# Module 6: Washington Healthplanfinder System Functionality

Office of Medicaid Eligibility Policy
July 2022



#### **Topics**

- Washington Healthplanfinder Overview
- Volunteer Assisters and Washington Healthplanfinder
- Account Creation
- Application Process
- Eligibility Results
- Managed Care Plan Selection
- Client Dashboard Key Features
- Renewing Coverage and Reporting Changes
- Resources



# Washington Healthplanfinder Overview



## Washington Healthplanfinder

- Washington Healthplanfinder is an easily accessible, online marketplace for Washington State residents to compare and enroll in health insurance plans. This one-stop shop enables applicants to:
  - ➤ Apply for free or low-cost health care coverage, including Apple Health (Medicaid), with real-time coverage results available in most instances; and
  - Receive personal customer support when applying, finding, comparing and enrolling in a health plan that meets their needs.



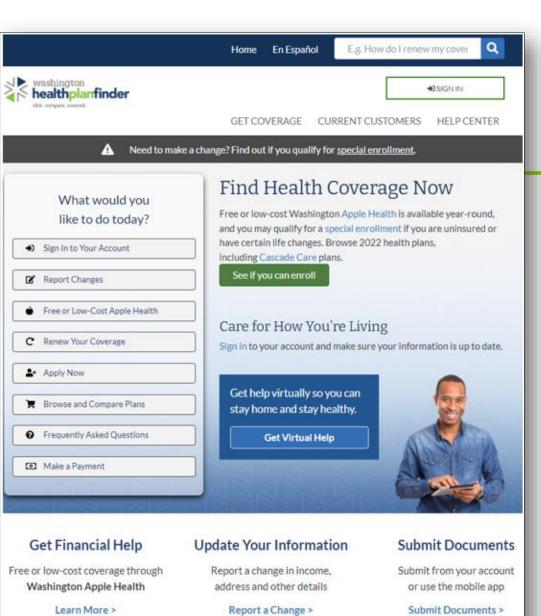
### **Apple Health Application Process**

Account creation & Eligibility Managed Care Application filing Determination Plan selection Enrollment

- Account creation is not required to apply for Apple Health.

  However, the benefits of creating an account include the ability to:
  - Easily report changes;
  - Upload documents; and
  - Sign-up for electronic communications.





Regence

Washington

Apple Health

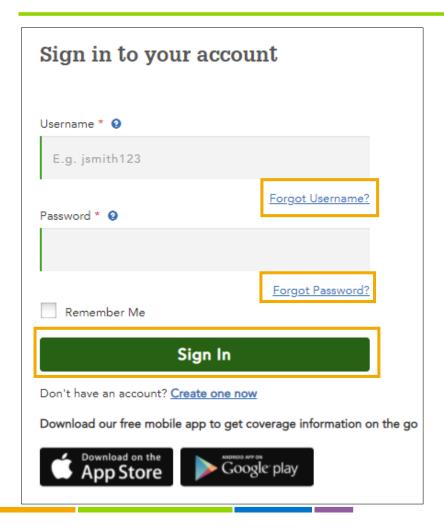
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#### **Home Page**

- From the Home page, users can:
  - Sign in and create an account;
  - Apply for coverage;
  - Find customer support and language assistance.



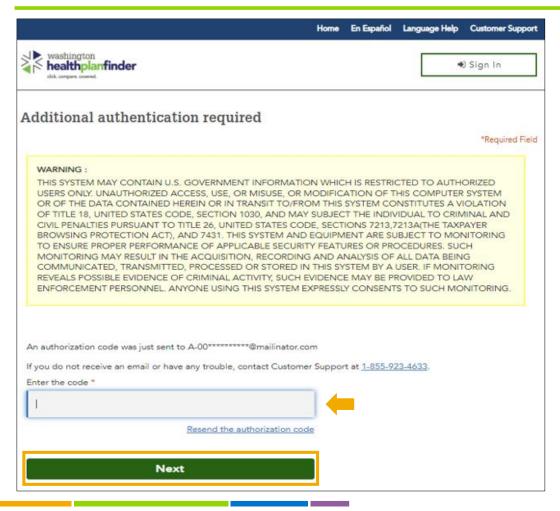
## Sign-in Page



- Users are given three attempts to correctly enter their username and password before their account is locked.
  - Use the 'Forgot Password' link before the account is locked to reset the password.



#### **Additional Authorization**



- Enter the emailed authorization code and select 'Next'.
- This code is character sensitive.



# Volunteer Assisters and Washington Healthplanfinder

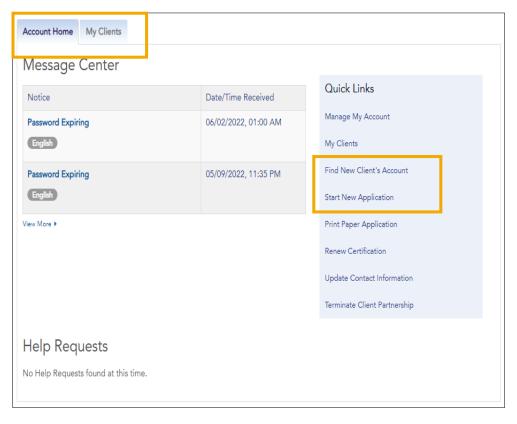


#### **Enhanced Access**

- To apply for Washington Healthplanfinder enhanced access, one must:
  - Complete the full seven-module Community-Based training;
  - Pass the assessment test;
  - Complete registration paperwork, and successfully pass a background check.
- Once granted enhanced access, a username and temporary password is emailed from Washington Healthplanfinder IT Account Support.
- Change password at initial login.



#### Volunteer Assister Dashboard

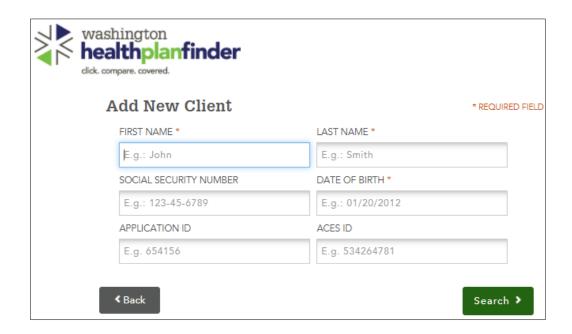


- A Volunteer Assister's dashboard includes some of the following tabs:
  - Account Home
  - My Clients
  - Find New Client's Account
  - Start New Application



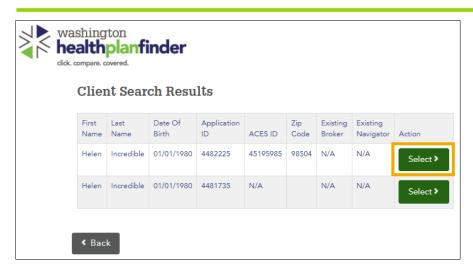
#### Find New Client's Account

- Always search for an existing application before starting a new one.
- Required search criteria:
  - First name;
  - Last name; and
  - Date of birth





#### **Client Search Results**



 For multiple search results, select the option that fits.



If there are no results that fit, or no records found, select 'Back' to create a new application.



#### Confirmation to Partner with a Client

\* REQUIRED FIELD

You are about to become the Navigator for Grumpy Dwarf. Please check the box below to indicate that you have reviewed the following terms with the client:

- Client agrees to disclose personal information, such as financial resources and family situation to a Program Navigator. Client understands the information will not be further disclosed without their permission.
- Client grants the Navigator permission to access, enter, and update information in their on-line application. Client further grants permission to the Navigator to submit their completed application, including activating an e-signature on their behalf.
- Client understand that they may end their partnership with the Navigator or change their duration or notification preferences at any time through their Healthplanfinder account or by calling 1-855-WAFINDER (1-855-923-4633).
- Client understands and agrees to these terms. \*

WOULD YOU LIKE TO RECEIVE COPIES OF ALL WASHINGTON HEALTHPLANFINDER NOTIFICATIONS SENT TO GRUMPY DWARF?

- O YES
- O NO

To formally partner with this client, click "Partner" below.

