Agents use Your Health Idaho to view all clients for which they are the agent/broker on record.

Agents use YHI to **manage insurance** which includes . . . obtaining payments, managing clients and making plan selections.

Agent information in YHI is not related to the information in idalink. The information does not transfer from one system to another.

Agents are only able to view clients who have designated the agent as an **Agent Authorized Representative**.

Agents use idalink as a special tool to act on behalf of the client who have given permission to DHW to discuss APTC eligibility with the agent.
The idalink Agent Console is personal portal for Agents to view a list of clients who are receiving APTC – AND – have designated the agent as an Agent Authorized Representative.

In the idalink Agent Console, Agents are able to represent their client and . . .

- View current eligibility status of Health Coverage Assistance and Advance Payment of Premium Tax Credit (APTC).

- Apply for Health Coverage Assistance and APTC.

- View Department of Health and Welfare (DHW) notices.

- Report changes in the client’s situation.
Before an agent can use the Agent Console in idalink . . .

- The client must designate the Agent as their **Agent Authorized Representative** in idalink.

- The agent must create an agent account in idalink.

Then the agent will be able to . . .

- Submit applications and represent their clients in idalink.
Suzanne Agent is an agent, her clients Martha Taylor, Jason Anderson and Shawn Smith will be able to select Suzanne as an Agent Authorized Representative in idalink . . .

Before an agent can use the Agent Console in idalink . . .

- The client must designate the Agent as their Agent Authorized Representative in idalink.

- The agent must create an agent account in idalink.

Then the agent will be able to . . .

- Submit applications and represent their clients in idalink.
Client **Martha Taylor**, DOES NOT have an idalink account.

Martha needs to create an idalink account to designate Suzanne Agent as an her **Agent Authorized Representative**.
When Martha completes her registration, a confirmation window appears and ask her what actions she would like to take.

Congratulations! You have successfully completed your account registration.

Using the links below, you may either start your HCA application or designate an Agent Authorized Representative. The Agent Authorized Representative will be able to complete activities related to the HCA program on your behalf.

Start my application
Designate an Agent Authorized Representative

Martha clicks here to designate Suzanne as her Agent Authorized Representative.
Suzanne Agent is an approved agent, Martha can search for her by typing Suzanne’s name.
OR by clicking the drop down and scrolling.
Designate an Agent Authorized Representative

Use this section to designate someone as an Agent Authorized Representative. Your Agent Authorized Representative will then be able to receive information related to your family's situation and view notices from DHW. If you do not find your agent's name in the list, please use the help link and submit an email request indicating that your agent is not available.

Agent Name: SUZANNE AGENT (99902)

Martha clicks NEXT to continue
When an agent is not listed, the client clicks the Help link to submit an email request.
The Client...

- Completes the form.
- Clicks the check box next to "Unable to find agent authorized representative."
- Submits the form by clicking SUBMIT.
Client Jason Anderson, has an EXISTING idalink account.

Jason will log in to designate Suzanne Agent as an his Agent Authorized Representative.
Welcome, Jason Anderson

Health Coverage Assistance
If you wish to apply for Medicaid or Advance Payment of Premium Tax Credit (APTC), you are now able to do so online!

If you need to report a change for benefits you are currently receiving, do not complete a new application. Learn more here.

My Benefits

<table>
<thead>
<tr>
<th>Health Coverage Assistance</th>
<th>July</th>
<th>August</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jason Anderson (12/13/1995)</td>
<td>Not Covered</td>
<td>Not Covered</td>
</tr>
</tbody>
</table>

Medicaid

Discontinued
Date 05/31/15

Find a Healthcare Plan
If you are not eligible for Medicaid, we have over 1,000 Healthcare plans available for you to purchase.

Start Shopping
Jason selects the Agent Authorized Representative tab, then clicks Designate an Agent Authorized Representative link.
Jason selects Suzanne as his agent.
Client **Shawn Smith**, has an **EXISTING** idalink account.

