

Virginia Exchange Agents Town Hall

July 26, 2023

Town Hall Reminders

Mics are muted

Participants can unmute
and raise their hands for
questions or add questions
in the chat

HBE is logging all questions
and will respond in the
Town Hall as time permits,
or follow up in email/FAQ

Agenda



VAHBE Updates and Reminders

- Town Halls will continue monthly on Wednesdays at 11am. We will send out invites one month in advance. Please send questions and suggested topics to: ExchangeAgents@scc.virginia.gov
 - August 23
 - September 20
- VAHBE continues to host consumer information regarding the continuous coverage unwinding on the SCC website at: <https://www.scc.virginia.gov/pages/Medicaid-Renewals>
- Town Hall materials are now hosted on the SCC website at:
<https://www.scc.virginia.gov/pages/Agents-and-Brokers>

Key Transition Updates- July 2023

- VAHBE Operational Readiness Reviews (ORRs) with CMS were successfully completed in early July. ORRs involved:
 - Executing specific test cases that should produce expected results when a consumer applies for health and dental insurance coverage on the Exchange
 - End-to-end testing of account transfers to demonstrate that DSS/DMAS can effectively transition receiving/sending account transfers from the FFE to the Exchange
- On July 13th CMS granted VAHBE the Authority to Connect (ATC) to the CMS Federal Data Services Hub

Timeline Review

Event:	Date:
Carrier Onboarding: Systems Integration and Electronic Data Integration (EDI) Testing	May-September 2023
CMS Operational Readiness Review Completion	Completed
PY 2024 Plans Loaded into Platform	July-November 2023
Agent/Assister Training and Certification Registration Opens	July 28
VAHBE notifies carriers, agents, assisters of official go/no-go and provide transition communications timeline	Early-mid August
Bureau of Insurance 2024 Health Insurance Rate Presentations	August 9
Agent/Assister Training Modules Open	August 11
Consumer Data Migration	Mid-late September 2023
Auto-Re-Enrollment Begins	October 2
Platform and Consumer Assistance Center (CAC) Soft Launch (agents and assisters)	~October 10
Agents Claim Books of Business	~October 10
Go-Live Open Enrollment PY 2024 Begins	November 1

Marketing Campaigns

Medicaid Unwinding: Messaging to support affected individuals will be ongoing through July 2024

Brand Awareness Campaign: Create awareness about the transition from HealthCare.gov to Virginia's Insurance Marketplace; Sept. 1 to Oct. 31

Open Enrollment Campaign: Drive audiences to the Marketplace's website to buy insurance; Nov. 1 to Jan. 15

