Find Local Help

Upkeep Tool Quick Reference Guide

Version 1.1

7/25/2018

Centers for Medicare & Medicaid Services

Center for Consumer Information and Insurance Oversight (CCIIO)

Table of Contents

Record of Changes

Date	Version	Description
7/25/2018	1.1	Edits and prep for 508 compliance
3/29/18	1.0	First version of a stand-alone Upkeep tool document. No significant changes have been made to the tool.

Disclaimer

This guide includes changes to the Upkeep tool as of **July 25, 2018**. All content herein is subject to change when new functionality, content or graphical user interface (GUI) changes are implemented. Functionality or other relevant changes to the FLH application are summarized in the Record of Changes.

Overview

Find Local Help (FLH) is a tool, available to the public via HealthCare.gov, that allows consumers to find people and organizations within a U.S. locality (zip code), who are trained to help apply for, pick and enroll in health insurance plans.

The FLH application is comprised of three front-end components:

- **Consumer tool** - The public-facing search application that allows for users to search for local resources.
- **Upkeep tool** - The public-facing application that allows for Assisters only to request addition of a new location or changes to existing records in the FLH directory.
- **Admin tool** - The internal-only administrative application that allows for CMS users to create a new organization or location and update or delete an existing listing record.

Note: Refer to the Find Local Help Quick Reference Guide document for guidance on Consumer and Admin tools.

The figure below depicts the flow in the FLH Consumer, Upkeep, and Admin tool.
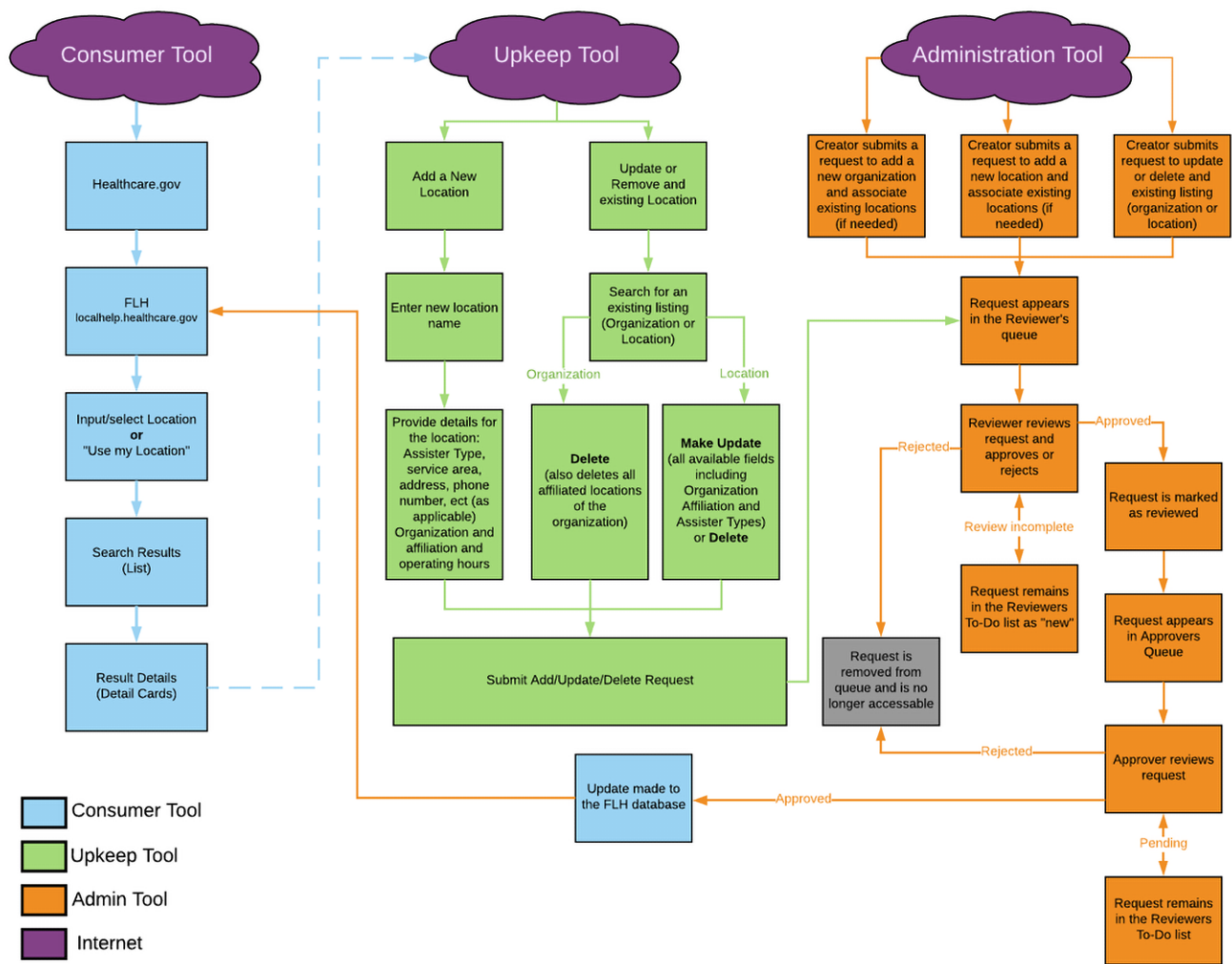

