

CERTIFIED APPLICATION COUNSELOR DESIGNATED ORGANIZATION AND NAVIGATOR GRANTEES

Find Local Help Upkeep Tool User Guide for Assisters

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Introduction

1. Introduction

The Find Local Help (FLH) Consumer Tool at Find Local Help, allows consumers seeking health coverage in the Federally-facilitated Marketplace (FFM) to find assisters in their community that will provide application enrollment assistance, by zip code. Assisters are Navigator Grantees, certified application counselor designated organizations (CDOs) and other non-Navigator assistance personnel certified by the FFM to provide impartial Marketplace, Medicaid, and Children's Health Insurance Program (CHIP) enrollment assistance.

Assisters can manage their organization's assistance locations using the FLH Upkeep Tool.

Note: Agents & Brokers cannot use the FLH Upkeep Tool to request an update or removal of their listing. If you are an Agent or Broker and need to update or delete your listing in the FLH directory, contact the Agent & Brokers Help Desk for instructions: FFMProducer-AssisterHelpDesk@cms.hhs.gov.

1.1. Helpful Resources & Tips Before Getting Started

Before you start, reference this user guide to understand what information you need to complete the FLH Upkeep Tool.

When completing the FLH Upkeep Tool, you must complete your request in one session to avoid losing the information you entered if not submitted.

For additional FLH Upkeep Tool information, the following resources are available at the top of each page of the <u>FLH Upkeep Tool</u> and also at <u>https://marketplace.cms.gov/technical-assistance-resources/training-materials/training:</u>

- Find Local Help Upkeep Tool Job Aid for Assisters provides a quick start guide for completion and submission of the FLH Upkeep Tool request.
- Find Local Help Upkeep Tool for Assisters Frequently Asked Questions
 (FAQs) contains frequently asked questions about how and when to use the FLH
 Upkeep Tool.

A Find Local Help Upkeep Tool video demonstration is also available at https://marketplace.cms.gov/technical-assistance-resources/training-materials/training. This user guide includes video time stamps for each section heading to indicate exactly where in the video you can find the demonstration of the steps included in that section.

Email any questions to <u>FindLocalHelp_FFMAssisters@cms.hhs.gov</u>. Be sure to include your organization's name and CDO or Navigator ID in the body of your email.





Welcome Page

2. Accessing the FLH Upkeep Tool

Video Time Stamp: [00:11]

To access the FLH Upkeep Tool:

1. Go to FLH Upkeep Tool.



Note: Only the leadership contacts on file with CMS for your organization can access the FLH Upkeep Tool and modify FLH listings for the Consumer Tool. For example, for CDOs, your leadership contacts are your CAC Project Director, Organization Senior Official, or Secondary Contact if you have one.

- 2. On the *Welcome* page, complete all required information:
 - First name
 - Last name
 - Email address
 - Assister ID CDOs enter your 8-digit CDO ID; Navigators enter your 8-digit Nav ID; if you don't know your Assister ID, contact <u>FindLocalHelp FFMAssister@cms.hhs.gov</u> for help.
- 3. Check the reCAPTCHA box.
- 4. Select **Submit** and the system takes you to the FLH Listing(s) page.

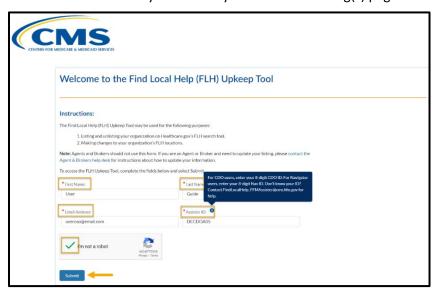


Figure 1: Welcome Page to the Find Local Help (FLH) Upkeep Tool

5. If any of the information entered does not match exactly what is on file for you, as a designated leadership contact, you will receive a *Contact Not Found* alert message.



Welcome Page

1 Contact Not Found

The information that was submitted does not match any of our records. Please review your information, make corrections, and try again. Only designated individuals on file with an assister organization will be allowed to make changes to that organization's FLH information. If you have questions, please contact FindLocalHelp_FFMAssister@cms.hhs.gov for help

Figure 2: Contact Not Found Alert Message

6. Re-fresh your *browser* to return to a re-set Welcome page. Follow *steps 2 through 4* above and be sure to enter your correct information.