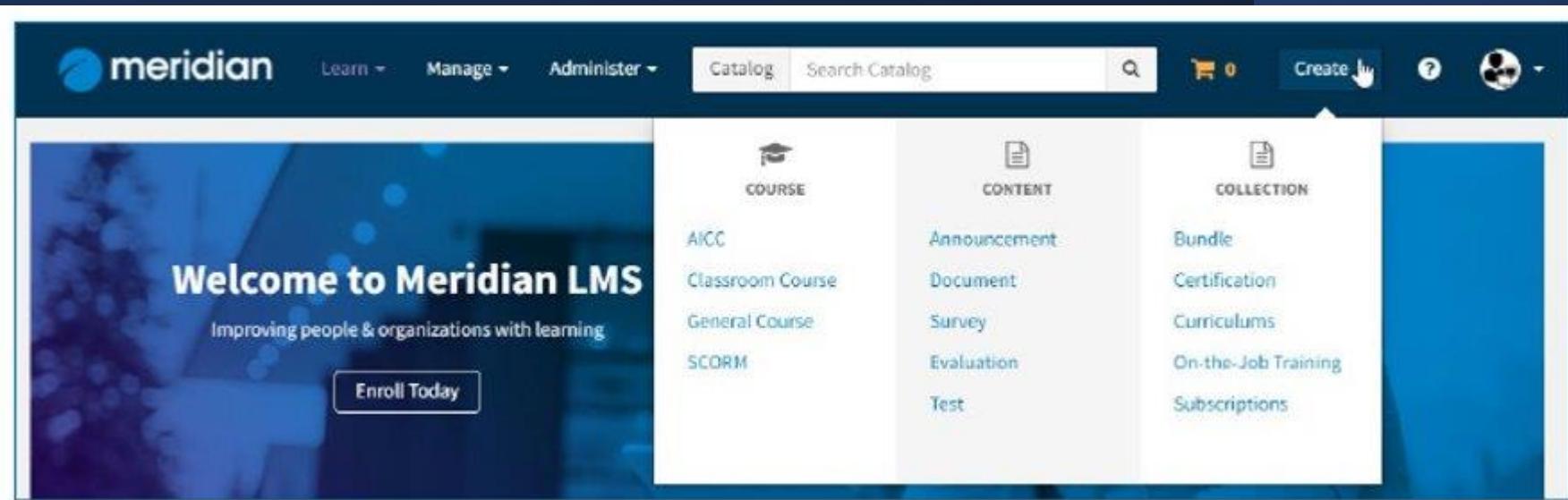
Communications and Marketing Media

Channel	Details
Programmatic Display and Video	Static or animated banner and video ads served on websites across the internet (news, entertainment, etc.).
Connected TV	Video ads placed on streaming platforms through the internet (e.g., YouTube TV, Amazon Prime Video, Sling TV, Hulu, Discovery+).
DOOH	Ads that appear on digital displays around the state (e.g., at gas pumps and bus stations).
Site Direct	Ads that run on specific partner sites to reach niche or distinct audiences.
Streaming Audio	Ads that run on music streaming platforms in between content.
Google Search	Text ads promoted on Google Search results pages for audiences that search with relevant search terms.
High-Impact Display	Premium display ad units that are interactive and encourage brand engagement through multiple touch points.
Social Media	Static banner and video ads promoted on social media platforms such as Facebook, Instagram, Twitter, and TikTok.
Moving Billboards	Digital or wrapped truck ads that serve as billboards.

Policy Updates

- **Deferred Action for Childhood Arrivals (DACA)**
 - On April 26, 2023, a new federal proposed rule would allow for DACA recipients to:
 - Purchase plans and receive income-based subsidies on healthcare exchanges
 - Participate in Medicaid or CHIP coverage for children and/or people who are pregnant in many states
 - Public comment period closed on June 23, 2023
 - The final rule is planned to take effect on November 1, 2023, to coincide with the open enrollment period
 - For information, the proposed rule can be found at the [Federal Register](#).

Training and Certification



- HBE will utilize the Meridian Learning Management System (LMS) to offer Agent, Navigator, and Assister training in Virginia
- Agents, navigators, and assistors with active PY23 certifications will be able to take a limited “renewal” curriculum
- Accounts will be created for those with active PY23 certifications upon account transfer date

Training and Certification, continued...

- LMS is expected to open for agents to claim or create their accounts on July 28
 - Training modules will be available based on your user type (Agent or Navigator/Assister) and whether you are new or “renewing”
 - Training will be free of charge
 - Agents must complete training and pass the exam with 80% or better for certification
 - FFE-certified agents who completed plan year 2023 FFE registration and training will be eligible to complete a shorter training program for plan year 2024 along with Virginia-specific modules
- Training modules are expected to go live on August 11, and should be completed by October 10 for November 1 Exchange Certification
 - The Exchange cannot guarantee certification by November 1 for Agent not able to meet the October 10 training completion deadline
 - Training modules will be provided via PDFs. Users can log in to their accounts 24/7, and can complete training at their own pace
- Agents will continue to be required to be licensed and in good standing through the VA Bureau of Insurance and will be required to sign a Virginia-specific agent agreement
- Updates to requirements will be published on HBE’s website and communicated in Monthly Town Halls and via weekly email updates

Training and Certification, continued...

