



## Washington Health Benefit Exchange

# Broker/Navigator Changes

# Broker/Navigator Changes

- Broker/Navigator Partnership Enhancements
- Navigators can Terminate Partnership with Another Navigator
- Updated Broker/Navigator Reporting Capability
- Password Requirements

# Broker/Navigator Partnership Enhancements

- Enhanced partnership functionality for brokers/navigators :
  - 1 broker **and** 1 navigator can be partnered on an individual user account at the same time
  - Can decline pending partnership requests
  - Can terminate any partnership(s) you hold with a customer



**Background:** streamlines customer experience when working with both a broker and navigator. Allows broker/navigator more administrative ability over their partnerships with clients.

# Broker/Navigator Partnership Enhancements (cont.)

- Enhanced partnership functionality for brokers/navigators:
  - Ability to decline pending partnership requests and terminate any/or all existing partnerships they hold with customers
  - Correspondence (ADM008) generated to consumer when partnership is declined or terminated
  - Navigators are able to terminate partnership a customer holds with any other navigator
- Enhanced partnership functionality for individual users:
  - Ability to have 1 broker and 1 navigator partnership on an individual user account
  - Updates to Quick Links to allow customer to **Find a Broker and Find Navigator**



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- Enhanced partnership functionality for individual users:
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  - Updates to Quick Links to allow customer to **Find a Broker** and **Find a Navigator**

# Broker/Navigator Declines Pending Partnership



Account Home My Clients

Message Center  
You have no notice at this time

Quick Links

Start New Application

**Decline Client Partnership** [X]

Are you sure you want to decline this partnership request? Declining this request will remove it from your dashboard. Please click Confirm to decline or Cancel to return to your dashboard

< Cancel Confirm >

Help Requests

App Id	Name	Company	Contact Date	Phone	Status	Action
30000221	Jack Johnson		01/31/2017	123-456-7899	Submitted	<a href="#">Accept</a> <a href="#">Decline</a>

1 Item Found.

- Brokers/Navigator
- may see a help
- request on their
- Account Home
- dashboard
- Click **Accept** to partner
- Click **Decline** to decline customer help request
  - Customer will be sent ADM008 when partnership is

# Navigator/Broker Accept or Decline Help Request Demo

The screenshot shows the Washington Healthplanfinder website interface. At the top, there are navigation links for HOME, EN ESPAÑOL, WELCOME, NAV TWO (SIGN OUT), and CUSTOMER SUPPORT. The logo for Washington Healthplanfinder is displayed with the tagline 'click. compare. covered.'. Below the logo, there are tabs for 'Account Home' and 'My Clients'. The 'Message Center' section indicates 'You have no notice at this time'. A 'Quick Links' sidebar on the right lists various actions such as 'Manage My Account', 'My Clients', 'Find New Client's Account', 'Start New Application', 'Print Paper Application', 'Renew Certification', 'Update Contact Information', and 'Terminate Client Partnership'. The 'Help Requests' section contains a table with one entry for Jack Johnson, submitted on 02/25/2017, with a status of 'Submitted' and a request type of 'Ongoing'. The table includes columns for App Id, Name, Company, Contact Date, Phone, Status, Request Type, and Action. Below the table, it states '1 Item Found.'

HOME | EN ESPAÑOL WELCOME, NAV TWO (SIGN OUT) | CUSTOMER SUPPORT

washington healthplanfinder  
click. compare. covered.

Account Home My Clients

Message Center  
You have no notice at this time

Quick Links

- Manage My Account
- My Clients
- Find New Client's Account
- Start New Application
- Print Paper Application
- Renew Certification
- Update Contact Information
- Terminate Client Partnership

Help Requests

App Id	Name	Company	Contact Date	Phone	Status	Request Type	Action
30000221	Jack Johnson		02/25/2017	333-333-3333	Submitted	Ongoing	Accept Decline

1 Item Found.

# Broker/Navigator Terminate Current Partnership(s)



Account Home My Clients

Message Center

You have no notice at this time

Update Contact Information

Browse and Quote Group Plans

**Terminate Client Partnership**

Help Requests

No Help Requests found at this time.

### Terminate Client Partnership

App Id	Name	User Type	Relationship Type	Terminate Partnership
30000221	Jack Johnson	Individual	Ongoing	<input type="checkbox"/>