Figure 1: Find Local Help User Flow Diagram

Background

HealthCare.gov helps Americans understand their private healthcare choices and select the coverage that best suits their needs. Spanish speaking consumers can use the parallel CuidadoDeSalud.gov for the same services. Key features of both websites include social media integration, content that can be easily shared, and collaborative resource links for consumers to get more information. The sites are built with a responsive design to enable access via a multitude of platforms including desktops, smart-phones, and other mobile devices.

The Find Local Help application resides on localhelp.healthcare.gov and it allows the public to search for local re-sources that can provide them assistance with the Health Insurance Marketplace. Consumers can search by city and state, state, ZIP code or current location to see a list of local organizations with contact information, office hours, and types of help offered, such as non-English language support, Medicaid or Children's Health Insurance Program (CHIP), and Small Business Health Options Program (SHOP).

Note: FLH resources are only provided to visitors in Federally Facilitated Marketplace (FFM), State Partnership Marketplace (SPM) states, and for some State-based Marketplaces that use a Federal Platform (SBM-FP) for certain coverage type(s). Consumers in State-Based Marketplace (SBM) states are directed to their state Websites.

Assistance available in the FLH directory can be one of two types:

> **Assisters:** Trained and certified individuals who can help consumers apply for coverage and enroll in a health plan with savings based on their income, or in Medicaid or the Children's Health Insurance Program (CHIP). Assisters provide information that's fair, impartial, and accurate, and their services for free. The various types of Assisters include: Navigators, Certified Application Counselors (CACs), and Medicaid or CHIP Specialists.

> **Agents & Brokers:** Trained, licensed and registered professionals who can help consumers apply for cover-age and enroll in a health plan with savings based on their income. Agents & Brokers provide their services to consumers for free – they're paid by insurance companies whose plans they sell. Some agents may sell only certain plans. Only agents and brokers that have a valid National Producer Number and are licensed in the state will appear in the search results. However, this listing should not be used as a primary source of information.

Assisters can access the Upkeep tool through the FLH application to submit a request to add, update or delete a listing in the directory.

Agents and brokers can make changes on the MLMS (Marketplace Learning Management System) by accessing the CMS Enterprise Portal (https://portal.cms.gov/) to change any information displayed. Agents and Brokers can opt out, or in with partial information or full information with the Find Local Help Preference options on the MLMS profile.

CMS Center for Consumer Information and Insurance Oversight (CCIIO) and Center for Medicaid and CHIP Services (CMCS) users with appropriate privileges can add, update, or remove listings for help providers to publish in the FLH directory of Healthcare.gov.

Upkeep Tool

The Upkeep Tool, also known as Manage Find Local Help Listings, is used by public users (typically Assisters) to submit a request to add a new location, update or remove an existing location, or remove an existing organization and all of its affiliated locations in the FLH directory.

Note: Agents & Brokers cannot use the Upkeep tool to request an update or removal of their listing. Contact the Agent & Brokers Help Desk for instructions on how to update or delete an Agent/Broker listing in the FLH directory.

Access the Upkeep Tool

There are two permanent ways to access the Upkeep tool.