**∢** Back

Proceed without Partnering >

Partner >

## Partnering with a Client

- The client must agree to the volunteer assister as their navigator to assist with the application.
- For ongoing assistance, the volunteer assister can partner with the client.

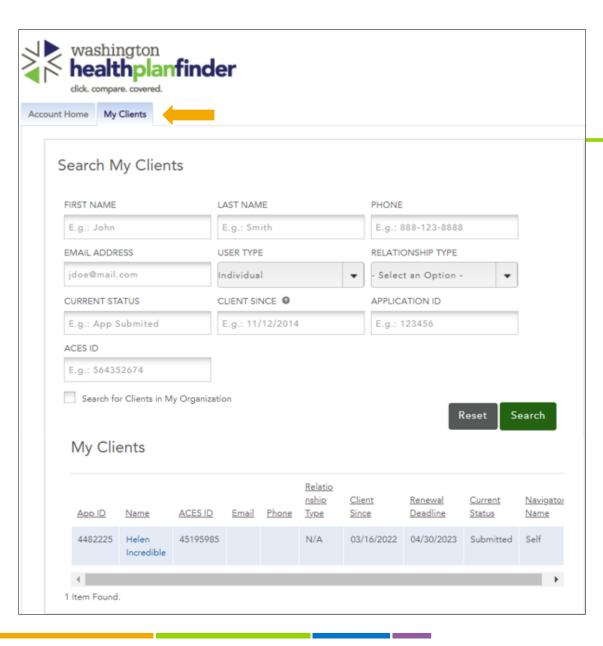


### Partnering with Clients

- Partnering with a client application allows a volunteer assister to:
  - Report changes on the application;
  - Assist with uploading documents;
  - Complete renewals; and
  - Receive copies of notifications.

Proceed without Partnering > Partner >





## Partnering with a Client

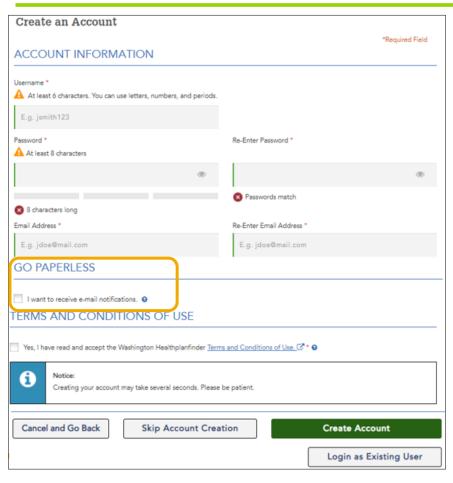
- Once successfully partnered, the client will be listed under the 'My Clients' tab for quick access.
- A partnership with a client's application lasts for 30 days but can be terminated at any time.



## **Account Creation**



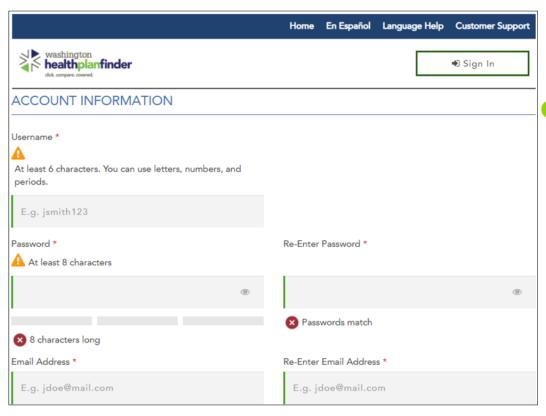
## **Creating an Account**



- Accounts can be created at any time, including when starting a new application.
  - An account is not required to apply for Apple Health.
- Benefits of creating an account:
  - Option to go paperless.
  - Easily report changes.
  - Mobile app access.



## **Creating an Account**

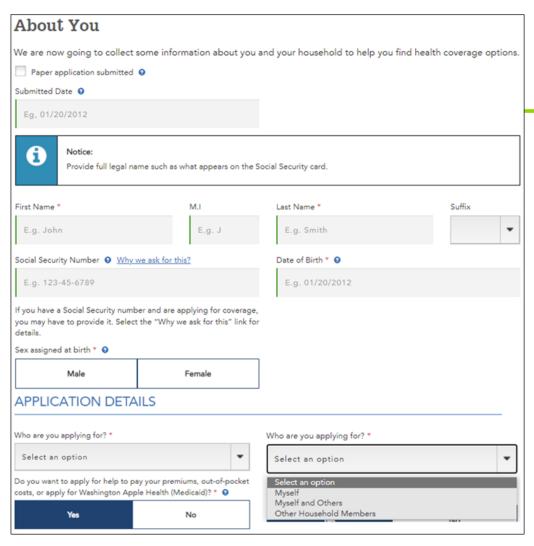


- To create an account, the client must:
  - Have an email address;
  - Create username and password; and
  - Agree to the terms and conditions.



## **Application Process**

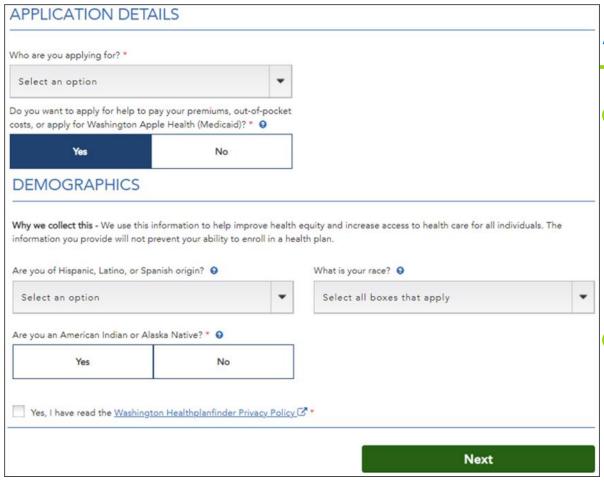




#### **About You**

- Enter the primary applicant's information, and indicate whom they are applying for:
  - Myself;
  - Myself and others; or
  - Other household members.

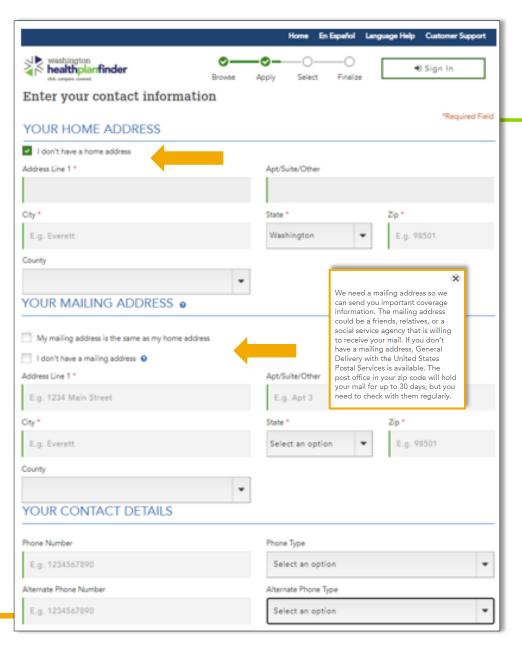




#### **About You**

- Help with premiums or to apply for Apple Health?
  - Leave this marked 'Yes' to apply for Apple Health.
- Agree to privacy policy.





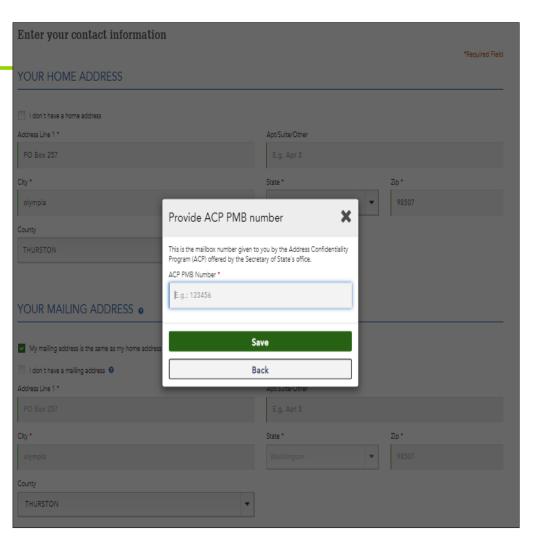
## **Entering Contact Info**

- Enter client's residential and mailing addresses.
- A city and zip are still required even when they do not have a home address.
  - Use the city the client spends most of their time.
- If a client reports they do not have a mailing address, a message will appear with the suggestion to use USPS General Delivery services.



