

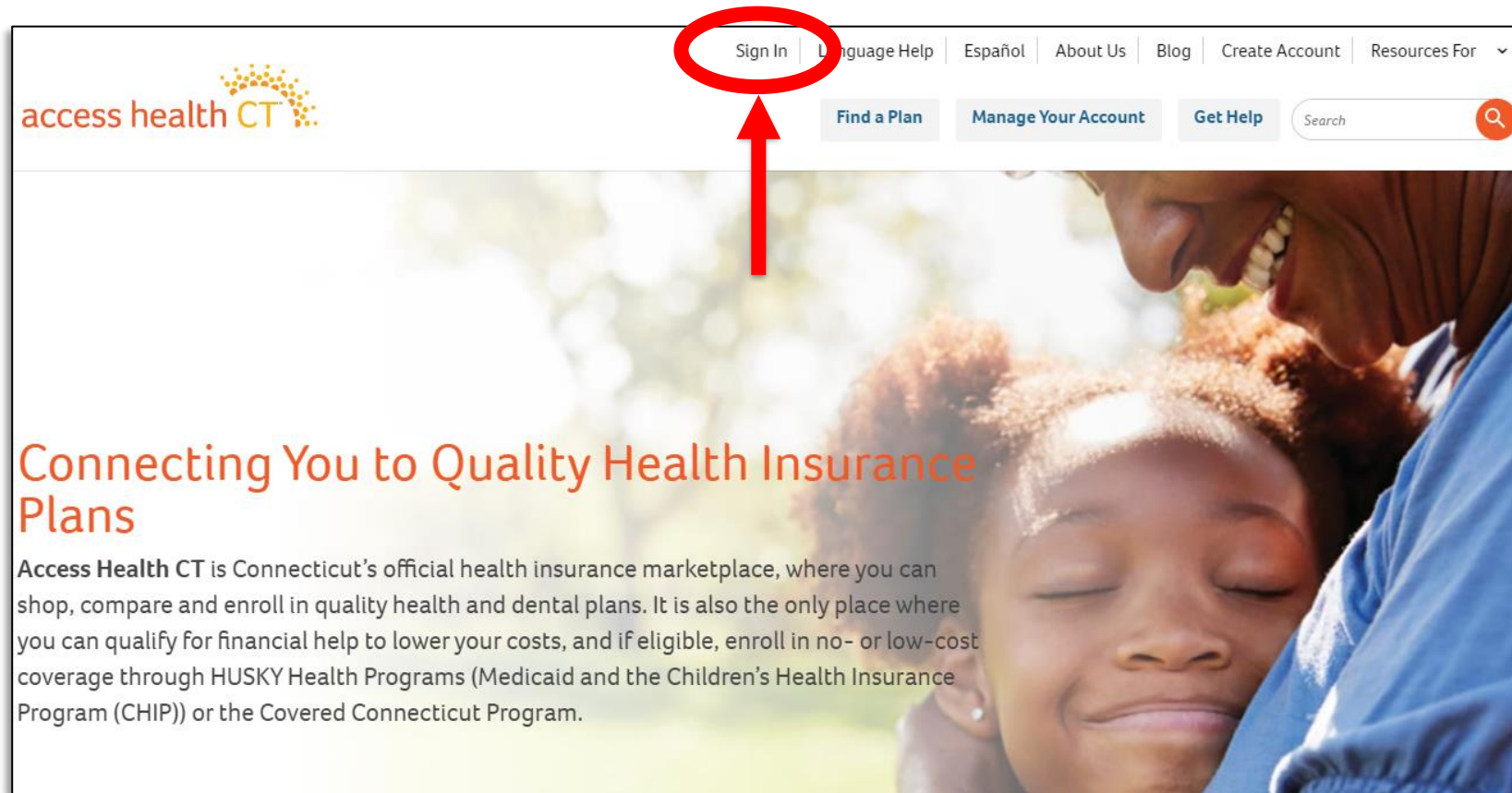
# Broker 101

# Broker 101

- **Broker Portal Basics**
- **The Tango Process**
- **Self Service Client Lists**
- **Commission**

# Broker Portal Basics

# Logging into the Portal (part 1)



[www.accesshealthct.com](http://www.accesshealthct.com)

# Logging into the Portal (part 2)

Hi, Broker Support | Log Out | About Us | Blog | Resources For ▾

access health CT

Get Help Search

Live Chat

## Security Code

How would you like to receive the Security Code

☐ Send to Email

☒ Send by SMS


☐ Send by Voice Call

The pass code will be sent to your mobile at

Security Code\*

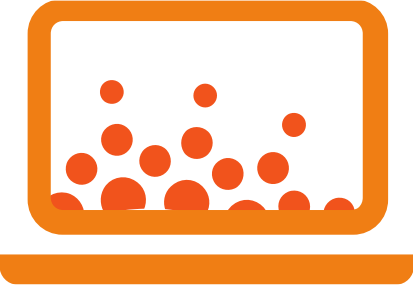
Validate >

Fields marked with \* are required.



