs will not receive their account invitation emails until the SSHIX Navigator Program Coordinator has verified their completion of the Training and Certification curriculum

and updated their Certification Status to “Certified.” For more information on Certification Status please see Section 6.

The screenshot shows the 'Step 5: Certified Enrollment Counselors' page on the Nevada Health Link portal. The sidebar on the left lists steps: Entity Information, Populations Served, Locations and Hours, Contact Information, 5. Certified Enrollment Counselors (highlighted), 6. Document Upload, and 7. Payment Information. The main content area has a heading 'Step 5: Certified Enrollment Counselors' and a sub-heading 'New Enrollment Counselor Form'. A red box highlights the 'Add Certified Enrollment Counselor' button. Below this is a 'Back' button and a 'Done' button. The form fields include: First name, Last name, Email (pre-filled with 'company@email.com'), Primary Phone Number (with masks 'xxx', 'xxx', 'xxxx'), Secondary Phone Number (with masks 'xxx', 'xxx', 'xxxx'), 'How would this person like to be contacted?' (radio buttons for Email, Primary Phone, Mail), 'Is this Enrollment Counselor Certified?' (radio buttons for No, Yes), Primary Certified Enrollment Counselor Site (dropdown), Secondary Certified Enrollment Counselor Site (dropdown), and a 'Mailing Address' section with fields for Street Address, Suite, City, State, and Zip Code.

First Name/Last Name/Email/Primary Phone Number: Enter the individual contact information for the CEC. Please note that the Email address provided must be different from the email address provided for the Entity account.

Secondary Phone Number: Optional

How would this person like to be contacted?: Enter your preference.

Is this enrollment Counselor Certified?: Suggested value = “No” (this relates to functionality which has been disabled in the SBE Platform and will not impact Entity/CEC functionality)

Primary Certified Enrollment Counselor Site: Choose the primary location where the CEC offers in-person assistance (see Sections 3.3.3 and 3.3.4 for more details)

Secondary Certified Enrollment Counselor Site: If your Entity organization has more than one location, and the CEC offers in-person assistance at more than one location, choose the appropriate option from the drop-down menu.

Mailing Address: Enter a mailing address for the CEC. This address will not be displayed to consumers, but it may be used by SSHIX for business correspondence.

Profile Information: Enter the spoken and written languages supported by the CEC. Choose an “Education” level from the drop-down menu (this value will not be displayed to consumers). A photo can also be uploaded at this time, or it can be uploaded by the CEC after his or her account has been Certified by the SSHIX Navigator Program Coordinator.

When you have completed the required fields click the ‘Save’ button to complete the CEC account creation process.

If you would like to add additional CEC accounts at this time, click the ‘Add Certified Enrollment Counselor’ button again and repeat the process above. When you have finished adding your CEC accounts click ‘Done.’

3.3.7. Document Upload

This section can be ignored; SSHIX does not require any documents to be uploaded by Entity organizations. Click the ‘Next’ button to proceed to the next section.

The screenshot shows the 'Step 6: Document Upload' page. On the left, a 'Steps' sidebar lists: Entity Information, Populations Served, Locations and Hours, Contact Information, Certified Enrollment Counselors, 6. Document Upload (highlighted), and 7. Payment Information. The main content area includes the text 'In this section, you can upload documents in support of your application', an 'Upload document' label, a 'Choose File' button, 'No file chosen' text, and 'File size limit is 5 MB.'. A 'Back' button is on the left and a 'Next' button is on the right, both highlighted with red boxes.

3.3.8. Payment Information

This section can be ignored; SSHIX does not use the SBE Platform to administer grant payments. Please choose a value of “No” and click the ‘Submit’ button.

The screenshot shows the 'Step 7: Payment Information' page. The 'Steps' sidebar is the same as in Step 6, with '7. Payment Information' highlighted. The main content area asks 'Receive payments?' with radio buttons for 'Yes' and 'No'. The 'No' button is selected and highlighted with a red box. A 'Back' button is on the left and a 'Submit' button is on the right, both highlighted with red boxes.

4. Entity: Registration Status

After the initial Entity account registration process has been completed, the account is placed into a default Registration Status of “Pending,” and the Entity Portal provides a read-only view of the information provided in Section 3.

Registration Status			
Entity Number	[Redacted]		
Status	Pending		
Registration Renewal Date	N/A		
Registration History			
Date	Previous status	New Status	Comment
08/14/2019	Incomplete	Pending	No Comments