Shawn will designate Suzanne Agent as his **Agent Authorized Representative** during the application process.
Shawn will answer YES and select Suzanne as his agent.
Shawn MUST submit his application or Suzanne will not be designated as his Agent Authorized Representative.
Now that the Suzanne Agent’s clients have designated her as an Agent Authorized Representative in idalink, Suzanne needs to register on idalink as an Agent to gain access to her Agent Console . . .

Before an agent can use the Agent Console in idalink . . .

- The client must designate the Agent as their Agent Authorized Representative in idalink.
- The agent must create an agent account in idalink.

Then the agent will be able to . . .

- Submit applications and represent their clients in idalink.
Agents use their existing YHI Login to access idalink.

Welcome to idalink
Your online portal for healthcare, food assistance and other programs in Idaho.

You now have the ability to apply for Health Coverage Assistance and see the results of your application submission online. You may also complete a re-eval for Food Stamps and view other benefits your family is currently receiving.
When an agent who has already registered with YHI attempts to register on idalink, they will see this pop up.
Welcome to idalink
Your online portal for healthcare, food assistance and other programs in Idaho.

You now have the ability to apply for Health Coverage Assistance and see the results of your application submission online. You may also complete a re-eval for Food Stamps and view other benefits your family is currently receiving.
Suzanne must:

- Check that she is an Agent Authorized Representative.
- Enter her information.
- Click Register.
Suzanne receives confirmation that her registration is complete. She checks her email for her password.
Dear Suzanne Agent,

Welcome to idalink!

You recently requested an idalink account. To complete the registration process, please go to https://idalinkidhw.state.id.us/login and enter your email address and temporary password.

Your temporary password is zNBHO6E9.

Sincerely,
The idalink team

Suzanne receives this email after she submits her idalink registration.

Suzanne follows the link to complete the registration process by logging in and updating her password.
If an Agent is not able to register, the Agent clicks the hyperlink **Send a Report**.
The Agent completes the Report an Issue form, adds a contact phone number in the comments section and clicks Submit.

The agent will be contacted to resolve the registration issue.
Suzanne Agent was able to complete her log in.

She can log into idalink to view the **Agent Console**. There she will be able to see any clients who have designated her as an **Agent Authorized Representative**.

Before an agent can use the Agent Console in idalink . . .

- The **client** must designate the Agent as their **Agent Authorized Representative** in idalink.

- The **agent** must create an agent account in idalink.

Then the agent will be able to . . .

- Submit applications and represent their clients in idalink.
This is the Agent Console Home Screen in idalink.

Select Client

To access your client's idalink account, select the client using one of the options below:

Search By
Type the client's name in the Search By drop down. As you type, all possible matches for clients with existing YH1 accounts display in the dropdown. Select your client from the list.

View Client List
Click the View Client List button for a complete list of clients who have selected you to be an Authorized Representative for their HCA program.

Submission Log

Recent activity completed by your clients is displayed below. Filter the results by completing the Name, Date, and/or Status fields, and then click Search.

Activity in a Submitted Status has been completed. You may view the submitted forms associated with each Submitted activity by clicking on the IBES CIN/ClientID hyperlink, or you may download the submitted forms by clicking the paperclip image.

Activity in a Draft Status has been started, but has not been completed. You may view and continue the activity by clicking on the IBES CIN/ClientID hyperlink.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Submitted Date</th>
<th>Submitted By</th>
<th>Applicant</th>
<th>DOB</th>
<th>IBES CIN/ClientID</th>
<th>Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/26/2015 8:38AM</td>
<td>06/26/2015 8:37AM</td>
<td>Suzanne Agent</td>
<td>Martha Taylor</td>
<td>10/14/1982</td>
<td>1635268330756</td>
<td>Application</td>
<td>Submitted</td>
</tr>
<tr>
<td>06/25/2015 2:45PM</td>
<td>06/25/2015 2:45PM</td>
<td>Martha Taylor</td>
<td>Martha Taylor</td>
<td>10/14/1982</td>
<td>1635268330756</td>
<td>HCA Agent</td>
<td>Submitted</td>
</tr>
</tbody>
</table>
Suzanne can find her clients by **Searching** OR by **Viewing** her Client List.
Suzanne can also review the activity completed by the client or the agent in the Submission Log.

