

Agenda

1. Broker Connect

2. Ticketing System

- Introduction
- Exchange-Initiated Tickets
- Issuer-Initiated Tickets
- Demo

Broker Connect

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.

Steps

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

Agent Connect Availability

ON

Please, select hours during which you are available to take the calls each day. For days when you dont 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

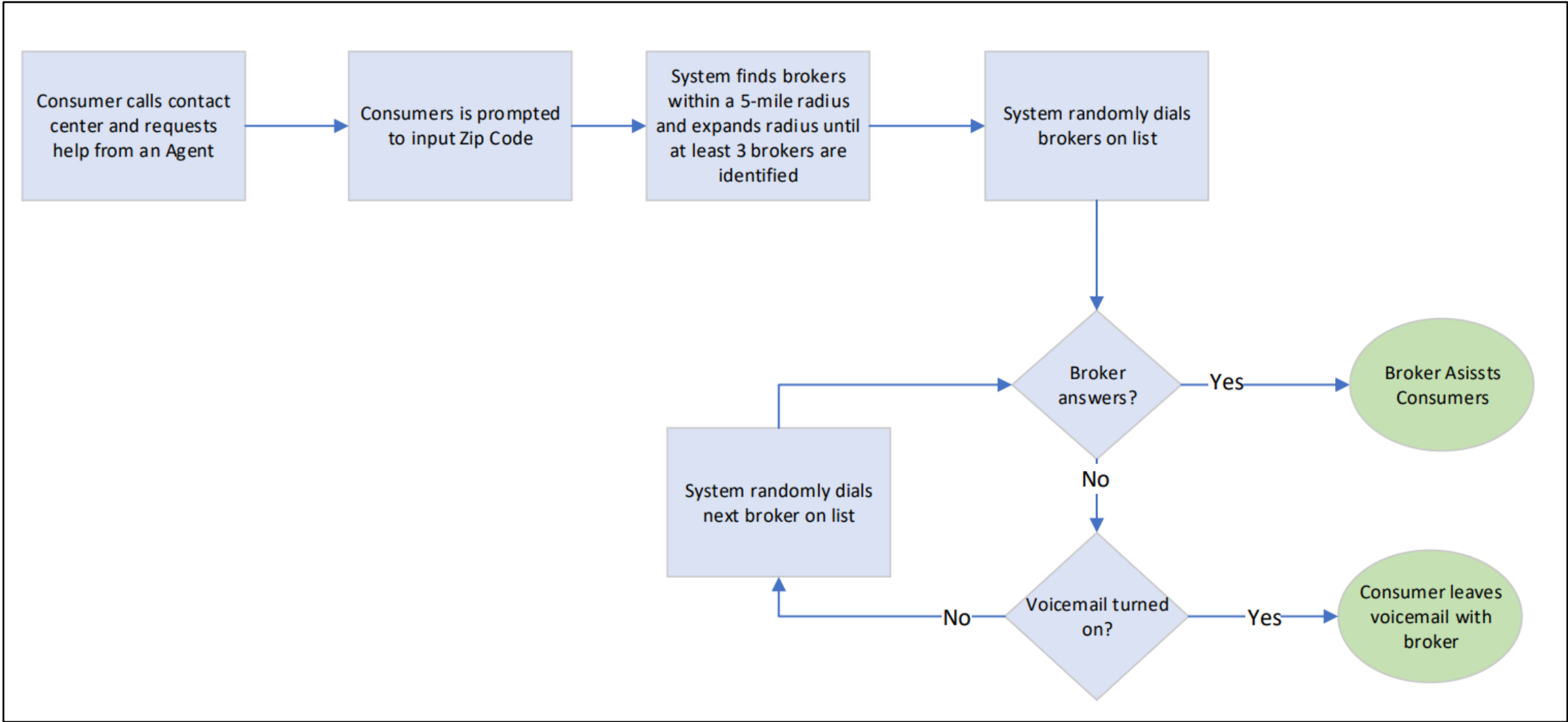
Note: Please enter Pacific Time

Monday	8:00 AM	To	5:00 PM	<input type="checkbox"/> Closed
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