#### Address Confidentiality Program

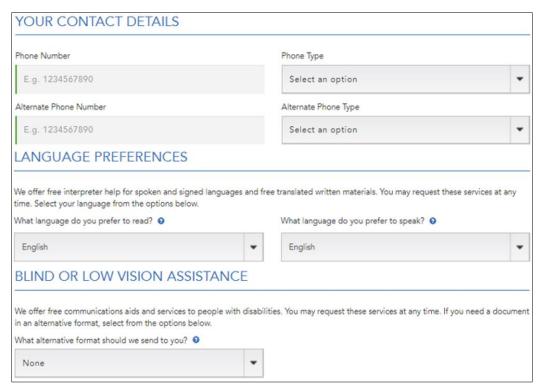
- For clients enrolled in the Address Confidentiality Program (ACP), only enter this address for home and mailing:
  - 'PO Box 257, Olympia WA 98507'.
- Enter the Personal Mailbox # (PMB) in the pop-up box.





#### **Enter Contact Info**

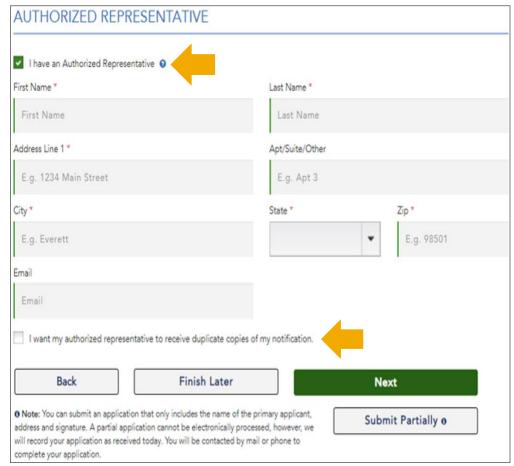
Enter telephone contact information, language preferences, and whether blind or low-vision assistance is needed (i.e. large print).





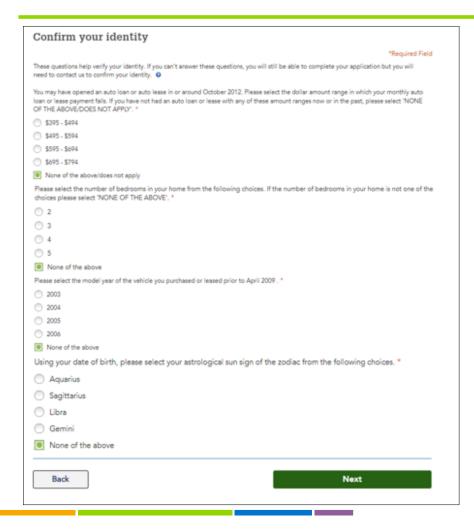
## Adding an AREP

- To add an Authorized Representative (AREP), select this box.
  - Enter the AREP's required information.
- Clients can choose to have a copy of their notifications mailed to their AREP.





## **Confirming Identity Process**

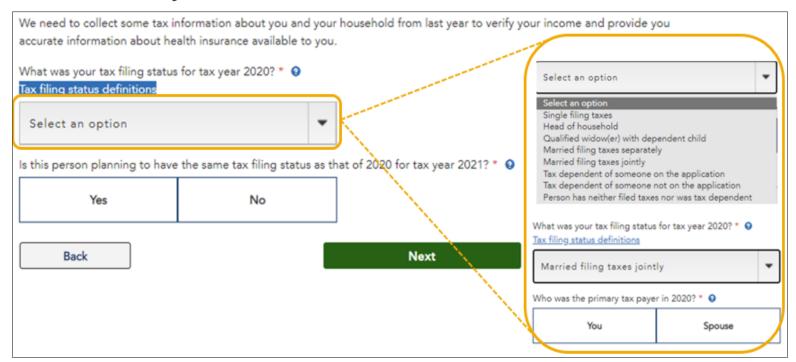


- Clients might be prompted to answer questions to confirm their identity.
- If answers are unknown, select 'None of the above/does not apply'.



#### **Set the Tax Status**

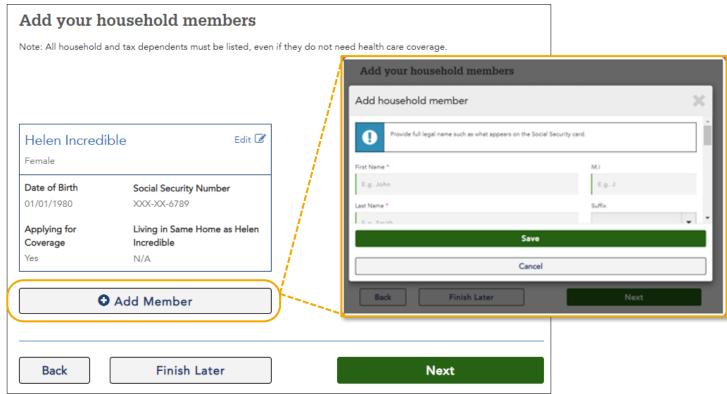
Report the primary applicant's tax filing status for the current and future year(s).



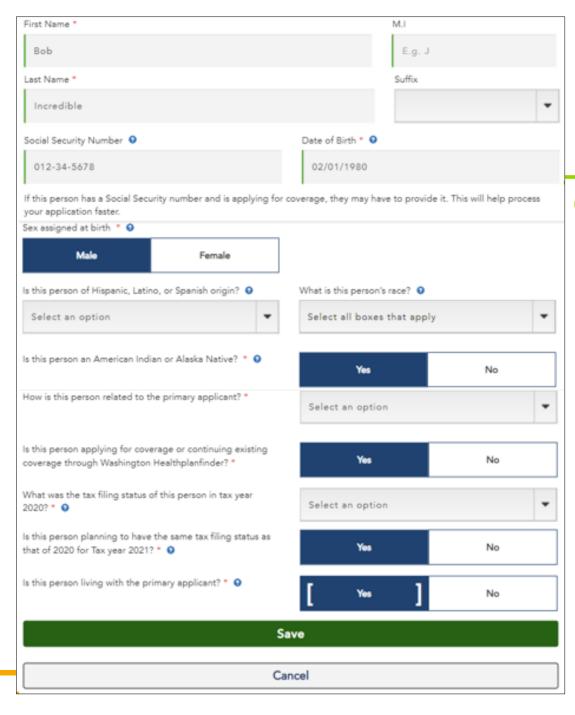


### **Adding Household Members**

Select 'Add Member' to add household members to the application.





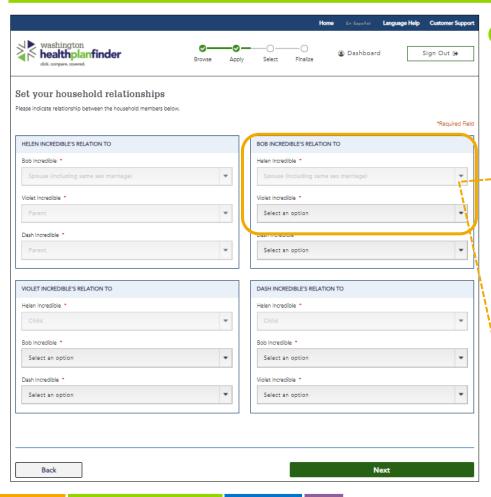


#### Adding Household Members

- Enter the household member's information, including their:
  - Relationship to the primary applicant;
  - Whether Apple Health coverage is requested; and
  - The current and future tax filing status.