The Submission Log will show Suzanne what client took actions and the status of each action.
<table>
<thead>
<tr>
<th>Status Field</th>
<th>What it means?</th>
<th>What Suzanne can do</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Draft</strong></td>
<td>An application has been started.</td>
<td>Suzanne can view, edit, complete, and submit the application for her client.</td>
</tr>
<tr>
<td><strong>Timed Out</strong></td>
<td>An application that was started, passed the 72 hour time limit.</td>
<td>This is informational only for Suzanne. Suzanne or the client can start a new application.</td>
</tr>
<tr>
<td><strong>Submitted</strong></td>
<td>An application has been submitted and will be processed by DHW.</td>
<td>Once the application is processed, Suzanne will be able to view the Notice in the View Notices link.</td>
</tr>
</tbody>
</table>
Suzanne can submit an application for Health Coverage Assistance for any client that has designated her as an Agent Authorized Representative.

Suzanne searches for her client Martha Taylor by using the Search By or Client List.
To search using **Search By**...

Suzanne clicks the drop down to display all the clients that have designated Suzanne as their Agent Authorized Representative and selects Martha’s name OR

By typing Martha’s name and pressing the Enter key to search.
By clicking Martha’s name, idalink brings Suzanne directly to Martha’s home page.

Suzanne is now representing Martha.
To search by View Client List . . .

Suzanne clicks View Client List to display all the clients who have designated her as an Agent Authorized Representative.
By clicking Martha’s name hyperlink, Suzanne can begin representing Martha and submit an application.

<table>
<thead>
<tr>
<th>Client Name</th>
<th>Date of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Christina Henderson</td>
<td>01-03-1975</td>
</tr>
<tr>
<td>Connor Robertson</td>
<td>12-16-1987</td>
</tr>
<tr>
<td>Martha Taylor</td>
<td>10-14-1982</td>
</tr>
<tr>
<td>Chris Smith</td>
<td>05-15-1968</td>
</tr>
<tr>
<td>Samantha Wright</td>
<td>06-06-1956</td>
</tr>
<tr>
<td>Jarrod Zinn</td>
<td>11-07-1953</td>
</tr>
</tbody>
</table>
Suzanne can verify that she is representing Martha Taylor by looking at the client name in the top left.
Suzanne completes all sections of the application and reviews the information at the Application Summary.
Suzanne Agent signs the application as an Agent Authorized Representative.
Suzanne receives a Preliminary Eligibility Determination.

**Your Preliminary Eligibility Determination**

- **Martha Taylor (10/15/1982)**
  - Advance Payment of Premium Tax Credit: Eligible
  - Medicaid: Not Eligible

Please note that the information shown above is not a final determination of eligibility. Once the information you have provided has been verified, you will receive an official notice of your eligibility for Health Coverage Assistance. You can expect to receive this notice within three to five business days.

If you are found eligible to receive an Advance Payment of Premium Tax Credits (APTC) to help pay for insurance premiums, you will be able to select a Qualified Health Plan that meets your household needs. You may visit Idaho's Marketplace to shop for and compare Qualified Health Plans at any time, but if you want financial assistance to
Suzanne can now see the Application submitted for Martha Taylor.
Hovering over the paperclip icon displays the link for PDF that was submitted.

### Submission Log

Recent activity completed by your clients is displayed below. Filter the results by completing the Name, Date, and Status fields. Activity in a Submitted Status has been completed. You may view the submitted forms associated with each Submitted Status hyperlink, or you may download the submitted forms by clicking the paperclip image.

Activity in a Draft Status has been started, but has not been completed. You may view and continue the activity by clicking the IBES CIN/ClientID hyperlink.