WEEKDAY HOURS

Click the button above to apply Monday hours to all weekdays

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

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 dont 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	<input type="checkbox"/> Closed
Tuesday	9:00 AM	To	5:00 PM	<input type="checkbox"/> Closed

WEEKDAY HOURS

Click the button above to apply Monday hours to all weekdays

Issuer Ticketing System: Introduction

Virginia's Insurance Marketplace provides three main roles to issuers in the Issuer Portal:

Role	Description
Issuer Representative	Issuer staff member who is responsible for reviewing and approving the display of plan data on the system and for configuring the PayNow integration.
Issuer Enrollment Representative	Issuer staff member who has access to all issuer enrollments and ticketing system.
Issuer Finance Staff	Issuer staff member who has access to view and pay the issuer's User Fee invoice.

The **Issuer Enrollment Representative** role has access to the ticketing system. The content in this presentation is focused on this role.

Issuer Ticketing System: Primary Functions

The purpose of the Issuer Ticketing System is for Issuers and Exchange Staff to communicate enrollment, eligibility, policy, billing, and general operational issues with one another.

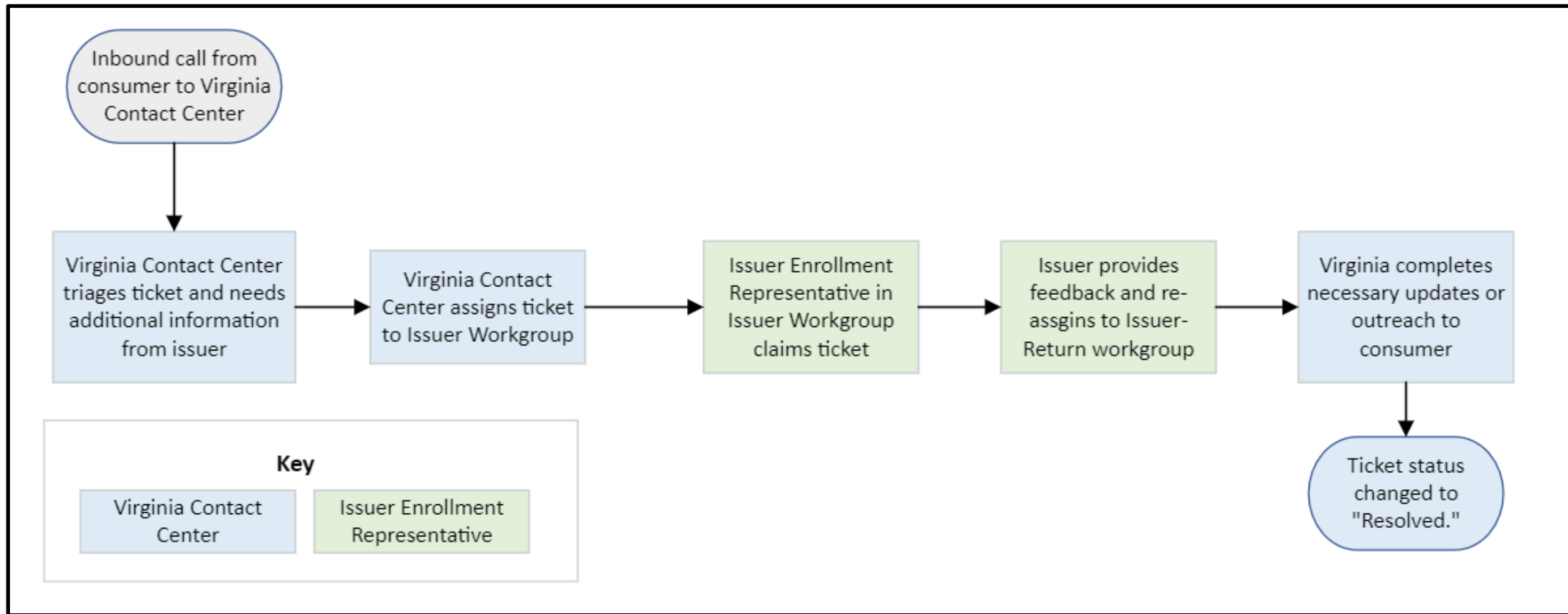
The key types of issues addressed in the ticketing system are the following:

- Enrollment Issues
- Eligibility Issues
- EDI/Technical Issues
- Reconciliation Disputes

Tickets can be initiated by the Exchange or by Issuer Enrollment Representatives. The subsequent slides provide the process flows for both ticket creation flows.

