

August Marketplace Update for Assisters

August 2017

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2018 Assister Training Updates

Assister Training Now Live!

We are pleased to invite all assisters to take the 2018 Assister Certification Training that went live August 4, 2017.

The training is hosted by the Marketplace Learning Management System (MLMS); the online web-based training platform for assisters providing application and enrollment assistance to consumers in Federally-Facilitated Marketplaces (FFMs), including State Partnership Marketplaces (SPMs), and certain State-based Marketplaces using the Federal platform (SBM-FPs). The training can be accessed through the CMS Enterprise Portal by logging in or

registering as a new user at <https://portal.cms.gov/wps/portal/unauthportal/registration>. Existing users can login at: <https://portal.cms.gov>.

We hope that you were able to participate in the Wednesday, August 2 webinar at 2pm ET on the 2018 training and certification requirements. You can view the webinar slides here: <https://marketplace.cms.gov/technical-assistance-resources/training-materials/2018-launch-ffm-assister-training.pdf>.

You can find training presentations and additional resources, such as Frequently Asked Questions (FAQs), and MLMS Quick Reference Guides at the following link: <https://marketplace.cms.gov/technical-assistance-resources/training-materials/training.html>.

For additional assistance with questions on the MLMS assister training, please submit inquiries to MLMSHelpDesk@cms.hhs.gov. For assistance with CAC program questions, submit inquiries to CACQuestions@cms.hhs.gov. For assistance with Navigator program questions, submit inquiries to your CMS project officer.

Assister Bulletin Released

CMS also released the [2017 Assister Certification Bulletin](#) which outlines the Navigator and certified application counselor (CAC) certification and recertification requirements for the 2018 plan year, including the certification training curriculum for the Federally-facilitated Marketplace (FFM). In this bulletin, we refer to this updated training curriculum as the “2018 training.” The 2018 training is available through the Marketplace Learning Management System (MLMS) and can be accessed through the CMS Enterprise Portal by logging in or registering as a new user at <https://portal.cms.gov/wps/portal/unauthportal/registration>.

Existing users can login at: <https://portal.cms.gov>.

Click [here](#) to view the 2018 Assister Certification Bulletin.

Updates to Citizenship and Immigration Verification Services at the Federally-facilitated Marketplace

Key Takeaway: Starting in August, the Federally-facilitated Marketplace (Marketplace)¹ will begin resolving more consumers’ citizenship or immigration status electronically with the Department of Homeland Security (DHS), without requiring the consumer to provide additional documentation right away.

¹ References to the Federally-facilitated Marketplace refer throughout to the Federally-facilitated Marketplace and State-based Marketplaces using the federal eligibility and enrollment platform.

Overview

As part of determining eligibility for enrollment in a qualified health plan (QHP), the Marketplace attempts verification of certain application information provided by the consumer with trusted data sources.

If a consumer attests on his or her Marketplace application to being a naturalized or derived citizen of the United States, or attests to having a verifiable immigration status, the Marketplace attempts to verify the consumer's citizenship or immigration status through DHS via the Federal Data Services Hub (Hub). The DHS database that is used to electronically verify citizenship and immigration status is known as the Systematic Alien Verification for Entitlements (SAVE) program.

The SAVE program consists of three steps:

- Step 1 includes real-time verification of a consumer's citizenship or immigration status through the Hub with DHS while a consumer navigates through and submits his or her application for coverage through the Marketplace.
- Step 2 can take between three to five business days and includes additional verification of a consumer's attested citizenship or immigration status by DHS.
- Step 3 is a manual process started by DHS if a consumer's citizenship or immigration status cannot be verified through Step 2, and can take up to 20 business days.

Previously, if the Marketplace was unable to verify a consumer's citizenship or immigration status during the application process through SAVE Step 1, a Data Matching Issue (DMI) was created for follow-up and processing, at which point CMS reviewed consumers through a manual verification process.