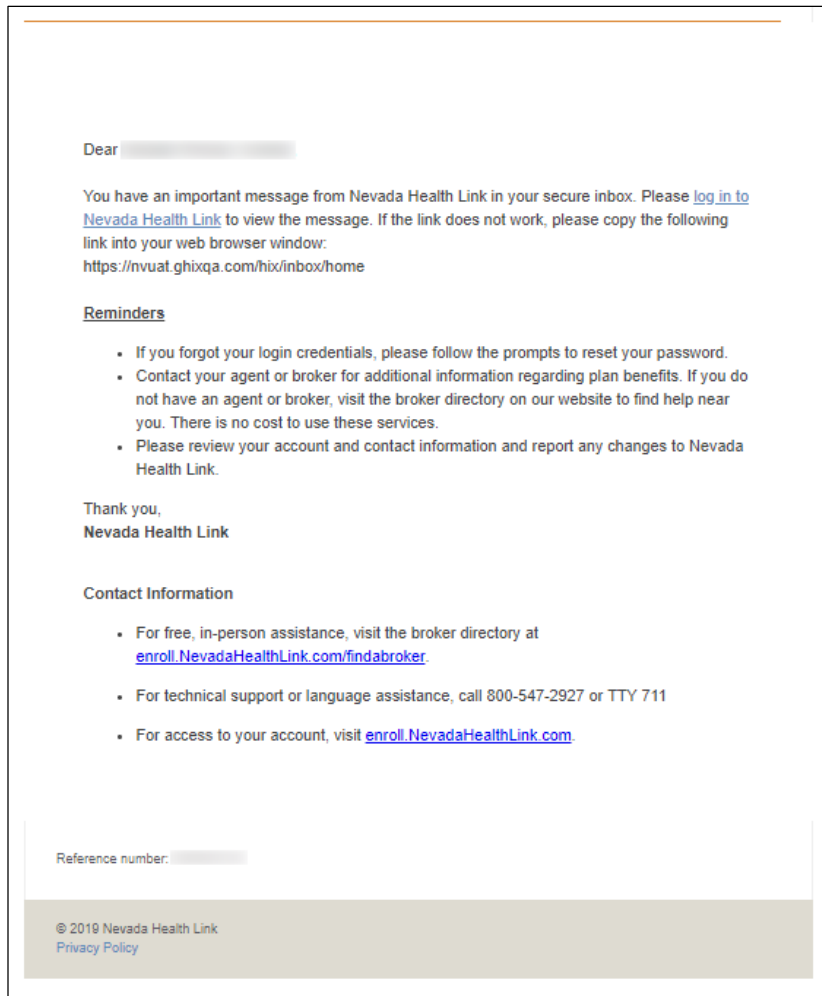
The “Registration Status” page provides an overview of the Entity’s current status, as well as any status changes that have occurred since the account was created. Entities can access the full functionality offered by the SBE Platform—including the creation of additional CEC accounts—only after the SSHIX Navigator Program Coordinator reviews and verifies the Entity organization’s information and updates their Registration Status to “Active.” 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.

PLEASE NOTE: The “Entity Number” displayed on the Registration Status page is an internal tracking number assigned automatically by the SBE Platform; this number is not related to the individual assister Certification numbers that may have been assigned by CMS or SSHIX.

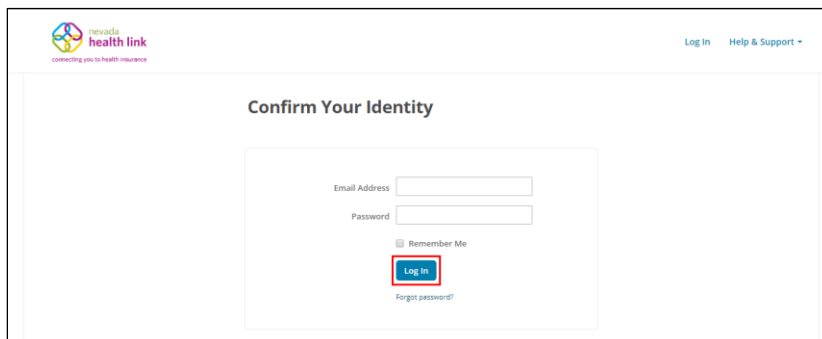
4.1. Notification of “Active” Status

- Step-1: When your status has been updated to “Active” you will receive notification via email. Open the new email received from noreply@exchange.nv.gov on the Entity’s email

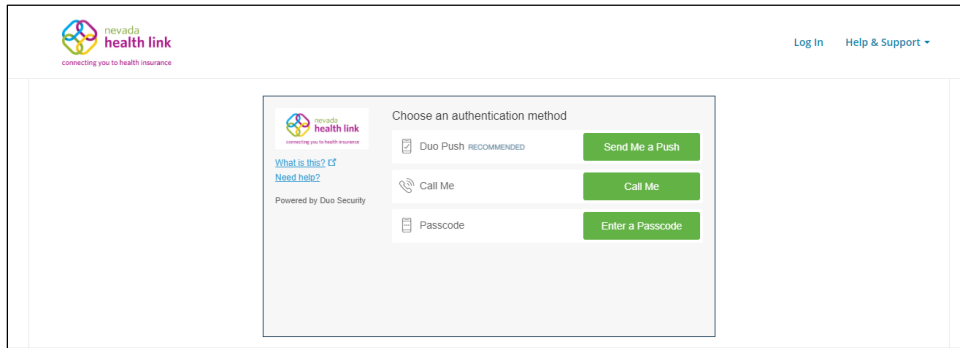
account and click on the 'log in to Nevada Health Link' link. If the link does not work, copy the provided link into a new web browser window.




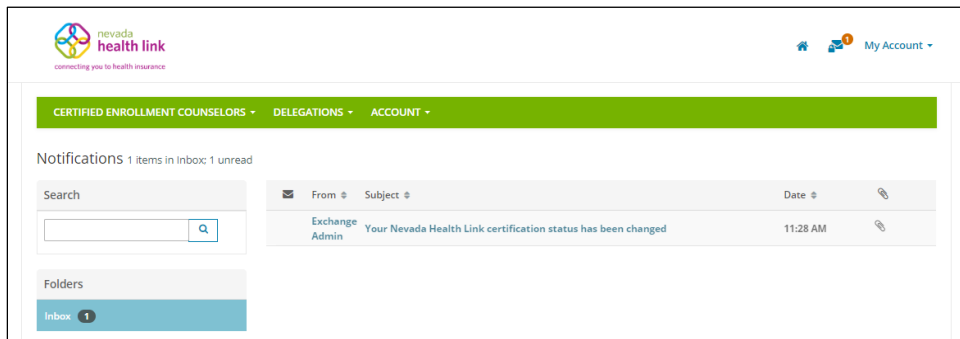
- Step-2: Enter login credentials to confirm your identity and click the 'Log In' button.