## Set Household Relationships

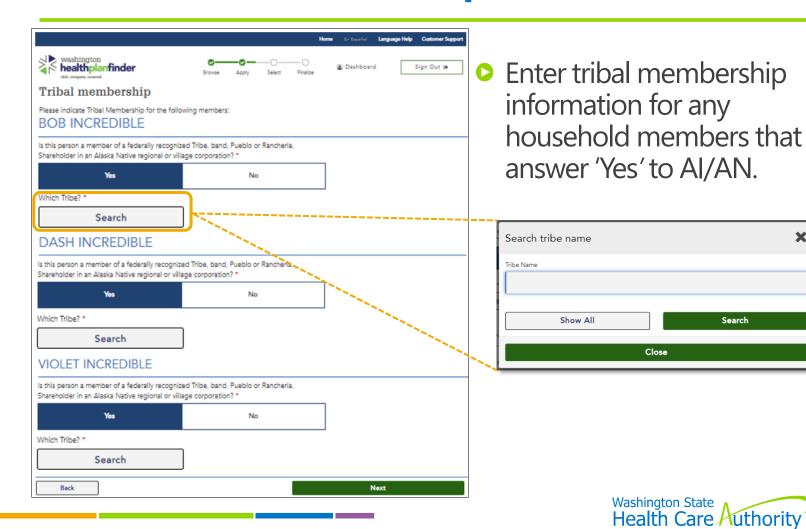


Select each member's relation to the other household members.

| BOB INCREDIBLE'S RELATION TO                                     |   |
|------------------------------------------------------------------|---|
| Helen Incredible *                                               |   |
| Spouse (including same sex marriage)                             | * |
| /iolet Incredible *                                              |   |
| Select an option                                                 | * |
| Select an option                                                 |   |
| Parent                                                           |   |
| Legal Guardianship                                               |   |
| Other Relative                                                   |   |
| Child                                                            |   |
| Spouse (including same sex marriage) Registered Domestic Partner |   |
| Cousin                                                           |   |
| Nephew/Niece                                                     |   |
| Uncle/Aunt                                                       |   |
| Unrelated                                                        |   |
| Grand Child                                                      |   |
| Sibling                                                          |   |
|                                                                  |   |
| Grand Parent                                                     |   |
|                                                                  |   |



#### **Tribal Membership**



Search

# About Your Household

#### Answer questions about your household This information is used to determine eligibility for household members applying for coverage: \*Required Field \* Helen Incredible \* Bob Incredible \* Violet Incredible \* Dash Incredible Are all the members listed above U.S. citizens (including naturalized Yes No or derived citizens) or U.S nationals? \* 9 Are any of the members listed above currently incarcerated? \* 9 Yes Have any of the members listed above used tobacco products regularly in the past 6 months? Vape and e-cigarette products are not Yes included. \* 0 Your answer will not be used to check your eligibility for Apple Health, tax credits or other savings programs. Do any members seeking coverage have current health insurance that Yes No is not Washington Apple Health (Medicaid) and not from Washington Healthplanfinder? \* 9 Note: Select "Yes" to see what types of health insurance you should Yes No Have any of the children lost health insurance within the last 4 months? \* 0 Yes No Are all the members listed above residents of the state of Washington? \* 9 Yes No Is any household member on this application pregnant or had a pregnancy in the previous 12 months? \* 9 Back Finish Later Next

- Questions about the members seeking coverage, include:
  - Incarceration status;
  - Washington residency; and
  - Pregnancy status.



## **Immigration Information**

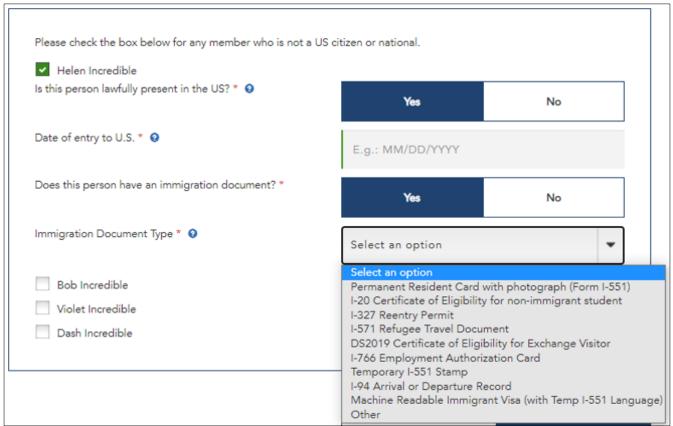
Input the information from the immigration documents. The information requested varies by document type.

| e all the members listed above U.S. citizens (including turalized or derived citizens) or U.S nationals? * | Yes                  | No |
|------------------------------------------------------------------------------------------------------------|----------------------|----|
| Please check the box below for any member who is not a US  Helen Incredible                                | citizen or national. |    |
| Is this person lawfully present in the US? * ②                                                             | [ Yes ]              | No |
| Date of entry to U.S. * ②                                                                                  | E.g.: MM/DD/YYYY     |    |
| Does this person have an immigration document? *                                                           | Yes                  | No |
| Bob Incredible                                                                                             |                      |    |
| Violet Incredible                                                                                          |                      |    |
| Dash Incredible                                                                                            |                      |    |



#### **Immigration Document Types**

Select the document type used for verification purposes.





#### **Permanent Resident Card**

▶ If using a permanent resident card enter the A# and Receipt # listed on the card.

| Please check the box below for any member who is not a US citizen or national. |                                         |    |  |
|--------------------------------------------------------------------------------|-----------------------------------------|----|--|
| ✓ Helen Incredible                                                             |                                         |    |  |
| Is this person lawfully present in the US? * •                                 | Yes                                     | No |  |
| Date of entry to U.S. * •                                                      | 01/15/2000                              |    |  |
| Does this person have an immigration document? *                               | Yes                                     | No |  |
| Immigration Document Type * •                                                  | Permanent Resident Card with photograph |    |  |
| Alien Number *                                                                 | Alien Number                            |    |  |
| Receipt Number *                                                               | Receipt Number                          |    |  |



## I-571 Refugee Travel Document

○ If using an I-571 Refugee Travel document enter the A#.





# I-776 Employment Authorization Card

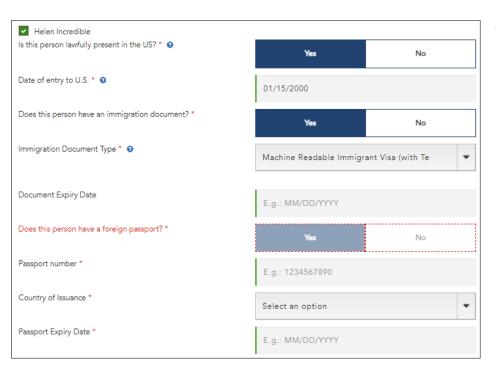
If using an Employment Authorization Card enter the A#, document expiration date, and receipt #.

| Please check the box below for any member who is not a US citizen or national. |                                     |    |  |  |
|--------------------------------------------------------------------------------|-------------------------------------|----|--|--|
| ✓ Helen Incredible                                                             |                                     |    |  |  |
| Is this person lawfully present in the US? * •                                 | Yes                                 | No |  |  |
| Date of entry to U.S. * •                                                      | 01/15/2000                          |    |  |  |
|                                                                                | 01/10/2000                          |    |  |  |
| Does this person have an immigration document? *                               | Yes                                 | No |  |  |
| Immigration Document Type * •                                                  | I-766 Employment Authorization Card |    |  |  |
| Alien Number * •                                                               | Alien Number                        |    |  |  |
| Document Expiry Date *                                                         | E.g.: MM/DD/YYYY                    |    |  |  |
| Receipt Number *                                                               | Receipt Number                      |    |  |  |



## Machine-Readable Visa

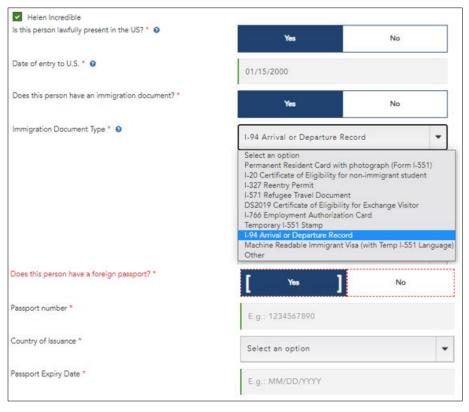
If using a Machine-Readable Immigrant Visa enter the document expiration date.