‘VIP Access’ installation instructions can be found [Here](#) as well as in the Resources section of the Broker website.

# Account Home



Account Home

My Clients

Message Center [View More](#)

Message	Date Received
Your password has been reset	08/16/2022
Your password has been reset	08/04/2022
Barton Graham has been accepted as a client	06/29/2022
Barton Graham has requested assistance	06/29/2022
Barton Graham has ended your assistance relationship	06/23/2022

Quick Links

- [Change Account Settings](#)
- [My Clients](#)

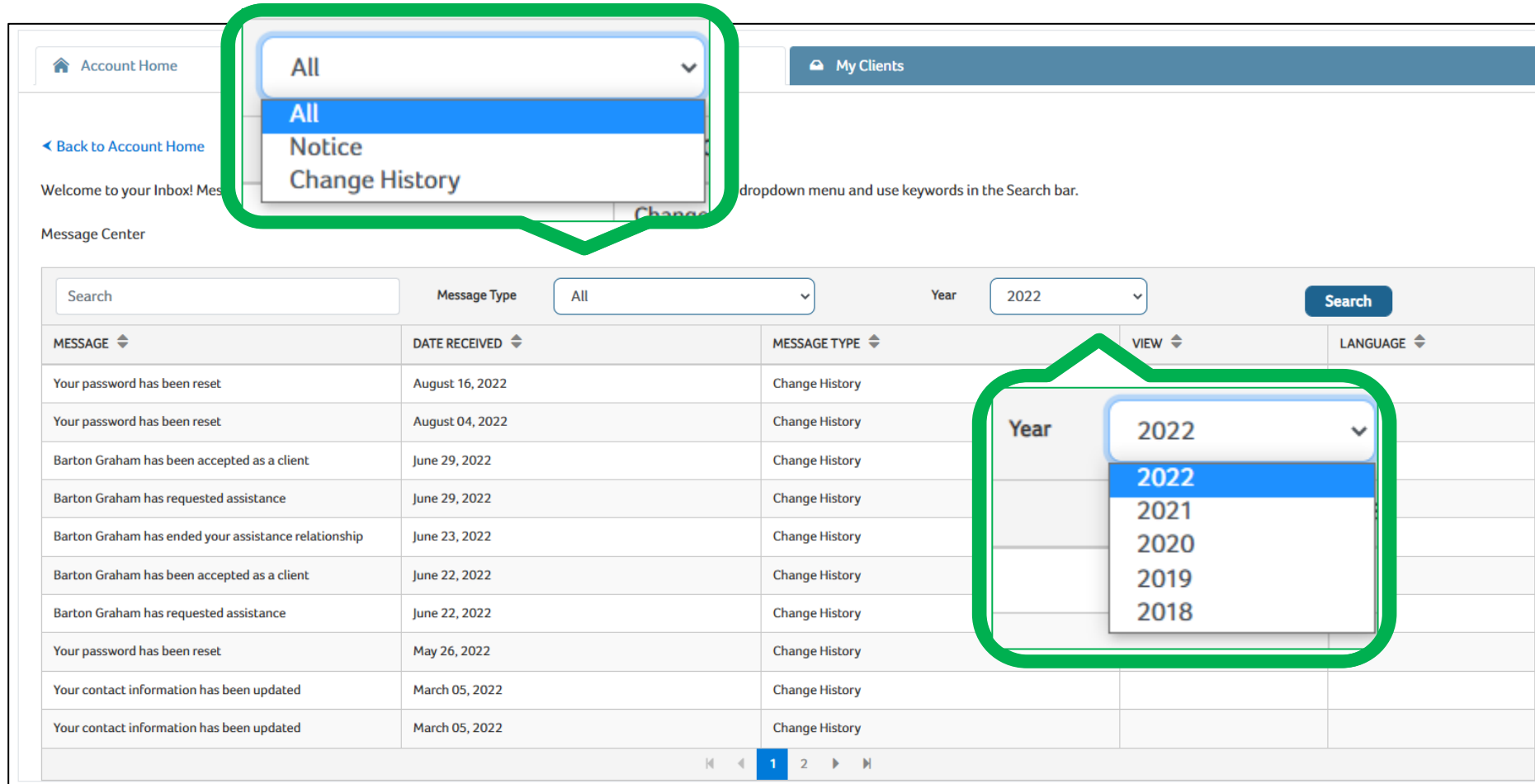
Announcements

There are no announcements

Client Partnership Requests

Person	Email	Date	Phone	Client Status	Action
There are no new requests					

# Message Center – View More



Account Home

My Clients

< Back to Account Home

Welcome to your Inbox! Messages

Message Center

Search

Message Type: All

Year: 2022

Search

MESSAGE	DATE RECEIVED	MESSAGE TYPE	VIEW	LANGUAGE
Your password has been reset	August 16, 2022	Change History		
Your password has been reset	August 04, 2022	Change History		
Barton Graham has been accepted as a client	June 29, 2022	Change History		
Barton Graham has requested assistance	June 29, 2022	Change History		
Barton Graham has ended your assistance relationship	June 23, 2022	Change History		
Barton Graham has been accepted as a client	June 22, 2022	Change History		