- Step-3: Select your Multi-factor authentication method.



- Step-4: Click the  icon near the top-right corner of the screen and open the message from Exchange Admin in your Secure Inbox. For more information on the Secure Inbox please see Section 8.2.



- Step-5: Scroll down or click on the attached pdf file to check the new Certification status.

The screenshot shows the Nevada Health Link user interface. At the top, there is a navigation bar with the logo and the text "nevada health link connecting you to health insurance". To the right, there is a "My Account" link. Below the navigation bar, there is a green header with the text "CERTIFIED ENROLLMENT COUNSELORS - DELEGATIONS - ACCOUNT".

The main content area is titled "Notifications 1 items in Inbox; 0 unread". On the left, there is a search bar and a "Folders" section with "Inbox 0" selected. The notification itself is titled "Your Nevada Health Link certification status has been changed". It includes the following details:

- From: Exchange Admin
- To: [Redacted]
- Sent: Aug 14, 2019 11:28
- Attachments: EnrollmentEntryCertificationNotification_7018_1565807312057.pdf(42 K)

The attached PDF file is displayed in a preview window. It features the Nevada Health Link logo and a barcode at the top. The text in the PDF reads:

August 14, 2019
[Redacted]
Carson City, NV 89501

Dear [Redacted],

Your certification status on Nevada Health Link has changed. Prior to this change, your certification status was: Pending.

Your new certification status is: Active.

Thank you,
Nevada Health Link

Contact Information
• For free, in-person assistance, visit the broker directory at [Redacted]

- Step-6: The following screen displays new Entity Organization Certification Status pdf file.



5. Entity: Create Additional CEC Account(s)

Once the Entity organization's Registration Status has been updated to "Active," the Entity user can create individual CEC accounts at any time using the steps described below. For more information on Registration Status see Section 4.

PLEASE NOTE: Although CEC user accounts can be created at any time, individual CECs will not receive their account invitation emails until the SSHIX Navigator Program Coordinator has verified their completion of the Training and Certification curriculum and updated their account status to "Certified." For more information please see Section 6.

5.1. Add Individual 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

CERTIFIED ENROLLMENT COUNSELORS - DELEGATIONS - ACCOUNT -

Certified Enrollment Counselors 2 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
	0		InActive	Certified
	0		Active	Certified

- Step-2: Fill out New Enrollment Counselor Form using the instructions provided in Section 3.3.6, then click the 'Save' button.

nevada health link
connecting you to health insurance

CERTIFIED ENROLLMENT COUNSELORS ▾ DELEGATIONS ▾ ACCOUNT ▾

Add Certified Enrollment Counselor

1 New Enrollment Counselor Form

New Enrollment Counselor Form

First Name *

Last Name *

Email *

Phone number *

Secondary Phone Number

How would you like us to contact you?
 Email
 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) *
 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.


6. CEC: Certification Status and Account Status

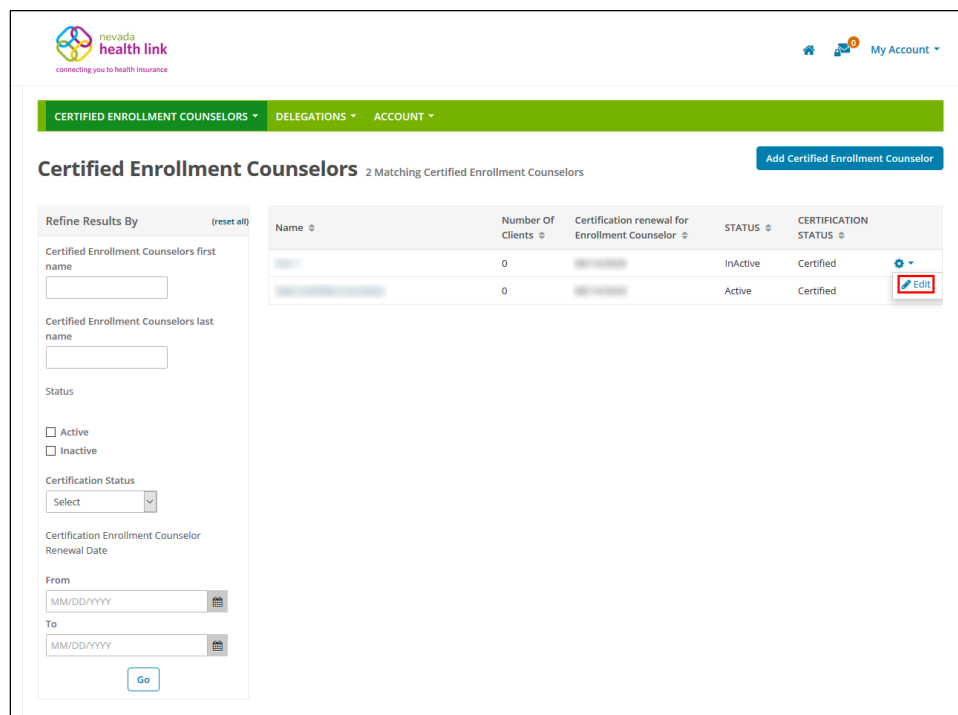
Although an individual CEC account can be created at any time, the individual CEC will not receive his or her account invitation email until the SSHIX Navigator Program Coordinator has verified completion of the Training and Certification curriculum and updated the CEC's Certification Status to "Certified."

