

Broker Town Hall

Virginia Health Benefit Exchange

January 18, 2023

Jennifer Krupp, Deputy Director of Enrollment and Outreach

Housekeeping

Microphones and chat features are disabled.

If you have questions during the presentation,
email them to:

brokers@scc.virginia.gov

This email address is monitored during the
presentation.

Submitted questions will be answered as time
permits.

HBE staff will follow up on all questions.



Virginia
Health
Benefit
Exchange
Introductions

Keven Patchett
Acting Director

Jennifer Krupp
Deputy Director of Enrollment and Outreach

Brionna Jones
Marketing and Outreach Manager

Kenyata Tyler-Moore
Consumer Center Manager

Holly Mortlock
Chief of Government Affairs and Policy

Toni Janoski
Deputy Director Operations and Finance

Christine Houchens
Certification and Compliance Manager



Agenda



VIRGINIA'S
TRANSITION UPDATE



TIMELINE



VIRGINIA'S BROKER
SOLUTION



DATA MIGRATION



BROKER
ENGAGEMENT AND
SUPPORT



NEXT STEPS

Transition Update

- On September 29, 2022 the SCC awarded a nine-year contract to GetInsured for Virginia's platform and consumer assistance center.
- GetInsured operates in 7 of the 18 state-based Exchanges nationwide.
- Successfully transitioned NV, NJ, and PA, from the Federally Facilitated Exchange (FFE) to their own state-based platforms.
- Virginia's platform and consumer assistance center will be integrated and will be staffed by customer service representatives dedicated to Virginia.

Timeline

- Fall/Winter 2022 – Design and development of Exchange Platform and Consumer Assistance Center
- Winter/Spring 2023 – FFE* Data Migration Testing
- Spring 2023 – Systems Integration & Carrier EDI* Testing
- Late Spring 2023 – HBE* public facing website launch
- Summer 2023 – Carrier Onboarding, PY 2024 Plans loaded into platform
- Summer 2023 – Broker Training and Certification
- Late Summer 2023 – FFE Consumer Data Migration
- September 1, 2023 – Platform and CAC Soft Launch/Plan Preview/Broker Portal Access
- Late September 2023 – Broker Books of Business created
- October 2, 2023 – Auto-reenrollment
- November 1, 2023 – PY 2024 Open Enrollment Begins

*FFE – Federally Facilitated Exchange

*EDI – Electronic Data Interface

*HBE – Health Benefit Exchange

Introduction: Virginia's Broker Solution

- Suite of Portals specifically designed to match the real-world workflow of insurance brokers.
- Designed with specific roles in mind:
 - Brokers
 - Agency Managers
 - Administrative Staff
- Ability to manage and assist consumers through online portal access, with a single log-in to complete all Exchange tasks.
- Focused on providing simple and efficient program administration and management of a broker's day-to-day business.

Broker Portal - Agency Portal

- Allows agency manager to view and edit Agency Account;
- View and edit personal account and profile;
- Add and manage broker accounts and profiles;
- Process delegation requests;
- Act on behalf of a broker and their delegated individuals; and
- View, manage and edit the overall Agency book of business.

The screenshot displays the 'Agents' section of the Broker Portal Agency Portal. At the top, there is a navigation bar with links for 'Agents', 'Admin Staff', 'Agency Delegations', 'Agency Account', 'My Delegations', and 'My Agent Profile'. Below the navigation bar is a search and filter panel on the left, and a table of agents on the right.

Refine Results By [Reset All](#)

