

Open Enrollment Agent Timeline

Beginning Now

- Inform all current customers about idalink accounts and the information they can view. (<u>Customer View</u>)
- 2. Inform the customer what it means to designate you as an Authorized Representative and how you can better assist them if they designate you.
- 3. Ask customers to create an Idalink account and designate you as the Authorized Representative. (idalink Registration and Authorized Representative)

New Applications for APTC

November 1 - Forward

- 1. Help new customers create an Idalink account. (idalink Registration)
- 2. Discuss the reason the customer should designate you as an Authorized Representative. (Authorized Representative)
- 3. Complete Health Coverage Assistance Applications in Idalink. (Start Application)
- 4. Use the calculator to get an estimate of their APTC. (YHI Calculator)
- 5. Shop for insurance and document plan. (YHI Plans)
- 6. Log into Idalink 5 business days later to review January 2019 APTC Notices. (Notices)
- 7. Enroll in the plan from step 5

Re-evaluation: Existing Customers

October 1 thru November 1

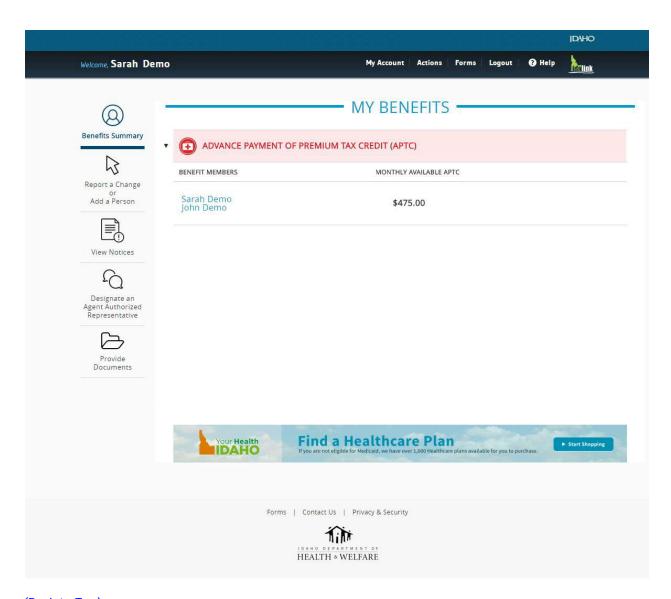
- Inform all current customers about Idalink accounts and the information they can view. (<u>Customer View</u>)
- 2. Inform the customer what it means to designate you as an Authorized Representative and how you can better assist them if they designate you.
- 3. Ask customers to create an Idalink account and designate you as the Authorized Representative. (idalink Registration and Authorized Representative)
- 4. Log into Agent Portal
- 5. Identify existing customers (Agent Portal)
- 6. Schedule meetings with customers after 10/7
- 7. During meeting, log into Idalink to view 2019 APTC
- 8. Shop for Insurance and document plan. (YHI Plans)
- 9. On November 1, enroll in plan selected in step 8



November 1 – Forward

- 1. Inform all current customers about Idalink accounts and the information they can view. (Customer View)
- 2. Inform the customer what it means to designate you as an Authorized Representative and how you can better assist them if they designate you.
- 3. Ask customers to create an Idalink account and designate you as the Authorized Representative. (idalink Registration and Authorized Representative)
- 4. Log into Agent Portal (Agent Portal)
- 5. During meeting, log into Idalink to view 2019 APTC
- 6. Shop for Insurance and document plan. (YHI Plans)
- 7. On November 1, enroll in plan selected in step 8
- 8. Contact existing customers to create Idalink account
- 9. Have existing customers designating you as an Authorized Representative in Idalink. (<u>Authorized Representative</u>)
- 10. Log into Agent Portal
- 11. Re-new APTC for January 2019. (Re-Evaluation View)
- 12. Enroll in plan selected starting November 1, 2018.







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		Already have an account? Sig	n In ② Help
REGISTRATION	ida link on adaga		
Registering in idalink for we have on file. When you has selected you as their	u are an Agent Authorized Representa n agent account requires that your name, l register for your agent account, you will be gent Authorized Representative through th er, please <u>send a report</u> for help with regist	tense number and email address match th able to view the activity on idalink for any eir idalink account.	
	* All fields are required		
Name:	First Name Last	lame	
Date of Birth:	MM / DD / YYYY		
Date of Birth:			





· AGENT AUTHORIZED REPRESENTATIVE ·



We currently do not have an Agent Authorized Representative on file for you. Using idalink, your Agent Authorized Representative is able to access your idalink account in order to complete activities related to your Health Coverage Assistance on your behalf. This includes being able to view notices and report changes relating to your Health Coverage Assistance. If you wish to designate an Agent Authorized Representative, please use the <u>Designate an Agent Authorized Representative</u> link.





