idalink Agent Console

Introduction

The idalink Agent Console is a tool available to health insurance agents to view and manage Health Coverage Assistance benefits available from the Idaho Department of Health and Welfare. Once a client has designated a health insurance agent as their authorized representative, the agent may access the client's account through the Agent Console.

Using the Agent Console, agents can:

- View eligibility for Health Coverage Assistance and APTC
- View clients' notices
- Apply for HCA and APTC on behalf of the client
- Report changes on behalf of the client

What is YHI vs. idalink?

Health insurance agents use both the Your Health Idaho website and the idalink website

Your Health IDAHO

Agents use the Your Health Idaho website to:

- View clients that list them as the health insurance agent or broker.
- Manage insurance plans, obtain payments, and make plan selections.

idalink

idalink.idaho.gov

Agents use the idalink website to:

- View clients who have designated them as the Agent Authorized Representative.
- Submit Health Coverage Assistance applications, report changes, and view client information.

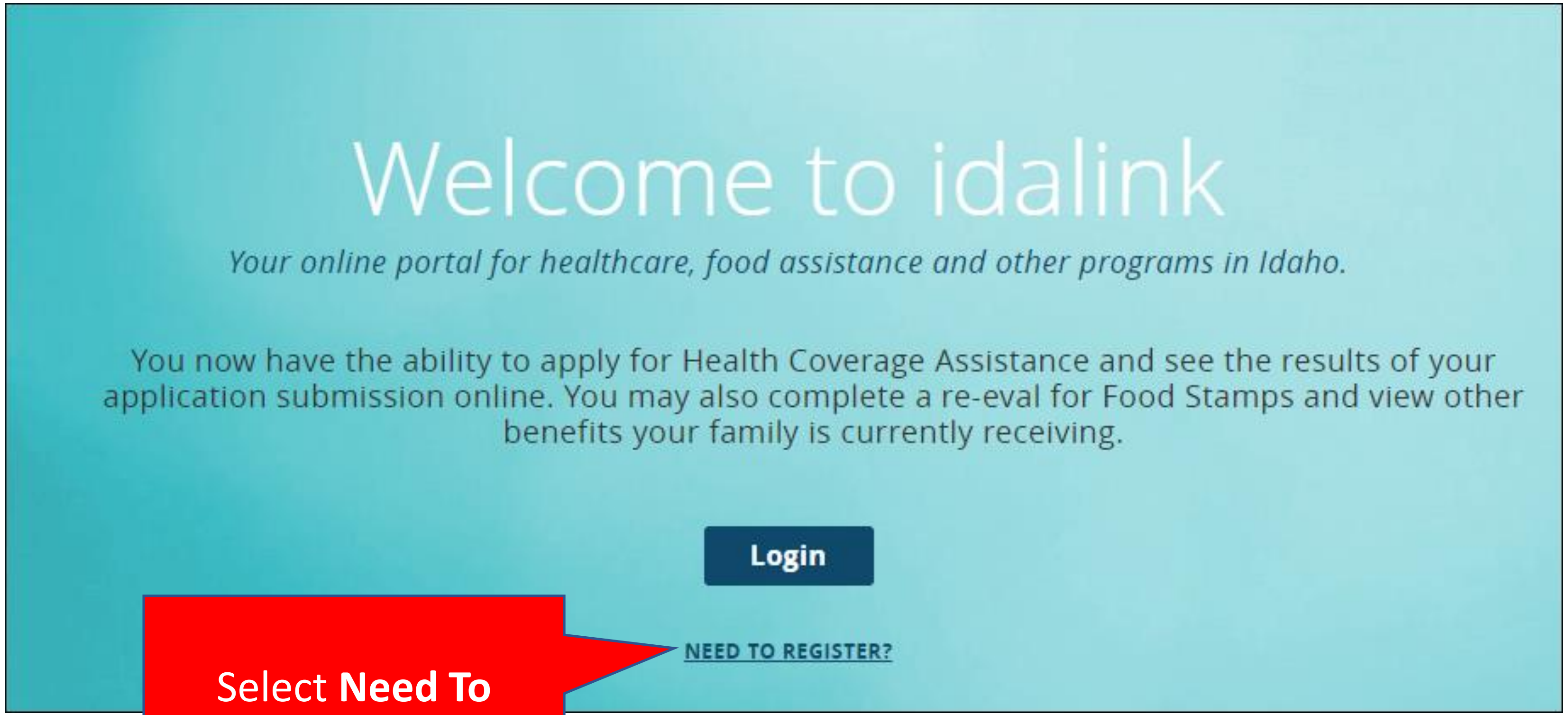
Getting started

Agents must meet the following criteria in order to view their clients in idalink:

- **Be an approved health insurance agent with Your Health Idaho**
  Agents are required to complete the YHI certification training. Contact connectors@yourhealthidaho.org to set up an account and begin the certification process.
- **Have a registered idalink account as a health insurance agent**
  Read on to see a walk-through for how to register an account on the idalink website.
- **Be designated by the client as their Agent Authorized Representative in idalink.**
  Read on to see a walk-through for how clients can designate an agent as their Agent Authorized Representative.

Registering with Idalink

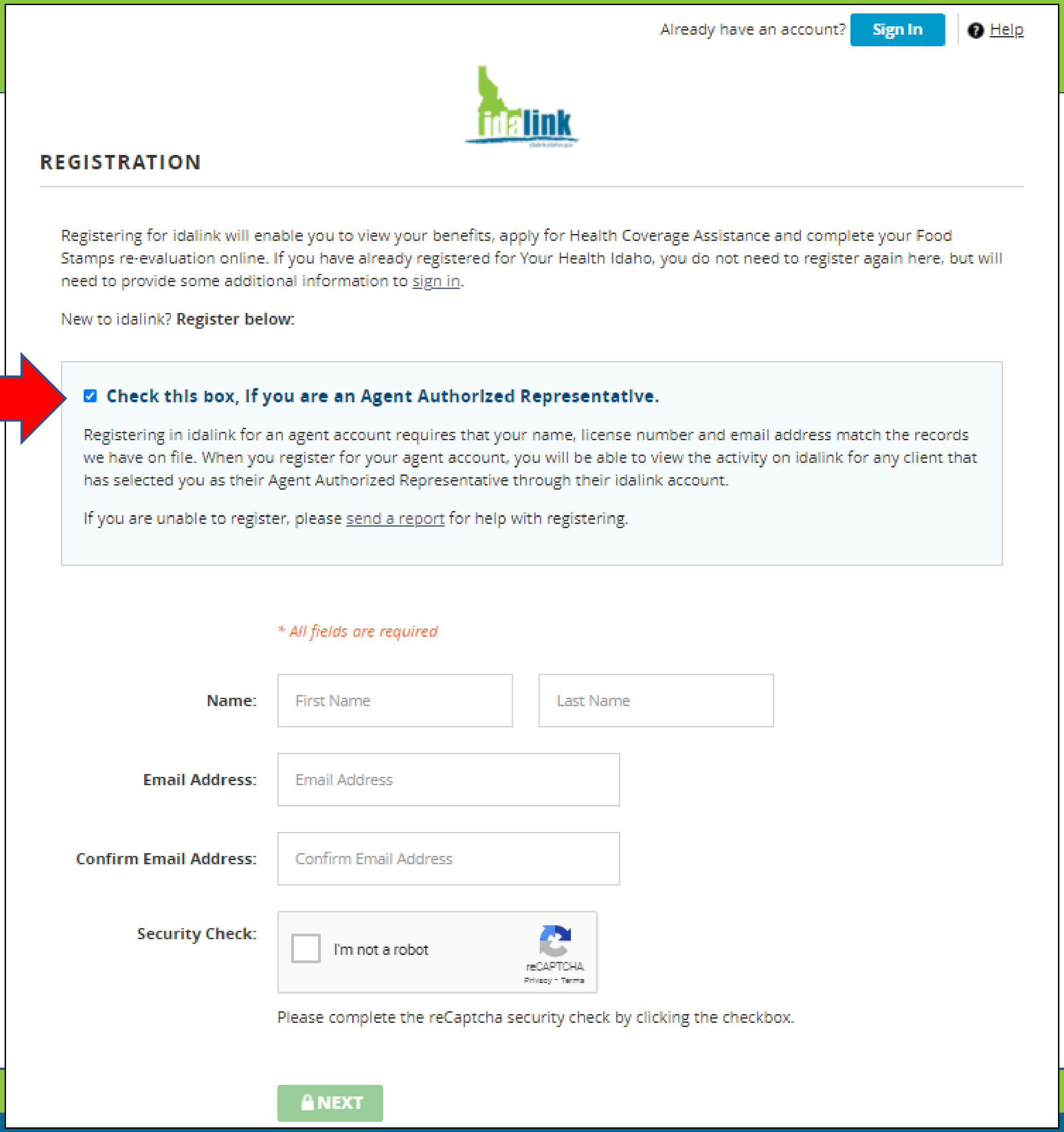
Before customers can select you as their Agent Authorized Representative, you must register with idalink by visiting https://idalink.idaho.gov/



Select **Need To Register**

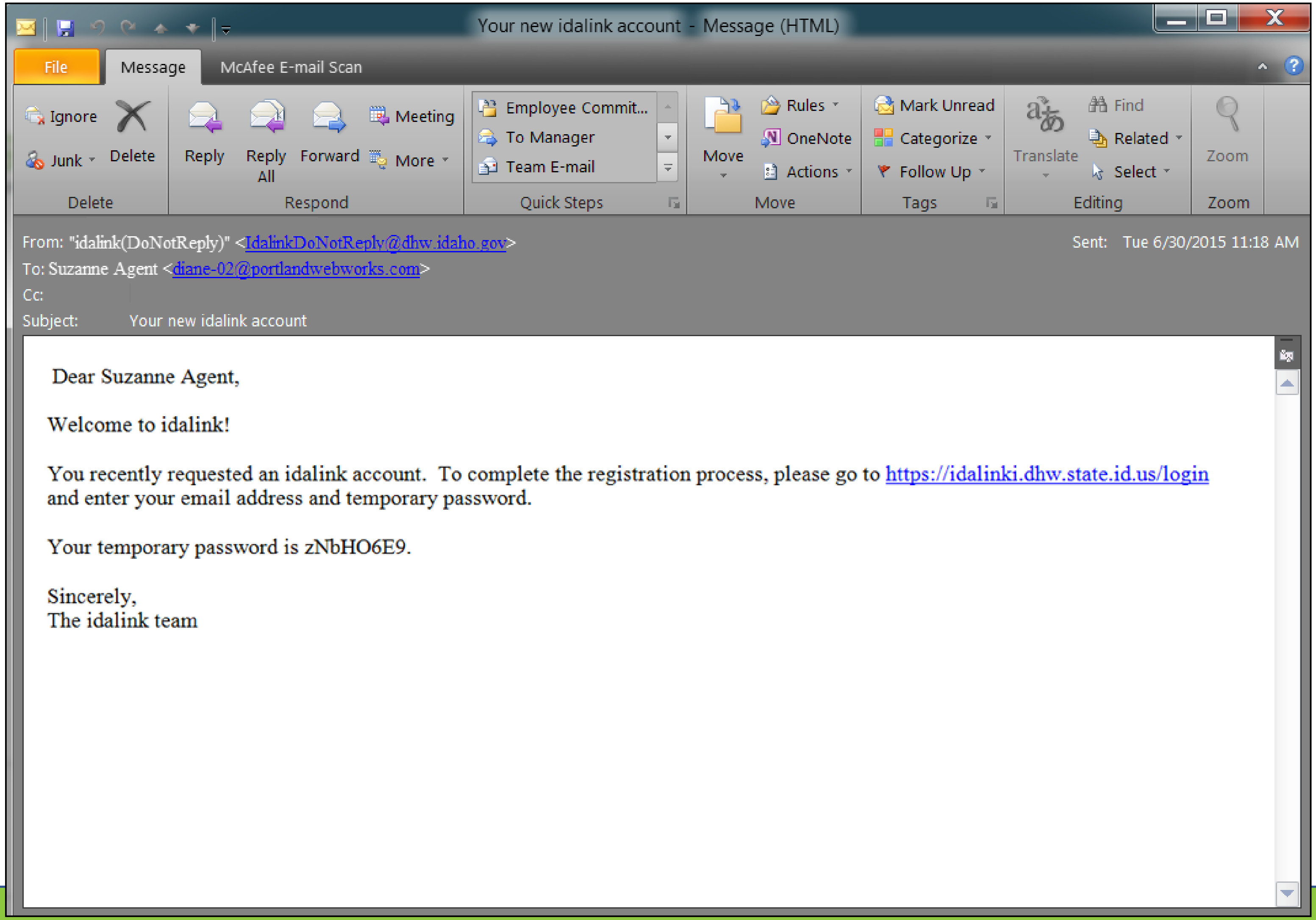
Registering with Idalink

Complete the Registration ensuring the check box to indicate you are an Agent Authorized Representative is selected.



Complete Registration

Once the registration is complete, a *Confirmation* screen will display. Your idalink password will be sent to your email.

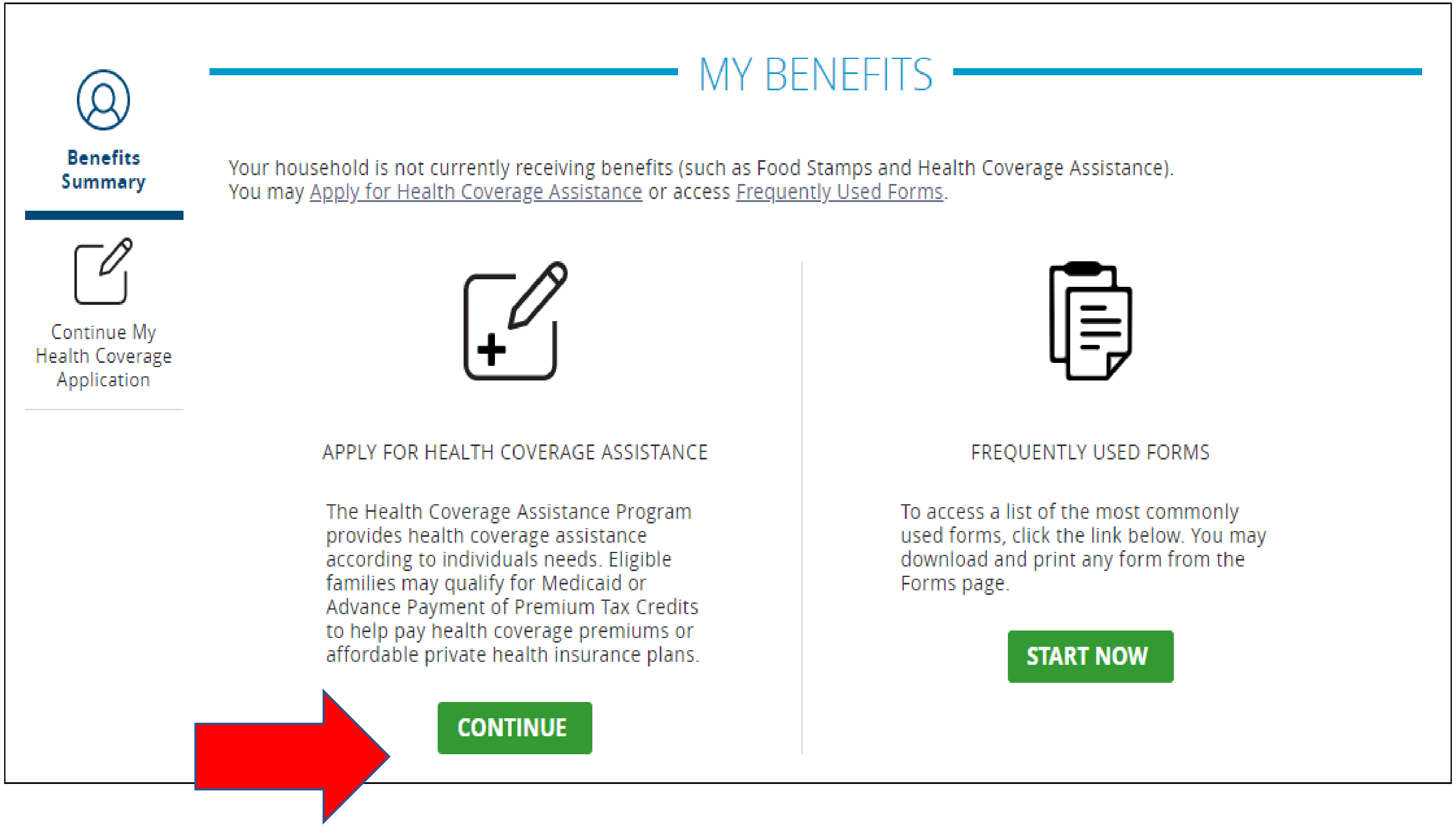


How to be designated as an Authorized Representative

Only clients can designate an Agent Authorized Representative.