Barton Graham has requested assistance	June 22, 2022	Change History		
Your password has been reset	May 26, 2022	Change History		
Your contact information has been updated	March 05, 2022	Change History		
Your contact information has been updated	March 05, 2022	Change History		

1 2

# Change Account Settings

[Account Home](#)[My Clients](#)

[Back to Account Home](#)

## Personal Information

**General**

User Namebsupport

Password\*\*\*\*\*

[Change Password](#)

[Change Security Question\(s\)](#)

**Language**

Preferred LanguageEnglish

Go Paperless☐ Yes ☒ No

**Assistance Offered**

☐ In-Person☐ Email☐ Phone

**Language(s) Spoken**

[Change Language\(s\)](#)

Accepting New Customers?\*☐ Yes ☒ No

**Certification Information**

Certification Number2018

Certification StatusActive

Start Date2018/11/28

End Date2018/11/31

Account Number2018

**Contact Information**

Website

Work280 Trumbull st  
Hartford , Connecticut 06103

Mailing380 Trumbull 15fl  
Hartford , Connecticut 06103

EmailAHCTbrokersupport@ct.gov

Preferred Phone Number860-241-8452

OrganizationAccess Health Ct

[Update Contact Information](#)

Provides Assistance for Special Enrollments?\*" ☐ Yes ☒ No

Update

You can find your Account status here. Currently, if you are in any other status besides 'Active' you will not be able to be searched under 'Get Help'

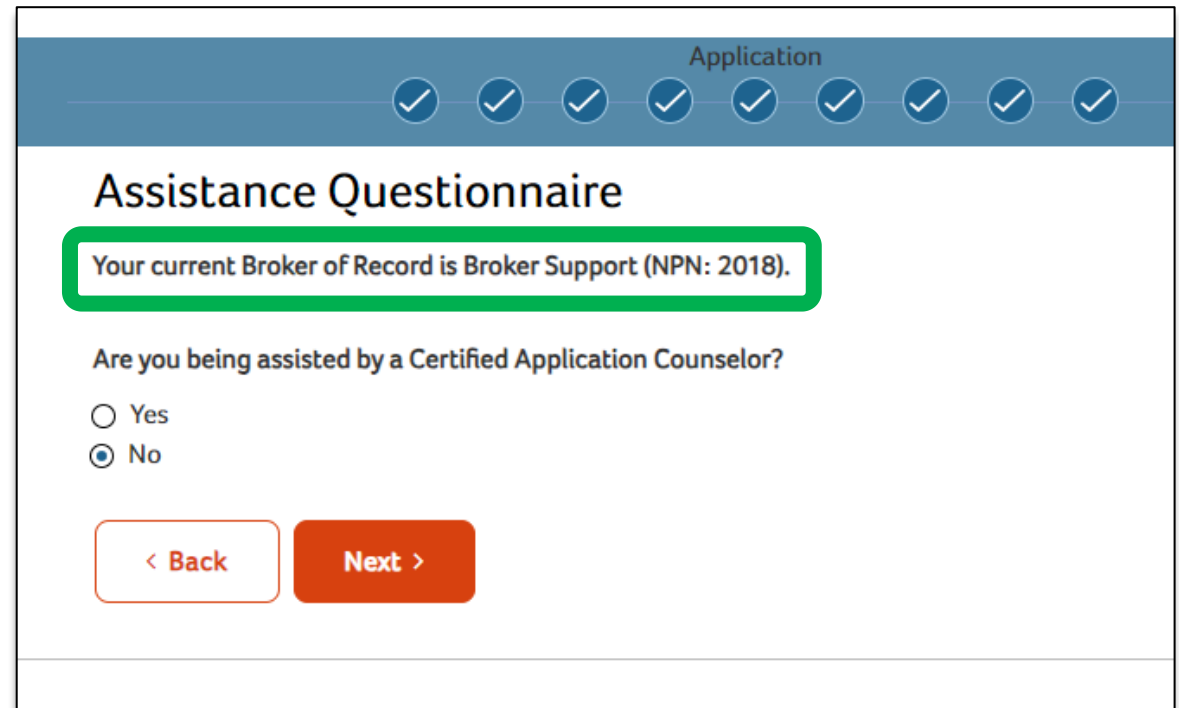
Keep Your Info  
Up to Date!