Module Topic Samples:

- Welcome and Training Overview
- ACA Basics
- Privacy and Security and Fraud Prevention Standards
- Serving Vulnerable and Underserved Populations
- Cultural Competence and Language Assistance
- Assisting People with Disabilities
- Continuous Coverage Unwinding
- Customer Service and Outreach
- Remote Identity Proofing
- How to Resolve Income DMIs

The screenshot shows the Meridian software interface. At the top, there is a navigation bar with links for Learn, Manage, Administer, Catalog, and a search bar. A dropdown menu is open over the 'Training' link in the navigation bar. The dropdown menu contains the following options: People, Careers, Team, Surveys and Evaluations, Gamification, Development Plan Approvals, Approval Requests, Recommendations, Certifications, and Tests. Below the dropdown menu, there is a table listing several training items. The columns in the table are 'Content Items', 'Title', 'Type', and 'Date Modified'. The items listed are: Real Time Computer Systems (7/16/2021), YouTube video (7/12/2021), NJD-Instructor, NJD-SurveySample, and NJD - Sample Survey2 (Survey, 6/29/2021). To the right of the table, there is a sidebar titled 'Manage Content' with a search bar, and a section titled 'Training Assignments' containing links for 'Create Training Assignment', 'Manage Training Assignments', and 'Manage Extensions & Exemptions'.

Virginia's Platform Deep Dive Demos

- Ticketing System
- Broker Connect

Broker Connect Overview

- Overview and Process Flow
- Setup Process

Broker Connect

Steps

- Agent Information
- Profile
- Certification Status
- Agent Connect**
- Participation Information
- Availability

Agent Connect Availability

Please, select hours during which you are available to take the calls each day. For days when you don't plan to take any consumer calls, please select Closed.

On certain days when you are not available to take calls during your working hours, please use the button above to turn your availability OFF. Also if you would like to take calls beyond your working hours on certain days, you can turn the availability button ON to make yourself available for the calls