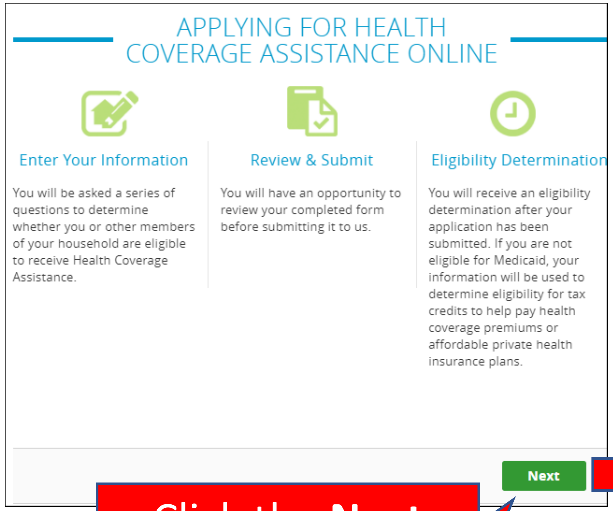
At Application:

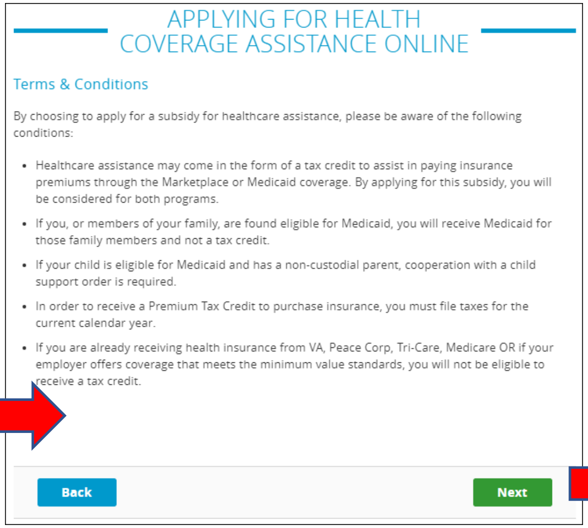
When a client hasn't already applied for Health Coverage Assistance, they can apply for coverage once they log into idalink and navigate to the *My Benefits* screen.

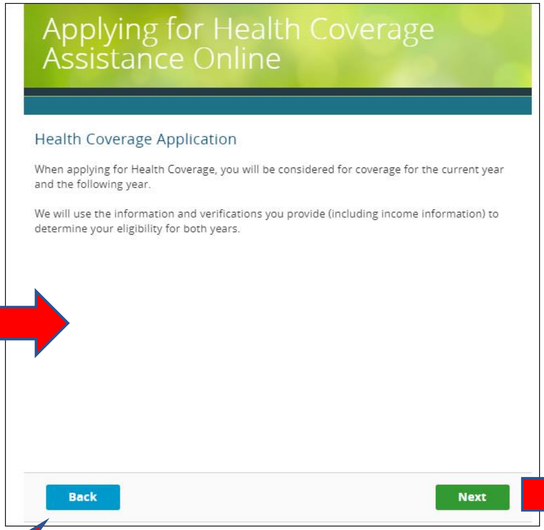


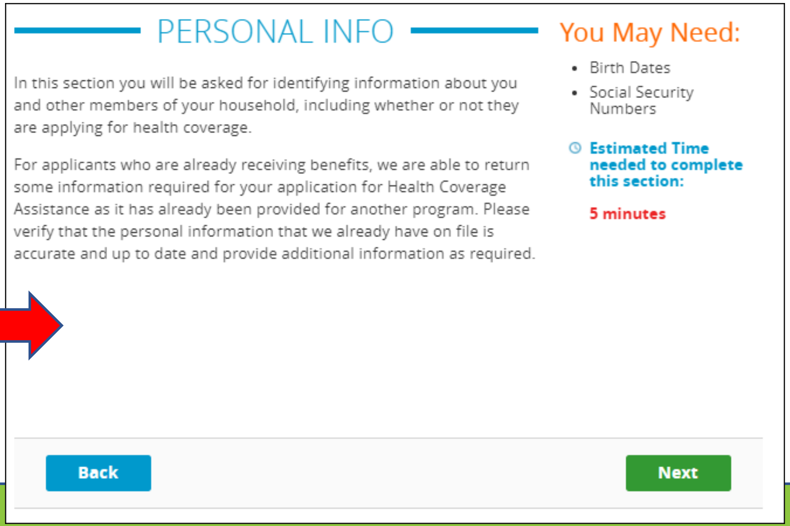
How to be designated as an Authorized Representative

At Application: Continue to read through the instructions and click the Next button until you arrive at the *Personal Info* screen.









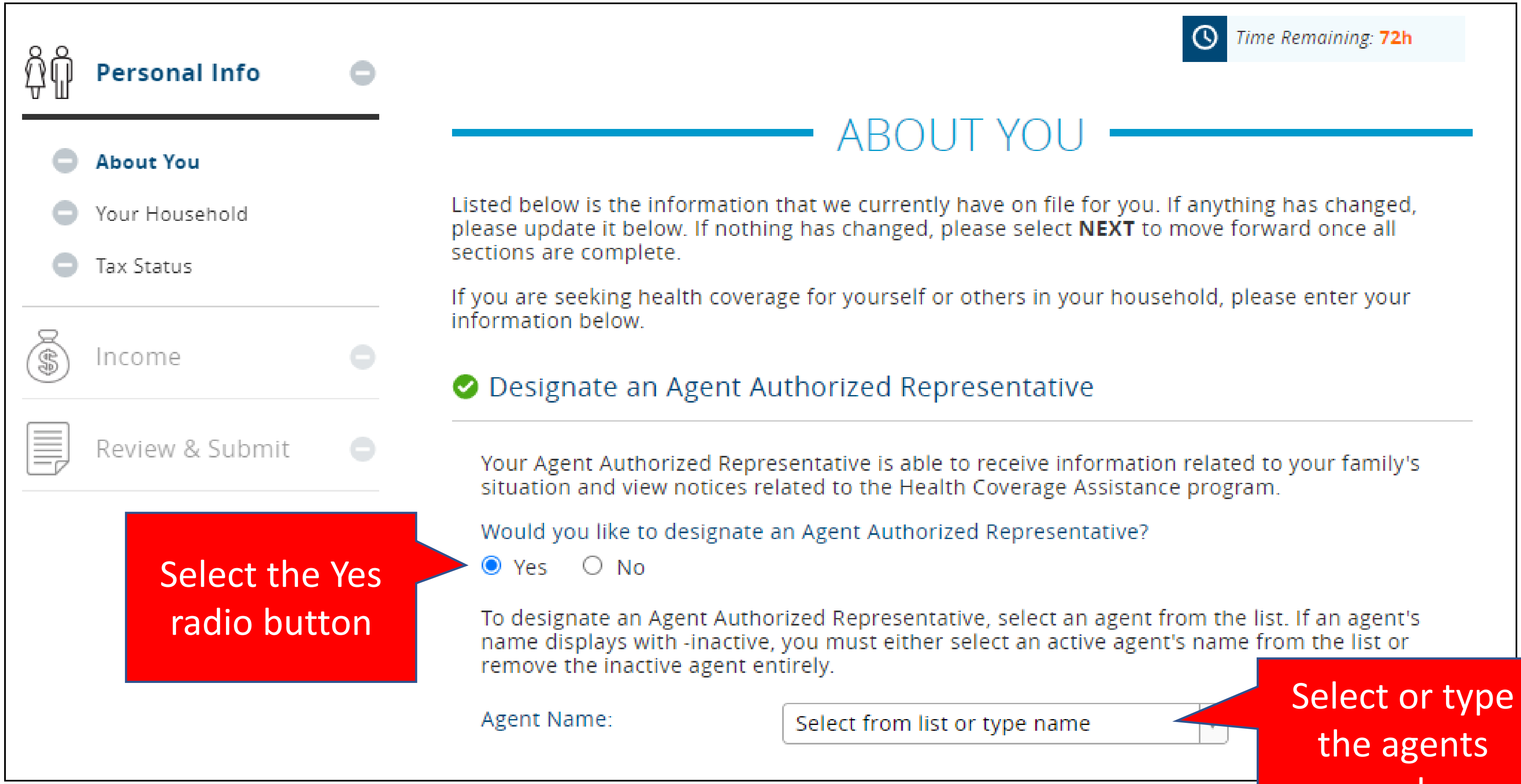
Click the **Next** button to continue to the next screen

Use the Back button to move to the previous screen

How to be designated as an Authorized Representative

At application:

The client can designate an **Agent Authorized Representative** in the *About You* section on the *Personal Info* screen.



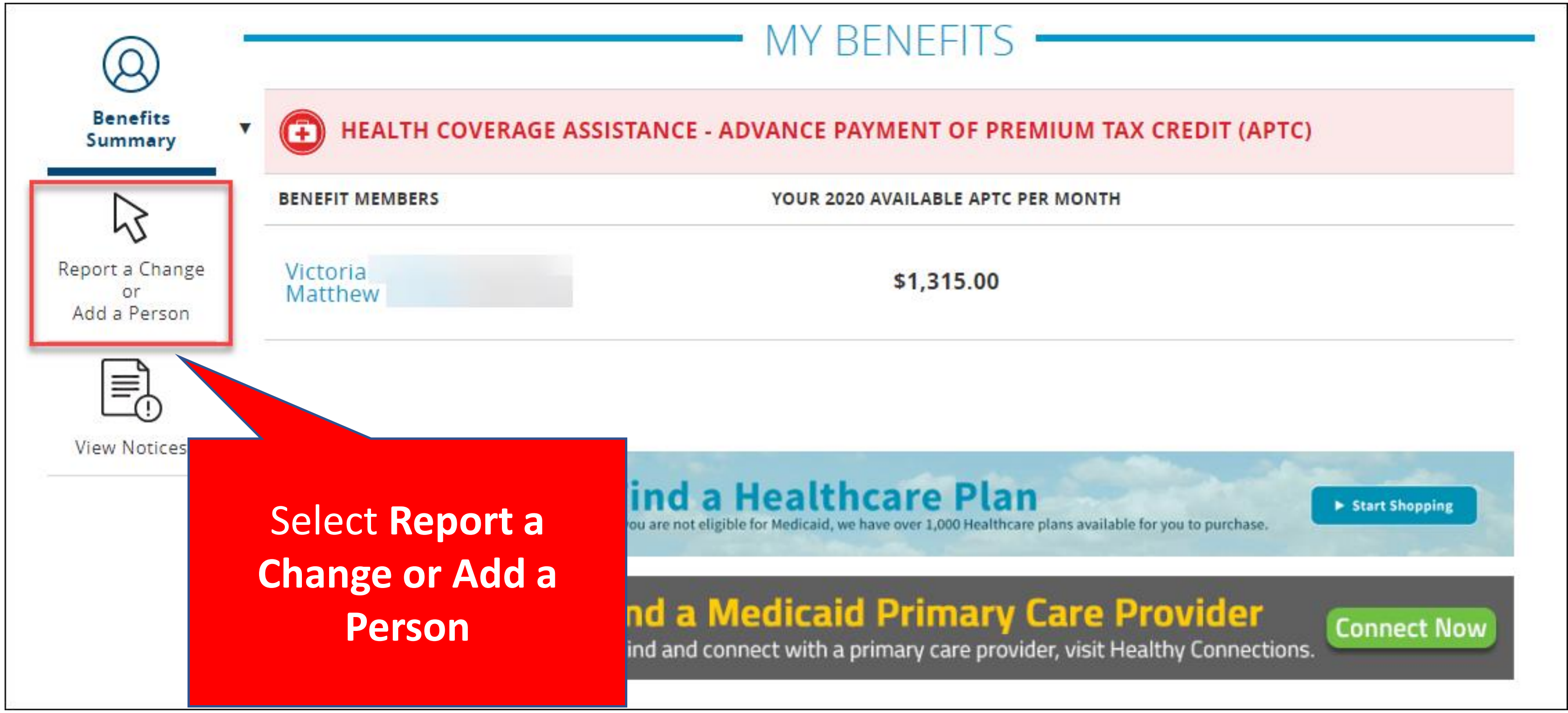
Select the Yes radio button

Select or type the agents name here

How to be designated as an Authorized Representative

When the client is receiving Health Coverage Assistance:

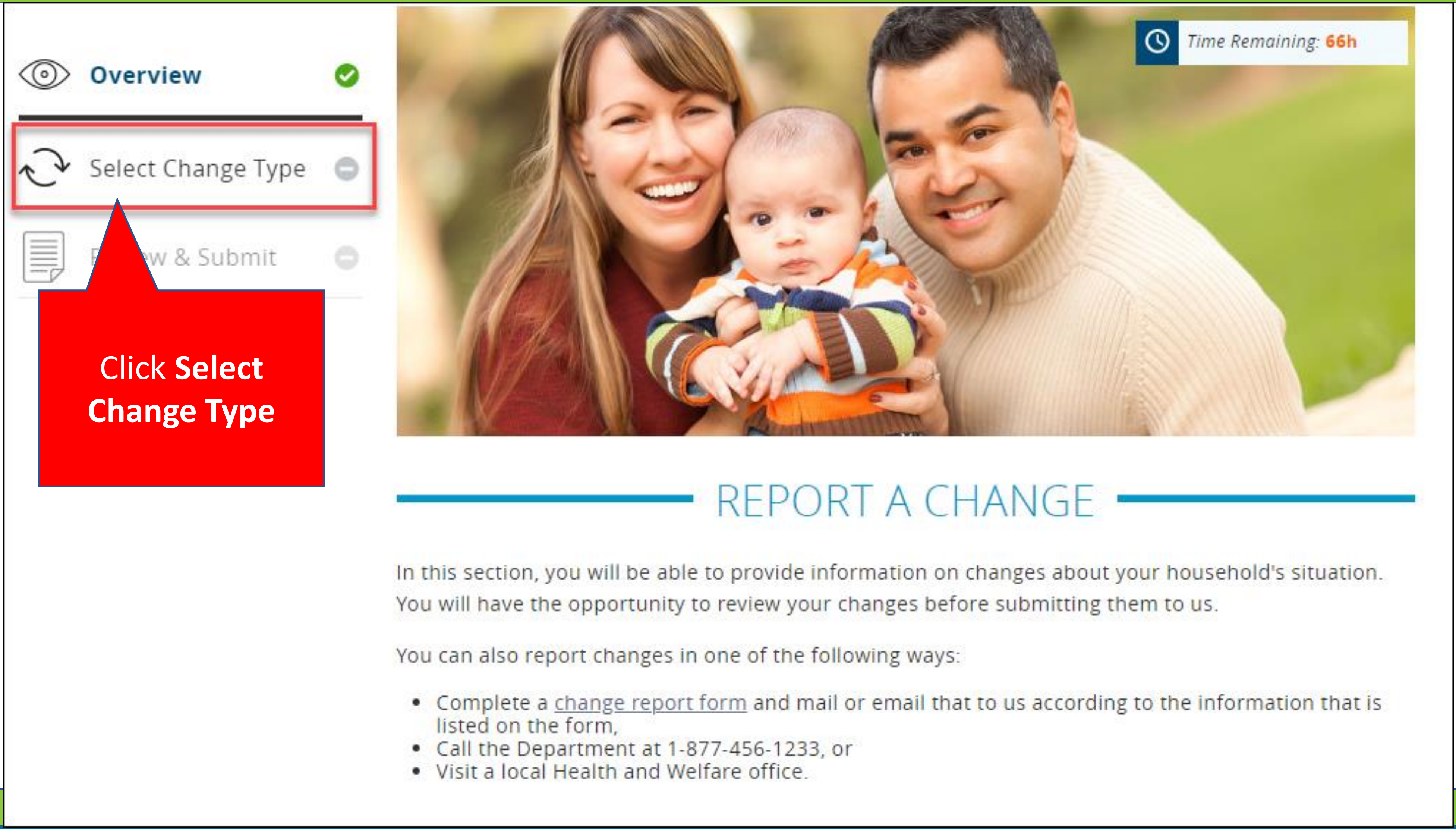
When a customer has active benefits and needs to designate an agent authorized representative, the client can report the change on the *My Benefits* screen.



Select **Report a Change or Add a Person**

How to be designated as an Authorized Representative

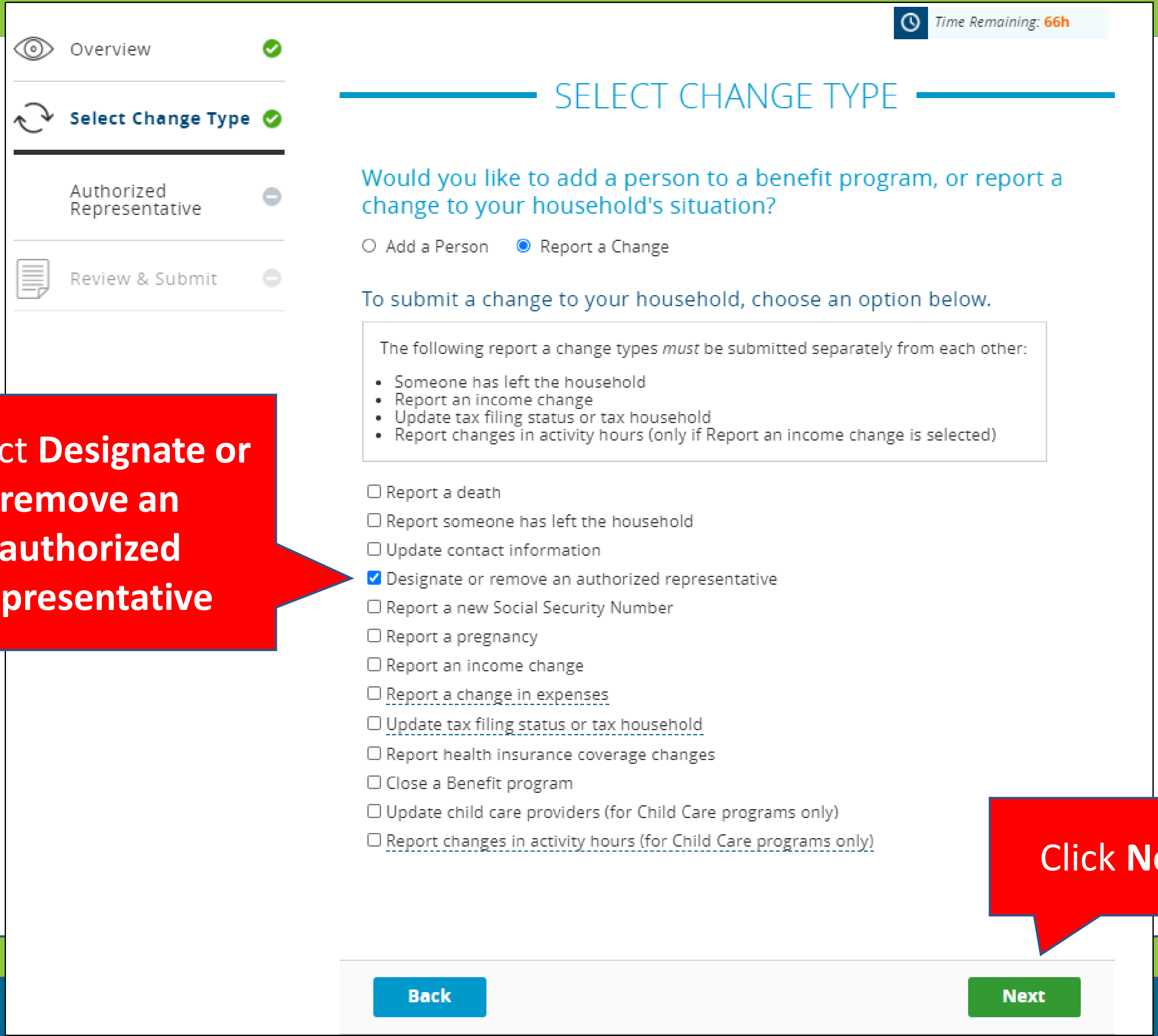
When an Application Exists:



Click **Select Change Type**

How to be designated as an Authorized Representative

When an Application Exists:

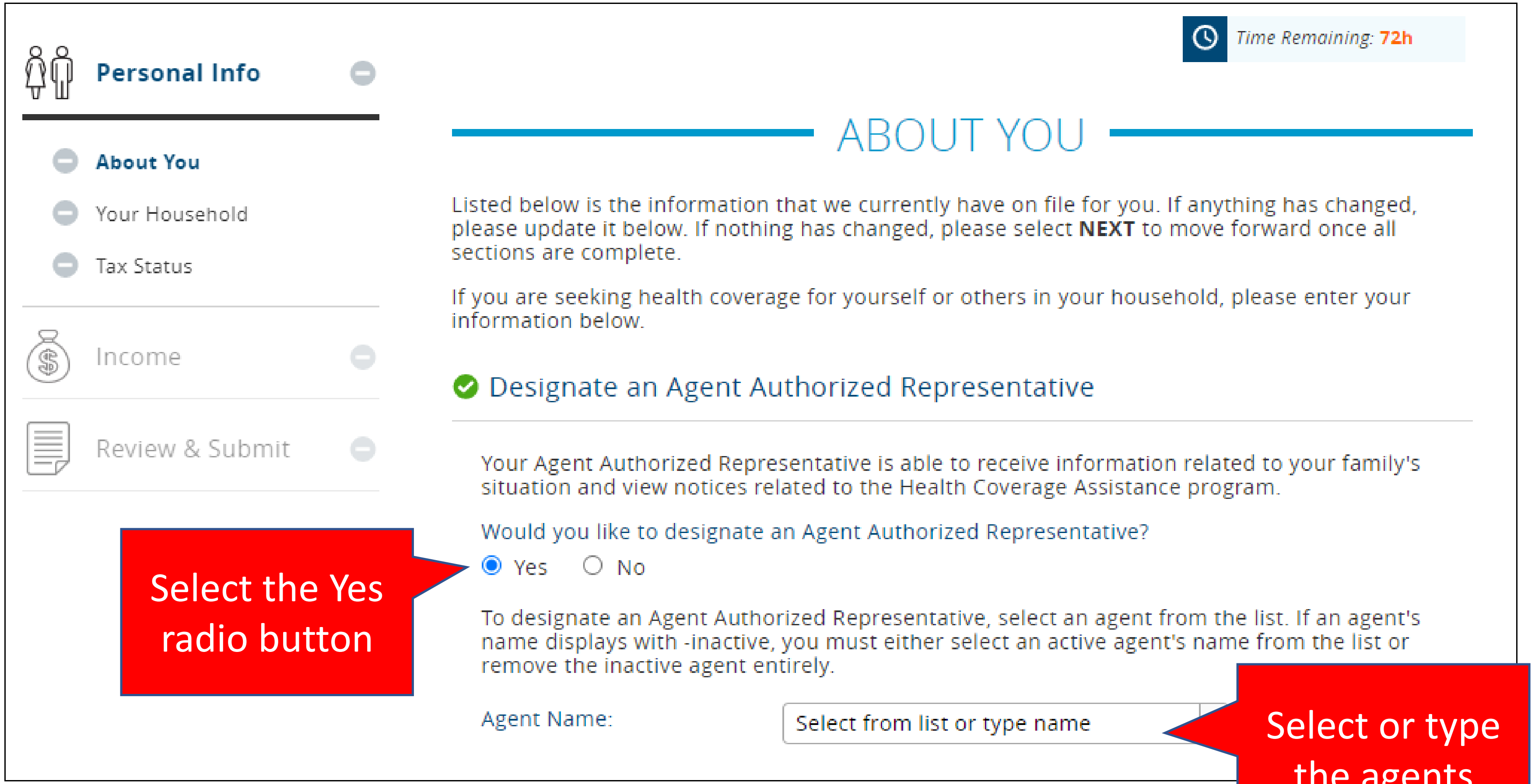


Select **Designate or remove an authorized representative**

Click **Next**

How to be designated as an Authorized Representative

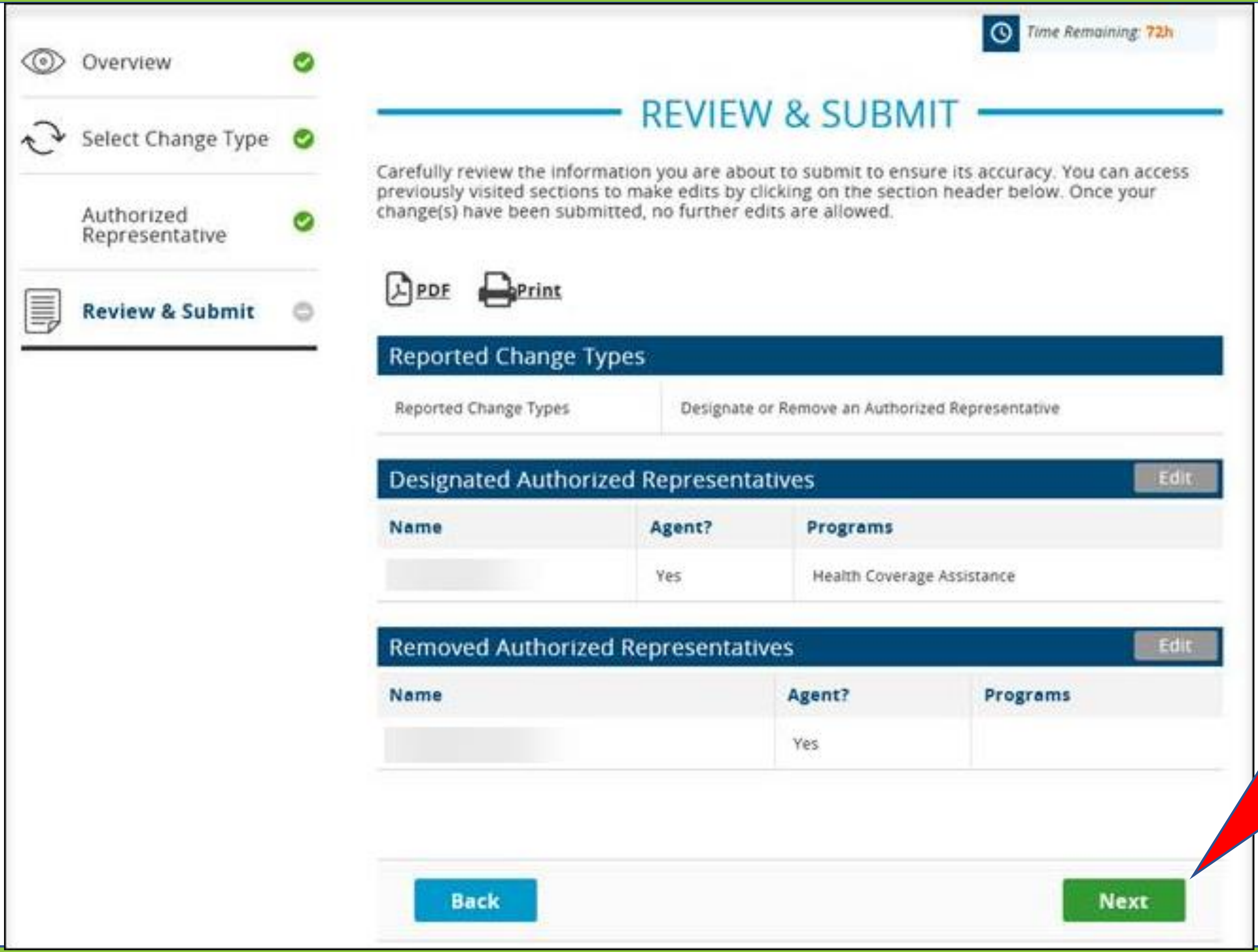
When an Application Exists:



Select the Yes radio button

Select or type the agents name here

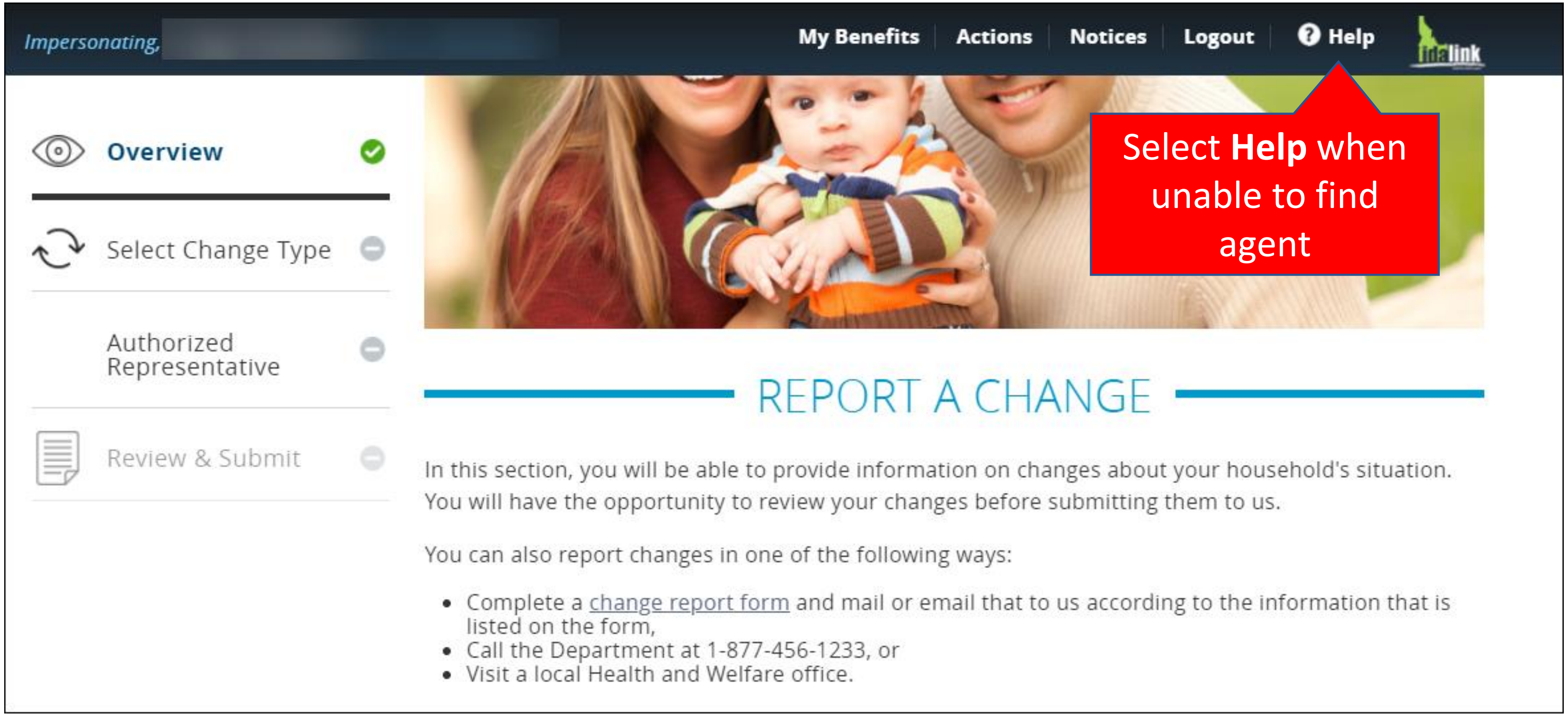
How to be designated as an Authorized Representative



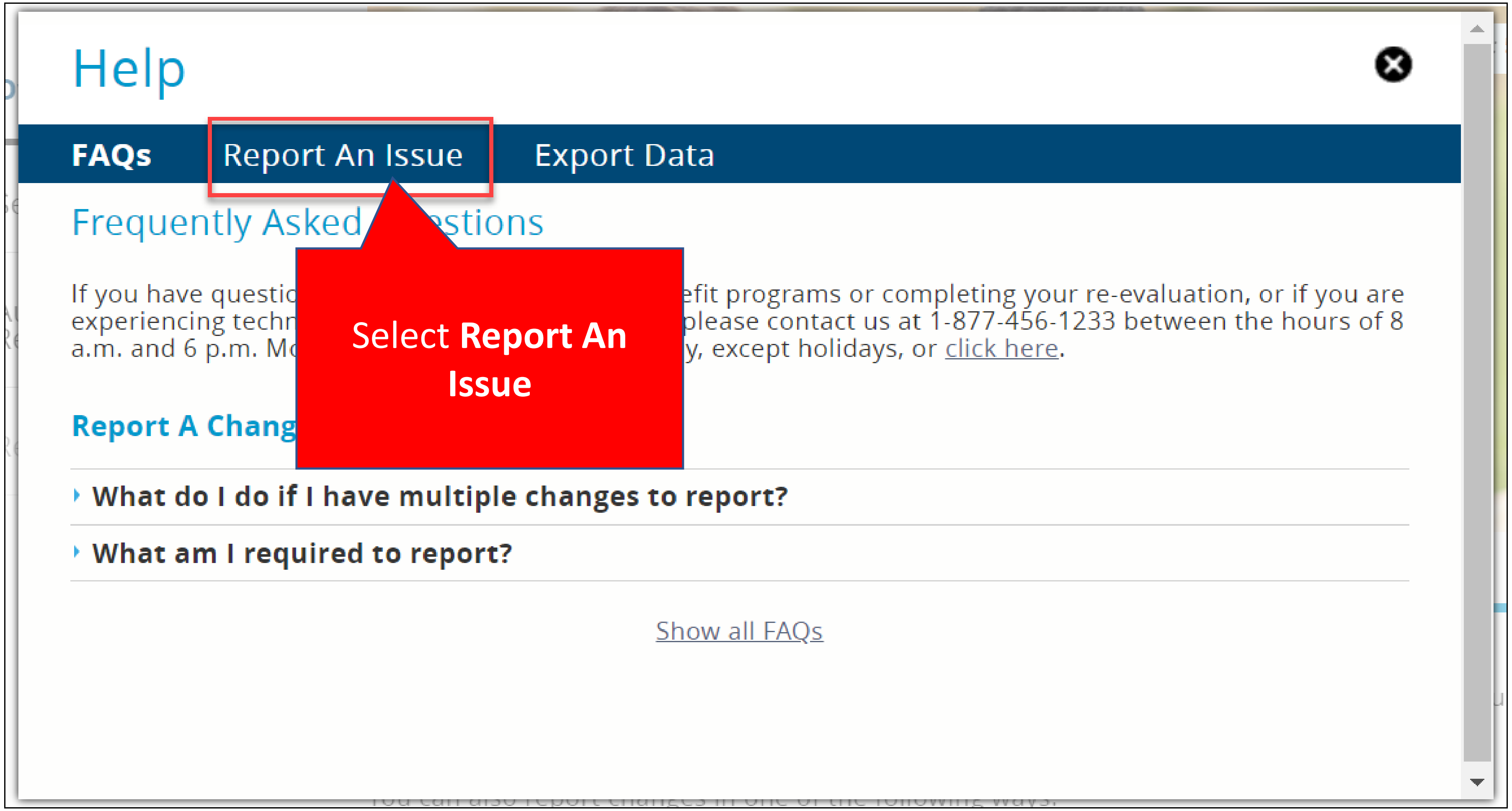
Review the information keyed and Click Next

When an Agent Doesn't Exist in idalink

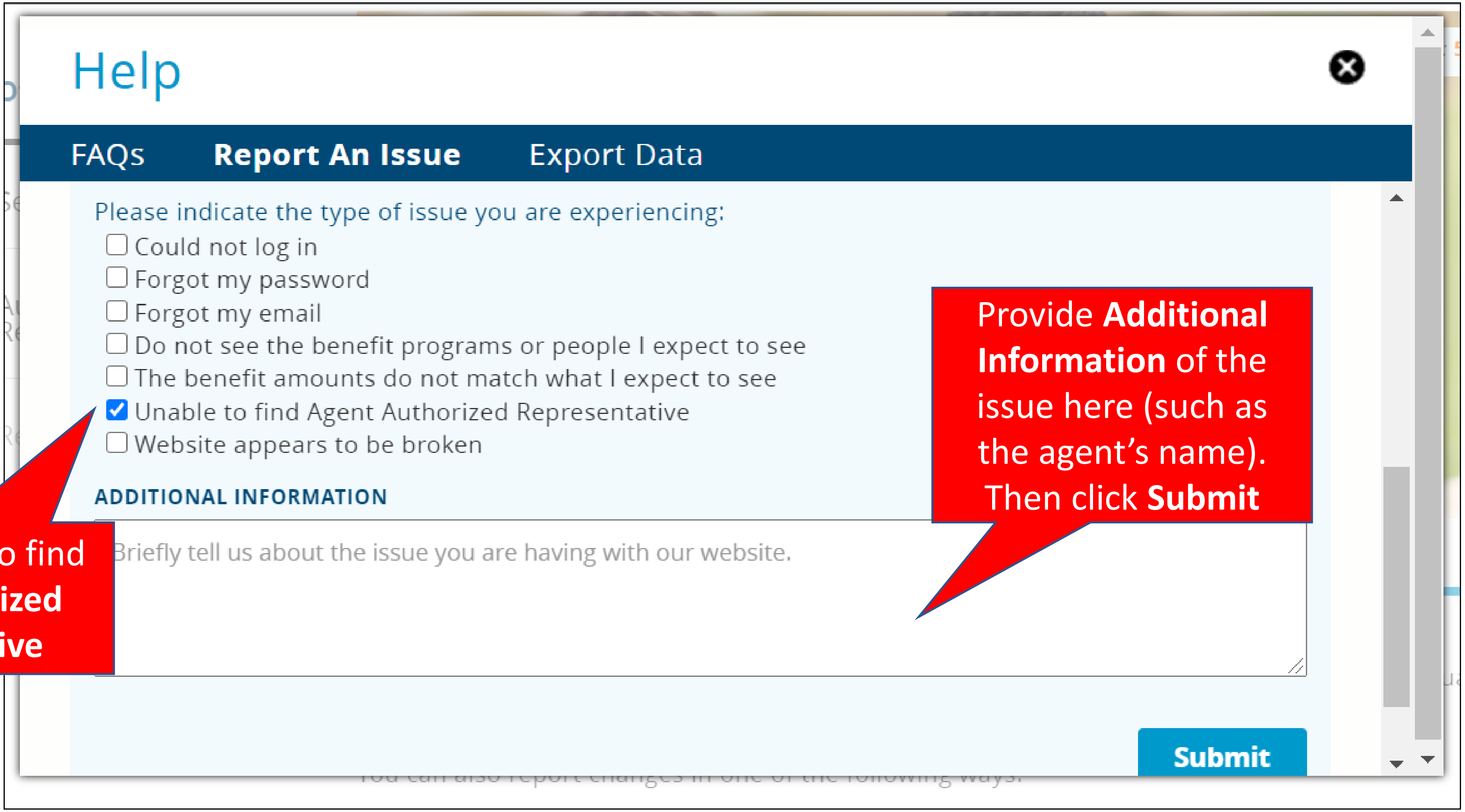
Clients can report when their agent isn't listed as an Agent Authorized Representative through idalink.



When an Agent Doesn’t Exist in idalink



When an Agent Doesn’t Exist in idalink

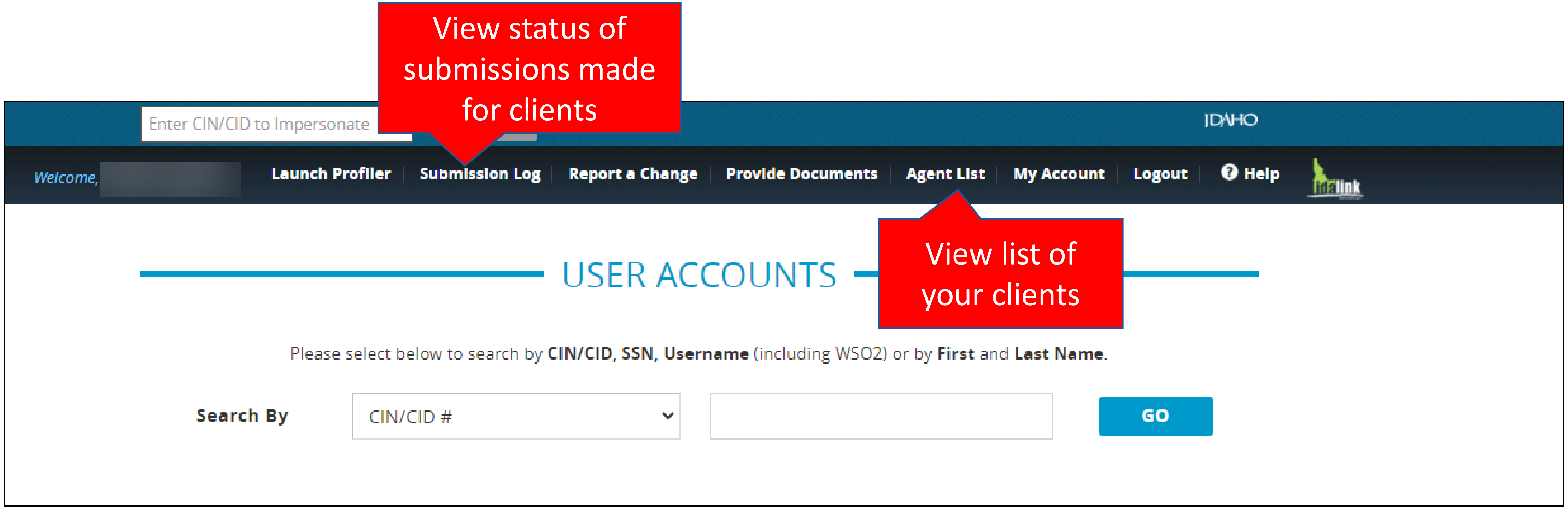


Select Unable to find **Agent Authorized Representative**

Provide **Additional Information** of the issue here (such as the agent’s name). Then click **Submit**

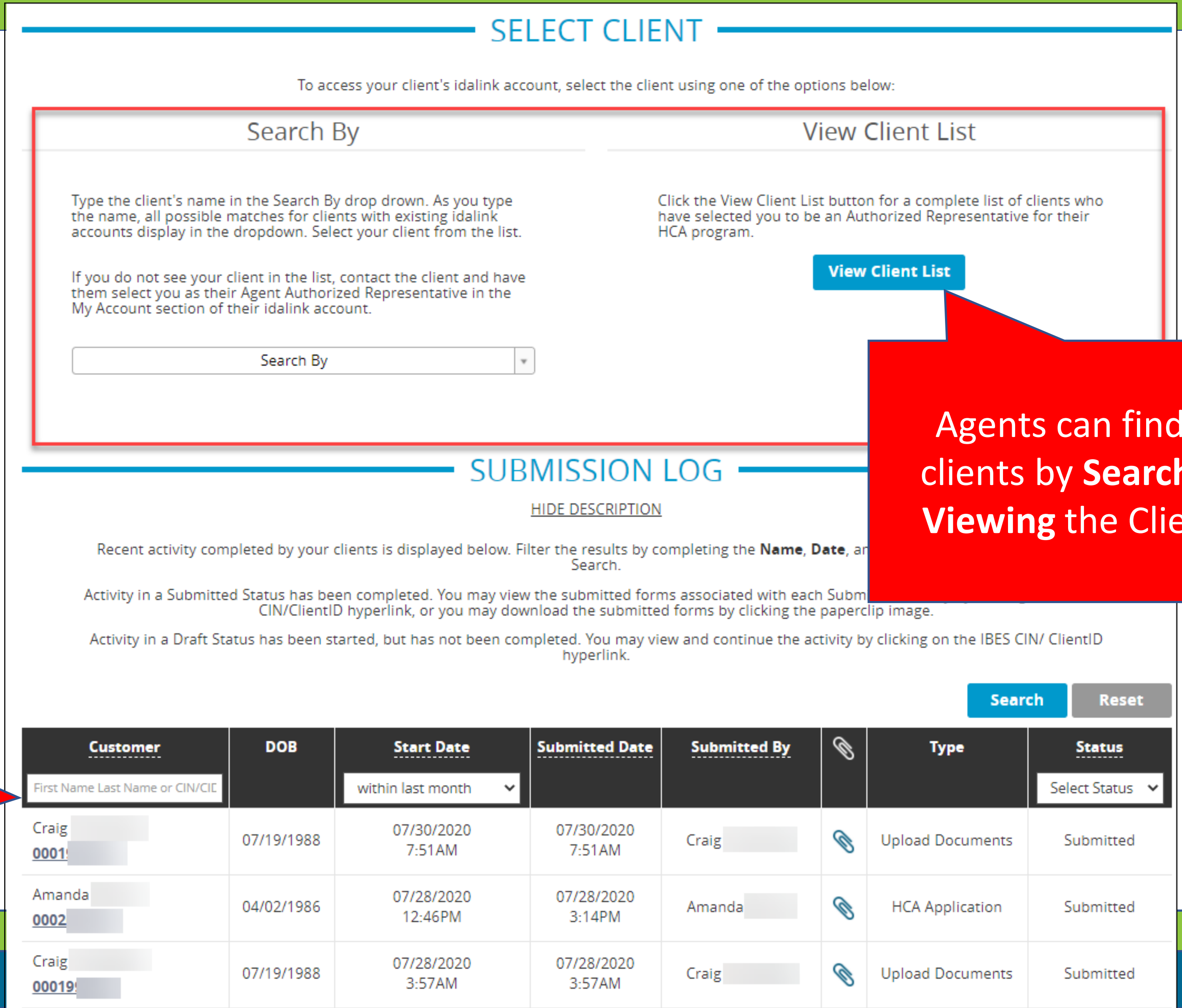
Logging into idalink

When agents log into idalink, the *User Accounts* screen displays. Agents can view their clients by selecting the Submission Log or the Agent List tab.



