Washington Health Benefit Exchange

Broker/Navigator Changes

April 11, 2017
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 a Navigator**
Broker/Navigator Partnership Enhancements (cont.)

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  • Updates to Quick Links to allow customer to Find a Broker and Find a Navigator
Broker/Navigator Declines Pending Partnership

- 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
Broker/Navigator Terminate Current Partnership(s)

• 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 70
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
Password Requirements

• **Impacted users**: account workers, navigators/brokers and employers (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