Figure 3: Browser Re-fresh



FLH Listing(s) Page

3. FLH Listing(s) Page

Video Time Stamp: [05:23]

The FLH Listing(s) page on the FLH Upkeep Tool provides the option to list/unlist your organization from the <u>Find Local Help</u> Consumer Tool. It also shows the associated FLH locations and the FLH submission confirmations for your session.

From this page you can add/edit your organization acronym, list/unlist your organization, add/edit/delete/list/unlist locations, and view your FLH submission confirmations for your current session.

To modify your service location such as your counties and states or if you need to modify any organization leadership contacts, CDOs must have one of your leadership contacts use the <u>Organizational Maintenance Web Form</u> and Navigators must go to your Project Officer.

3.1. Listing/Unlisting an Organization

Video Time Stamp: [06:37]

The Current FLH Status indicates the status of your organization on the Consumer Tool.

To list your organization:

Listed status means a user can find your organization by using the Search feature on the Find Local Help Consumer Tool. With your organization in a Listed status you can add, edit, delete, list or unlist your Assister locations for your organization.

1. Select *List Organization* in the *Current FLH Status* box on the *FLH Listing(s)* page.

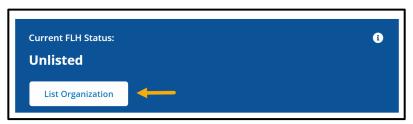


Figure 4: List Organization Button

2. Select **Yes** to confirm that you want to list your organization.



FLH Listing(s) Page

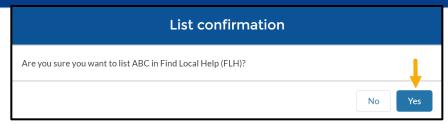


Figure 5: Organization List Confirmation

To un-list your organization:

Unlisted status means your organization and any associated assister locations are removed on the Find Local Help Consumer Tool. If you do unlist your organization, you can list it again in the future using the FLH Upkeep Tool.

1. Select *Unlist Organization* in the *Current FLH Status* box on the *FLH Listing(s)* page.



Figure 6: Unlist Organization Button

2. Select **Yes** to confirm that you want to unlist your organization.



Figure 7: Organization Unlist Confirmation

3.2. Navigating the My Find Local Help (FLH) Locations Table

Video Time Stamp: [07:46]

The My Find Local Help (FLH) Locations table displays all locations, either listed or unlisted, for your organization on the Consumer Tool. The table shows the Name, Address, Phone, Email, and Status of each location for your organization. The Action column displays actions you may want to make for any of the locations.



FLH Listing(s) Page

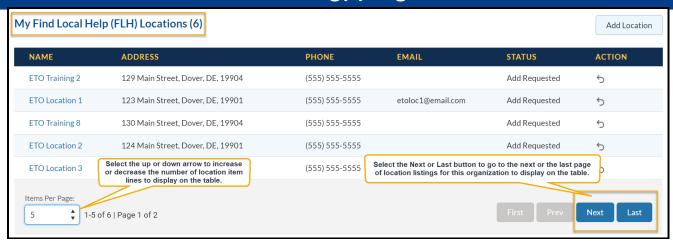


Figure 8: My Find Local Help (FLH Locations Table

3.3. Adding a Location

Video Time Stamp: [08:36]

Assisters can use the Add Location button to submit a request to add a new location listing on the FLH Consumer Tool.

Your organization must be in a Listed status as shown in the Current FLH Status blue box on the FLH Listing(s) page. If your organization is Unlisted or in a Change Requested status, you cannot add a location. The system disables the Add Location button, and you receive an alert banner message as shown in Figure 7.



Figure 9: Alert Banner Message

To add a location:

1. Select *Add Location* above the *My Find Local Help (FLH) Locations* table on the *FLH Listing(s)* page of the FLH Upkeep Tool.

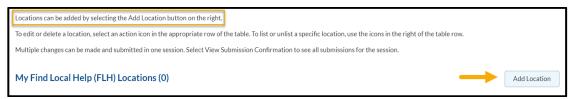


Figure 10: Add Location Button

2. On the *Add Location* page, enter the unique *Location Name*. The unique Location Name that you enter will display on the FLH Consumer Tool. Be sure this is the name you want your consumers to see and the name they will recognize.