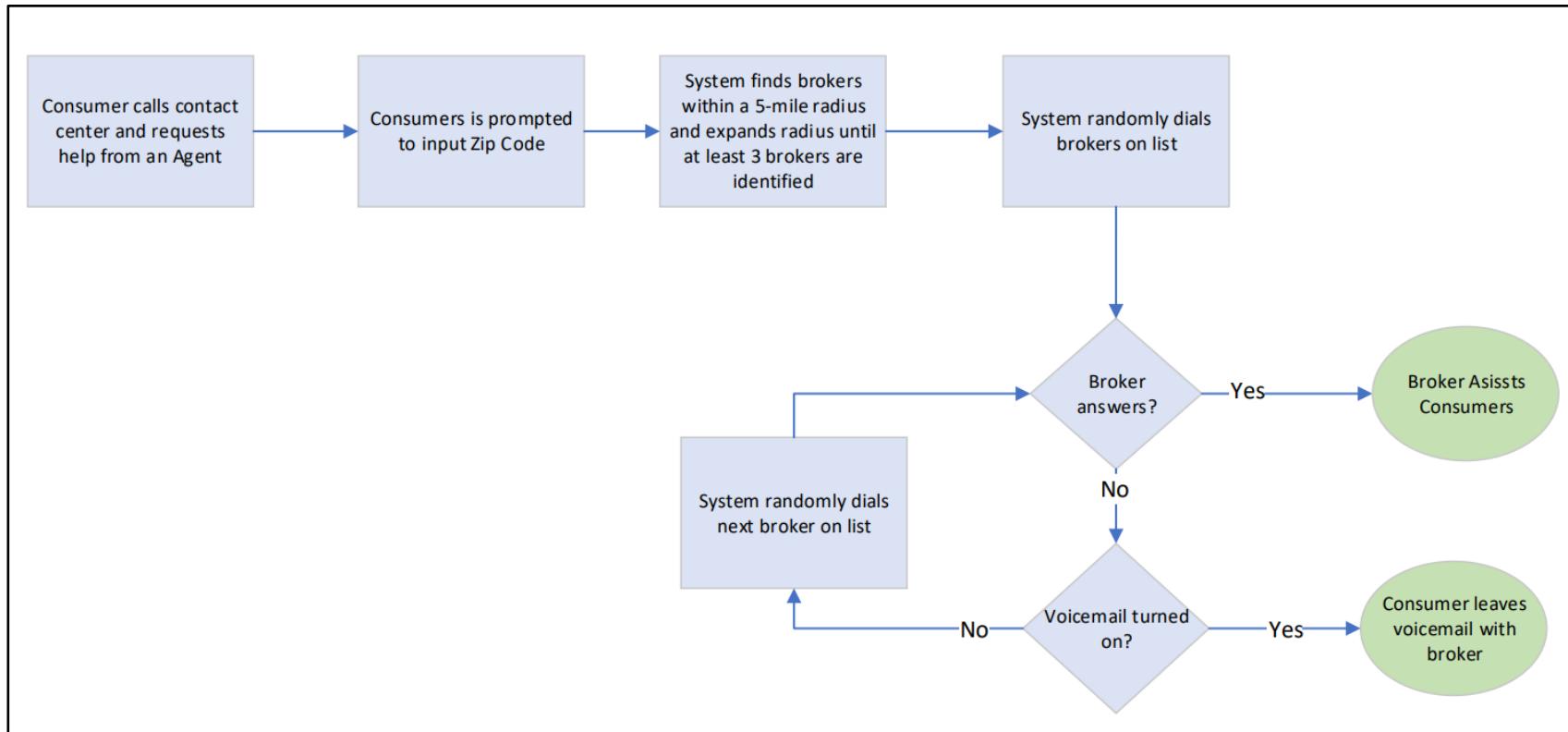
Note: Please enter Pacific Time

Monday	8:00 AM	To	5:00 PM	<input type="checkbox"/> Closed
	WEEKDAY HOURS			
Tuesday	8:00 AM	To	5:00 PM	<input type="checkbox"/> Closed
Wednesday	7:00 AM	To	5:00 PM	<input type="checkbox"/> Closed
Thursday	Closed	To	Closed	<input checked="" type="checkbox"/> Closed

Click the button above to apply Monday hours to all weekdays

Broker connect is a program that brokers can join to receive leads from consumers who need help with completing their application or shopping for a plan. This is equivalent to the FFM's "Help on Demand" tool.

Broker Connect: Process Flow



Broker Connect Setup

➤ Step 1: Agent Confirms Participation in Agent Connect:

Steps

Agent Information

Profile

Certification Status

Agent Connect

Participation Information

Availability

Participation Information

Agent Connect is a program where agents can join to receive leads for consumers that need help with completing their health insurance application or shop for a plan.

Please provide a phone number below on which you would like to receive calls.

Agent Connect Phone Number

Please note that this number will be called only during business hours that you will provide on the next screen.

I agree to Agent Connect Terms and Conditions

Confirm Participation in Agent Connect

Broker Connect Setup

➤ Step 2: Turn on Agent Availability and Set Hours:

The screenshot shows a user interface for setting up Agent Connect availability. On the left, a sidebar titled 'Steps' lists several sections: Agent Information, Profile, Certification Status, Agent Connect (which is currently selected), Participation Information, and Availability. The main content area displays a green success message: 'Successfully enrolled. Your participation in the Agent Connect program is confirmed. Please note that you will not start getting calls unless you select the hours during which you are available to take calls below.' Below this, under 'Agent Connect Availability', there is an 'ON' toggle switch. A note below the switch says: 'Please, select hours during which you are available to take the calls each day. For days when you don't plan to take any consumer calls, please select Closed.' Another note below that says: 'On certain days when you are not available to take calls during your working hours, please use the button above to turn your availability OFF. Also if you would like to take calls beyond your working hours on certain days, you can turn the availability button ON to make yourself available for the calls.' At the bottom, there is a note: 'Note: Please enter Pacific Time'. For Monday, the time is set from 9:00 AM to 5:00 PM, with an unchecked 'Closed' checkbox. For Tuesday, the time is also set from 9:00 AM to 5:00 PM, with an unchecked 'Closed' checkbox. To the right of these fields is a blue-bordered box labeled 'WEEKDAY HOURS' containing the text: 'Click the button above to apply Monday hours to all weekdays.'

Steps

Agent Information

Profile

Certification Status

Agent Connect

Participation Information

Availability

Successfully enrolled

Your participation in the Agent Connect program is confirmed. Please note that you will not start getting calls unless you select the hours during which you are available to take calls below.

Agent Connect Availability

ON

Please, select hours during which you are available to take the calls each day. For days when you don't plan to take any consumer calls, please select Closed.

On certain days when you are not available to take calls during your working hours, please use the button above to turn your availability OFF. Also if you would like to take calls beyond your working hours on certain days, you can turn the availability button ON to make yourself available for the calls.