<table>
<thead>
<tr>
<th>File Name</th>
<th>Size</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application.143526030756.2013-06-30.pdf</td>
<td>32KB</td>
<td>Submitted</td>
</tr>
</tbody>
</table>
Suzanne can log into her Agent Console to review the Application Status of Jason Anderson’s Application.

Suzanne reviews the **Submission Log** for the status and details of Jason’s application.
Suzanne reviews the Submission Log to see the Jason Anderson’s Application is in Draft Status. She needs to complete the application on his behalf.

She clicks the IBES CIN/Client ID hyperlink to be taken to the Application.
Suzanne can continue the Application representing Jason Anderson just as she did with Martha Taylor.
When Suzanne completes the application she will receive an email confirmation.

Suzanne clicks the hyperlink or clicks Agent Home at the top of the screen to return to the Agent Home.
Suzanne’s clients have questions on about their status and APTC premiums.

Suzanne searches for her clients by using the Search By or Client List and clicks his or her name to view My Benefits home page.
Suzanne can see that Christopher and the members of his household are approved for APTC.
Suzanne can also click here to review the notices to verify if the 2016 APTC has been calculated.
Suzanne clicks VIEW NOTICES to view the DHW APTC notices sent to the client.
Suzanne clicks View notice to see the PDF version of the DHW sent to the client.
Customer Sierra is not eligible for APTC.
For this family, the kids Lillyan and Griffin are covered through Medicaid but the mom Christina is APTC eligible.
Suzanne can see that Peggy and her spouse Reed are both approved for APTC.
Suzanne’s client Christopher has a change in his household’s situation.

Suzanne searches for Christopher by using the **Search By** or **Client List** and clicks his name to view his *My Benefits* home page.
Suzanne clicks REPORT A CHANGE to report the change in the client’s situation.
Suzanne clicks next to complete and submit a change.
When the change type is to add a new household member, additional sections populate to capture information about the new household member(s) as well as information about existing members of the household.
When the change type is not related to a new household member, the list of reportable changes becomes available to choose from.

The change type list will display change types for multiple programs, not just APTC.
Suzanne can hover over a change type for additional information on the change type.
Suzanne is able to report multiple changes at one time.
Suzanne will enter customer information based on what type of change she selected.

If Suzanne selected an income change, idalink will gather the income information as well as the tax status information.
Suzanne can review and print the change before she submits the change.
Suzanne is also able to upload verification provided by the client.

Suzanne can review a list of possible verifications.

**Verification Documents**

Verification will likely be required when a part of your household situation has changed (even if the change is small). For example, a common required verification is proof of your current income. Please review the list of possible verification documents below to identify which verifications may apply to your change in situation.

To assist us in updating your household change as quickly as possible, please submit your verification as soon as possible. The quickest way to get us your verification is to upload the files now.

**Upload Files**

Drag & Drop files here to upload.

Acceptable file formats are pdf, jpeg, gif, tiff, tif, BMP and png. File size must be less than 10MB. You may also mail, fax, or email the documents to us:

- **Mail:** Self Reliance Programs
  
P.O. Box 83720
  
Boise, ID 83720-0026
- **Fax:** 1-866-434-8278
- **Email:** mybenefits@dhw.idaho.gov

If you have any questions, you can contact us at 1-877-456-1233.

**Types of Documents**

**Income**
- Copies of paychecks for the most recent 30 days
- Work Verification form*, signed by employer
- Proof of income not earned from employment
- Most recent tax forms for self-employment income
- Award letters from Dept of Labor for unemployment insurance income
- Printout or signed statement from payee for Child Support income

**Medical Expenses**
- Proof of unpaid bills or agreements to pay a hospital, doctor, provider, etc.
Suzanne will complete the change report with an E-Signature on behalf of the customer.

Suzanne must click SUBMIT YOUR CHANGES for DHW to receive the change.
Suzanne will receive confirmation that the change has been submitted to DHW.