FLH Listing(s) Page

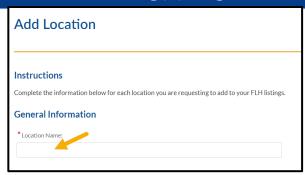


Figure 11: Add Location Name Field

3. The *Assister Type, Coverage Type, Service Location State*, and *County(s)* for your organization automatically populate from what is in the system for your CDO or Navigator Grantee organization.



Figure 12: Assister Type, Coverage Type, Service Location State, and County(s)

4. Enter the *Address*. The drop-down list for the *State* field will contain only the state(s) shown in the *Service Location State* column on the above table. If the Service Location State(s) or County(s) need updating, CDOs use the <u>Organizational Maintenance Web Form</u> and Navigators must go to your Project Officer.

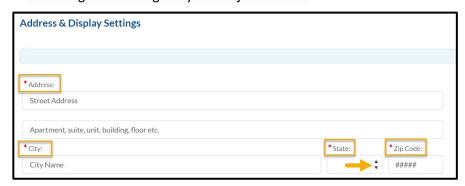


Figure 13: Address Fields

5. Select an option for *Display Settings*.





FLH Listing(s) Page

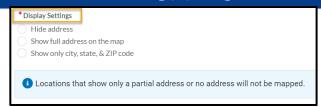


Figure 14: Display Settings Selection

6. Enter *Contact Information*. The only required piece is the Main Phone number, however, any additional contact information you can add is always helpful.



Figure 15: Contact Information Fields

7. Select all *Specialized Services* and *Languages* from the drop-down menus that you may offer at this location.





FLH Listing(s) Page

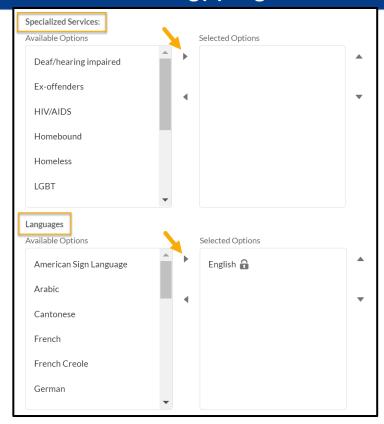


Figure 16: Specialized Services and Languages Menus

8. Enter *Hours of operation*. Check the *box* next to each day of the week this location offers assistance hours and select the *hours* from the drop-down menus.





FLH Listing(s) Page

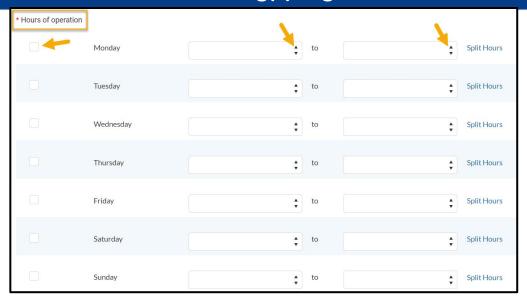


Figure 17: Hours of Operation Menus

9. If applicable for this location, select *Split Hours*, and enter the hours of operation. For example, this location may be available with split hours of 9:00 AM to 3:00 PM and 5:00 PM to 8:00 PM on Monday and straight hours of 9:00 AM to 5:00 PM on Tuesday.

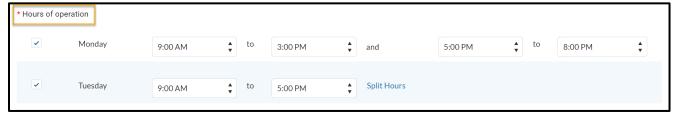


Figure 18: Hours of Operation – Split Hours

10. Enter any *Special Instructions* if needed for this location. For example, if you want your consumers to use a particular entrance of your location's building, you may enter *Please use side entrance*.



Figure 19: Special Instructions Text Box

- 11. Select the appropriate *navigation action* to continue:
 - Back information is not submitted, and the system returns you to the FLH Listing(s) page.
 - Submit the system submits your request, returns you to the FLH Listing(s) page, and
 your request is viewable in the My Find Local Help (FLH) Locations table.