1. Click the Request corrections link on the detail page of any assister location within the Consumer tool.
   Figure 2 below shows this link highlighted in red.

2. Use the direct URL: https://localhelp.healthcare.gov/update-organization-information.

Either way will navigate the user to the Upkeep tool landing page, shown in Figure 3 on the next page.
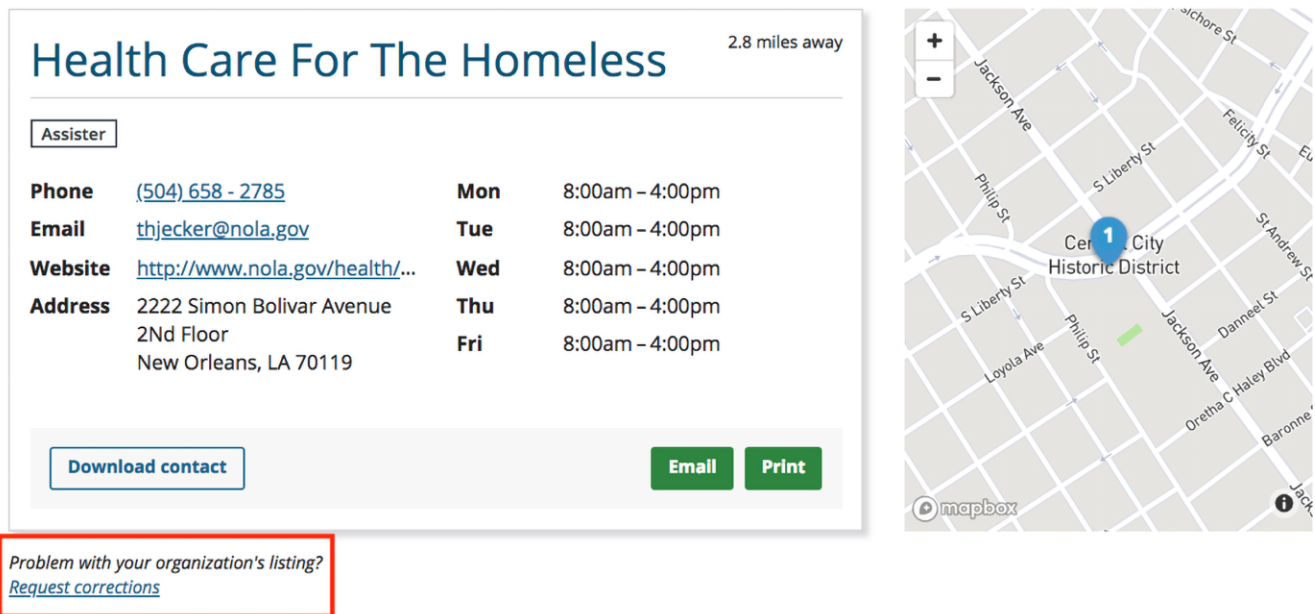
Figure 2: Request Corrections Link
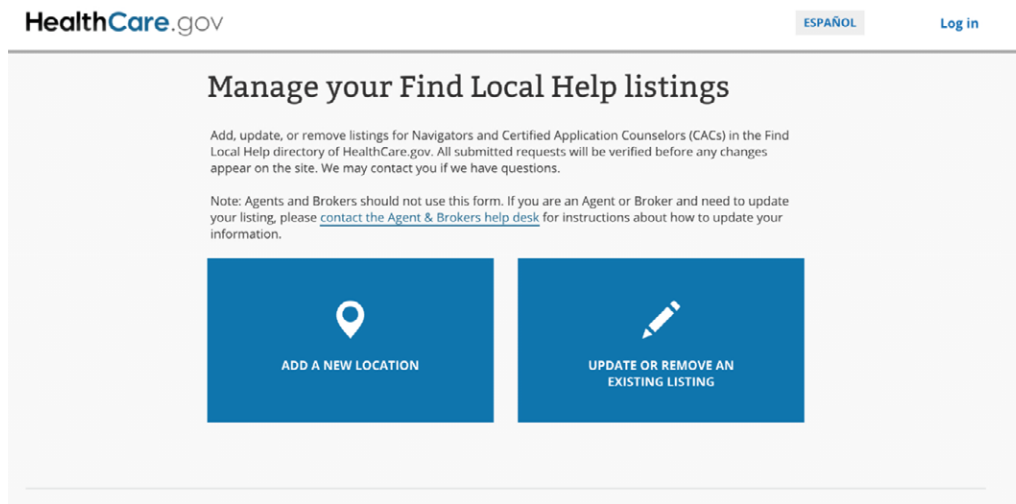
Figure 3: Manage Your Find Local Help Listings - Upkeep Tool Landing Page