Beginning in August 2017, the Marketplace will begin using enhanced functionality called SAVE Step 2 to more seamlessly verify citizenship or immigration status. This functionality allows the Marketplace to verify more consumers electronically through the Hub, and reduces the need for some consumers to provide documentation in order to resolve their citizenship or immigration status DMI. Note: all consumers with citizenship or immigration status DMIs will still have the option to submit documentation to resolve their DMI, if they choose.

New language in the Eligibility Determination Notice (EDN) will alert consumers that the Marketplace is continuing to attempt to verify their citizenship or immigration status electronically with trusted data sources. All notices will be mailed and/or posted to the Marketplace account of the household contact for the affected consumer(s) (depending on what the household contact selected as his or her communication preference). If the household contact has selected a preference for email communication, the Marketplace will send an email to inform him or her that a new notice is available for review in his or her account.

Q&A: How to help consumers with questions related to citizenship or immigration verification processes

Q1: How will consumers identify the different notices, and what does each notice say?

A1: The Marketplace has updated language in the EDN under the section titled “What should I do next?” for consumers whose applications will be processed through this enhanced SAVE Step 2 functionality.

If a U.S. Citizen or National receives a citizenship DMI:

- The EDN will now read: *“For each person listed here: We’re still confirming your U.S. citizenship information. We’ll send you another notice when this is complete, and we may ask you to upload or mail documents to help us confirm your information. If you already have documents to confirm your citizenship status, you may want to send them now to help with this process. If your citizenship information isn’t confirmed by [date], your eligibility for Marketplace health coverage may end.”*
- If the consumer decides to take action to provide additional documentation, a list of acceptable documents that can be used to resolve the DMI are included in the notice.

If a consumer receives an immigration DMI:

- The EDN will now read: *“For each person listed here: We’re still confirming your immigration information. We’ll send you another notice when this is complete, and we may ask you to upload or mail documents to help us confirm your information. If you already have documents to confirm your immigration status, you may want to send them now to help with this process. If your immigration status isn’t confirmed by [date], your eligibility for Marketplace health coverage may end.”*
- If the consumer decides to take action to provide additional documentation, a list of acceptable documents that can be used to resolve the DMI are included in the notice.

If a consumer receives an immigration DMI with a notice regarding status expiration:

- The EDN will now read: *“For each person listed here: According to our data, your immigration status is about to expire. Upload or mail documentation to confirm your most recent immigration status. If you don’t send documents by [date], your eligibility for Marketplace health coverage may end.”*
- If the consumer decides to take action to provide additional documentation, a list of acceptable documents that can be used to resolve the DMI are included in the notice.

If a consumer’s attested citizenship or immigration status is verified successfully through SAVE Step 2, a **Resolution Notice** will be sent to the household contact for the impacted consumer. The headline of the notice states: *“The Health Insurance Marketplace has verified citizenship or immigration status information for [first name, last name of impacted consumer(s)].”* No further action is required of the consumer to verify this information. Note: this resolution is specific to

immigration and/or citizenship status. The individual may still need to provide documentation to resolve another DMI type.

Copies of the notice are available in English and Spanish, and language assistance services are available to consumers who need help in another language.

Q2: Why might consumers contact me after receiving a notice related to citizenship or immigration status verification, and how can I help them?

A2: Consumers whose citizenship or immigration attestations are processed through SAVE Step 2 may contact you for help understanding the notice and determining next steps. Here are some examples of ways you can help:

- **Help consumers understand the notice.** Explain that when they see language in their EDN that says the Marketplace is still confirming their eligibility, it's because the Marketplace is still trying to verify their information electronically. If a consumer's status cannot be verified through this electronic process, the consumer will need to submit additional documentation to verify his or her citizenship or immigration status to establish eligibility for enrollment in a QHP. The Marketplace will send a follow-up notice to the household contact for the impacted consumer if he or she needs to send additional documents.
- **Help consumers who receive a citizenship or immigration status DMI** to resolve the issue within the 95-day timeframe by helping them submit additional documentation, as needed, to prove the impacted consumer's lawful presence (see instructions on HealthCare.gov: <https://www.healthcare.gov/verify-information/send-more-info/>). Explain that CMS is still trying to verify their citizenship or immigration status electronically, and will send another notice when that is complete. However, because CMS may still need consumers to upload or mail documents, the impacted consumer may want to send those documents now to expedite the process, though this is not required at this time.