First Name

Last Name

Agent Status
 Active Inactive

Certification Status
Select Certification Status

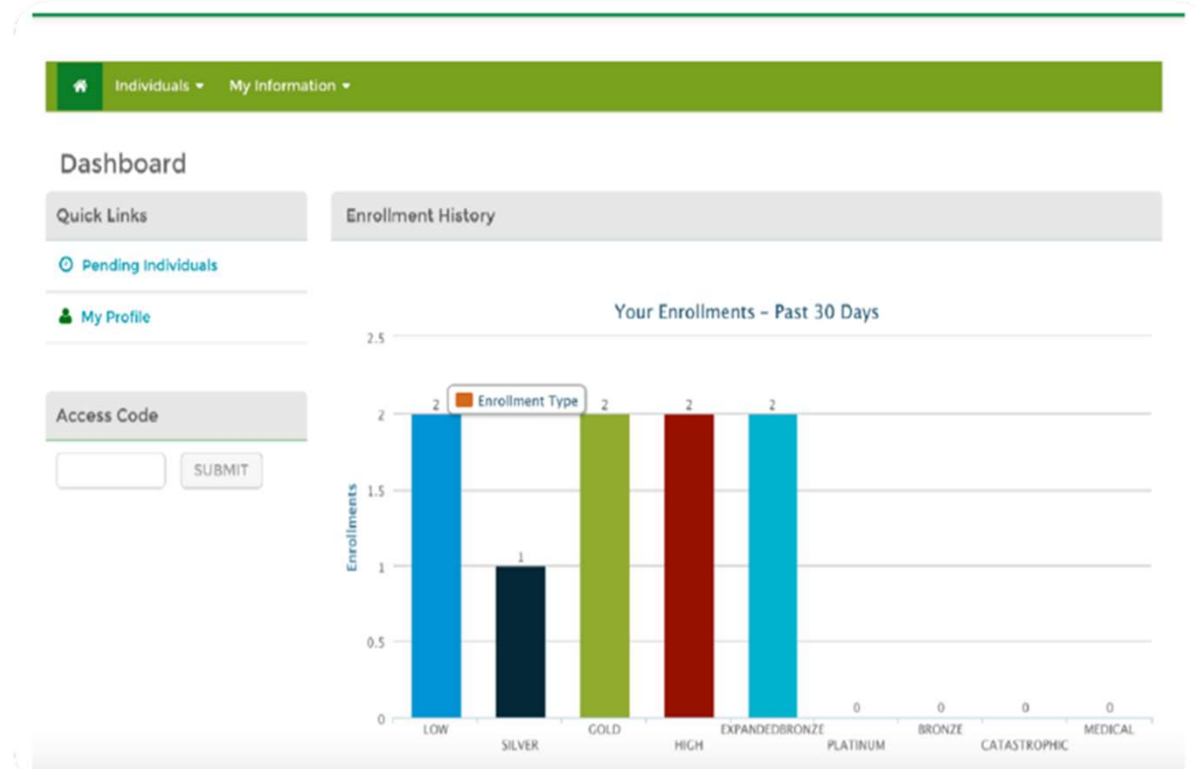
License Number

Agent Name	Active/Inactive	Consumers	Agent License #	Certification Status	Actions
Tiffany Wu	Active	0	1234341	Pending	
Kimberely Green	Active	1	2938359	Certified	
Robert Thatcher		0	1234567	Incomplete	
Esha Desai		0	1234567	Incomplete	
Adam Smith	Active	0	9760307	Certified	
Cecilia Payne-Gaposchkin	Active	0	5590057	Certified	

Previous **1** Next

Broker Portal – Individual Brokers

- View, edit and manage their Book of Business;
- Accept delegation requests;
- See a dashboard of their enrollments;
- Assist consumers with the submission of an application and plan selection;
- Manage their account and profile information; and
- Search and self designate consumers



Broker Portal – Administrative Staff

- Admin Level 1
- View agency's broker list;
- Accept pending delegation requests on behalf of a broker;
- Complete the application process.
- Admin Level 2:
- Administrative staff to view and update broker and agency profiles;
- Accept pending delegation requests on behalf of a broker;
- Transfer delegations between brokers;
- Add brokers;
- Start and complete an application on behalf of consumers.

The screenshot displays the 'Active Customers' section of a web application. At the top, there is a navigation bar with links for 'Agents', 'Agency Delegations', 'Agency Account', and 'My Profile'. Below the navigation bar, the title 'Active Customers' is prominently displayed. A search bar with a magnifying glass icon and a plus sign is located below the title. To the right of the search bar, there is a 'Change Delegation' link with a plus sign. Below the search bar, there is a 'Sort By:' dropdown menu currently set to 'First Name A-Z'. The main content area features a table with the following columns: 'SELECT', 'HOUSEHOLD', 'CASE DETAILS', 'COVERAGE', 'AGENT', and 'ACTIONS'. The table contains one row of data for a customer named Orlando Bloom. The 'SELECT' column has a checkbox. The 'HOUSEHOLD' column lists the customer's name, email, phone number, and address. The 'CASE DETAILS' column provides the Household Case ID, Application Year, Application Type, Current Status, Next Steps, and Due Date. The 'AGENT' column lists the agent's name and ID. The 'ACTIONS' column has a gear icon.