Add a New Location

Assisters can use the "Add a New Location" button to submit a request to add a new location listing to the FLH directory. Visit Health Insurance Marketplace to find information about assister programs.

To add a new location:

1. From the landing page, click Add a New Location.

2. Enter the name of the new location in the Enter new location name field.

    a. If the name entered is similar to another listing in the FLH directory, the user will see a duplicate location warning screen, stating that the user entered a location similar to one already in the database.

    b. Click Continue and Add New Location to proceed with the request to add the location.
        Alternatively, click Start Again to return to the landing page.
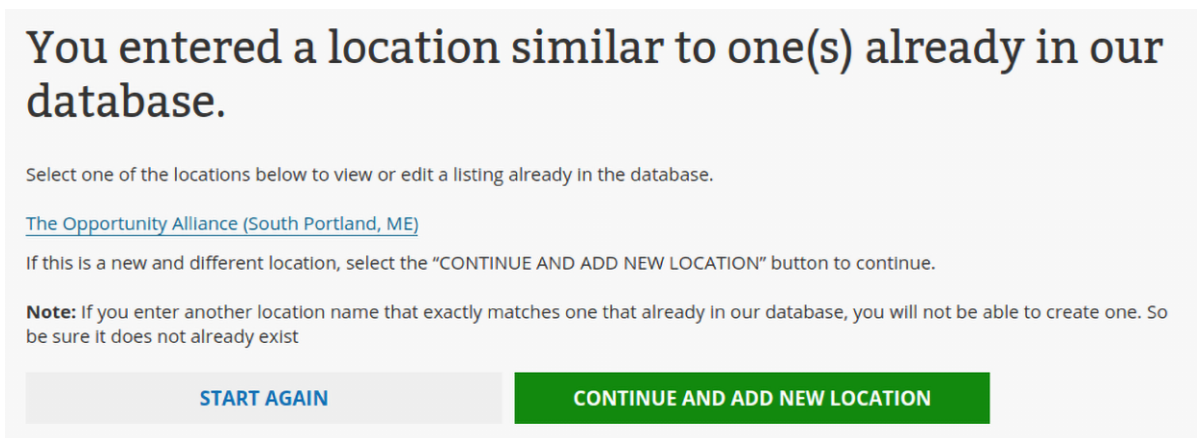
Figure 4: Duplicate Location Warning Screen

3. The Add a Find Local Help location page will render. Complete each required section of the form to submit the request.

> LOCATION NAME & ORGANIZATION
> > Location name
> > Organization affiliation (Navigator grantee organizations or certified application counselor designated organizations)
>
> ASSISTER TYPES, COVERAGE TYPES, AND SERVICE AREAS
> ADDRESS AND DISPLAY SETTING
> > Street address 1 | Street address 2 (optional) | City | State | Zip Code
> > Display location options (Show this location on the map, Hide address, etc.)
>
> CONTACT AND OPERATING HOURS
> > Main phone | TTY phone (optional) | Toll-free phone (optional)
> > Website (optional) | Email (optional)
> > Specialized services (optional) | Languages (English is selected by default)
> > Hours of operation
> > Special Instructions (optional)
>
> YOUR INFORMATION IN CASE WE NEED TO CONTACT YOU
> > First name | Last name
> > Email Address | Phone number

4. Click Continue. The Verify new location page will render.
    (Alternatively, click Back to return to the landing page.)

5. Verify the details provided for the new location and solve the CAPTCHA. Refer to Solving Captcha / Submitting a Request section for instructions.

6. Click Submit Request.

Note: When adding a new location, always include the organizational affiliation to include the name of the grantee organization or Certified Application Counselor designated organization (CDO).

Refer to Add a New Location in the Admin QRG for detailed descriptions of each section and instructions on how to complete the **Add a Find Local Help location** page.