Issuer Ticketing System: Exchange-Initiated Tickets

The Virginia Contact Center fields initial inquiries from consumers. If an inquiry requires additional details or feedback from an issuer, the Exchange will assign the ticket to the Issuer's Workgroup. The process flow below outlines this process.



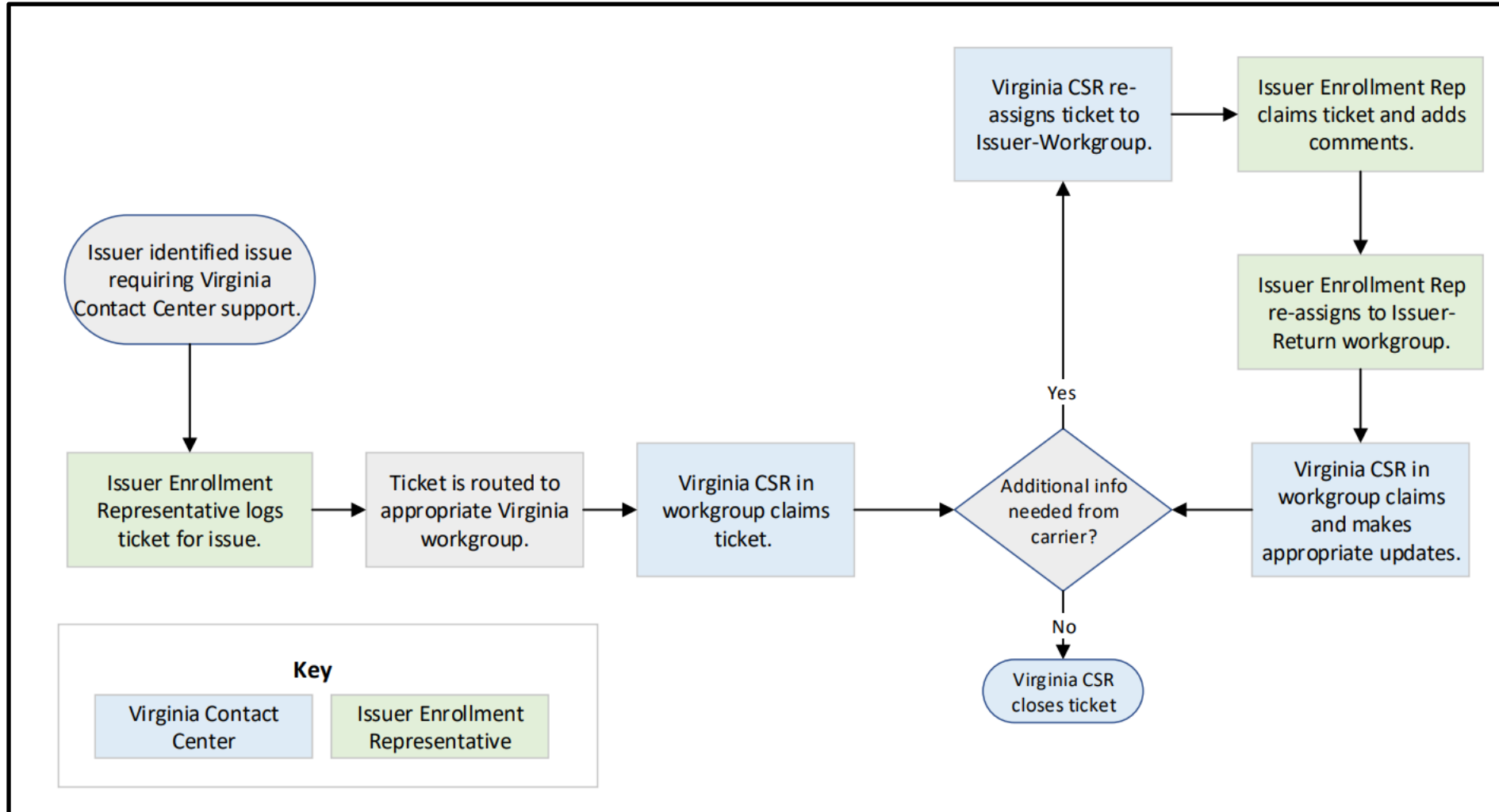
Ticketing System: Exchange-Initiated Tickets

The Virginia Exchange Call Center will assign tickets to the Issuer Workgroup when input is required on a specific consumer inquiry. The table below outlines the Ticket Status and Ticket Workgroup associated with each step of this process.