- If there is also a passport, enter:
  - Passport number;
  - Country of issuance; and
  - Passport expiration date.



## Other Document Types

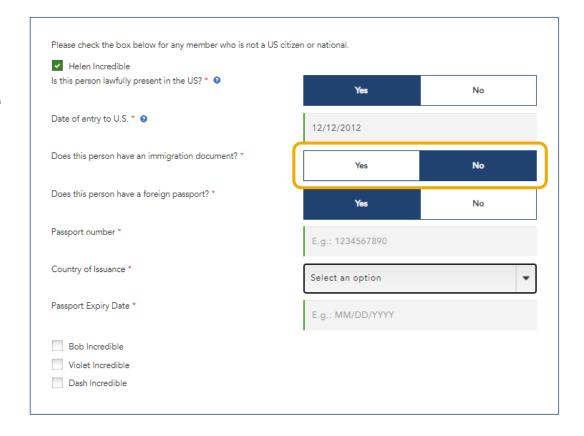


- These document types also request information from the foreign passport:
  - Other;
  - ► I-94 Arrival or Departure Record; and
  - ► Temporary I-551 Stamp.
- If there is a passport, enter:
  - Passport number;
  - Country of issuance; and
  - Passport expiration date.

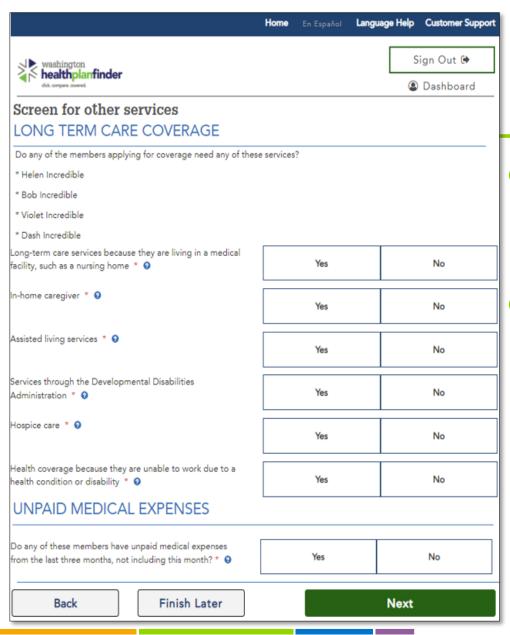


## Foreign Passport

If the client only has a foreign passport, indicate they do not have an immigration document, then enter the requested information from the passport.







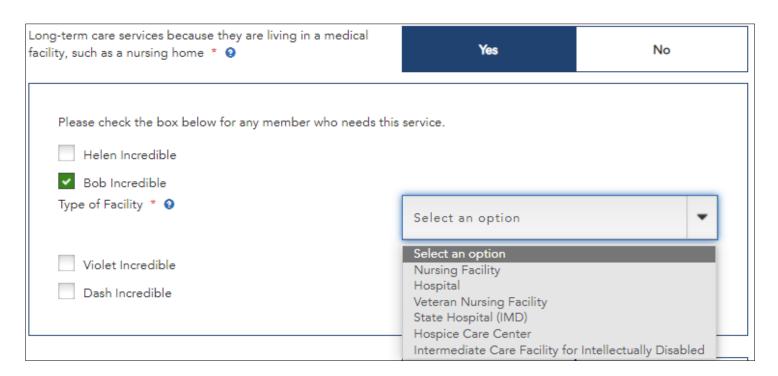
# Screening for Other Services

- If specialized services are needed, select 'Yes' to the service type needed.
- Examples of services include:
  - Long-term care services;
  - In-home caregiver; and
  - Help with unpaid medical expenses.



## Requesting Other Services

- Select 'Yes' for each requested service.
- Select the household member who needs the service.





## Requesting AEM Coverage

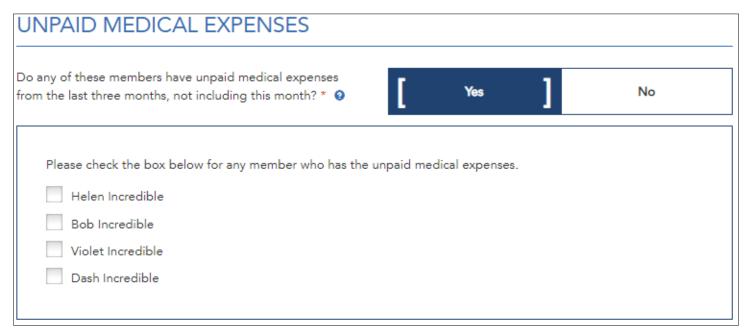
For those requesting Apple Health that otherwise do not meet the citizenship or immigration requirements, this question will appear.

| EMERGENCY MEDICAL COVERAGE                                                                                                                                                                                |     |      |  |  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|------|--|--|
| You reported that an adult applying for coverage is not a U.S. citizen.  Do they need coverage due to emergency hospitalization, cancer treatment, kidney dialysis or COVID-19 testing and treatment? * ? | Yes | No   |  |  |
| Helen Incredible                                                                                                                                                                                          |     |      |  |  |
| Back Finish Later                                                                                                                                                                                         |     | Next |  |  |



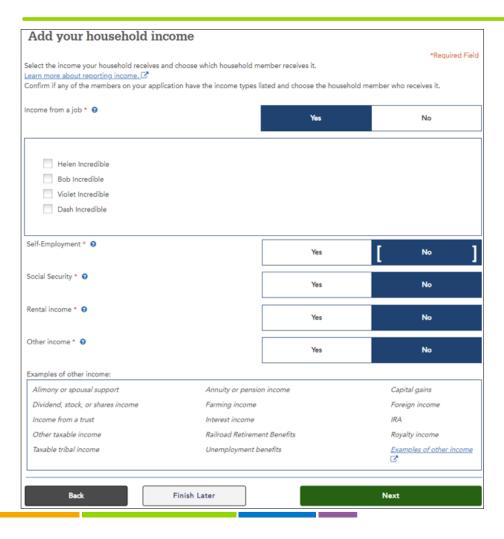
## Requesting Retroactive Coverage

- For assistance with unpaid medical expenses, select 'Yes' and indicate who the expense is for.
  - ► A request for information to verify eligibility is sent to the client.





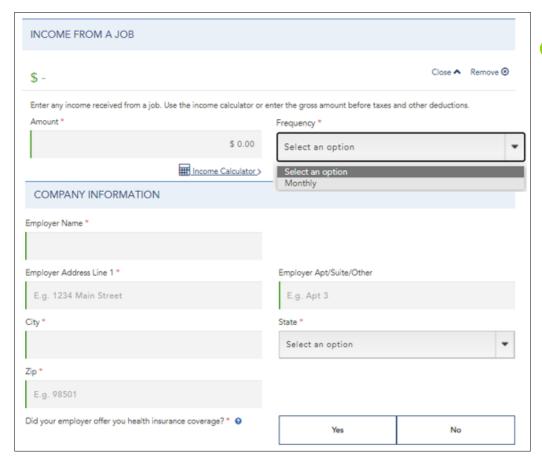
## Adding Household Income



- To add the income, select 'Yes' for each income type received in the household.
  - Then, select who receives that income.
- Select 'Next' to enter income amounts.