Viewing the Client List and the Submission Log

The *Agent Console Home* screen displays. Agents can view their clients who have designated them as their agent authorized representative by viewing them on the *Agent Console Home* screen.

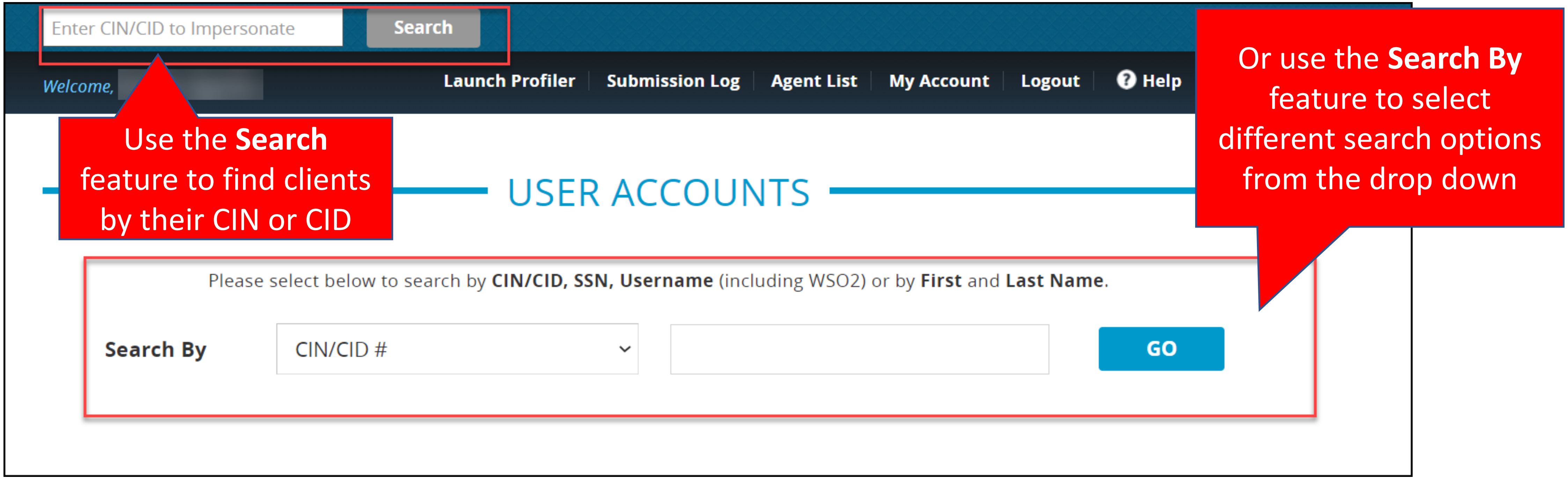


Agents can find their clients by **Searching** or **Viewing** the Client List

Agents can review activity completed by the client or agent in the **Submission Log.**

Searching for Clients

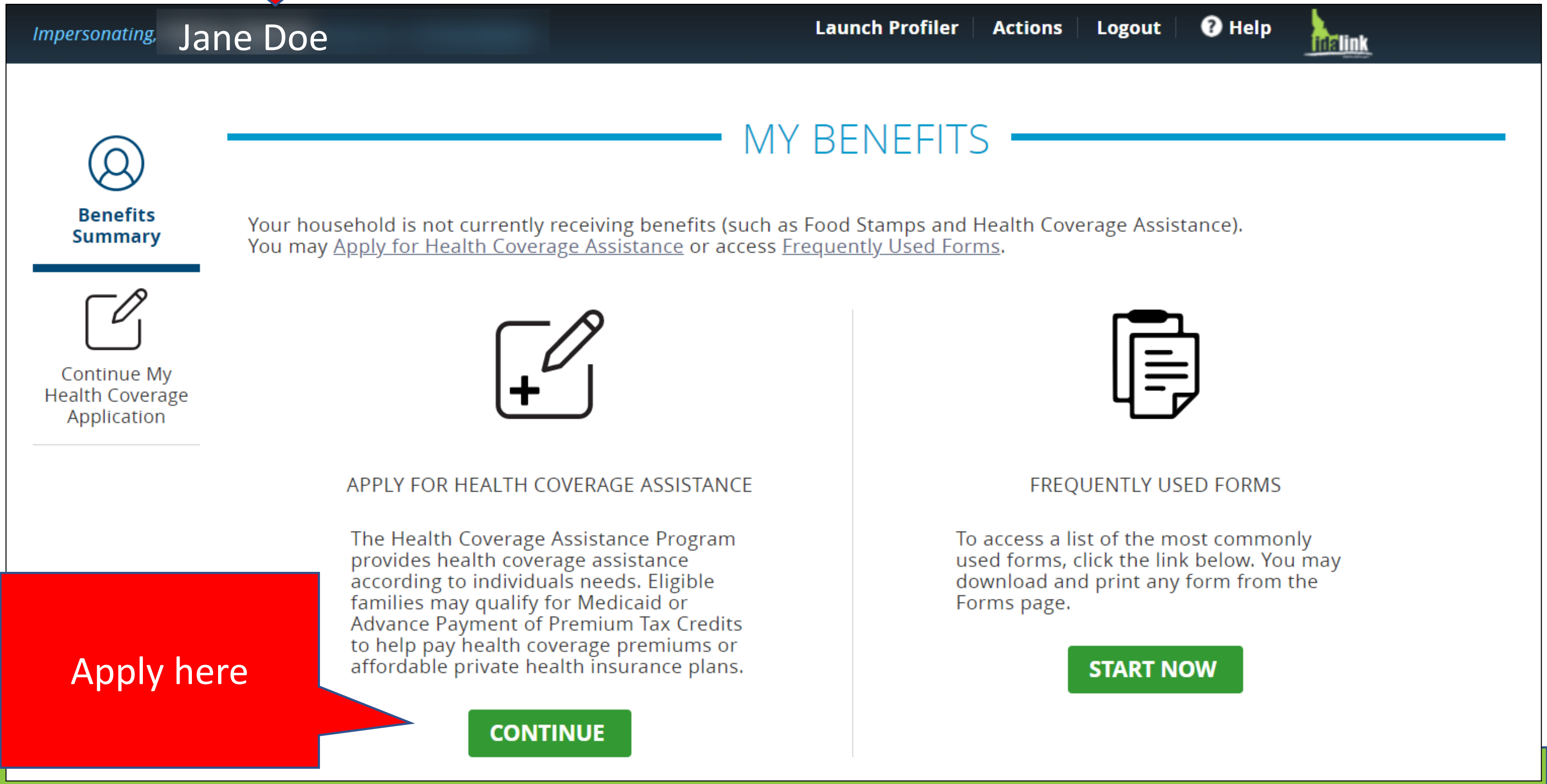
Agents have the ability to apply for Health Coverage Assistance, report a change, or view a client’s information. To do so, agents must search for their client.



Applying for Health Coverage Assistance

Agents can impersonate clients and complete applications on their behalf.

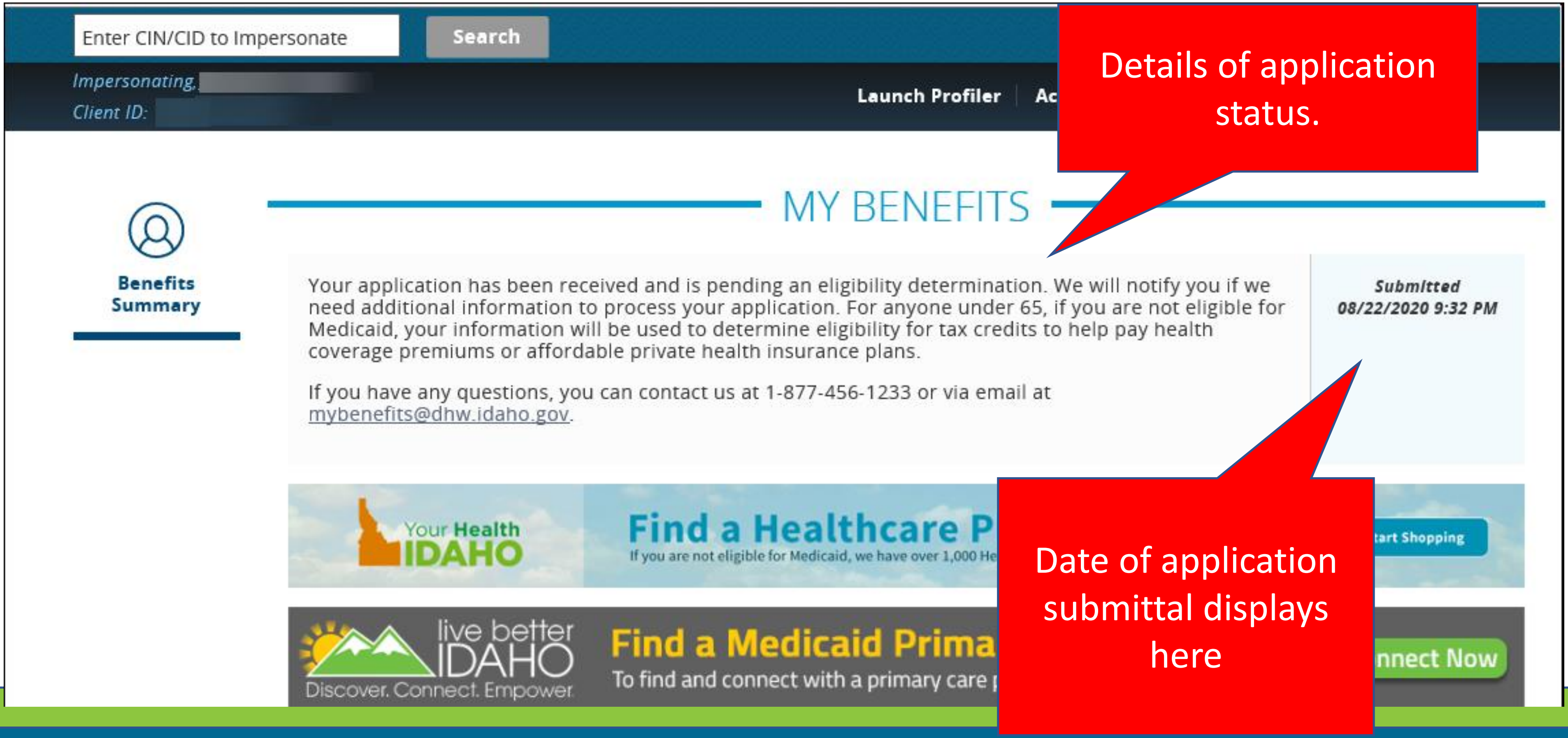
Displays client being impersonated



Apply here

Applying for Health Coverage Assistance

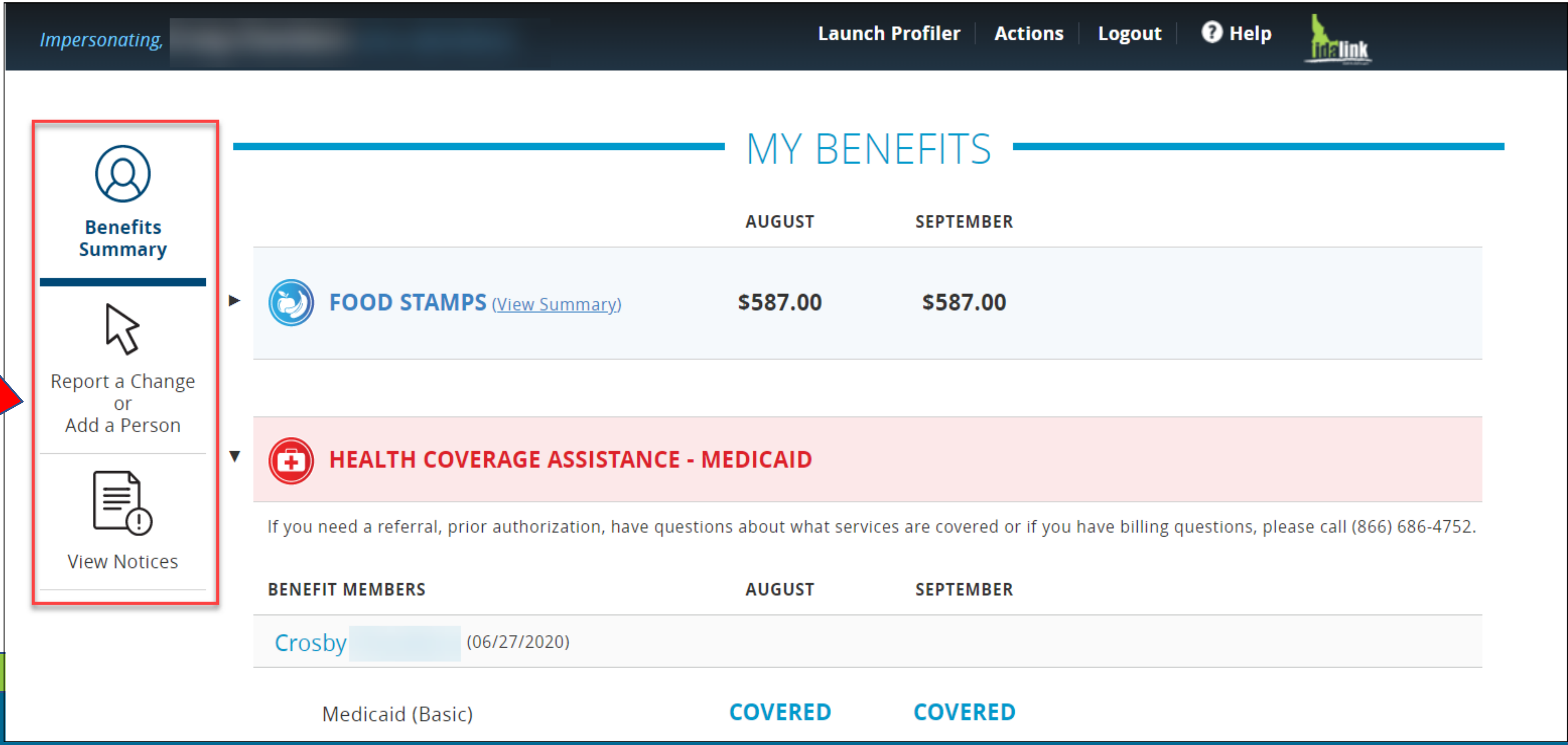
Once the application is submitted, the *My Benefits* screen displays the submission date until the application is processed.