Advise consumers who want updates on citizenship or immigration status verification to log into their Marketplace online account and review the "Application Details" page or to contact the Marketplace Call Center.

Phase 2: Pre-enrollment SEP Verification (SEPV) Process Overview

On June 23, 2017, CMS launched Phase 1 of the SEPV process to verify SEP eligibility for consumers newly enrolling in Marketplace coverage through loss of qualifying coverage and move Special Enrollment Period (SEP) types. Under the process, the Marketplace creates an **SEP Verification Issue, referred to as an SVI**, for *new* Marketplace applicants who submit an application and attest to information that qualifies them for an SEP that's subject to pre-enrollment verification. These consumers are required to submit documents to confirm their SEP

eligibility before they can complete enrollment, make their first premium payment, and start using their Marketplace coverage.

- [Click here to view slides from an assister webinar on the SEPV process.](#)
- [Click here to view a fact sheet on the SEPV process.](#)

On August 23, 2017, CMS will start Phase 2 of SEPV for three additional SEP types:

- Marriage
- Gaining or becoming a dependent through an adoption, foster care placement, or a child support or other court order
- Medicaid/Children's Health Insurance Program (CHIP) denial after applying for Medicaid/CHIP during Open Enrollment.

What do consumers need to confirm?

To prove a marriage, consumers must submit documents to confirm the marriage happened up to 60 days before they applied for Marketplace coverage. These documents must include the names of the people who were married and the date of the marriage.

To prove an adoption, placement in foster care, child support or other court order, consumers must confirm that someone on the application was adopted, placed in foster care, or became a dependent due to a court order in the 60 days *before* they applied for Marketplace. These documents must be signed by a government or court official, showing who was adopted, placed in foster care, or became a dependent due to a court order and the date of the qualifying event.

To prove a denial of coverage through Medicaid or CHIP, consumers must return to their application or newly apply for coverage within the 60 days after their Medicaid or CHIP denial and submit documents to confirm who was determined ineligible for Medicaid/CHIP coverage and the date they were determined ineligible.

- The FFM will attempt to verify a denial of coverage through Medicaid/CHIP electronically by checking for an inbound account transfer and checking FFM internal application records. If this SEP is verified this way, no SVI will be created and enrollment can process without document submission.
- For those whose SEP cannot be verified electronically, consumers should upload or mail one or more documents as described above.

A list of acceptable documents consumers can submit to prove these SEP types will be available on HealthCare.gov in the coming weeks.

Resources on SEPV



[Model Notices: Click here to view sample EDNs, PPS notices, and other consumer notices.](#)

Click here for additional information on Submitting Documents for SEPs (e.g. for loss of qualifying event, to prove a move, and submitting documents online or mail): [When the Marketplace needs documents to confirm a Special Enrollment Period](#)

Assister Resources:

- [SEPV Overview: Assister Webinar Slides](#)
- [5 Things Assisters, Agents, and Brokers Should Know About SVIs: Fact Sheet](#)

Resources on SEPs:

- [SEP Overview: Assister Webinar Slides](#)
- [Special Enrollment Periods Available to Consumers: Fact Sheet](#)

Important Update Regarding SEPV Phase 2 on HealthCare.gov

As a reminder, Special Enrollment Period Pre-Enrollment Verification (SEPV) Phase 2 is scheduled to begin August 23rd, 2017. Consumers newly enrolling in Marketplace coverage through SEPs related to gaining/becoming a dependent due to marriage, adoption, foster care placement, or court order, and SEPs related to a Medicaid/CHIP denial will be requested to submit verification documents prior to proceeding to plan selection in his or her Marketplace application.