Step	Description of Action	Ticket Status	Ticket Workgroup
1	Consumer reaches out with an inquiry. The ticket is logged in the appropriate workgroup based on the inquiry.	Unclaimed	[Dependent on Ticket Type*]
2	Virginia CSR in the appropriate role claims the ticket.	Open	[Dependent on Ticket Type*]
3	Virginia CSR requires additional information from issuer. CSR assigns the ticket to the appropriate Issuer Workgroup.	Unclaimed	Issuer – Workgroup
4	Issuer Enrollment Representative claims ticket.	Open	Issuer – Workgroup
5	Issuer Enrollment Representative reviews ticket and adds additional comments as needed.	Open	Issuer – Workgroup
6	Issuer returns ticket to Virginia CSR to resolve.	Unclaimed	Issuer – Return
7	Virginia CSR claims ticket and reviews updated comments from issuer.	Open	Issuer – Return
8	Virginia CSR performs appropriate outreach and closes ticket.	Resolved	Issuer – Return

Issuer Ticketing System: Issuer-Initiated Tickets

Issuers will follow the process below to escalate items to the Virginia Contact Center.



Ticketing System: Issuer-Initiated Tickets

Issuer Enrollment Representatives will log tickets in their issuer portal requiring Exchange input. The table below outlines the Ticket Status and Ticket Workgroup associated with each step of this process.

Step	Description of Action	Ticket Status	Ticket Workgroup
1	Issuer Enrollment Representative submits ticket in Issuer Portal.	Unclaimed	[Dependent on Ticket Type*]
2	Virginia CSR in the appropriate role claims the ticket.	Open	[Dependent on Ticket Type*]
3	Virginia CSR requires additional information from issuer. CSR assigns the ticket to the appropriate Issuer Workgroup.	Unclaimed	Issuer – Workgroup
4	Issuer Enrollment Representative claims ticket.	Open	Issuer – Workgroup
5	Issuer Enrollment Representative reviews ticket and adds additional comments as needed.	Open	Issuer – Workgroup
6	Issuer returns ticket to Virginia CSR to resolve.	Unclaimed	Issuer – Return
7	Virginia CSR claims ticket and reviews updated comments from issuer.	Open	Issuer – Return
8	Virginia CSR performs appropriate outreach and closes ticket.	Resolved	Issuer – Return

Issuer Ticketing System: Issuer-Initiated Tickets

Issuers will initiate tickets to Virginia that require Exchange input. We will be providing training material and finalized ticket types in the upcoming weeks. The table below outlines the available ticket types.

Category	Ticket Type
Enrollment	Address Validation
Enrollment	Duplicate Enrollment
Enrollment	Enrollment Issue
Enrollment	Insurer – Other
Enrollment	Relationship Update
Enrollment	SSN Validation
Enrollment	Reconciliation Dispute
Enrollment	1095A Questions
Enrollment	834 Error/Issue
Enrollment	Enrollment – Urgent Medical Need
Enrollment	Enrollment Not Found with Issuer
Enrollment	Enrollment Termination or Cancellation
Enrollment	Reinstatement
Enrollment	Rescissions
Enrollment	Subsidy Not Found with Issuer
Finance	User Fee Payment

NOTE: Ticket types are preliminary and subject to change based on future needs and feedback.

Issuer Ticketing System: Summary of Statuses

The summary of the statuses that will be available to issuers are listed below.

Ticket Status	Description
Unclaimed	Default status when ticket is created by the Issuer.
Open	Virginia CSR has claimed the ticket.
Resolved	Ticket is closed; no further action needed from Issuer or CSR.
Cancelled	Closed; ticket was opened in error
Re-Opened	Ticket was re-opened after it was resolved due to new issue identified