FLH Listing(s) Page

- Submit & Add the system submits your request, and you remain on the Add Location page with all fields on the page reset.
- Logout you receive a message to confirm your logout.
 - a. **No** the system returns you to the Add Location page
 - b. Yes the system returns you to the Welcome page



Figure 20: Navigation Buttons

3.4. Adding a Duplicate Location Name

Video Time Stamp: [14:18]

You can add multiple locations with the same location name with different location addresses. For example, you may have multiple locations with the same name of ETO Org, but each has its own address. If the Location Name already exists in FLH for your organization or you previously submitted a request for this location name, you will receive a Warning message when you submit the request.

- 1. Follow steps 1 through 11 in Section 3.3 Adding a Location
- 2. In the Warning message box, select either *Change Location Name* or *Continue with Duplicate Name*.
 - Change Location Name the system takes you back to the Location Name field on the Add Location page for you to change the Location Name.
 - **Continue with Duplicate Name** the system accepts the name you entered and returns you to the FLH Listing(s) page.



Figure 21: Location Name Warning Message

3.5. Correcting a Duplicate Location Address

Video Time Stamp: [16:27]

You cannot add locations with the same location address. If the location address already exists in FLH for your organization or you previously submitted a request for this location address, you will receive an *Error* message when you submit the request. The system takes you back to the Add Location page.

1. Follow steps 1 through 10 in Section 3.3 Adding a Location



FLH Listing(s) Page

2. Select **Submit** and you receive an **Error: Duplicate Address** message. The system returns you to the Add Location page.



Figure 22: Duplicate Address Error Message

3. If you made an error, enter the correct address, and select Submit.

3.6. Viewing a Location

Video Time Stamp: [19:35]

To view a location:

1. In the *My Find Local Help (FLH) Locations* table of the *FLH Listing(s)* page, select the location *Name link*.

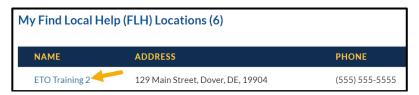


Figure 23: Name Link

2. View the location information on the *View Location* page. You cannot edit any information on the View Location page.





FLH Listing(s) Page

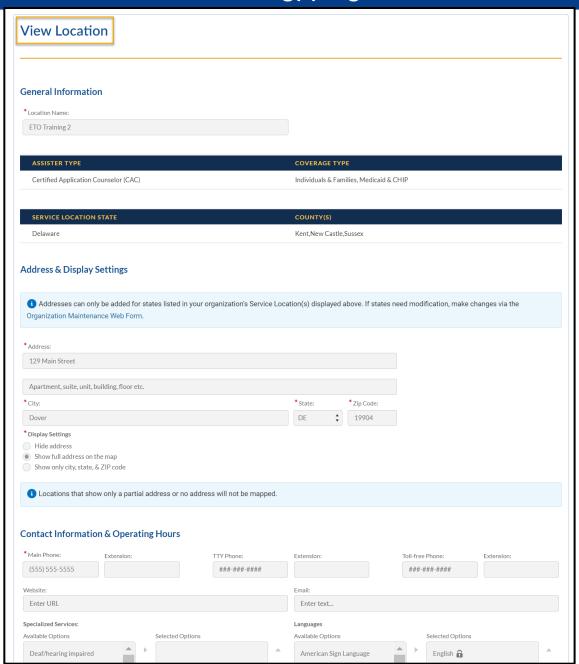


Figure 24: View Location Page

- 3. Select the appropriate navigation *action* to continue.
 - Back the system returns you to the FLH Listing(s) page.
 - Logout you receive a message to confirm your logout: No the system returns you
 to the View Location page; Yes the system returns you to the Welcome page



FLH Listing(s) Page



Figure 25: Navigation Buttons

3.7. Listing/Unlisting a Location

Video Time Stamp: [20:17]

You can unlist a location, which will show it in an Unlisted Status in the My Find Local Help (FLH) Locations table and will remove it from view in the FLH Consumer Tool. The removed location remains visible and accessible in the My Find Local Help (FLH) Locations table of the FLH Upkeep Tool for you to list again in the future if needed, such as for a seasonal location.

To list or unlist a location:

1. On the *FLH Listing(s)* page, be sure the status of the location in the *My Find Local Help* (*FLH*) *Locations* table is in either *Listed* or *Unlisted*.