To reflect these new changes and requirements, HealthCare.gov is in the process of upgrading and making modifications to the existing application. Recently, consumers and assisters have seen new questions related to those SEPs appearing on the application. Even though these new questions appear, along with a note that the consumer may need to submit documents, their Eligibility Determination Notice will not include any statement to that effect until August 23rd. *Documents for these 3 SEPs will not be required for any enrollments prior to August 23rd.*

Guidance on Annual Eligibility Redeterminations and Re-enrollments for Marketplace Coverage for 2018

In July, the Centers for Medicare & Medicaid Services (CMS) issued guidance on annual eligibility redetermination and re-enrollment (ARR) outlining the policies the Federally-facilitated Marketplace (FFM) will operationalize for the upcoming Open Enrollment Period. These policies and procedures ensure that an enrollee may take no action and maintain coverage across benefit years and this guidance serves as a model for State-based Marketplaces to follow, if desired.

Click here for additional information on the guidance:

<https://www.cms.gov/CCIIO/Resources/Regulations-and-Guidance/Downloads/Guidance-Redetermination-Exchange-2018.pdf>

Role of Assisters after Open Enrollment

Assisters play a vital role after Open Enrollment ends. By staying in touch with consumers, assisters can help enrolled consumers get the most out of their health care coverage.

To contact consumers after you've provided enrollment assistance, you can use an opt-in consent form during the initial enrollment assistance session. This will allow you to follow-up with consumers to share important information about their coverage. For example, you can:

- Remind them when it's time to pay their first premium
- Help them make their first doctor's appointment
- Share information about preventative care
- Help them update their Marketplace application information, if needed
- Reevaluate their plan choice during a special enrollment period or during the annual Open Enrollment period

When scheduling appointments to enroll or renew your consumers' coverage, make sure they know what [information](#) they need to bring to make the process go as smoothly as possible.

Assisters can help enrolled consumers reevaluate their coverage options to ensure consumers choose the coverage that suits their needs. Use [this resource](#) with consumers to evaluate how satisfied they are with their current plan.

Back-to-School Outreach Opportunity: Address the Health Coverage Needs of Students & Families

During August and September, assisters are invited to take action to help students and families achieve their full potential for health through the year by organizing outreach and education events that coincide with the beginning of the school year. Back-to-School season is an important time to engage parents in conversations about addressing the health care coverage needs of children and families; moreover, it's also a great time to conduct outreach to students at college and university that are returning to campus and beginning to think about their choices and priorities for the upcoming school year. To launch timely and effective Back-to-School outreach and education, assisters can establish relationships and collaborate with school staff and organizations who work with students and families. Professionals within local school districts and community groups are well situated to identify children who are in need of health care coverage and provide their parents with the information and contacts to help them enroll in coverage. Similarly, many organizations on college and university campuses are able to

leverage their position and social network to reach uninsured students, provide health coverage information, and make connections for those in need.

Assisters are encouraged to make the most of the unique timeframe of year, when students are returning to school, by planning targeted and collaborative outreach and education events. Consider teaming up with local school districts, colleges, universities, community organizations to help get out the word to students and families about the upcoming open enrollment period and the coverage options available to them. Remember, eligibility and enrollment in Medicaid and the Children's Health Insurance Program (CHIP) continues year-round.

To help jump-start assister Back-to-School #GetCovered outreach, education, and enrollment efforts for children, students, and families, make use of the [HealthCare.gov](https://www.healthcare.gov) and [Connecting Kids to Coverage National Campaign](#) resources *below*:

- Review the HealthCare.gov resources targeted towards students and young adults, like [Getting Covered if You're under 30](#), [In School? Student Health Plans & Other Options](#), [Why Bother with Health Insurance?](#) and [How to Get or Stay on a Parent's Plan](#).
- Use the [Connecting Kids to Coverage National Campaign's School-Based Outreach and Enrollment Toolkit!](#) It has everything your organization needs for effective planning and outreach. The Toolkit includes resources for partnering with schools, tips for connecting with members of the school community, like superintendents and counselors, and strategies for including enrollment into existing school activities. The Toolkit features ready-to-use materials like message guides, templates, resource links, and offers social media graphics for Facebook and Twitter.
- Checkout the Connecting Kids to A+ Health Coverage for Back-to-School Season webinar [slides](#) and [transcript](#) that explore how organizations can engage schools and other education-focused groups to help enroll children and families in health coverage. It also highlights best practices and provides tips to help make the Back-to-School enrollment season a success.
- [Share](#) Connecting Kids to Coverage National Campaign materials widely. There is an ever-growing Outreach Tool Library featuring resources to use in outreach and enrollment efforts, including materials in other languages.
- Spotlight details about your organization's efforts with the Connecting Kids to Coverage National Campaign via email at ConnectingKids@cms.hhs.gov or Twitter using #Enroll365, and #KidsEnroll in tweets.
- [Sign up](#) to receive the Connecting Kids to Coverage National Campaign Notes eNewsletter directly to your inbox. The eNewsletter is distributed throughout the year and provides updates on Campaign activities.

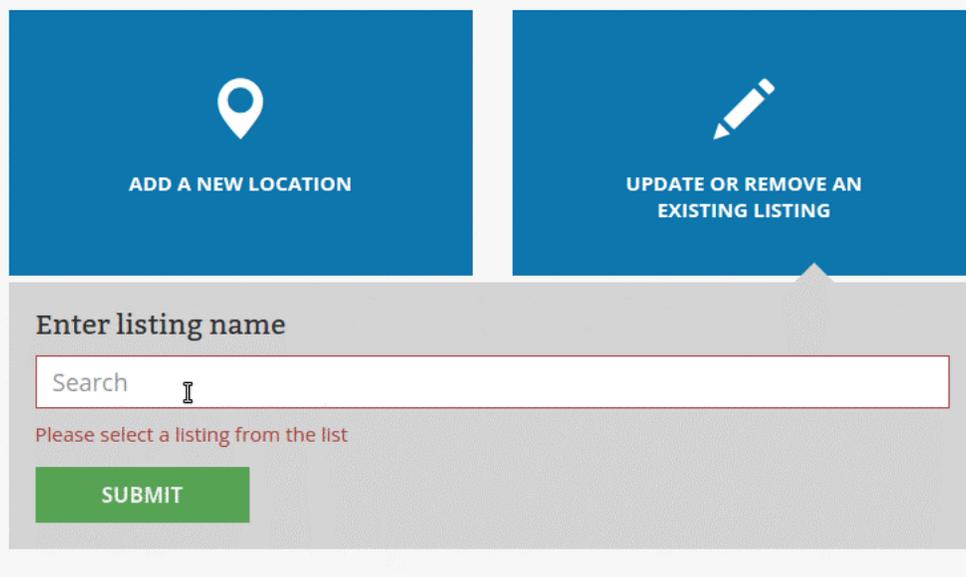
What's New with Find Local Help?

What's new with Find Local Help? The autocomplete dropdown has been updated on the upkeep tool. As you submit a request to update or delete your listing(s), you will now see up to 10 results in the scrollable autocomplete box. This functionality provides more options to choose when searching for a location or organization.

Manage your Find Local Help listings

Add, update, or remove listings for Navigators, Certified Application Counselors (CACs), and other In-Person Assistants (IPAs) in the Find Local Help directory of HealthCare.gov. All submitted requests will be verified before any changes appear on the site. We may contact you if we have questions.

Note: Agents and Brokers should not use this form. If you are an Agent or Broker and need to update your listing, please [contact the Agent & Brokers help desk](#) for instructions about how to update your information.



ADD A NEW LOCATION

UPDATE OR REMOVE AN EXISTING LISTING

Enter listing name

Search

Please select a listing from the list

SUBMIT

We have also updated Find Local Help by implementing a new vCard feature. The vCard provides an electronic business card for your organization. Now, you will see a new “Download Contact” button for each Find Local Help listing. When consumers select this green button, they can download your organization’s contact information to their mobile or desktop application for easy and quick reference.