Update or Remove an Existing Listing

A request to update a listing can only be submitted for existing locations (although this does not include Organization listings) in the FLH directory.

To manage an existing location:

1. From the landing page, click **Update or Remove an Existing Listing**.

2. Enter the name of the location in the **Enter listing name** field.

3. Select the location or organization name from the suggested list of names. If an organization and its location have the same name, then only the organization listing can be selected.

Figure 5: Manage Your Find Local Help Listings - Select an Existing Listing

Note: The name of an organization or location will not appear if it does not exist in the FLH directory. A new organization or location will not appear until it has undergone a review and approval process.

  4. Click Submit.

Figure 6: Select a Listing

The **Update or remove an existing Find Local Help listing** page will render for the organization or location. See Figure 7 at the bottom of this page.

Organization Listing

If the user selected the organization name, then the organization listing with all of its affiliated locations (if any) will be displayed.

Figure 7: Organization Listing with Affiliated Locations

- A user can only submit a request to **Delete** an organization listing. Deleting an organization will also delete all of its Affiliated Locations.

- To update or delete an affiliated location listing, click on the location listing name.

Location Listing

If the user selected a location name, then only the location listing will be displayed with a hyperlink to its Affiliated Organization.

Figure 8: Location Listing

- A user can submit a request to **Edit** or **Delete** the location listing.

Update a Location

To make changes to an existing location:

1. Click the **Edit** button.

Figure 9: Edit a Location Listing

2. Update each field of the form as needed.   Any field may be updated in any of the following form sections:

• Location name & organization: Update the location name and add/remove the Organization affiliation.

• Assister types, coverage types, and service areas: Add or Remove Assister type(s).

• Address and Display Setting: Update the street address, city, state, zip code, or display setting for the location.

• Contact and operating hours: Update the phone number(s), website address, and email address for the location. Also, select all applicable specialized services and languages provided at the location.

  ◦ Hours of operation: Update the hours of operation from Monday through Sunday for the location.

  ◦ Special instructions: Free text field to enter any special instructions or additional information for the location.

  ◦ Your information in case we need to contact you: The user should enter their full name, email address, and phone number in case someone from CCIIO needs to contact them regarding their request.

Note: When updating a location listing, an organization affiliation must be included. Organizational affiliation could be the name of the grantee organization or Certified application counselor designated organization (CDO).

Figure 10: Make Updates to a Location Listing

3. Click **Continue** to verify the updates prior to submitting the request for review and approval.

Figure 11: Verify Updates Made to Location Listing

4. Solve the CAPTCHA. Refer to Solving Captcha / Submitting a Request section for instructions.

5. Click Submit Request to submit the update request for review and approval.

Delete an Organization or Location

To delete an existing organization or location:

1. Click the **Delete** button for an organization or a location. The **Verify deletion of Find Local Help listing** page will render.
*The figure on the next page shows the **Verify deletion of Find Local Help listing** page for an organization listing.*

Figure 12: Verify Deletion of Organization Listing

Note: Deleting an organization listing deletes all affiliated locations for that organization.

The following figure shows the **Verify deletion of Find Local Help listing** page for a location listing.

Figure 13: Verify Deletion of Location Listing

2. Solve the CAPTCHA. Refer to Solving Captcha / Submitting a Request section for instructions.

3. Click Submit Request.

Solving CAPTCHA / Submitting a Request

A CAPTCHA must be solved whenever a user submits a request to create, update, or delete a listing on the **Verify new location, Verify Updates for Find Local Help listing**, or **Verify deletion of Find Local Help listing** pages, respectively. To solve the CAPTCHA:

1. Click the check box for I'm not a robot. A pop-up modal window will appear.
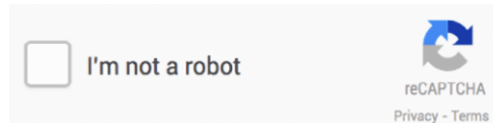
Figure 14: Captcha - Unverified