Figure 26: Location Status

2. Select the *list/unlist icon* in the *Action* column on the *My Find Local Help (FLH) Locations* table to make the location visible or not visible on the FLH Consumer Tool.



Figure 27: List/Unlist Icon

3.8. Editing a Location

Video Time Stamp: [22:04]

To edit a location:

1. In the *Action* column on the *My Find Local Help (FLH) Locations* table of the *FLH Listing(s)* page, select the *pencil icon*.



FLH Listing(s) Page



Figure 28: Location Edit Icon

2. Review the *information* on the *Edit Location* page and edit as needed.

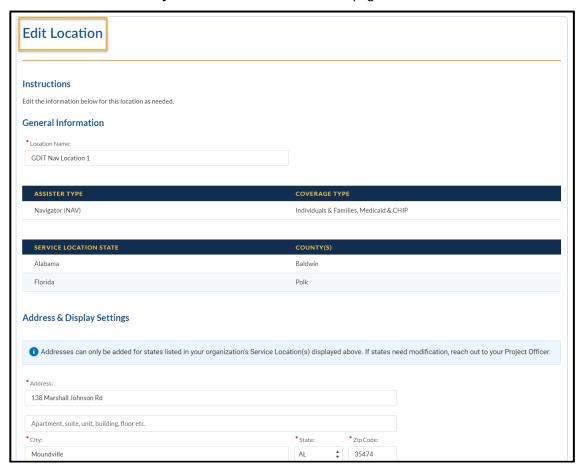


Figure 29: Edit Location Page

- 3. Select the appropriate navigation *action*.
 - **Back** information entered is not submitted and the system returns you to the FLH Listing(s) page.
 - Submit the system submits your request and returns you to the FLH Listing(s) page.
 - Logout you receive a message to confirm your logout: No the system returns you
 to the Edit Location page; Yes the system returns you to the Welcome page



FLH Listing(s) Page



Figure 30: Navigation Buttons

3.9. Recalling a Location Request

Video Time Stamp: [22:40]

You can recall, or undo, a request while it is in a requested status by selecting the recall icon and the system immediately removes the request.

To recall a location request:

1. Select the *Recall icon* in the *Action* column on the *My Find Local Help (FLH) Locations* table.



Figure 31: Location Request Recall Icon

- 2. Select **Yes** or **No** in the **Recall Confirmation** message window.
 - Select No and the system returns you to the FLH Listing(s) page with no change to the request.
 - Select Yes and the system removes the request, returns you to the FLH Listing(s) page, and the request no longer displays on the My Find Local Help (FLH) table.

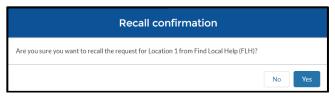


Figure 32: Recall Confirmation Message

3.10. Deleting a Location

Video Time Stamp: [23:20]

You can permanently delete a location that is in an Unlisted Status on the My Find Local Help (FLH) Locations table. Deleting the location will remove it from the My Find Local (FLH) Locations table and from the FLH Consumer Tool. The location will no longer be visible or accessible to you in the My Find Local Help (FLH) Locations table of the FLH Upkeep Tool.

1. In the *My Find Local Help (FLH) Locations* table of the *FLH Listing(s)* page, select the *trash* can icon in the *Action* column.



FLH Listing(s) Page



Figure 33: Location Delete Icon

- 2. Select **Yes** or **No** in the **Delete Confirmation** message window.
 - Select No and the system returns you to the FLH Listing(s) page with no change to the location.
 - Select Yes and the system submits your request, returns you to the FLH Listing(s) page, and the location no longer displays on the My Find Local Help (FLH) table.

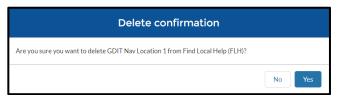


Figure 34: Delete Confirmation Message

4. Adding/Editing an Organization Acronym

Video Time Stamp: [24:04]

If your organization has an acronym commonly recognized by consumers for your organization's name, you can add or edit your acronym in the organization table at the top of the FLH Listing(s) page and it will show in the FLH Consumer Tool. For example, if your organization name is Example of South Florida, the recognized acronym may be ESF. This is an optional field.