Note: Please enter Pacific Time

Monday 9:00 AM To 5:00 PM Closed

Tuesday 9:00 AM To 5:00 PM Closed

WEEKDAY HOURS

Click the button above to apply Monday hours to all weekdays

Agent Ticketing Overview

1. Ticket Types and Subtypes
2. Ticket Process Flow – Create Ticket on Behalf of Agent
3. Ticket Process Flow – Create Ticket on Behalf of Consumer

Agent Ticketing Types and Subtypes

The Ticket Types and Subtypes available to Agents are provided below. Agents will be prompted to select a Type and Subtype when logging the request.

Ticket Type	Description
Enrollment Issues	All non-technical enrollment, eligibility, notice, accessibility, and 834 issues.
Feedback	General feedback for Virginia Exchange staff.
Technical Issues	Technical issues for an agent or consumer's account.

Ticket Type	Ticket Subtype	Description
Enrollment	Enrollment Issues	Consumer has issue accessing coverage, locating ID cards, or confirming enrollment.
	Question on billing	Consumer has issue paying invoice with issuer.
	Tax Credit Eligibility	Consumer question or issue regarding tax credit and/or CSRs
	Other	Issue that does not fall into the subtypes above.
Feedback	Feedback	Agent or consumer has feedback for Virginia's Insurance Marketplace.
Technical Issues	Technical Issues	Technical issue including account lockout, password reset, or general errors using system.

Agent Ticketing – Create Ticket on Behalf of Agent

This process outlines how Agents create tickets that are not related to a specific consumer. This includes questions on certification, an agent's Book of Business, or technical account issues.

Step	Description of Action	Ticket Status
1	Broker opens a ticket for their own account using the Ticketing dropdown on the left.	New
2	Virginia's Insurance Marketplace CSR in the appropriate role claims the ticket.	Open
3	Virginia's Insurance Marketplace CSR communicates to Agents as appropriate until the issue is resolved via the Secure Inbox.	Open
4	Virginia's Insurance Marketplace updates the ticket to "Resolved." Agent receives a notification in their secure inbox that the ticket has been resolved and performs the appropriate outreach as needed.	Resolved

Ticket Status	Description
New	Default status when ticket is created by the Broker.
Open	Virginia's Insurance Marketplace CSR has claimed and is working the ticket.
Resolved	Ticket is closed; no further action needed from agent or CSR.

Agent Ticketing – Create Ticket on Behalf of Consumer

If an agent needs to create a ticket for a specific consumer issue, the Agent has the option to Create the ticket on behalf of the consumer in the Agent Account or create the ticket on behalf of the consumer in their Member account.

- Option #1: Create Ticket on Behalf of Consumer in Agent Account (most common)
 - Agents have access to all tickets in their Agent Portal
 - Consumers do not have access to these specific tickets
- Option #2: Create Ticket on Behalf of Consumer in Consumer's Member Account
 - Ticket is created as if it were submitted by consumer
 - Agents have access to these tickets from the member's account, but these do not appear in their Agent Ticketing homepage.

Agent Ticketing – Create Ticket on Behalf of Consumer

Agents can create a ticket on behalf of a consumer by navigating to the “Active Individuals” tab and locating the appropriate consumer. They will then use the “Submit New Ticket” Option.

Step	Description of Action	Ticket Status
1	Broker opens a ticket on behalf of a consumer. The ticket is routed to the appropriate CSR workgroup based on the ticket type.	New
2	Virginia's Insurance Marketplace CSR in the appropriate role claims the ticket.	Open
3	Virginia's Insurance Marketplace CSR communicates to Agents as appropriate until the issue is resolved.	Open
4	Virginia's Insurance Marketplace CSR updates the ticket to “Resolved.” Agent receives a notification in their secure inbox that the ticket has been resolved.	Resolved

Ticket Status	Description
New	Default status when ticket is created by the Broker.
Open	Virginia's Insurance Marketplace CSR has claimed and is working the ticket.
Resolved	Ticket is closed; no further action needed from agent or CSR.

Contacts

Questions, updates, and requests to be added to Monthly Town Halls:

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