# Assistance Questionnaire

We implemented another change to the assistance question which will help to reduce the number of commission issues being seen within the system. If you are properly Tangoed to your client, you will see your name and NPN listed at the top of this page and can simply click 'Next.' If you do NOT see your name, you will have to go back and complete the Tango. This Question is only used for CAC tracking purposes (NOT commission) and will have no impact on the BOR/Client relationship.

Brokers CANNOT enter their NPN on this screen



The screenshot shows a web form titled "Assistance Questionnaire". At the top, there is a progress bar with ten blue circles, each containing a white checkmark. The word "Application" is centered above the progress bar. Below the progress bar, the title "Assistance Questionnaire" is displayed. A green-bordered box contains the text "Your current Broker of Record is Broker Support (NPN: 2018).". Below this, the question "Are you being assisted by a Certified Application Counselor?" is shown. There are two radio button options: "Yes" (unselected) and "No" (selected). At the bottom, there are two buttons: "< Back" (outlined in orange) and "Next >" (solid orange).

# Broker Changes Within an Agency

When requesting a change from one broker to another (for any reason) within an agency, please immediately contact Broker Support at [AHCT.Brokersupport@ct.gov](mailto:AHCT.Brokersupport@ct.gov)

# The Tango Process

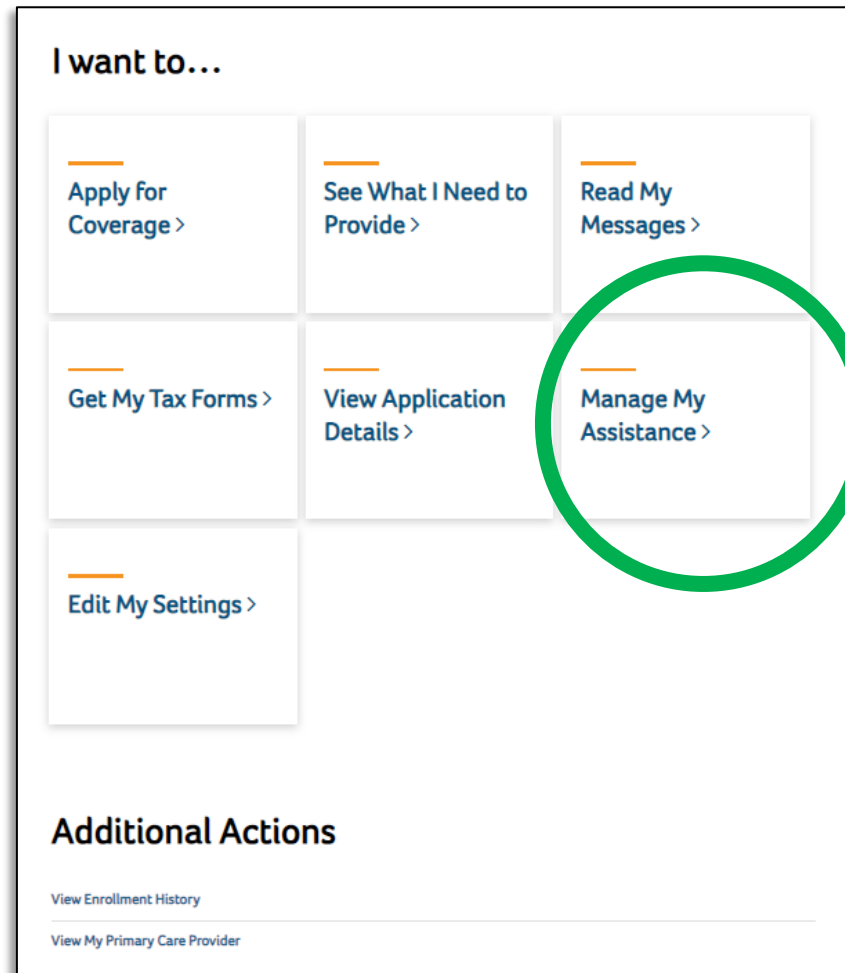


# Tango Before Enrolling in Coverage

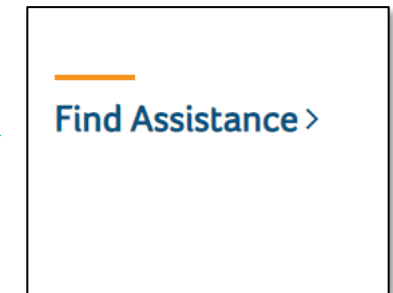
To ensure you receive commission, tango with the consumer **BEFORE**  
you Enroll a member in a plan

# The Consumer Account Home

Here you can view the consumer's enrollment history in the same Dashboard Format that was previously shown directly on the Account Home Page, as well as view and update PCP Information when applicable.



Before a consumer has Tangoed, this tile will read "Find Assistance"



# The Get Help Tool

## Assistance Search

Please enter information below to find an individual who can assist you.

### I need...

- ☐ Help from an Enrollment Specialist (Certified Application Counselor) to answer my questions and help me enroll.
- ☐ A Certified Broker to help me select a health care plan for me and/or my family.

Zip Code

Eg: 06101

Last Name

Eg: Smith

Language Preference

-- Any --

Within Miles

5

Organization Name

-- Any --

Town/City