In addition to the Certification Status, the SBE platform provides an additional data field called Account Status (or simply "status") which is intended to allow Entity users to manage the availability of the CECs within their organization. The default Account Status for new CEC accounts is "Inactive," and in order for CECs to show up in the "Find Local Assistance" directory tool the Entity user must update the Account Status to "Active" using the steps below.

PLEASE NOTE: The Entity user is expected to keep the Account Status of all CECs within the organization up to date. If a CEC leaves the organization or is temporarily unavailable to provide assistance (e.g. as a result of an extended vacation or medical issue) the Entity should update the Account Status to "Inactive." When the CEC returns to work the status should be updated to "Active."

6.1. Update Certified Enrollment Counselor Account Status to "Active"

- Step-1: Click on the  button next to a "Certified" CEC on the Home Page and select 'Edit' from the drop-down menu.

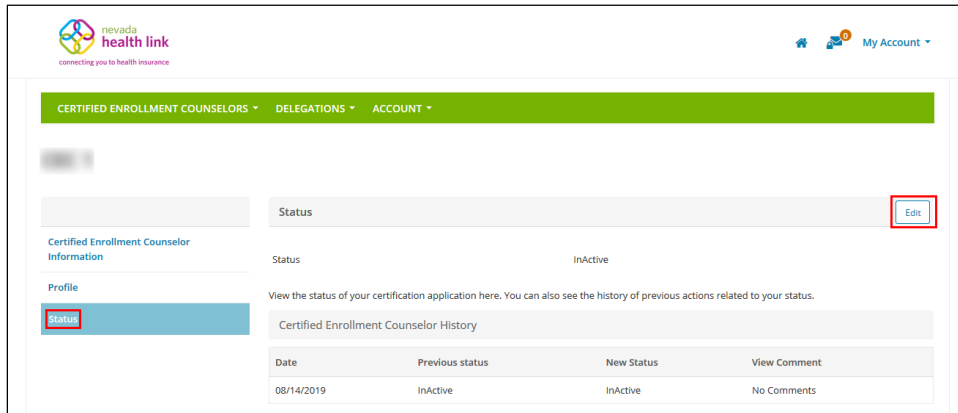


The screenshot displays the 'Certified Enrollment Counselors' page on the Nevada Health Link platform. The page features a navigation bar with 'CERTIFIED ENROLLMENT COUNSELORS', 'DELEGATIONS', and 'ACCOUNT'. Below the navigation bar, there is a search and filter section on the left and a table of counselors on the right. The table has the following columns: Name, Number of Clients, Certification renewal for Enrollment Counselor, STATUS, and CERTIFICATION STATUS. Two rows are shown in the table:

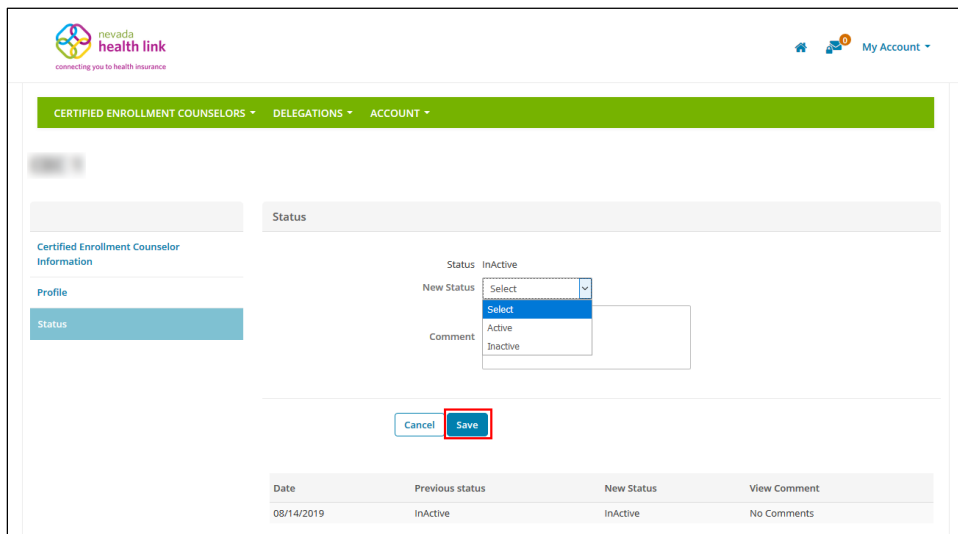
Name	Number of Clients	Certification renewal for Enrollment Counselor	STATUS	CERTIFICATION STATUS
[Redacted]	0	[Redacted]	InActive	Certified
[Redacted]	0	[Redacted]	Active	Certified

The 'Active' row has a gear icon and a red 'Edit' button highlighted. The search and filter section on the left includes fields for 'Certified Enrollment Counselors first name', 'Certified Enrollment Counselors last name', 'Status' (with checkboxes for Active and Inactive), 'Certification Status' (a dropdown menu), and 'Certification Enrollment Counselor Renewal Date' (with 'From' and 'To' date pickers).

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



- Step-3: Select “Active” status from the “New Status” drop-down menu and click on the ‘Save’ button.