Reporting a Change or an Add a Person

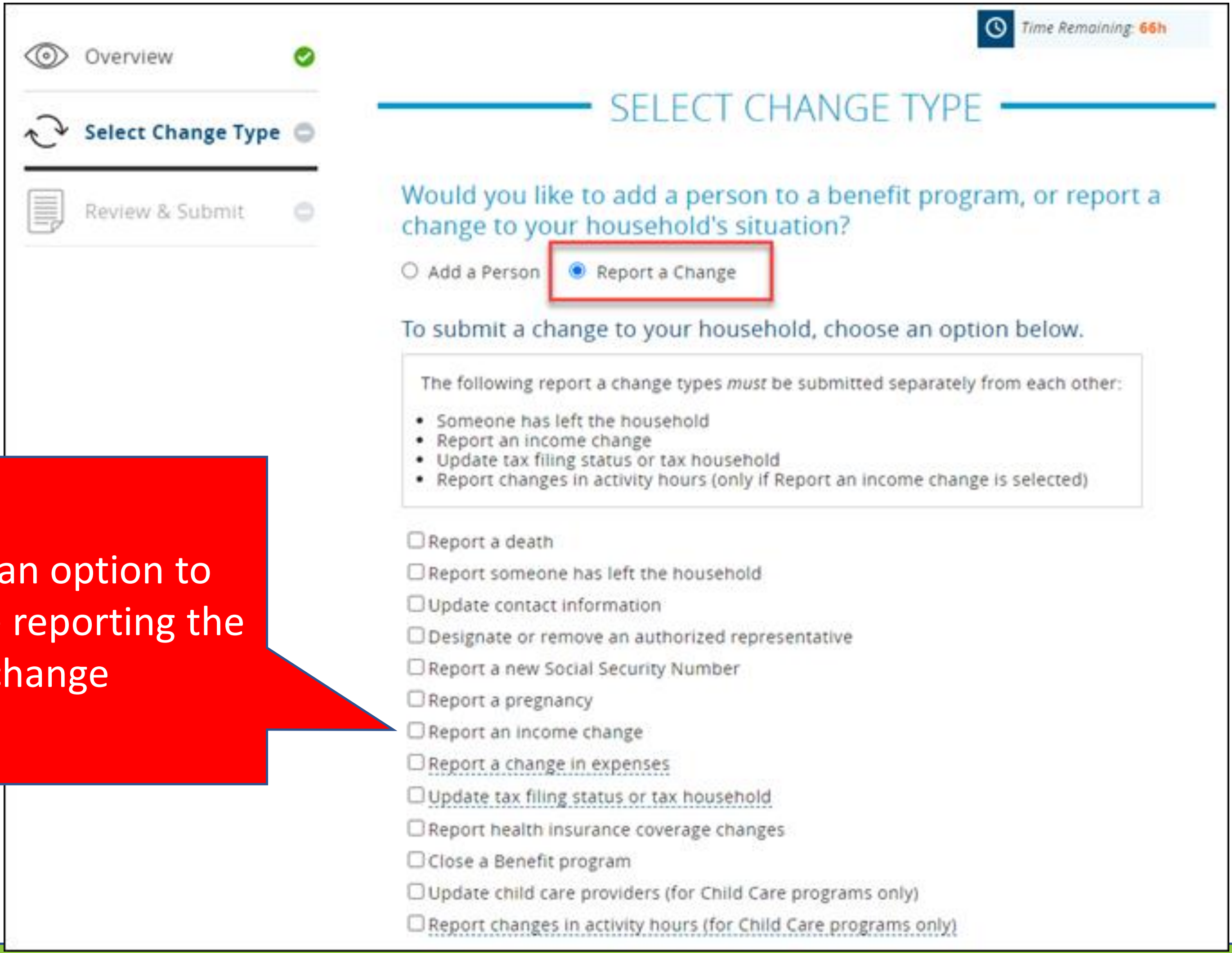
Once an application is processed and a client has active benefits, the agent can report a change or add a person.

Agents can report changes, or add a person on the client's behalf



Reporting a Change or an Add a Person

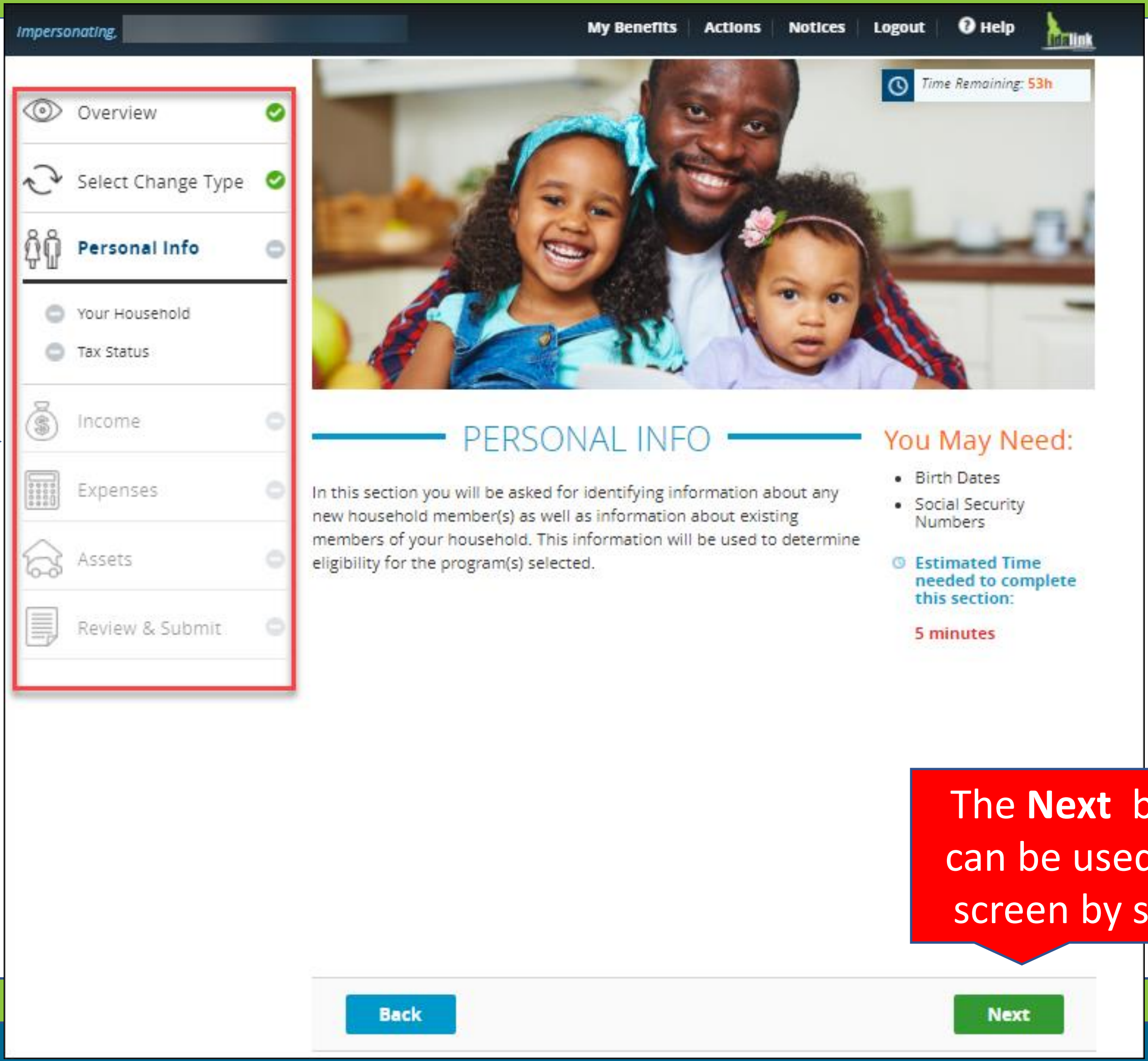
Select a Change Type:



Select an option to continue reporting the change

Reporting a Change or an Add a Person

Reporting a Change:



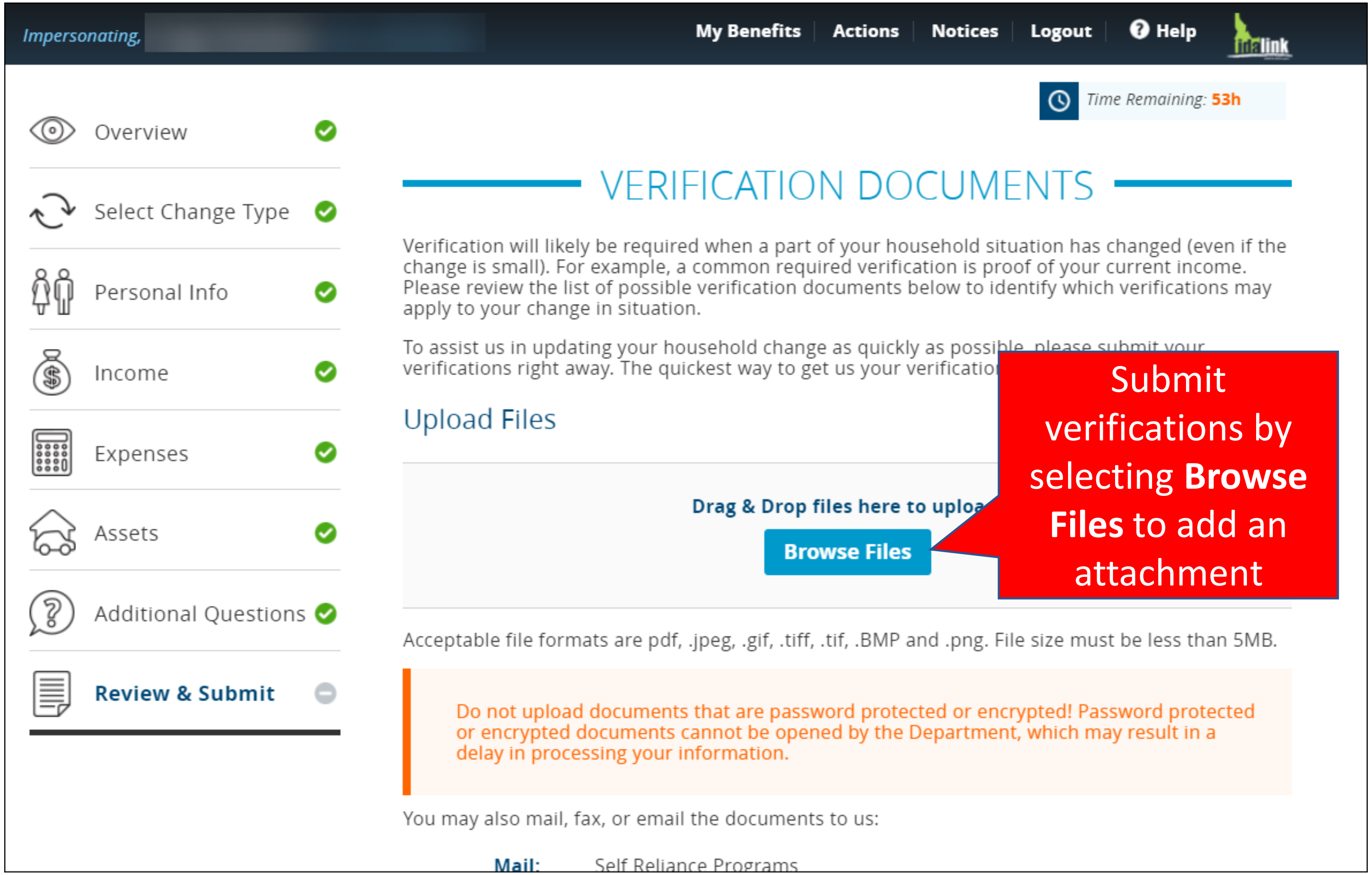
Based on the program(s) selected, mandatory fields populate and must be completed in order to submit the change

The **Next** button can be used to go screen by screen

Reporting a Change or an Add a Person

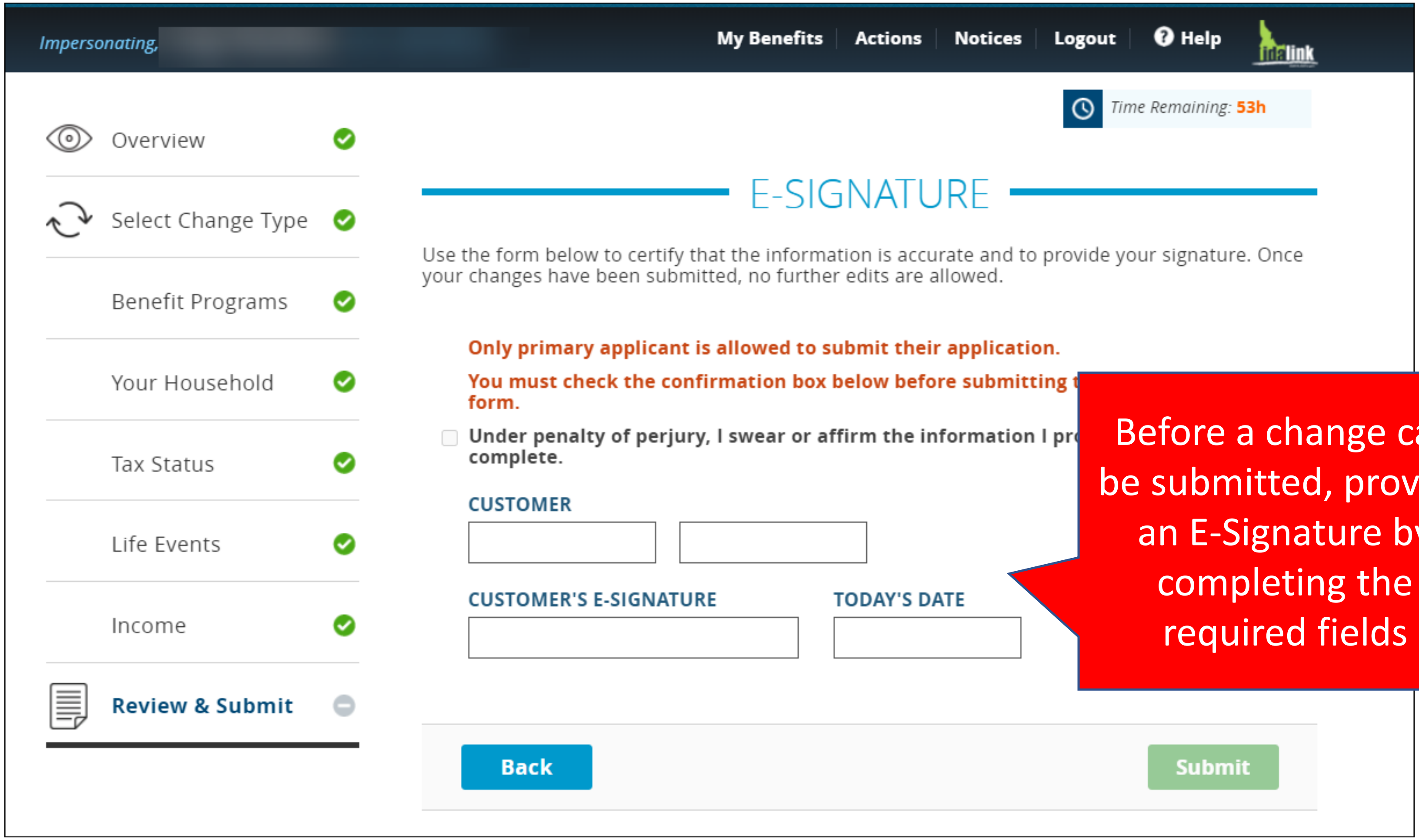
Provide Verification:

Verification of the change can be uploaded before submitting the change.