2. Follow the instructions in the modal window (e.g. select all specified images) and click **Verify** when done.
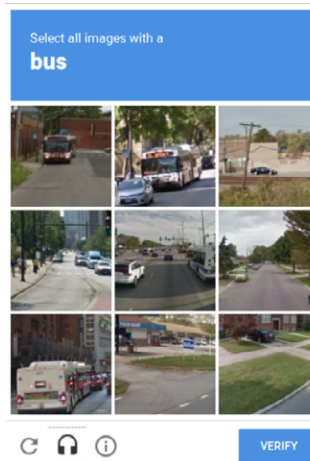
Figure 15: Pop-Up Modal Window

3. Verify that a check mark appears next to **I'm not a robot.**
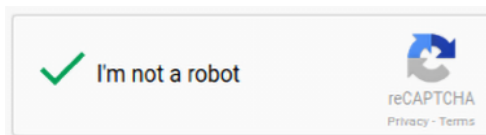
Figure 16: Captcha - Verified

4. Click Submit Request / Submit Delete Request to send the request for review and approval. Alternatively, the following options are available:

   • Click Edit to make changes to the listing before submitting the request.

   • Click Back to go back to the listing.

   • Click Cancel to cancel the request. A confirmation modal window will appear.

Figure 17: Cancel Confirmation Modal Window

- Select Yes, I do want to cancel to cancel the request and return to the landing page.

- Select No, I don't want to cancel to close the confirmation modal window.

Note: The submitted updates will go through a review and approval process prior to being added to the FLH directory.

Glossary

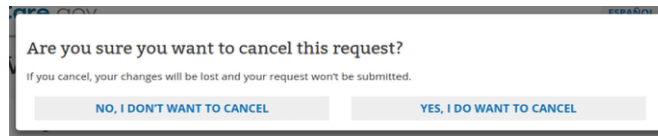| Acronym	Term	Description
--	Assister Types	The following Assister types are available in the Upkeep and Admin tool. Certified Application Counsel or (CAC) Navigator (NAV) CHIP Medicaid
ABA	Agent/Broker Associations	To the extent permitted by a state and if all Marketplace requirements are met, licensed health insurance agents and brokers may enroll individuals, small employers, and employees in coverage through the Marketplace. Federal and state training and certification requirements apply to agents and brokers who enroll or assist consumers in the Marketplace. Agent and Broker Industry Trade Associations include: National Association of Health Underwriters (NAHU) Council on Insurance Agents and Brokers (CIAB) National Association of Insurance and Financial Advisors (NAIFA) Independent Insurance Agents and Brokers of America (IIABA) National Association of Professional Insurance Agents (NAPIA)

Acronym	Term	Description
CAC	Certified Application Counselors	In the FFM, certified application counselor designated organizations (CDOs) are voluntary organizations that certify application counselors (CACs) to provide enrollment assistance. CACs perform many of the same functions as Navigators and non-Navigator assistance personnel - including educating consumers and helping them complete an application for coverage. These groups include community health centers or other health care providers, hospitals, or social service agencies. A State-based Marketplace may choose to certify application counselors directly rather than designate organizations to do so. In states that already have their own certification programs, staff at consumer non-profit organizations may also be certified as application counselors by Marketplace-designated organizations. All certified application counselors are required to complete comprehensive training.
CCIIO	Center for Consumer Information and Insurance Oversight	
CHIP	Children's Health Insurance Program	
CMS	Centers for Medicare & Medicaid Services	
FFM	Federally-facilitated Marketplace	
FLH	Find Local Help	
I&F	Individuals and Families	
M/C	Medicaid/CHIP	
NAV	Navigators	Navigators have a vital role in helping consumers prepare electronic and paper applications to establish eligibility and enroll in coverage through the Marketplace. This includes steps to help consumers find out if they qualify for insurance affordability programs (including a premium tax credit, cost sharing reductions, Medicaid and the Children's Health Insurance Program), and if they're eligible, to get

Acronym	Term	Description
		enrolled. Navigators also provide outreach and education to consumers to raise awareness about the Marketplace, and refer consumers to ombudsmen and other consumer assistance programs when necessary. Navigators can play a role in all types of marketplaces. They must complete comprehensive training. NAV organizations receive funding through a cooperative agreement to support enrollment assistance.
SMB	State-Based Marketplace	
SBM-FP	State-Based Marketplace on the Federal Platform	
SHOP	Small Business Health Options Programs	
SPM	State Partnership Marketplace	