SELECT	HOUSEHOLD	CASE DETAILS	COVERAGE	AGENT	ACTIONS
<input type="checkbox"/>	Orlando Bloom orlando.bloom665@yopmail.com (774) 341-8909 3655 S Las Vegas Blvd Las Vegas NV, 89109	Household Case ID: 100014035 Application Year: 2022 Application Type: Financial Current Status: Eligible for Shopping Next Steps: Shop for Plans Due Date: Jan 20, 2022		Helena Bonham Carter 09812	

Broker Connect

- Gives agents/brokers the ability to receive inbound calls from consumers who do not already have a designated agent or broker.
- Made available to consumers through IVR
- Agents and Brokers can set their availability and turn on/off participation

The screenshot shows a web form titled "Peggy Ashcroft" for "Broker Connect". On the left is a "Steps" sidebar with links for "Agent Information", "Profile", "My Tickets", "Certification Status", "Broker Connect", "Participation Information" (highlighted in blue), and "Availability". The main content area is titled "Participation Information" and contains the following text: "Broker Connect is a program where brokers can join to receive leads for consumers that need help with completing their health insurance application or shop for a plan." Below this is a prompt: "Please provide a phone number below on which you would like to receive calls." A text input field contains "609-121-8909". A note follows: "Please note that this number will be called only during business hours that you will provide on the next screen." At the bottom left, there is a checkbox labeled "I agree to [Broker Connect Terms and Conditions](#)". At the bottom right, there is a blue button labeled "CONFIRM PARTICIPATION IN BROKER CONNECT".

Broker Mobile App – Planned for Open Enrollment 2023

- For Brokers and Agency Managers
- Available on Android and iPhone
- Touch ID/Face ID Login
- Weekly/Monthly/Yearly Dashboard
- Contact List type Book of Business
- Consumer plan/subsidies details
- One touch enable/disable Broker Connect Availability
- Alerts for new delegation requests
- Agency Managers can transfer consumers



Data Migration from FFE

- Virginia's Data Migration will be the same process conducted successfully in NV, NJ, and PA
- Broker profiles and associated books of business will be created as part of the process.
- Consumer data will be pre-loaded so brokers can begin helping their clients immediately.
- Broker books of business will be migrated from the FFE data and matching NPN numbers to broker profiles.
- To make the migration seamless the SCC will work to obtain complete and up-to-date broker profiles.
- In the case where a consumer association is not migrated, brokers can search for the consumer and claim the consumer designation through the broker portal.

Claiming your Book of Business



Books of Business will be created in September/October of 2023



Agents will have Books of Business created automatically if:

They have consumers with 2023 enrollments

They have completed the training and certification requirements



Agents will be issued a notice via email with an invitation code to log into the system and claim their Book of Business

Training and Certification

- Training and Certification will be open to all Agents/Brokers
- Registration for training will open in Summer 2023
- Agents and Brokers must successfully complete training for certification
- Agents and Brokers will continue to be required to be licensed and in good standing through the VA Bureau of Insurance
- Agents and Brokers will be required to sign a Virginia-specific agent and broker agreement.
- Updates to requirements will be published on the HBE's website and communicated in Monthly Townhalls and via email newsletters.

Broker Engagement

- Monthly Town Hall meetings
 - February 15
 - March 15
 - April 19
 - May 17
 - June 14
 - Bi-monthly sessions beginning in July
- Email newsletters with updates and FAQs between Broker Town Halls
- To sign up, please send an email indicating your interest to: Brokers@scc.virginia.gov

Broker Support

Dedicated Broker Engagement Liaison

Dedicated HBE staff to support training and certification

Complex Case Resolution Specialist assigned to Agent/Assister submitted cases.

Dedicated and separate Agent/Assister phone number for Consumer Assistance Center

Contacts

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

brokers@scc.virginia.gov

Virginia Health Benefit Exchange

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