## Income from a Job

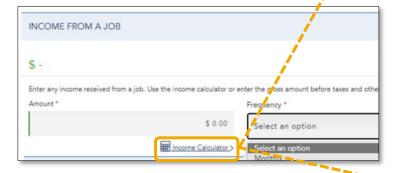


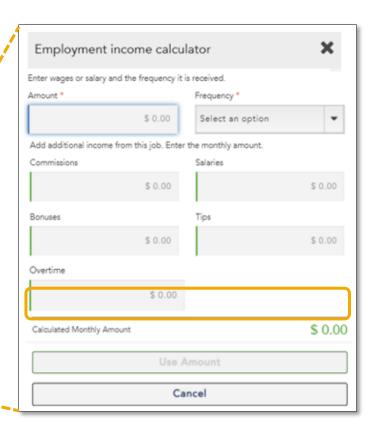
- Enter gross monthly income as well as the employer's:
  - ► Name;
  - Address; and
  - Whether the employer offers health insurance.



## **Income Calculators**

- Income calculators are available to assist in calculating monthly income for the following income types:
  - Income from a job;
  - Self-employment income; and
  - ► Rental income.

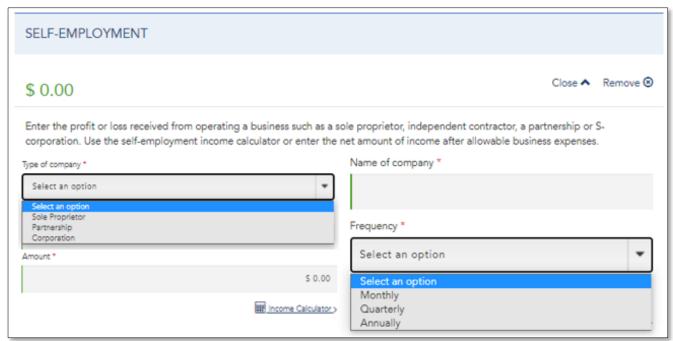






## Self-Employment Income

- Select type of self-employment company.
- Enter name of business, the net business income, and frequency earned.





### Rental Income

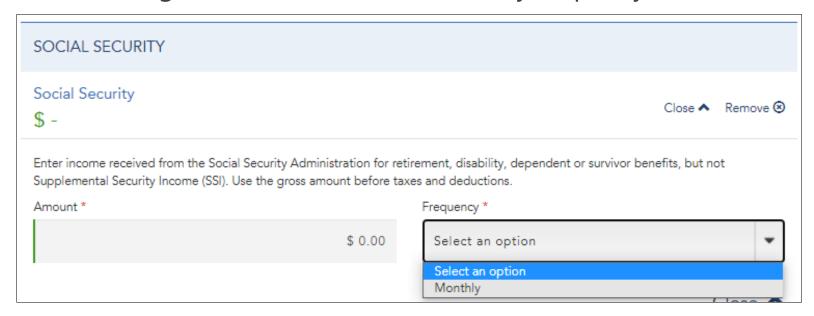
- Income earned from renting out personal property.
- Enter the property name, the net income, and frequency earned.





## **Income From Social Security**

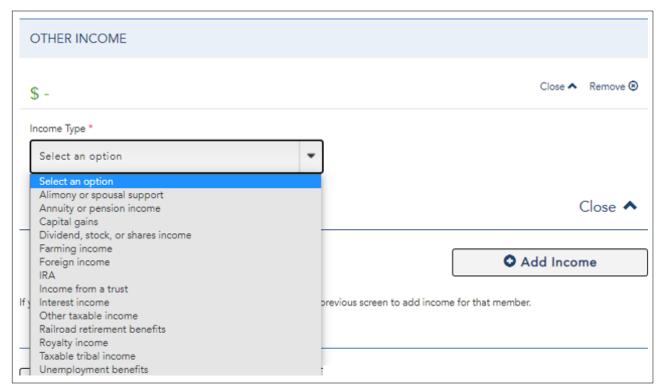
- Social Security Disability (SSDI), Survivor, and Widower benefits are countable income for Apple Health. Supplemental Security Income (SSI) is not countable for Apple Health.
- Enter the gross amount and select monthly frequency.





#### Other Income

- Less-common income types are listed under 'Other Income'.
- Select the income type, enter the income amount, and frequency.





## Income of a Tax Dependent

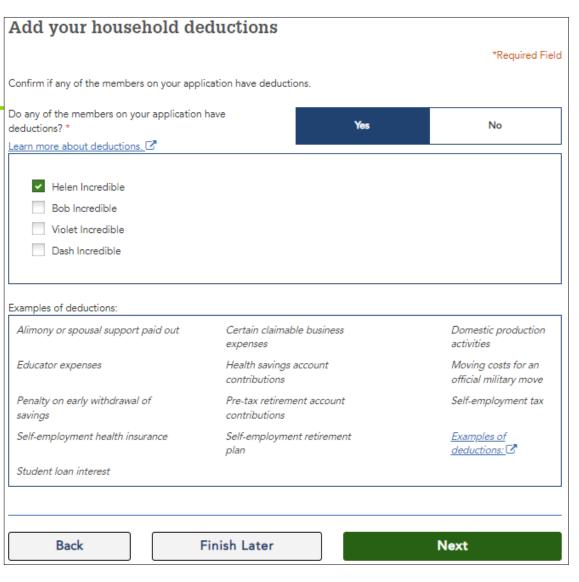
- Income earned or received by a minor may not always be countable.
- Indicate whether they will be required to file a tax return to determine if the income is counted.





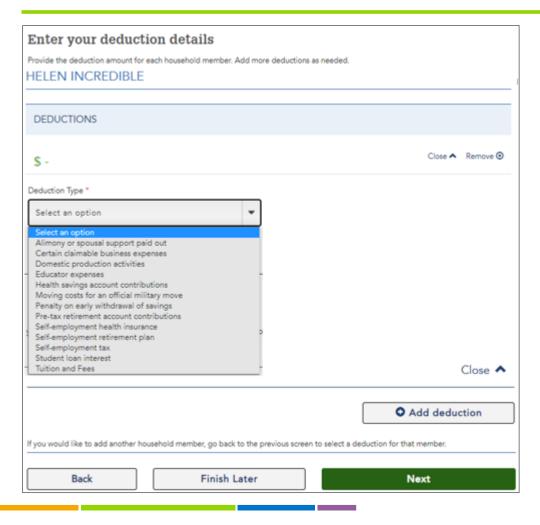
# Adding Deductions

- IRS deductions reduce the total countable income.
- To add deduction(s) select 'Yes' and indicate who the deduction belongs to.





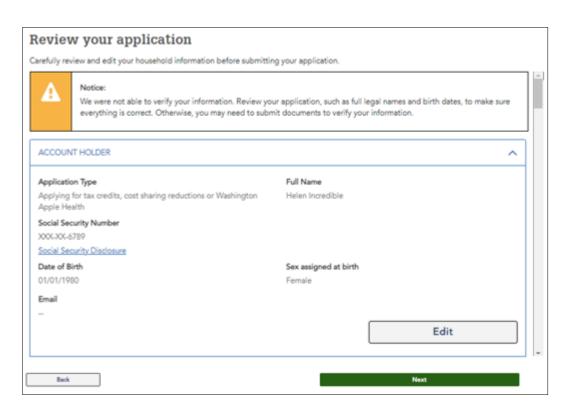
## **Entering Deduction Details**



- Select deduction type:
  - Enter the amount of the deduction and frequency reported.
- To enter additional deductions, select '+Add Deduction.'



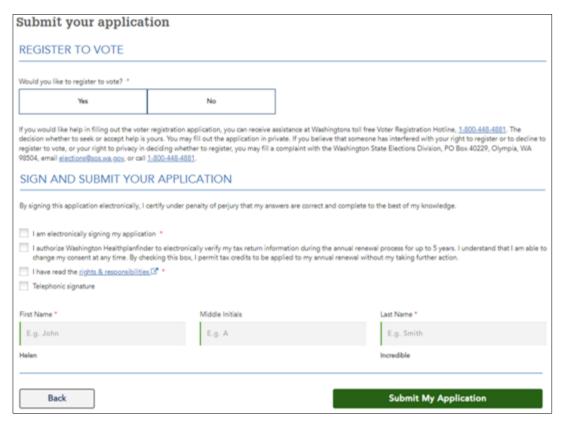
## **Application Review**



- Review the information before signing.
- Select 'Edit' to make corrections.
- Select 'Next' to proceed to signature page.