Reporting a Change or an Add a Person

Complete the Change:

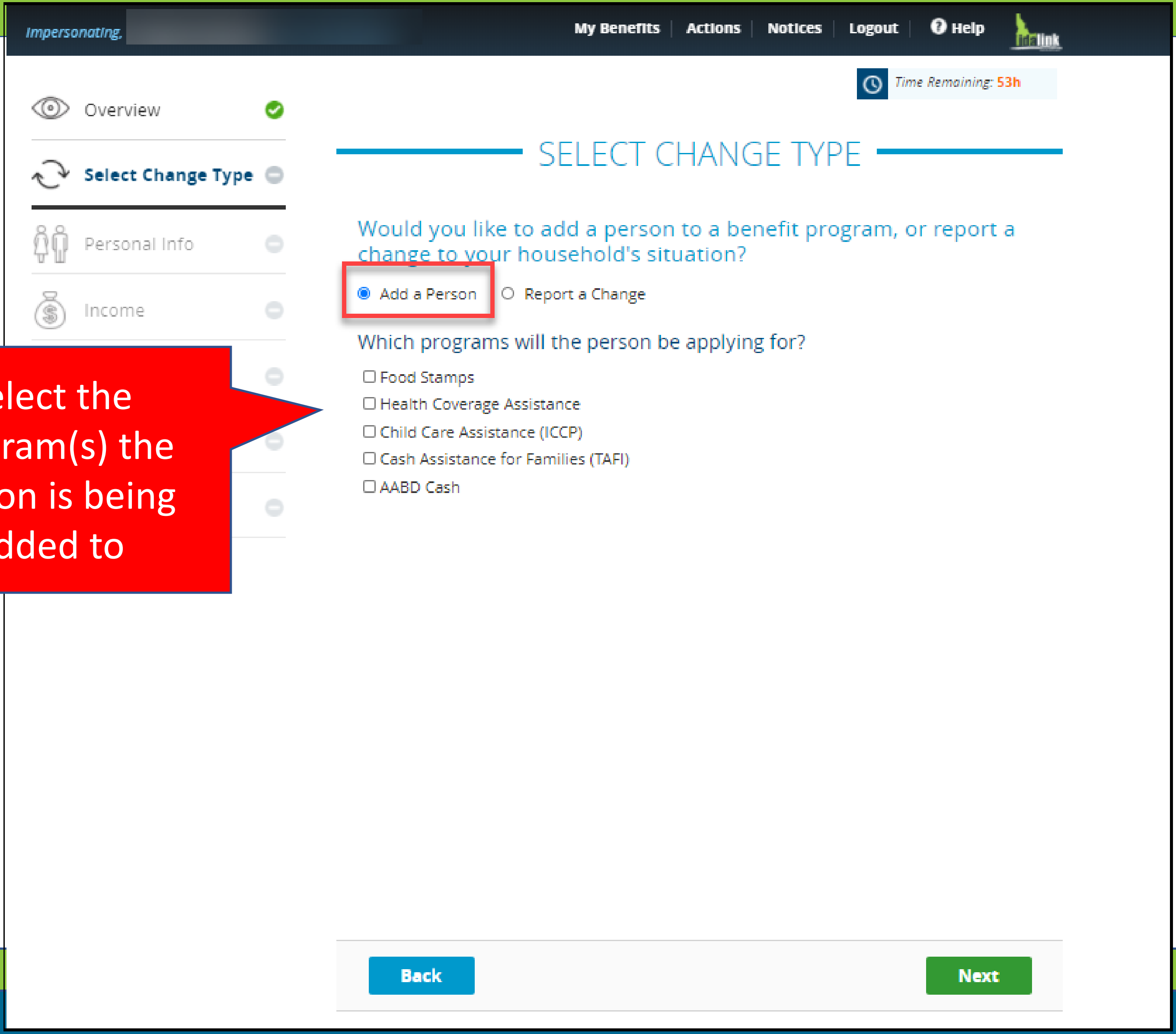


Before a change can be submitted, provide an E-Signature by completing the required fields

Reporting a Change or an Add a Person

Add a Person:

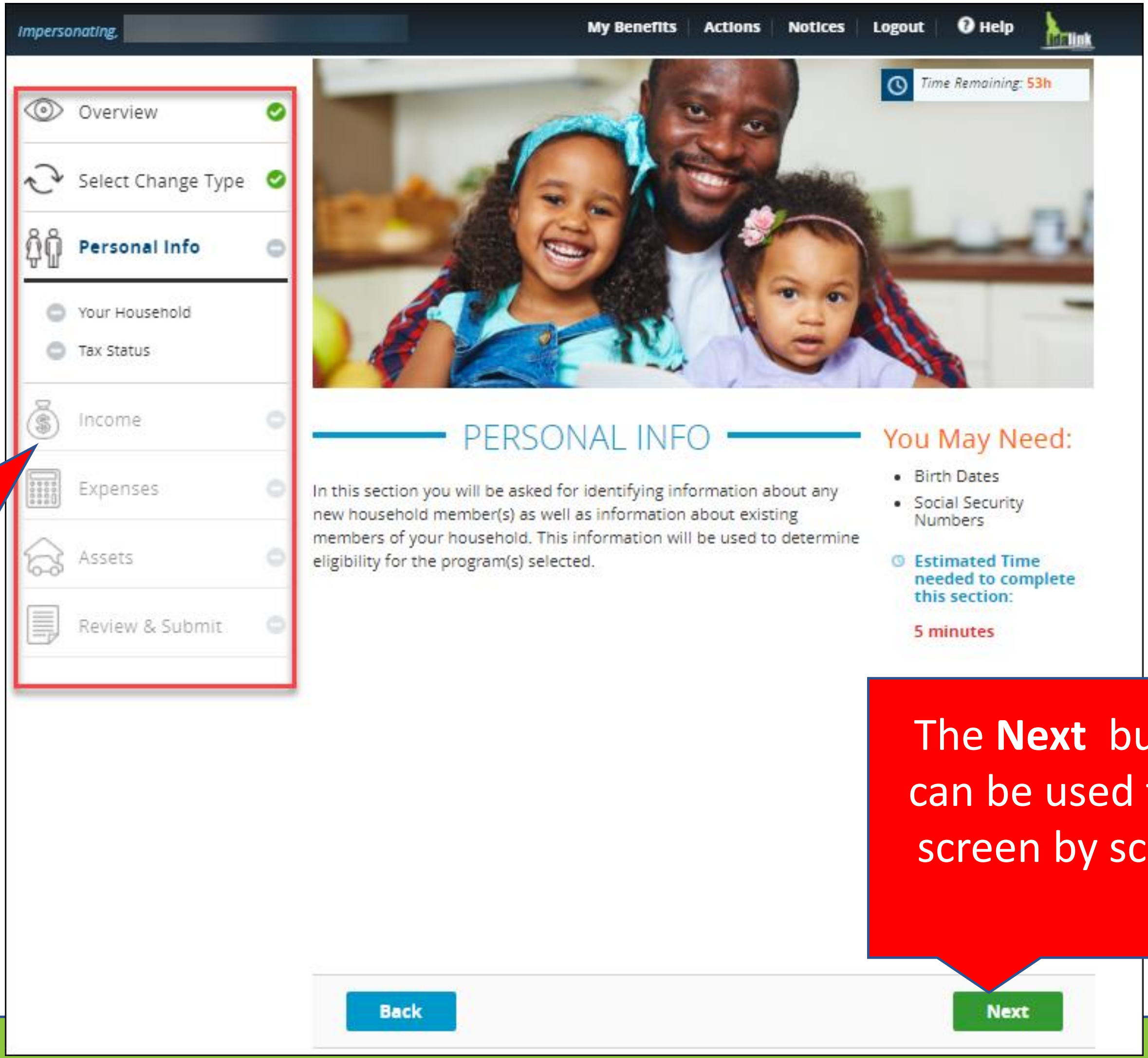
Select the program(s) the person is being added to



Reporting a Change or an Add a Person

Add a Person:

Based on the program(s) selected, mandatory fields populate and must be completed in order to submit the request

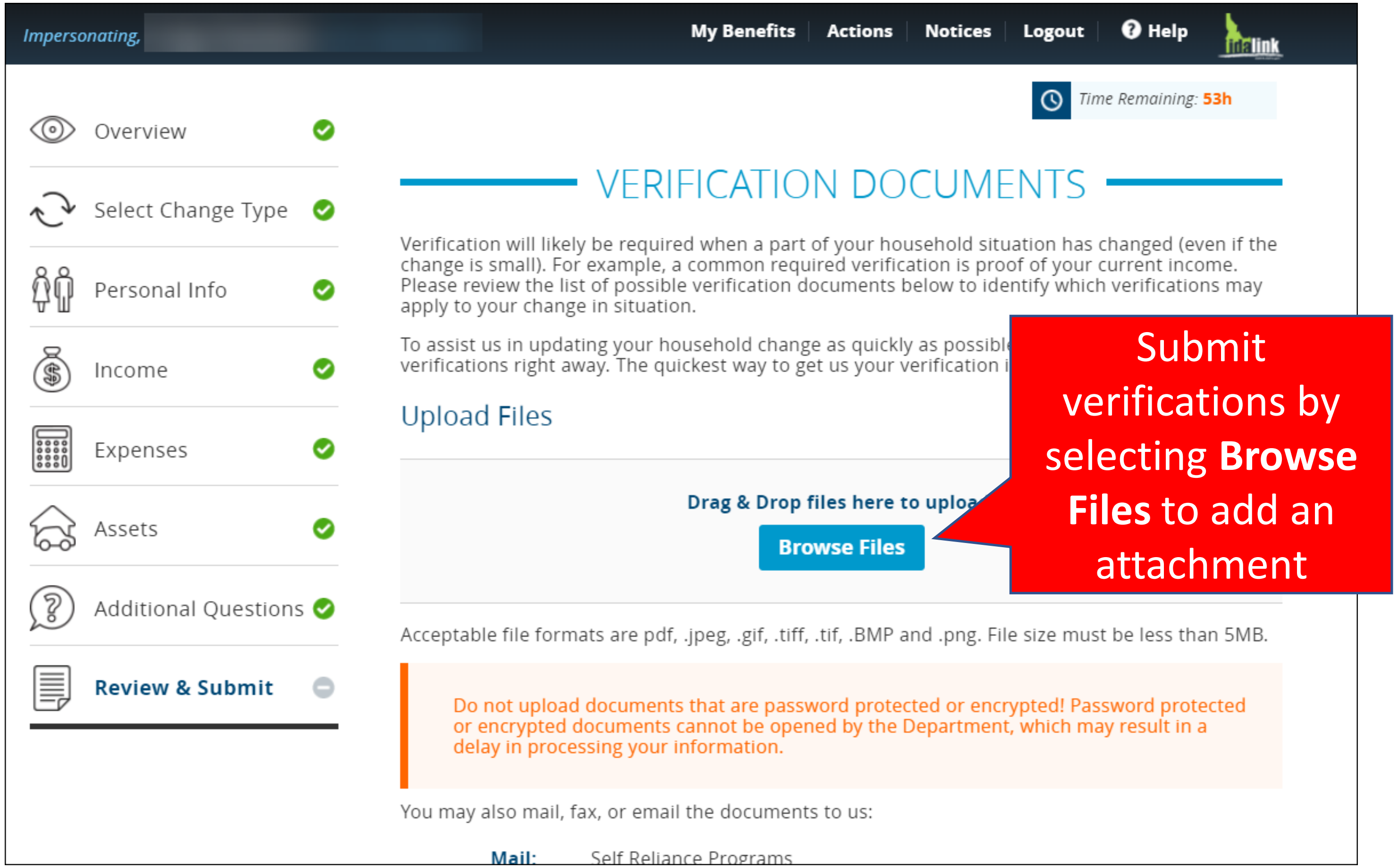


The **Next** button can be used to go screen by screen

Reporting a Change or an Add a Person

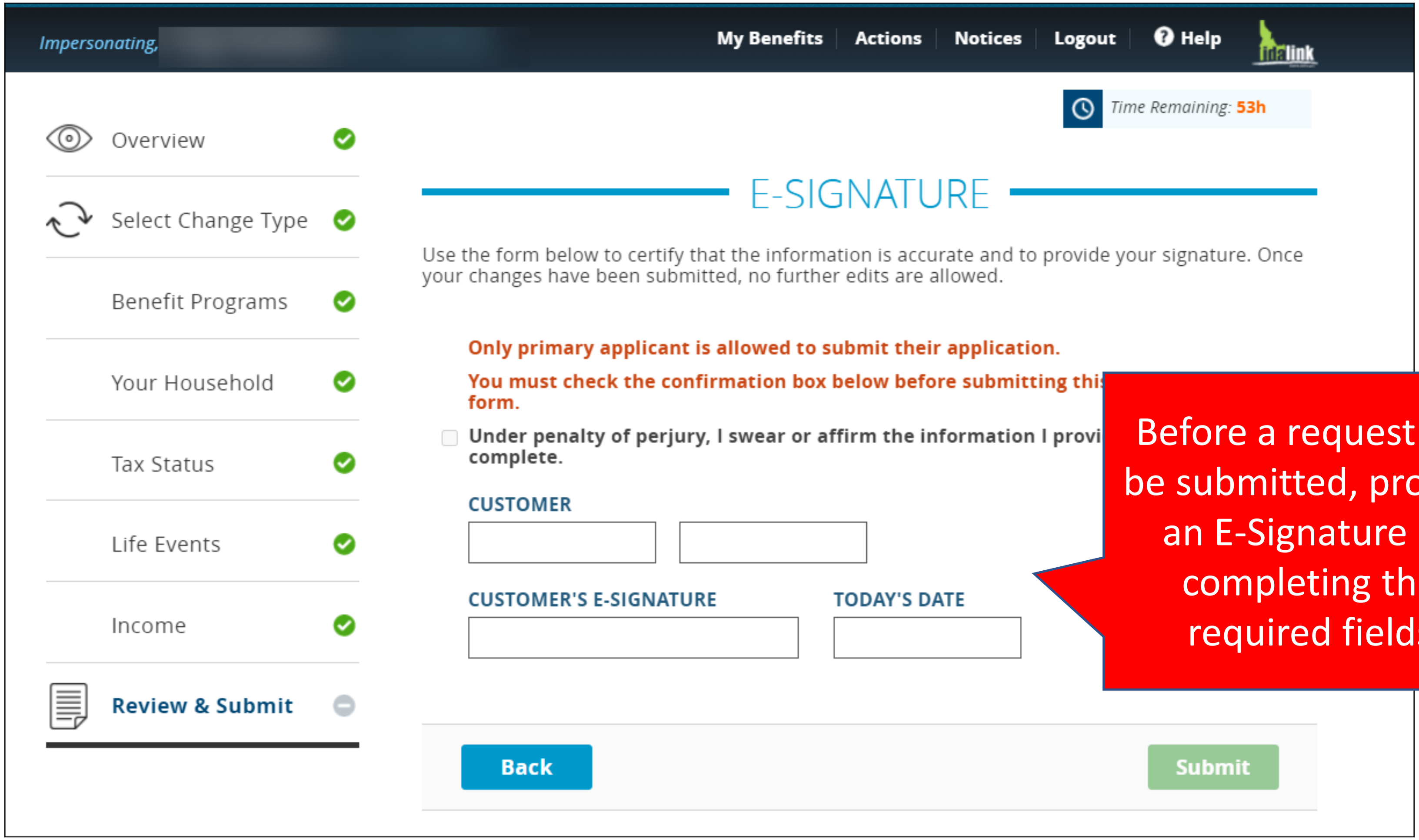
Provide Verification:

Verification of the request can be uploaded before submitting the add a person request.