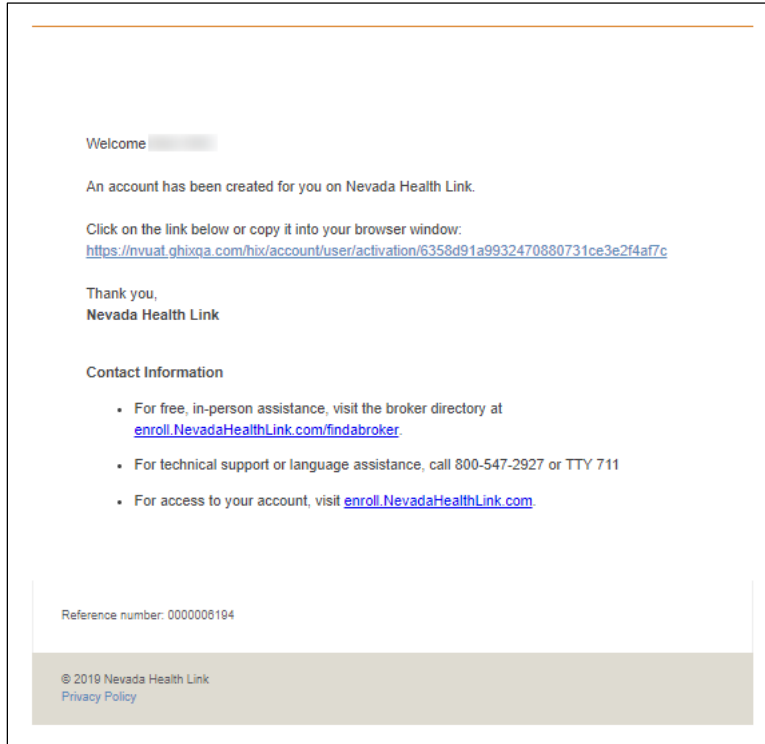


7. CEC: User Account Registration

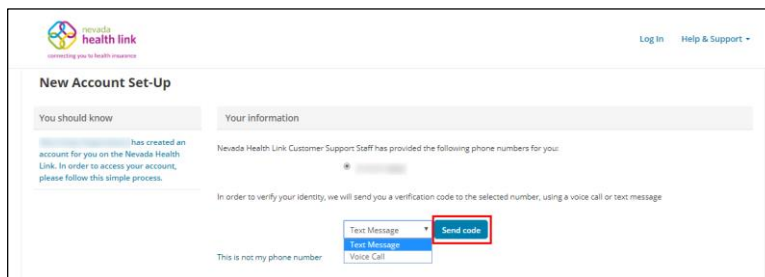
New CEC accounts will be assigned a default Certification Status of “Pending.” CEC accounts cannot be used to assist consumers until the SSHIX Navigator Program Coordinator has verified completion of the Training and Certification curriculum and updated the Certification Status to “Certified.” The Platform will then send an email invitation to the new user with a link for completing the account registration process.

7.1. Claim Account Invitation

- Step-1: Open the email invitation received from noreply@exchange.nv.gov, and click on the provided link. If the link does not work, copy and paste the full link text into a new web browser window.



- Step-2: Select a verification method (either a Text Message or Voice Call) and click the 'Send Code' button to receive a verification code on the associated phone number.



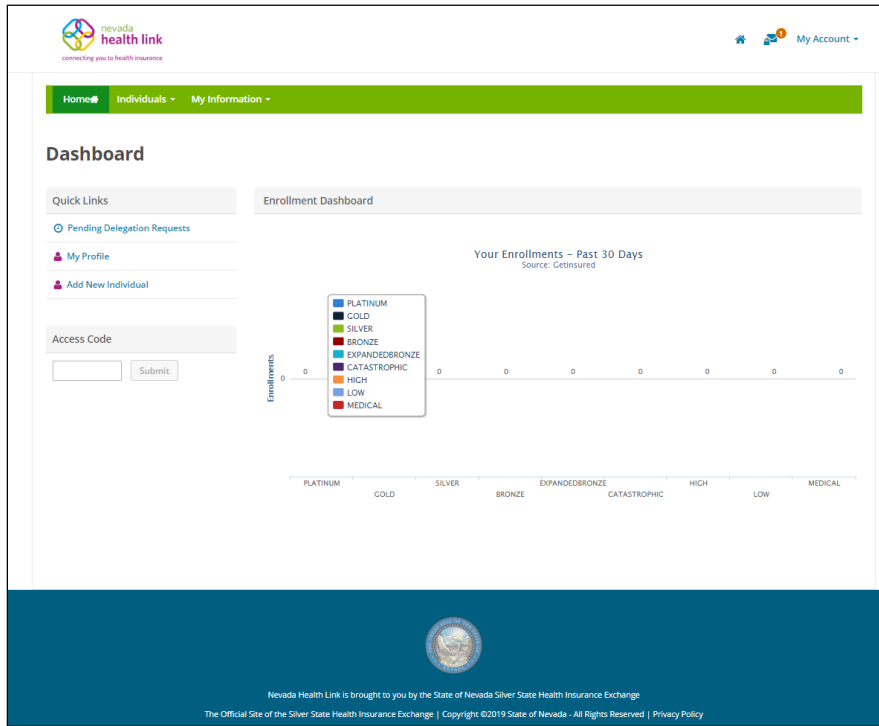
- Step-3: Enter the received verification code and click the 'Verify' button.

The screenshot shows the 'New Account Set-Up' page for Nevada Health Link. The page has a header with the logo and 'Log In Help & Support' links. The main content area is titled 'New Account Set-Up' and is divided into two sections: 'You should know' and 'Your information'. The 'You should know' section contains a message: 'has created an account for you on the Nevada Health Link. In order to access your account, please follow this simple process.' The 'Your information' section contains a message: 'Nevada Health Link Customer Support Staff has provided the following phone numbers for you:' followed by a redacted phone number. Below this, it says 'In order to verify your identity, we will send you a verification code to the selected number, using a voice call or text message'. There is a dropdown menu for 'Text Message' and a 'Send Again' button. Below that, it says 'This is not my phone number' and 'Verification Code' followed by a redacted code and a 'Verify' button highlighted with a red box.