-- Any --

If you need immediate help, please contact the Call Center at: 1-855-805-4325. Individuals with a hearing disability, please call the TTY line at: 1-855-789-2428.

If you need assistance in a language other than English, you may contact us at the number above.

< Back

Search >

# The Consumer View (part 1)

## Search Results

### NEED HELP CHOOSING A PLAN?

Our Certified Brokers can help you choose a private health plan (also known as Qualified Health Plan) at no cost. Simply call 1-855-805-4325.

[Live Chat](#)

- For additional help from Certified Brokers, please see the list below.

1 Found, Displaying 1-1

« Previous **1** Next »

### Search Results

Name	Organization Name	Assistance Offered	Contact Information	Spoken Language(s)	Accepting New Customers?	Provides Assistance for Special Enrollments?	Action
Access Health	Access Health Ct	In Person	280 Trumbull st Hartford 06103 (860) 757-1605		YES	YES	<a href="#">Select</a>

« Previous **1** Next »

If you need immediate help, please contact the Call Center at: 1-855-805-4325. Individuals with a hearing disability, please call the TTY line at: 1-855-789-2428.

If you need assistance in a language other than English, you may contact us at the number above.

[< Back](#)

# The Consumer View (part 2)

If there is no current Broker

Confirm your request

Name:

Access Health

Organization:

Access Health Ct

Address:

280 Trumbull st, , Hartford, 06103

Website:

Email:

Phone:

(860) 757-1605

Go Back

Confirm

If a new Broker is selected

Confirm Broker Change

You currently have a Broker associated with your account. Please click "Confirm" only if you wish to remove and replace your current Broker with the new Broker.

Current Broker

Name:

Broker Support

Organization:

Access Health CT

Address:

280 Trumbull st, Hartford, 06103

Website:

Email:

[AHCTbrokersupport@ct.gov](mailto:AHCTbrokersupport@ct.gov)

Phone:

(860) 241-8452

New Broker

Name:

Bart Graham

Organization:

Address:

280 Trumbull St, Hartford, 06103

Website:

Email:

[bwgAHCTtest@gmail.com](mailto:bwgAHCTtest@gmail.com)

Phone:

(860) 241-8452

Go Back

Confirm

If the same Broker is selected

Confirm Broker Change

This is already your current Broker.

Cancel

16

access health CT



# The Consumer View (part 3)

Account Home > Add Contact Information Live Chat

## Add Contact Info

Please complete the fields below. The Broker will use this information to contact you.

Fields marked with \* are required.