## **Submit Your Application**



- To submit for determination:
  - Answer 'yes/no' to register to vote;
  - Permit electronic submission; and
  - Read rights and responsibilities.



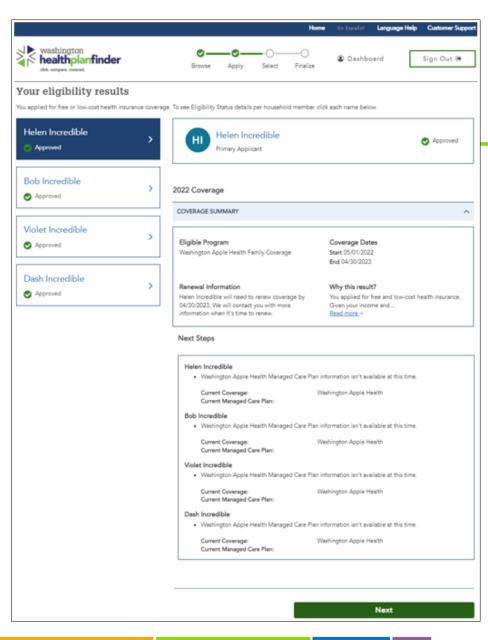
# **Eligibility Results**



## **Eligibility Results**

- Washington Healthplanfinder sends the application data to the Eligibility Services (ES) to determine each household member's eligibility for Free and Low-Cost Health Insurance programs.
- In most instances, ES instantly returns each client's eligibility results using the information in the application. This information is either verified or unable to be verified by the Federal Hub.
- If information is unable to be verified, Washington Healthplanfinder will approve Apple Health with a request for verification needed or it will place the member in a pending status.





## **Eligibility Results**

- The eligibility outcomes for each member requesting coverage is found on the eligibility results page.
- Select each household member's name to view their eligibility results.



# Managed Care Plan Selection

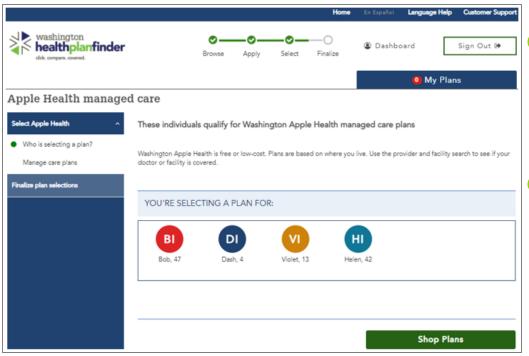


## **About Managed Care**

- Apple Health coordinates, delivers, and pays for a client's coverage, providing whole-person care under a single health plan, known as a managed care plan.
  - ► For clients that are exempt, or not eligible for managed care enrollment, Apple Health coverage is offered fee-for-service (FFS), which is when Apple Health pays the provider directly.
- Clients enrolled in a managed care plan must see providers within the plan's provider network, unless prior authorization has been approved, or to receive urgent or emergent care.
- Managed care plan options may vary depending on the county of residence.



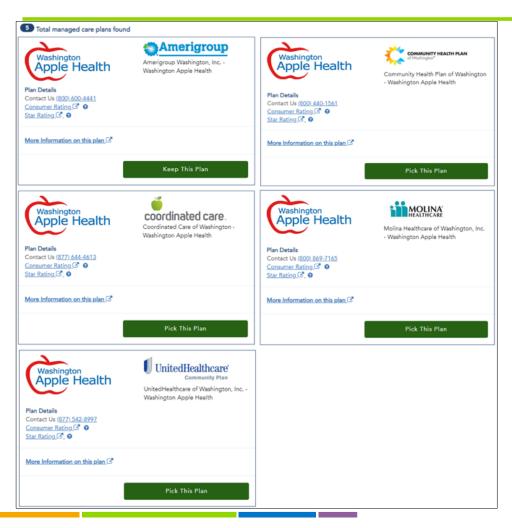
## Selecting a Managed Care Plan



- Select 'Shop Plans' to enroll in a managed care plan.
- Change the plan selection at any time, under the 'Account Home' tab.



## **Shop for Managed Care Plan**



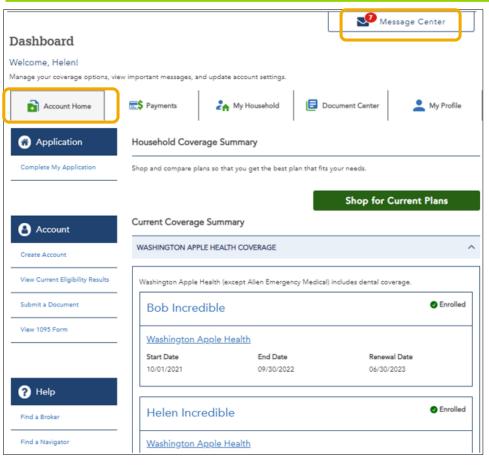
- Only one managed care plan can be selected for the application.
- If no plan is chosen, one will be autochosen.



# Client Dashboard Key Features



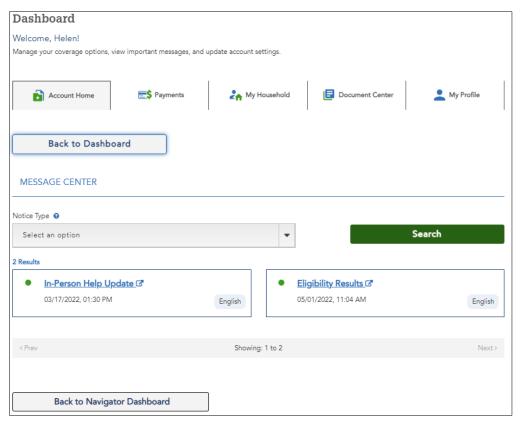
## **Account Home Overview**



- The 'Account Home' tab shows the coverage summary.
- Use account tabs or hyperlink to make changes or view account documents.
- The tab 'Message Center' is only available when within the 'Account Home' tab.



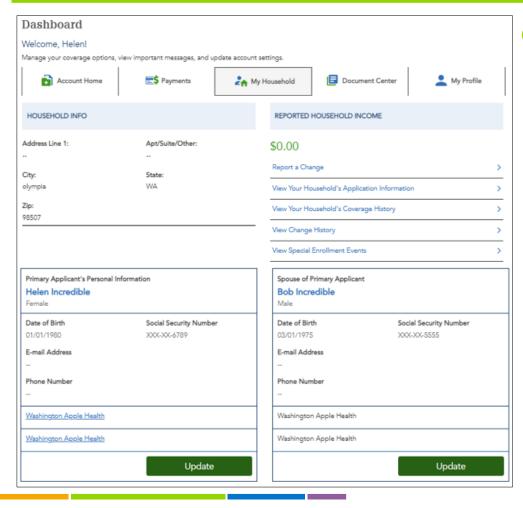
## Message Center



 Select the 'Message Center' button to view an electronic copy of letters sent.



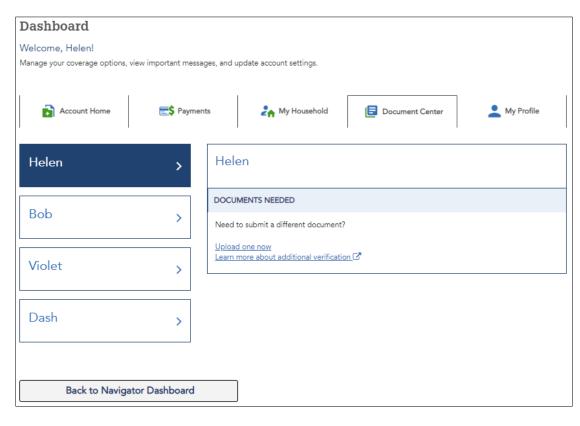
## My Household



Select the 'My Household' button to view and update the address, or other member information.