- Step-4: Verify and complete the basic information, set up a security question (the answer will be required if you need to request a password reset), and create a new password. Check the box next to *I have read and agree to the Privacy Policy*, and click the 'Submit' button.

The screenshot shows the 'New Counselor Account Set-Up' page for Nevada Health Link. The page has a header with the logo and 'Log In Help & Support' links. The main content area is titled 'New Counselor Account Set-Up' and contains a message: 'All fields on this form marked with an asterisk (*) are required.' The form is divided into three sections: 'Basic Information', 'Security Question', and 'Set Password'. The 'Basic Information' section has fields for 'First Name *', 'Last Name *', 'Email Address *', 'Confirm Email Address *', and 'Phone Number *'. The 'Security Question' section has a dropdown menu for 'Security Question *' with the value 'What was your childhood' and a text input field. The 'Set Password' section has fields for 'Password *' and 'Confirm Password *'. Below the password fields, there is a checkbox labeled 'I have read and agree to the Privacy Policy' which is checked. At the bottom of the form, there are 'Submit' and 'Cancel' buttons, with the 'Submit' button highlighted by a red box.


- Step-5: Welcome to the Certified Enrollment Counselor Home Page.



8. User Portal Navigation


This section applies to both Entity and CEC accounts, and describes the navigation options located on the top-right corner of the Entity and CEC portals. It contains a Home page button, Secure Inbox button and My Account section:

8.1. Home page

The Home page icon  redirects the user to the home page of their user portal, also referred to as the “Dashboard.”



8.2. Secure Inbox

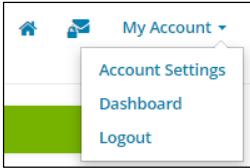
The Secure Inbox icon  provides a centralized location for system-generated updates or messages associated with the Entity and CECs account, some of which may require additional

action from the Entity and CECs. Checking the Secure Inbox often ensures that the Entity and CECs stay up to date with these notifications.



8.3. My Account

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

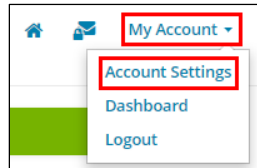


8.3.1. Account Settings

The Account Settings helps the Entity and CECs with updating a password, security question, or email address.

8.3.1.1. Change Password

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



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

The screenshot shows the 'Account Settings' page. It has three sections: Password, Security Question, and Email Address. The 'Change Your Password' button is highlighted with a red box.

Account Settings

Password
Change Your Password

Security Question **What was your childhood nickname?**
Answer
Change Your Security Question

Email Address
Change Your Email Address

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

The screenshot shows the 'Change Your Password' dialog box. It has three input fields: Current Password, New Password, and Confirm New Password. The 'Save' button is highlighted with a red box.

Change Your Password

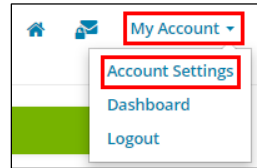
All fields on this form marked with an asterisk (*) are required unless otherwise indicated.

Current Password *
New Password *
Confirm New Password *

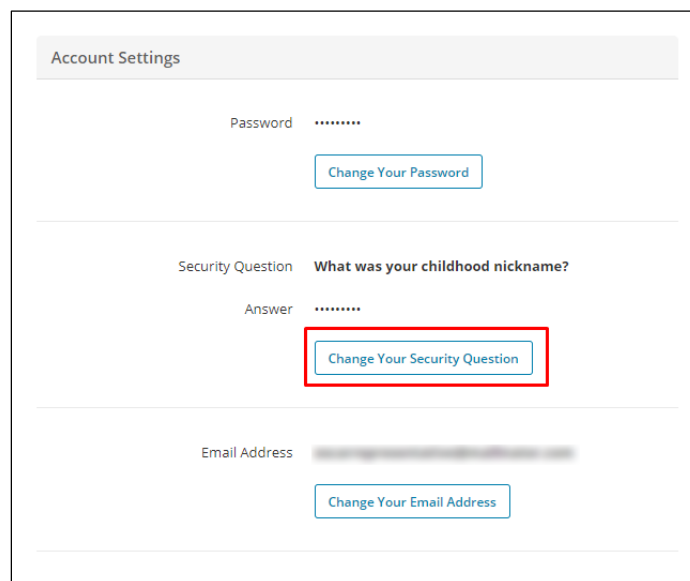
Save

8.3.1.2. 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”.



Account Settings

Password

Change Your Password

Security Question What was your childhood nickname?

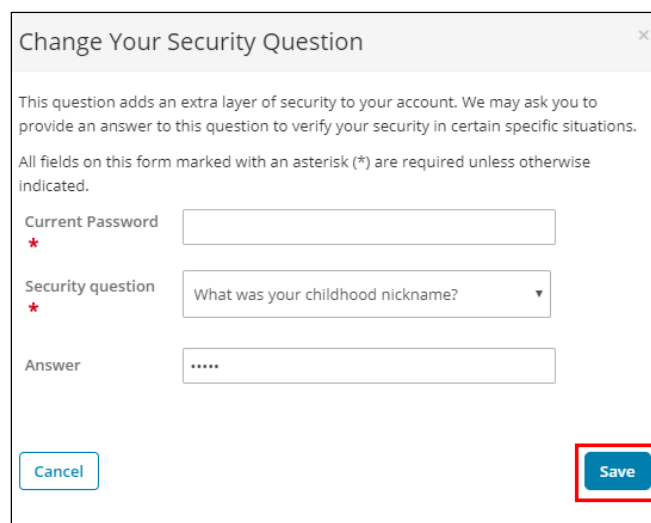
Answer

Change Your Security Question

Email Address

Change Your Email Address

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



Change Your Security Question

This question adds an extra layer of security to your account. We may ask you to provide an answer to this question to verify your security in certain specific situations.