Phone Number\*

8602418452

Phone Type\*

Work

E-Mail Address

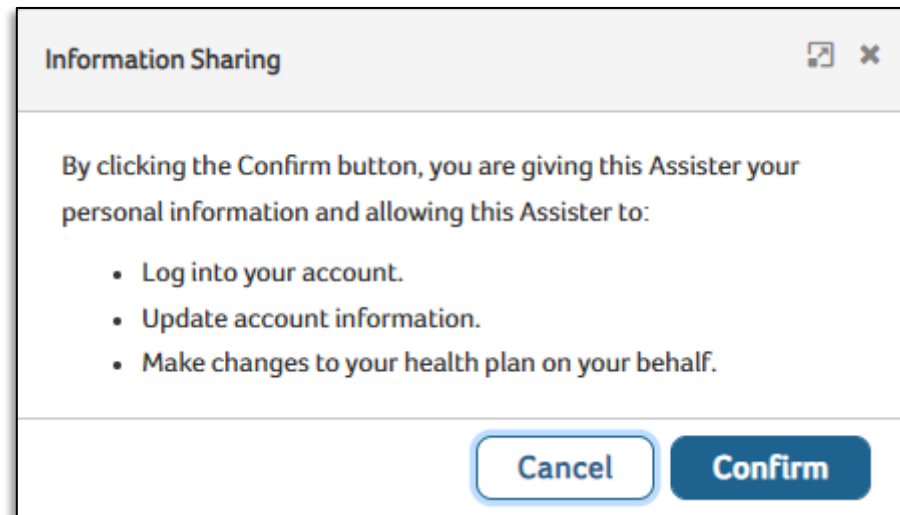
**Note:** If you have a current application, we used the contact information on file. Any updates made here will not be reflected in your account.

If you need immediate assistance with your application, please contact the call center at: 1-855-805-4325. Individuals with a hearing disability may contact the Call Center via the TTY line at: 1-855-789-2428.

< Back

Submit >

# The Consumer View (part 4)



# Broker Action - Accept

Client Partnership Requests					
Person	Email	Date	Phone	Client Status	Action
Barton Graham		09/12/2022	(860) 241-8452	Enrollment Started	<div>Accept</div> <div>Decline</div>

# Broker Action- Decline

## Decline Request

Please provide the reason(s) why you are unable to partner with Barton Graham at this time.

Reason:\*

Select an Option

Comments:\*

Select an Option

Select an Option

Client is geographically distant from my location

Unable to take on new clients

I do not speak the same language as this client

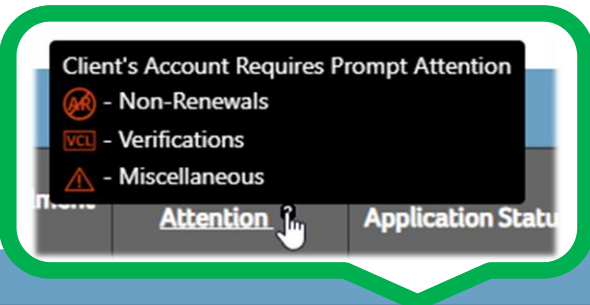
This client has special (disability) needs that I can't serve

Other

# Self Service Client Lists & Commission

# The Attention Column

You will see new symbols in your 'My Clients' list when your clients receive any of a number of different “actionable” notices, which indicate that this consumer needs to take some kind of action on their account. These icons will persist here until the Broker navigates to the consumer’s Message Center of their online account to view any of these notices, or if the period specified below passes with no viewing of said notices.



« Previous 1 2 Next »									
My Clients									
Name	Email	Phone	Client Since	Open Enrollment/Renewal Date	Active Carrier Enrollment ?	Attention ?	Application Status	QHP Enrollees	Action
John Wick			03/15/2023	02/12/2024	Anthem Blue Cross and Blue Shield	!	Completed	1	Remove
Bill Gates			07/19/2020	02/10/2024			Determined		Remove

Client Since	Open Enrollment/Renewal Date	Active Carrier Enrollment ?	Attention ?	Application Status
01/16/2024	03/11/2024		AR	Completed
01/11/2024	12/17/2024		VCL	Submitted
01/11/2024	12/17/2024		!	Submitted

# The Attention Column (part 2)

## Attention Icon Descriptions and Durations:



The Non-Renewal Icon signifies when a plan was projected to be auto renewed, but then failed the auto renewal process (including Medicaid). [60 days]



The VCL Icon signifies when a member of the household is being asked to provide verification of some kind whether that be income, immigration or other. [90 days]



The Miscellaneous Icon will be present when a member of the household receives an 'actionable notice' of any other kind that doesn't fall into the other categories. [90 days]