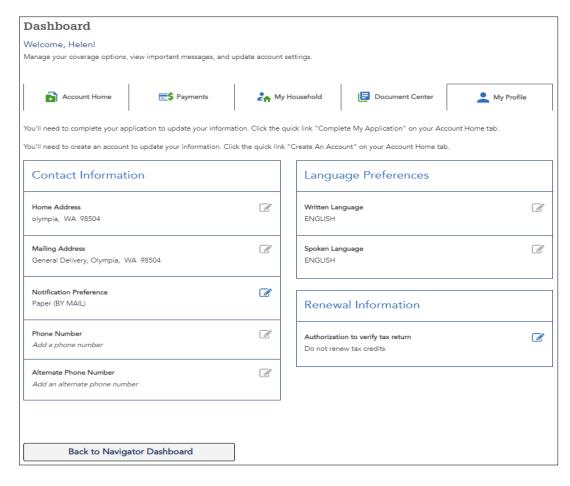
#### **Document Center**



Center' is where documents can be submitted for verification purposes.



## My Profile



- Select the 'My Profile' tab to view, and update:
  - Account information;
  - Notification preferences; and
  - Language preferences.

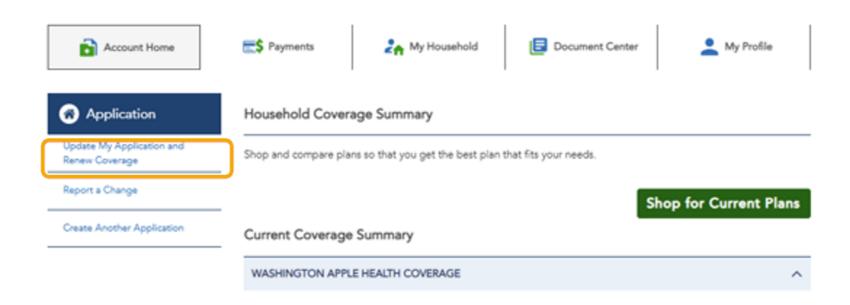


# Renewing Coverage and Reporting Changes



## Renewing Coverage

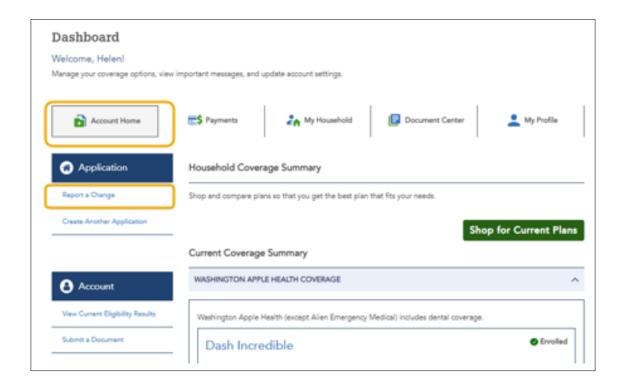
To renew a member's coverage, select the 'Update My Application and Renew Coverage' button.





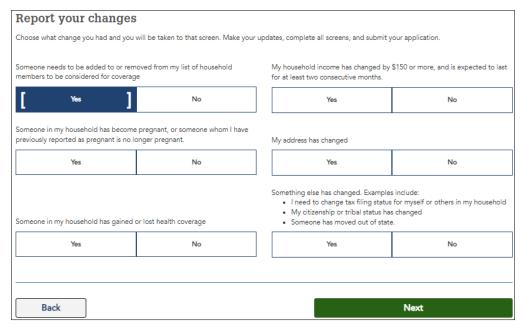
## Reporting Changes

To report changes, select the 'Report a Change' option on the 'Account Home' dashboard.





# Reporting Changes

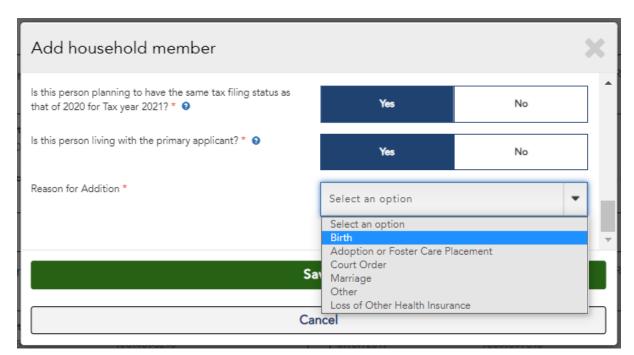


- Choose 'Yes' for the change option(s) that fits best, then 'Next' to make those changes.
  - For example, to add a new member for coverage, select 'Someone needs to be added as a household member to be considered for coverage'.
- Proceed through to sign and submit the changes.



## Adding Household Member

- Add new member's personal and demographic information.
- Adding new members to an active application will ask for the 'Reason for Addition'. Select the option that fits best.





## Reporting a Change in Pregnancy

To report that a person is or was pregnant, select 'Yes' to the pregnancy question and answer the pregnancy-related questions.

| y household member on this application pregnant or had a nancy in the previous 12 months? * •     | Yes             | No   |  |
|---------------------------------------------------------------------------------------------------|-----------------|------|--|
| neck the box for any household member who is pregnant or has been pregnant in the last 12 months. |                 |      |  |
| Helen Incredible Is this household member currently pregnant? *                                   | Yes             | No   |  |
| Due Date * •                                                                                      | E.g. MM/DD/YYYY |      |  |
| Number of babies expected *                                                                       | E.g. 1          |      |  |
| Has this household member had a past pregnancy in the last 12 months? * •                         | Yes             | No   |  |
| Violet Incredible                                                                                 |                 |      |  |
| Back                                                                                              |                 | Next |  |



## Reporting End of Pregnancy

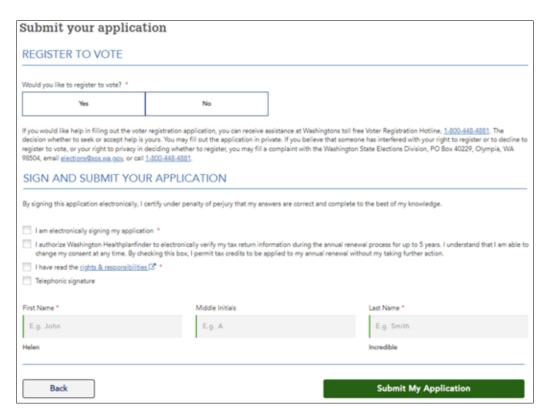
For pregnancy-related changes, such as adding a newborn or reporting the end of a pregnancy, the pregnancy question is to be updated and the pregnancy end date added.

| Is any household member on this application pregnant or had a pregnancy the previous 12 months? * • | in <b>Yes</b>   | No     |  |  |  |
|-----------------------------------------------------------------------------------------------------|-----------------|--------|--|--|--|
| Check the box for any household member who is pregnant or has been pregnant in the last 12 months.  |                 |        |  |  |  |
| Helen Incredible                                                                                    |                 |        |  |  |  |
| Is this household member currently pregnant? *                                                      | Yes             | [ No ] |  |  |  |
| What date did the pregnancy end? * €                                                                | E.g. MM/DD/YYYY |        |  |  |  |
| Bob Incredible                                                                                      |                 |        |  |  |  |
| Violet Incredible                                                                                   |                 |        |  |  |  |
|                                                                                                     |                 |        |  |  |  |



# Finalizing Reported Changes

E-signature is required to finalize all reported changes.





# Resources

#### Resources

- Apple Health MAGI Medicaid paper application
  - hca.wa.gov/assets/free-or-low-cost/18-001P.pdf
- Apple Health Classic Medicaid paper application
  - hca.wa.gov/assets/free-or-low-cost/18-005.pdf
- HCA Stakeholder training and education webpage
  - http://hca.wa.gov/free-or-low-cost-health-care/i-need-medical-dental-or-vision-care/stakeholder-training-and-education
- HCA area representatives
  - hca.wa.gov/assets/free-or-low-cost/area\_representatives.pdf
- Contact us
  - hcavolunteerassister@hca.wa.gov





## Congratulations!

- You have completed Module 6 of HCA Community Based Training!
- Continue to Module 7 of the 7 module HCA Community Based Training.