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

Current Password *

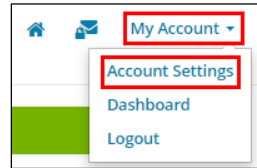
Security question *

Answer

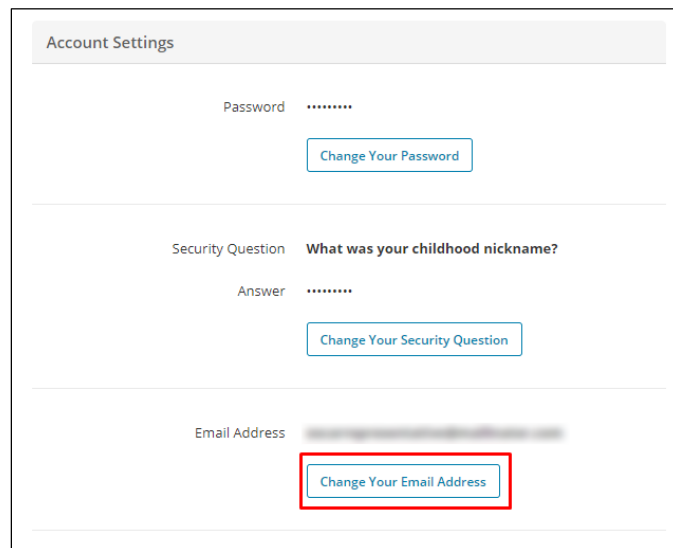
Cancel Save

8.3.1.3. Change Email Address

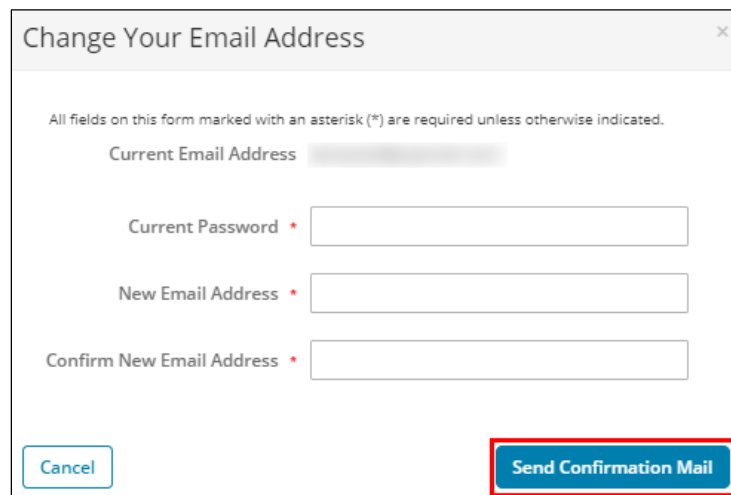
- Step-1: Click on “My Account” on the top-right corner, then click on “Account Settings”.



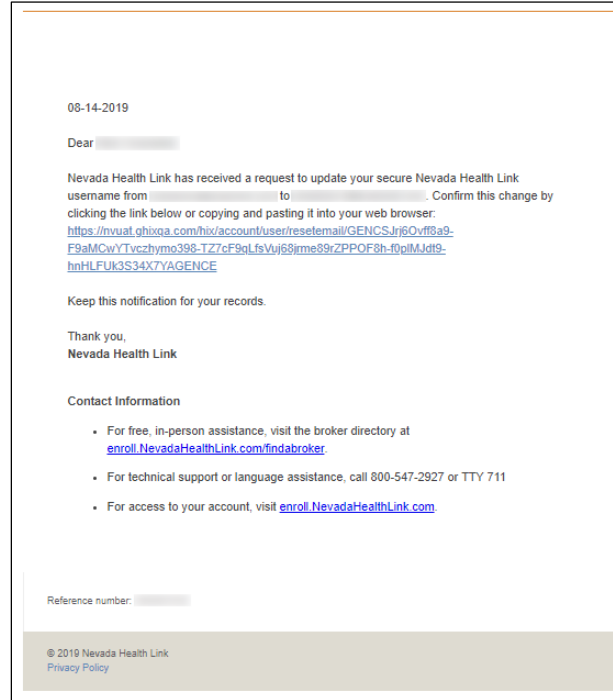
- Step-2: Click on “Change Your Email Address”.

A screenshot of the 'Account Settings' page. The page has a light gray header with the text 'Account Settings'. Below the header, there are three sections: 'Password' with a masked input field and a 'Change Your Password' button; 'Security Question' with the question 'What was your childhood nickname?', an 'Answer' masked input field, and a 'Change Your Security Question' button; and 'Email Address' with a masked input field and a 'Change Your Email Address' button. The 'Change Your Email Address' button is highlighted with a red box.