# Sort Your Clients

All My Clients column headers are clickable and sortable

My Clients									
Name	Email	Phone	Client Since	Open Enrollment/Renewal Date	Active Enrollment ?	Attention ?	Application Status	Active Enrollees	Action
1	2	3							
Name	bill gates	Unenrolled Account							
Bill Gates	Barton Graham	TestWarranty ReleaseOne							
Glorivee Machado	Barton Graham	Roberto Blundo							
Marlude Pierre-Louis	Bart Graham	Marlude Pierre-Louis							
Barton Graham	Bill Gates	Luke Bajana							
Bart Graham	Glorivee Machado	John Wick							
TestWarranty ReleaseOne	Jim Halpert	Jim Halpert							
John Wick	John Wick	Glorivee Machado							
bill gates	Luke Bajana	Bill Gates							
Luke Bajana	Marlude Pierre-Louis	Bart Graham							
Roberto Blundo									

1. Initial results are auto-sorted based on column data.
2. Upon the first click, text columns should display alphabetically, a-z, A to Z, special characters.
3. Subsequent clicks should again re-sort in the opposite manner based on column data as applicable.



# Choose Coverage Type

Account Home

My Clients

First Name  
Eg: John

Active Enrollment

Application Status

Coverage Type

All

All

Health

Dental

Phone  
Eg: 888-123-8888

Coverage Type  
All

Export

Reset

Search >

20 Found, Displaying 1-10

Health/Dental/All

My Clients

Name	Email	Phone	Client Since	Open Enrollment/Renewal Date	Active Enrollment	Attention	Application Status	Active Enrollees	Action
bill gates	bill.gates@gmail.com	888-123-8888	07/19/2020				In Process		Remove
Glorivee Machado	glorivee.machado@gmail.com	888-123-8888	10/12/2023	03/27/2025			Enrollment Started		Remove
Marlude Pierre-Louis	marlude.pierre-louis@gmail.com	888-123-8888	05/14/2020	05/08/2025			Enrollment In Progress		Remove
Barton Graham	barton.graham@gmail.com	888-123-8888	08/12/2021				In Process		Remove
TestWarranty ReleaseOne			05/22/2020	06/05/2021			Completed		Remove
Krishna Teja Thati	krishna.teja.thati@gmail.com	888-123-8888	12/27/2024				In Process		Remove
bill gates			11/14/2019				Application Not Started		Remove
Luke Bajana			11/14/2019				Application Not Started		Remove
Roberto Blundo			11/14/2019				Application Not Started		Remove
Unenrolled Account			02/27/2021				Application Not Started		Remove

# Refine By Carrier & Application Status

Active Enrollment

▼

- Anthem Blue Cross and Blue Shield
- ConnectiCare Benefits Inc
- ConnectiCare Benefits, Inc.
- ConnectiCare Insurance Company, Inc.
- HealthyCT Inc
- HUSKY**
- UnitedHealthcare

Brokers can now select HUSKY to view all of their clients who are enrolled in Medicaid.

Account Home

First Name

Eg: John

Active Carrier Enrollment

▼

Application Status

▼

- Application Not Started
- Cancelled
- Completed
- Denied
- Determined
- Enrollment In Progress
- Enrollment Started
- Inactive
- In Process
- Partially Enrolled
- Submitted

Name	Email	Phone
------	-------	-------



# Export Your Own Client Lists

Account Home

My Clients

First Name

Eg: John

Last Name

Eg: Smith

Phone

Eg: 888-123-8888

Active Enrollment

Application Status

Application Not Started

Coverage Type

All

Export

Reset

Search >

Carrier name is only populated in the event the enrollee is actively enrolled with the carrier and their enrollment is not in a canceled, terminated, or renewed status.