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| COVERAGE TYPE | LANGUAGES: American Sign Language, English, French, French Creole, German, Italian, Portuguese, Russian, Spanish Interpretation services available for other languages | Thursday: 8:00 AM - 5:00 PM | |
| DISPLAY | | Friday: 8:00 AM - 5:00 PM | |
| LANGUAGE | | SEE MORE DETAILS | DOWNLOAD CONTACT |
| SPECIAL SERVICES | | | |

2017 CMS Assister Summit

Thank you for participating in the 2017 Assister Summit: Understanding the Evolving Marketplace. We believe that our diverse and dynamic group of speakers and panelists provided in-depth insight, as well as, actionable and practical tools of engagement models and methods to develop strategies that engage and educate about Marketplace initiatives.

We hope that you enjoyed your Summit experience and appreciate you sharing your best practices. Your presence helped to make this event a great success and your enthusiasm and positive spirit helped make our time together both productive and fun.

We will be presenting many of the topics during our Assister webinars over the next few months. Session materials from the summit are available on Marketplace.CMS.gov under Technical Assistance Resources, Assister Webinars link [here](#).





Standing Assister Resources: Helpful Links / Call Center Hours / Contact Us

Links to Helpful Resources

- Marketplace Assister Training [Resources](#) and [Webinar](#)
- [Technical Assistance Resources](#)
- CMS Marketplace [Applications & Forms](#)
- CMS [Outreach and Education](#) Resources
- [Marketplace.CMS.gov Page](#)
- [CMSzONE Community Online Resource Library Pilot for Marketplace Assisters](#)
- [Find Local Help](#)

Marketplace Call Center and Shop Center Hours

Health Insurance Marketplace Call Center: 1-800-318-2596 (TTY: 1-855-889-4325). For customer service support, to start or finish an application, compare plans, enroll or ask a question. Available 24 hours a day, 7 days a week. Closed Memorial Day, July 4th, Labor Day, Thanksgiving Day and Christmas Day. CACs and Navigators should call their dedicated phone lines so the Call Center can better track the needs of assisters. The dedicated Assister Line can

also help with password resets and can help with access to non-application SEPs. Contact your Navigator Project Officer (for Navigators) or your designated organization leadership (for CACs) for more information on the Assister Line.

Navigator Marketplace Call Center line: 1-855-868-4678

CAC Marketplace Call Center line: 1-855-879-2683

General consumer Call Center line: 1-800-318-2596 (TTY: 1-855-889-4325).

SHOP Call Center: For customer service support, including assisting employers and employees apply for and enroll in SHOP. 1-800-706-7893 (TTY: 711). Available M-F 9:00 am-7:00 pm EST. Closed New Year's Day, Martin Luther King Day, Memorial Day, July 3rd, Labor Day, Veterans Day, Thanksgiving and the day after, and Christmas.

Stay in Touch

To sign up for the CMS Weekly Assister Newsletter, please send a request to the Assister Listserv inbox (ASSISTERLISTSERV@cms.hhs.gov) write "Add to listserv" in the subject line, please include the email address that you would like to add in the body of your email. For requests to be removed from the listserv, please forward a copy of a webinar invite or newsletter received and write "Remove" in the subject line.

If you have specific questions or issues that you would like to see us highlight in our weekly webinar series or here in this newsletter please contact us.

- For **HHS Navigator grantees** - please get in touch with your Navigator Project Officer.
- For **CAC Designated Organizations in FFM or SPM states** - please send an email to CACQuestions@cms.hhs.gov.

Follow @HealthCaregov Twitter with the hashtag #ACAassisters for updates, reminders, and new publications for assisters.

We welcome questions, suggestions and comments, so please feel free to contact us!

Please note that the information presented in this Assister Newsletter is informal, technical assistance for assisters and is not intended as official CMS guidance.