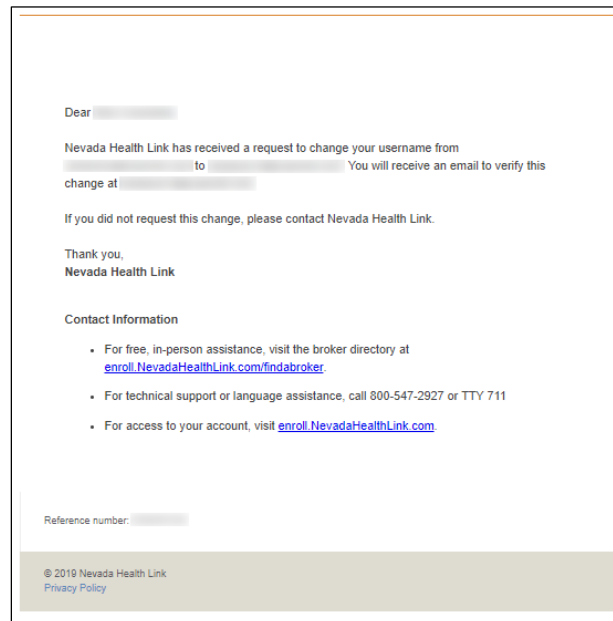
- Step-3: Provide the current password, new email address and confirm the new email address, and click the “Send Confirmation Email” button.

A screenshot of a modal window titled 'Change Your Email Address'. At the top, it says 'All fields on this form marked with an asterisk (*) are required unless otherwise indicated.' Below this, there are four input fields: 'Current Email Address' (masked), 'Current Password *', 'New Email Address *', and 'Confirm New Email Address *'. At the bottom left is a 'Cancel' button, and at the bottom right is a 'Send Confirmation Mail' button, which is highlighted with a red box.

- 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.

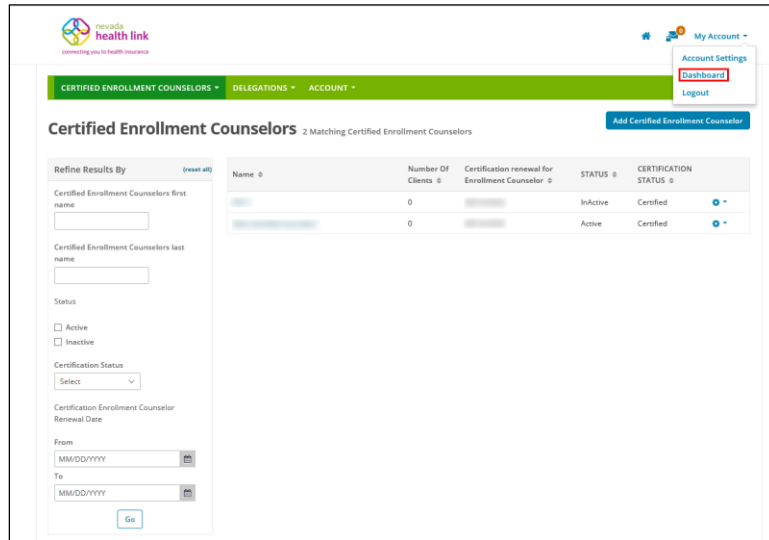


- Step-5: For security purposes, a verification email is also sent on the old email address to notify the user of the change.

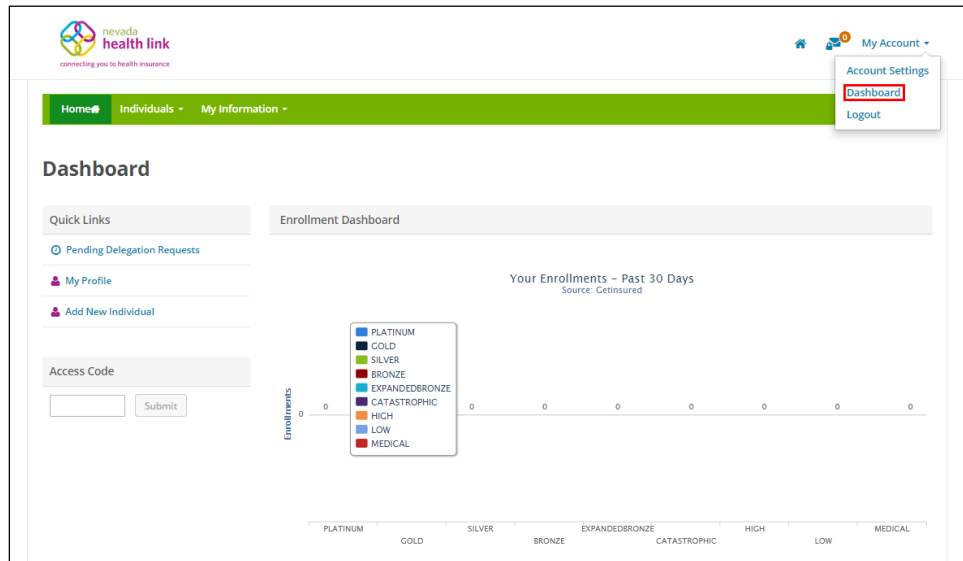


8.3.2. Dashboard

For Entity accounts, the Dashboard link guides an Entity Organization to the list of Certified Enrollment Counselors associated with the organization. Entities can manage CEC profiles, and these profiles can be accessed by searched for the name, Active/Inactive status, Certification status, or CEC certification renewal date of the CEC.

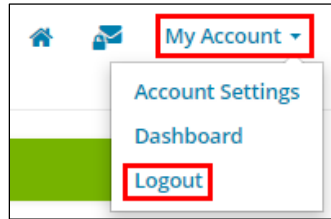


For CEC accounts, the Dashboard tab guides a CEC to their Enrollment History dashboard. This dashboard shows a count of the CEC’s enrollment for the past 30 days as distributed across the type of plan selected.



8.3.3. Log out

The Log out tab allows Entities and CECs to sign out from their current session. For security purposes SSHIX recommends logging out after each session.



Document Revision History

Version	Issue Date	Changes	Drafted	Approved
1.0	8/20/2019	Initial Release	Vinit Yagnik	Russell Cook