1 Item Found.

Terminate Selected ▶

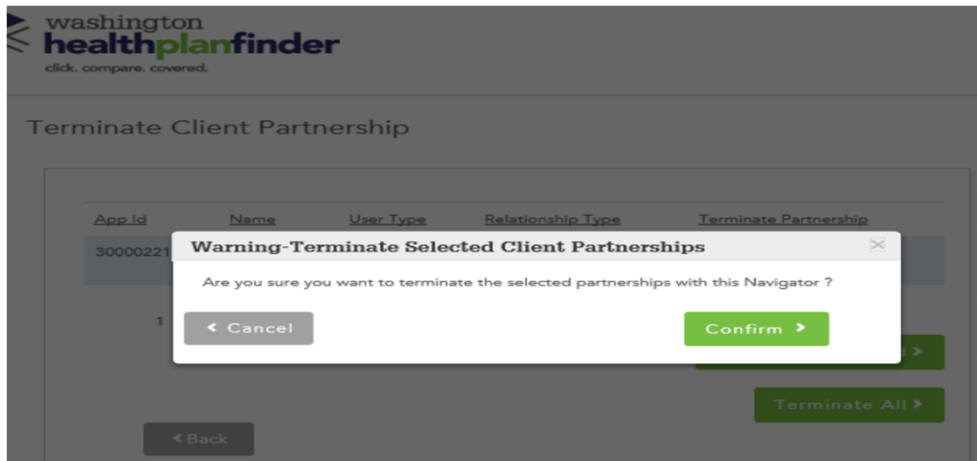
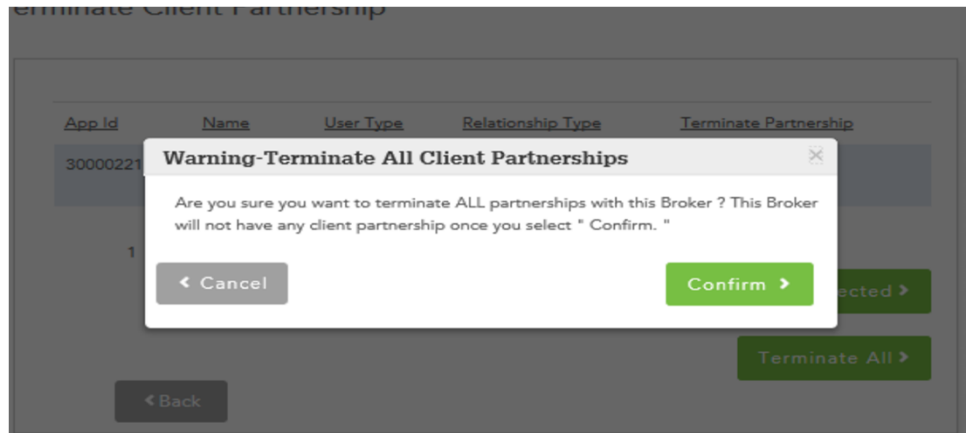
Terminate All ▶

◀ Back

- Brokers/navigators can terminate partnerships from their **Account Home**
- Click **Terminate Client Partnership**
- Once in **Terminate Client Partnership** click:
  - Select one (or multiple)
- partnerships and click **Terminate Selected**
- Option to **Terminate**



# Broker/Navigator Terminate Current Partnership(s)



- Once **Terminate All** or **Terminate Selected** is clicked broker/navigator will see one of two modals
- Once **Confirm** is **clicked** from either modal the action is completed and customer is removed from **My Clients**
  - Customer will be sent ADM008 when partnership is declined

# Navigator Terminate Other Navigator Partnership Flow Demo

The screenshot displays the Washington Healthplanfinder website interface. At the top, there is a navigation bar with links for HOME, EN ESPAÑOL, WELCOME, NAV TWO (SIGN OUT), and CUSTOMER SUPPORT. The Washington Healthplanfinder logo is prominently displayed, with the tagline "click. compare. covered." Below the logo, there are two tabs: "Account Home" and "My Clients". The main content area is divided into three sections: "Message Center" with the message "You have no notice at this time", "Quick Links" which includes options like "Manage My Account", "My Clients", "Find New Client's Account", "Start New Application", "Print Paper Application", "Renew Certification", "Update Contact Information", and "Terminate Client Partnership", and "Help Requests" with the message "No Help Requests found at this time."

HOME | EN ESPAÑOL WELCOME, NAV TWO (SIGN OUT) | CUSTOMER SUPPORT

washington healthplanfinder  
click. compare. covered.

Account Home My Clients

Message Center  
You have no notice at this time

Quick Links  
Manage My Account  
My Clients  
Find New Client's Account  
Start New Application  
Print Paper Application  
Renew Certification  
Update Contact Information  
Terminate Client Partnership

Help Requests  
No Help Requests found at this time.

# Password Requirements

- **Impacted users:** account workers, navigators/brokers and employees (*not for individual users*)
- No commonly used dictionary words or names can be used when creating/changing a password in *Washington Healthplanfinder*
  - *Some examples of dictionary words could be –Password, Password1, GoSeahawks, Football, letmein, etc.*
- Verbiage update to all password related screens and field level help
- This will not affect existing passwords, only when changing or resetting your password



**Background:**required for the Exchange to be compliant with federal password requirements for privileged users.

# Impact to Broker/Navigator Summary

- Ability to decline customer help requests
- Ability to terminate current partnerships
- **\*Navigator Only\*** ability to terminate customer partnership with another navigator when trying to partner
- No commonly used dictionary words or names can be used when creating/changing a password in *Washington Healthplanfinder*