Reporting a Change or an Add a Person

Complete the Change:

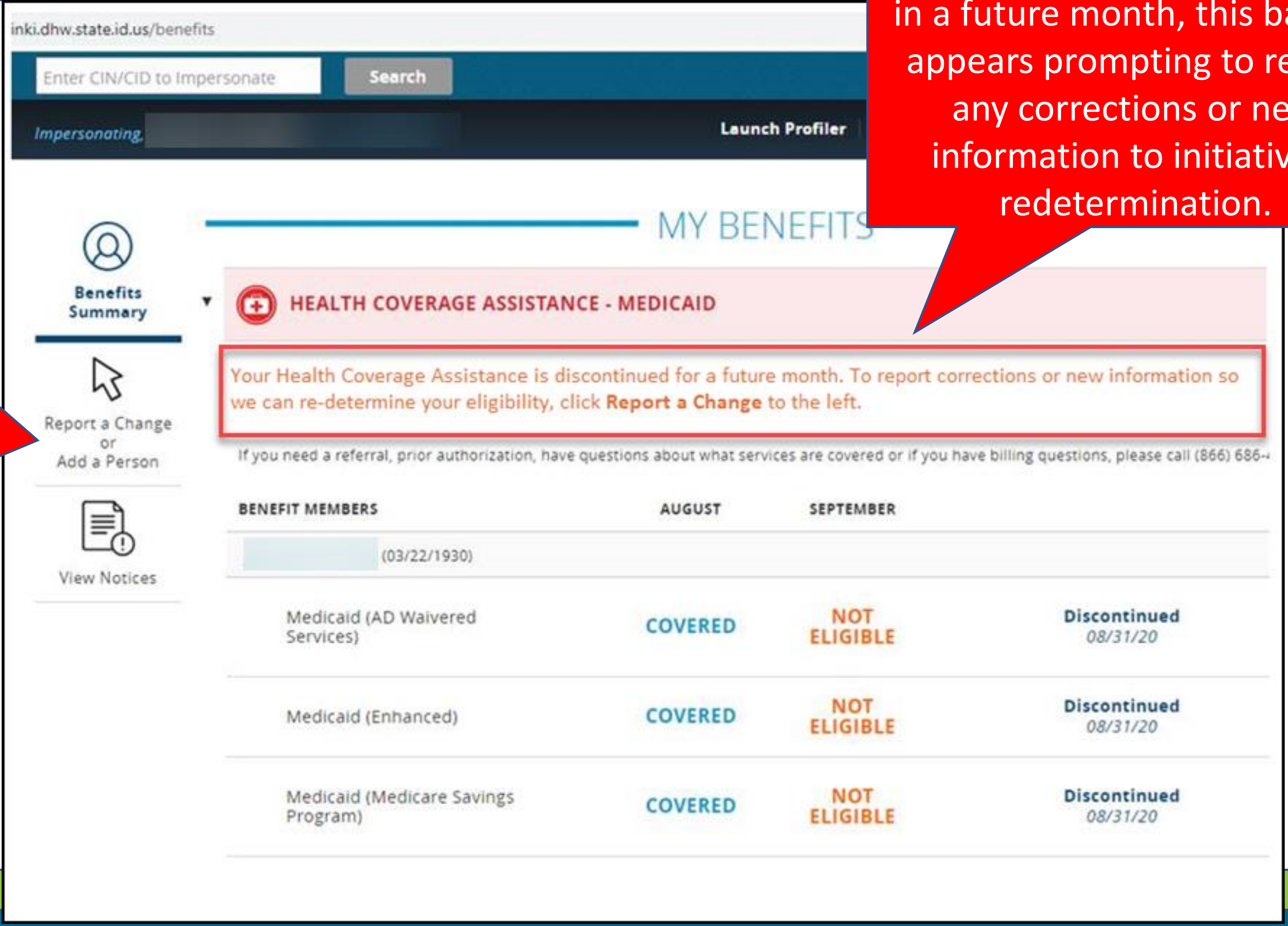


Before a request can be submitted, provide an E-Signature by completing the required fields

Viewing Clients’ Benefits

To view a client’s existing benefits, navigate to the client’s *My Benefits* screen.

When a program is discontinued for January and a change report is needed, click **Report a Change or Add a Person**



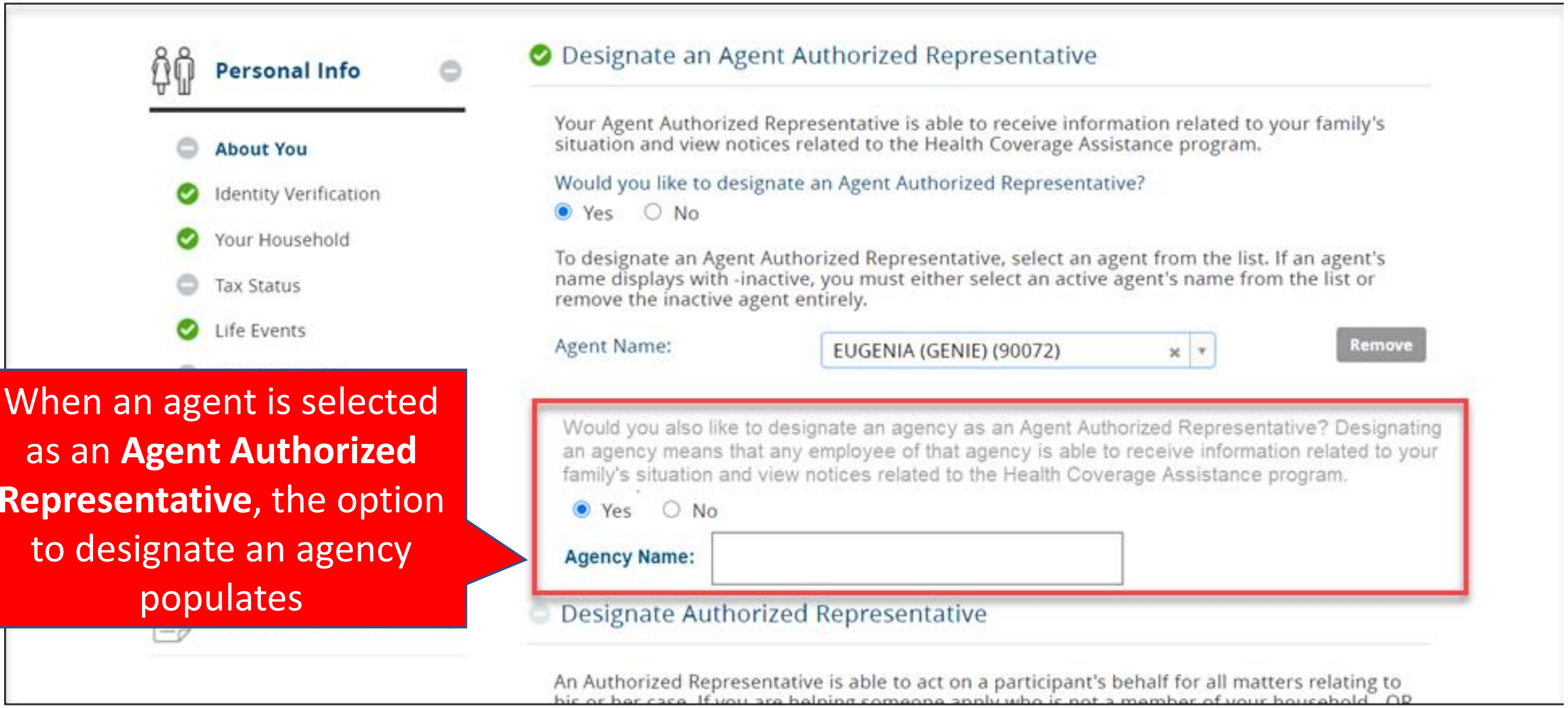
When a client’s Health Coverage is set to discontinue in a future month, this banner appears prompting to report any corrections or new information to initiative a redetermination.

Coming Soon – Features Coming in October 2020

Changes planned for an October 2020 release include:

- **Ability to designate an entire agency as an Authorized Representative**
  in addition to designating a health insurance agent as an authorized representative, clients will soon be able to also designate the entire agency so that more than one employee in that agency may manage the client’s account.
- **New Resolve APTC Compliance Option**
  When a client needs to self-attest that they are in compliance with APTC requirements, they will be prompted to self-attest once logged into idalink.

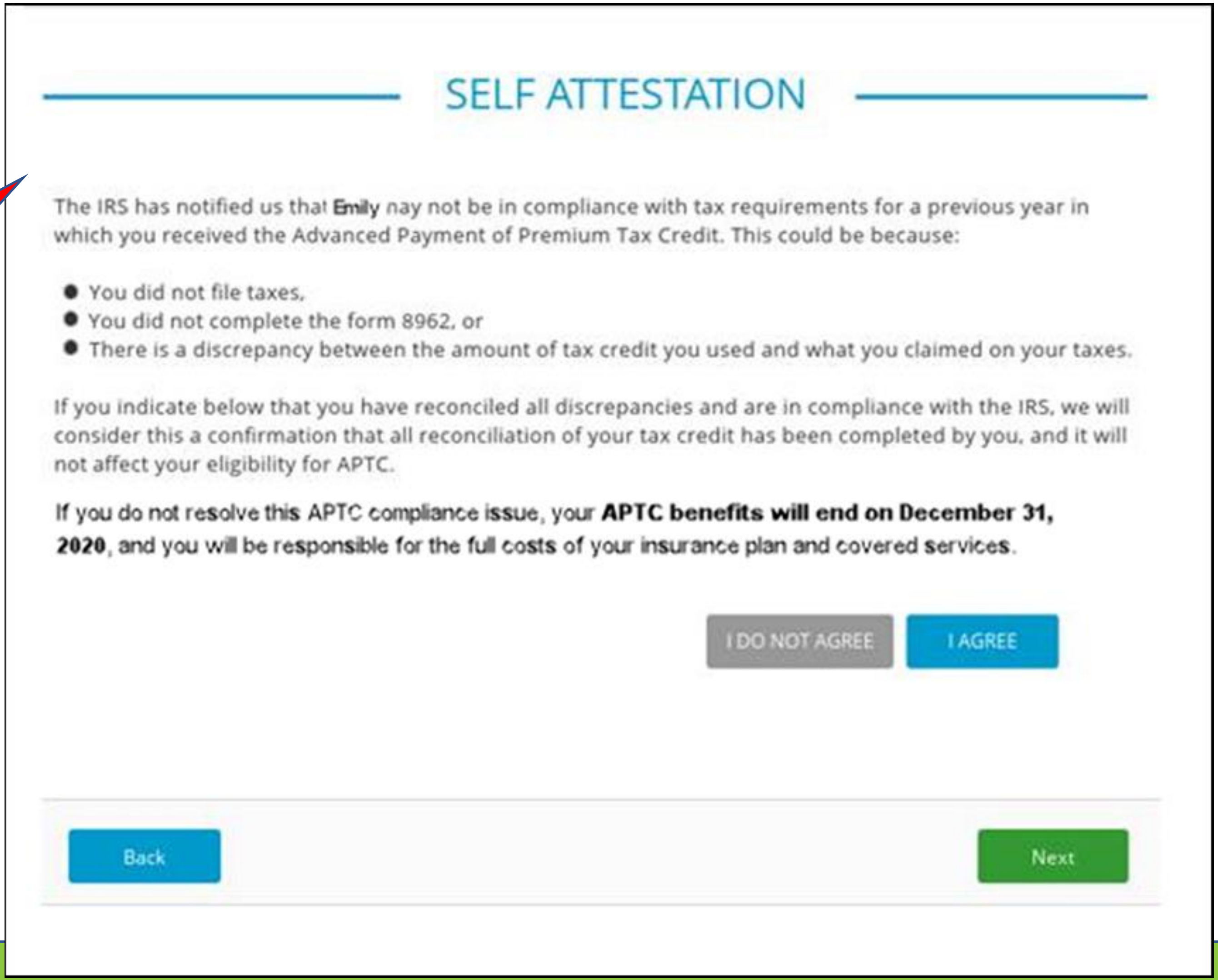
Designate an Agency as an Authorized Representative



When an agent is selected as an **Agent Authorized Representative**, the option to designate an agency populates

New Resolve APTC Compliance Option

Clients can Self Attest that they are in compliance with APTC requirements through idalink



SELF ATTESTATION

The IRS has notified us that Emily nay not be in compliance with tax requirements for a previous year in which you received the Advanced Payment of Premium Tax Credit. This could be because:

- You did not file taxes,
- You did not complete the form 8962, or
- There is a discrepancy between the amount of tax credit you used and what you claimed on your taxes.

If you indicate below that you have reconciled all discrepancies and are in compliance with the IRS, we will consider this a confirmation that all reconciliation of your tax credit has been completed by you, and it will not affect your eligibility for APTC.

If you do not resolve this APTC compliance issue, your **APTC benefits will end on December 31, 2020**, and you will be responsible for the full costs of your insurance plan and covered services.

I DO NOT AGREE | I AGREE

Back | Next

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