To add or update your organization's acronym:

1. Select the **pencil icon** in the table at the top of the **FLH Listing(s)** page.



Figure 35: Organization Table Edit Pencil Icon

2. Add or edit the *Acronym* and select the *Save* icon.



FLH Listing(s) Page

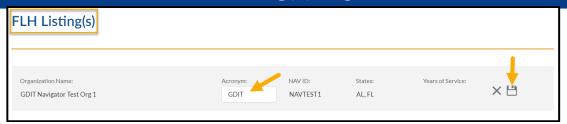


Figure 36: Organization Table Acronym Field and Save Icon

5. Viewing Submission Confirmation

Video Time Stamp: [25:07]

To view and save confirmation of the submission(s) for your session:

1. At the bottom of the *My Find Local Help (FLH) Locations* table on the *FLH Location(s)* page, select *View Submission Confirmation*.



Figure 37: View Submission Confirmation Button

2. Review your *Confirmation* of your session.



FLH Listing(s) Page

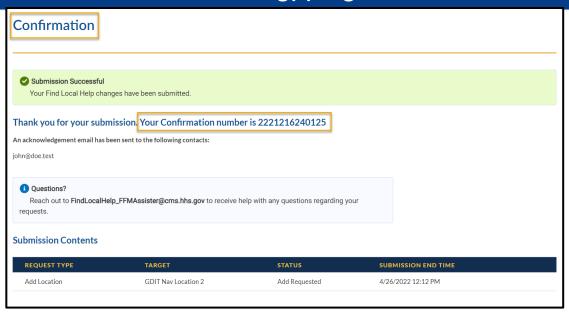


Figure 38: Confirmation Page

Select **Print PDF** to print or save the PDF Confirmation for your records.



Figure 39: Print PDF Button

3. Select *Logout* to end your session and return to the FLH Welcome page.



Figure 40: Logout Button



Email Communication

6. Email Communication

For each FLH Upkeep Tool request you submit, you receive an acknowledgment email with a confirmation number and an email upon approval or rejection of your request. Email notifications keep you informed of your request from start to finish. A CDO Program team member may also contact you via email for additional information, if needed, to process your request. Please be sure to check your spam or junk folder for these emails if you do not see them.

1. See *Figure 41* for an example of an acknowledgement email you receive upon submission of your FLH Upkeep Tool request.

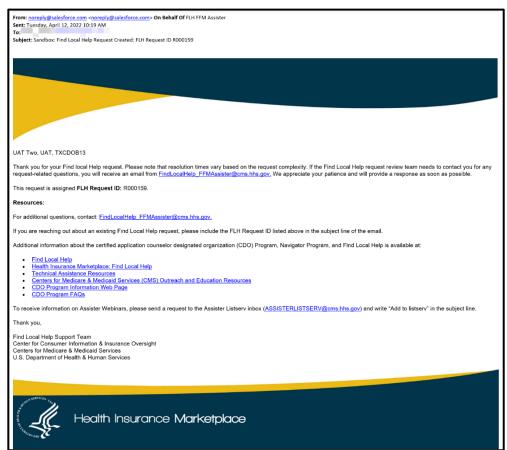


Figure 41: Acknowledgement Email Communication Example

2. See *Figure 42* for an example of an approval email you receive upon completion of your FLH Upkeep Tool request.





Email Communication

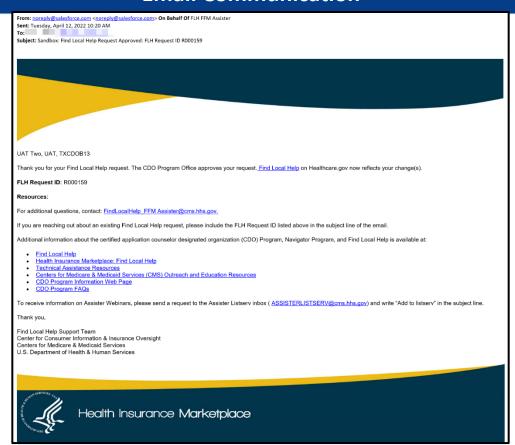


Figure 42: Approval Email Communication Example

Email any questions to <u>FindLocalHelp_FFMAssisters@cms.hhs.gov</u>. Be sure to include your organization's name and CDO or Navigator ID in the body of your email.