Active Carrier Enrollment

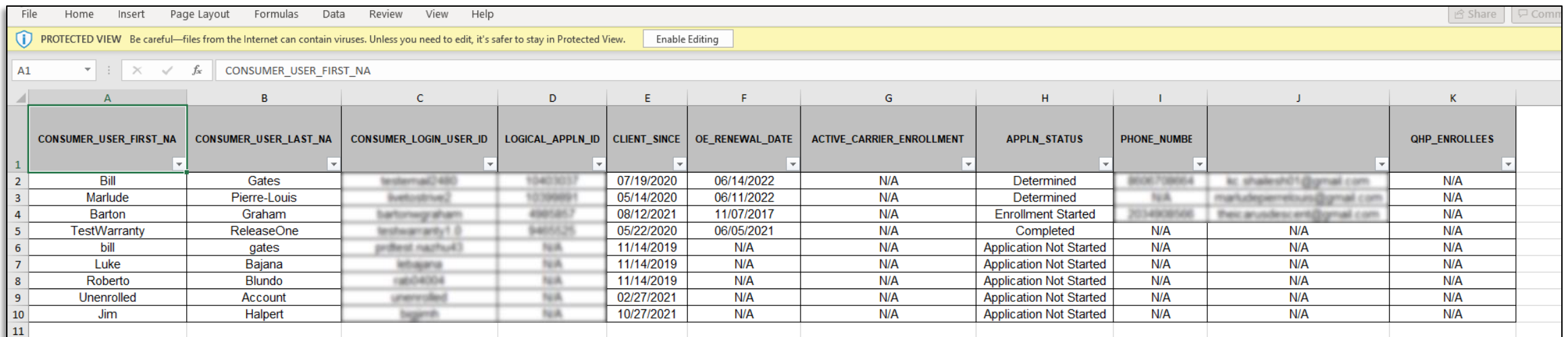
Application Status

My Clients

Name	Email	Phone	Client Since	Open Enrollment/Renewal Date	Active Enrollment	Attention	Application Status	Active Enrollees	Action
bill gates			11/14/2019				Application Not Started		Remove
Luke Bajana			11/14/2019				Application Not Started		Remove
Roberto Blundo			11/14/2019				Application Not Started		Remove
Unenrolled Account			02/27/2021				Application Not Started		Remove
Jim Halpert			10/27/2021				Application Not Started		Remove
Barton Graham			08/26/2023				Application Not Started		Remove

# Example of the Exported Client List

Client lists will export as excel spreadsheets with any filters you may have selected. You can save as many copies as needed with any different filter settings as you'd like.



PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing											
CONSUMER_USER_FIRST_NA	CONSUMER_USER_LAST_NA	CONSUMER_LOGIN_USER_ID	LOGICAL_APPLN_ID	CLIENT_SINCE	OE_RENEWAL_DATE	ACTIVE_CARRIER_ENROLLMENT	APPLN_STATUS	PHONE_NUMBE			QHP_ENROLLEES
Bill	Gates	external2480	10403017	07/19/2020	06/14/2022	N/A	Determined	860-708014	lc.shahen01@gmail.com		N/A
Marlude	Pierre-Louis	external2	10398891	05/14/2020	06/11/2022	N/A	Determined	N/A	marludepierre01@gmail.com		N/A
Barton	Graham	bartongraham	4881457	08/12/2021	11/07/2017	N/A	Enrollment Started	2034881456	thecarroll01@gmail.com		N/A
TestWarranty	ReleaseOne	testwarranty1.0	9401125	05/22/2020	06/05/2021	N/A	Completed	N/A	N/A		N/A
bill	gates	external2480	N/A	11/14/2019	N/A	N/A	Application Not Started	N/A	N/A		N/A
Luke	Bajana	lujana	N/A	11/14/2019	N/A	N/A	Application Not Started	N/A	N/A		N/A
Roberto	Blundo	roblundo	N/A	11/14/2019	N/A	N/A	Application Not Started	N/A	N/A		N/A
Unenrolled	Account	unenrolled	N/A	02/27/2021	N/A	N/A	Application Not Started	N/A	N/A		N/A
Jim	Halpert	logon	N/A	10/27/2021	N/A	N/A	Application Not Started	N/A	N/A		N/A

# Commission

- Please reach out to the Carriers for commission related issues.
- Any commission concerns returned from the carrier unresolved, please reach out to the Broker Support Team IMMEDIATELY.

For commission related issues please sent requests to

[AHCTbrokersupport@ct.gov](mailto:AHCTbrokersupport@ct.gov)

# Resources

# Contact Us

## Email Inboxes:

- **Broker Support :** [AHCTbrokersupport@ct.gov](mailto:AHCTbrokersupport@ct.gov) – *Consumer concerns, commission discrepancies*
- **Broker Registration:** [BrokerRegistration.AHCT@ct.gov](mailto:BrokerRegistration.AHCT@ct.gov) – *Certification, Newsletter distribution, license renewal, Broker Portal demographic changes*
- **Compliance:** [BrokerCompliance.AHCT@ct.gov](mailto:BrokerCompliance.AHCT@ct.gov) – *Compliance concerns*

## Broker Webpage:

<https://www.accesshealthct.com/brokers>

# Call Center Hours

## Hours of Operation for Open Enrollment

- Mon–Friday: 8am-7pm
- Saturday: 9am-3pm all Saturdays throughout OE13
- Sunday: Closed
- *These hours will vary dependent upon holidays, etc. Please watch your bi-weekly newsletter for updates.*

**1-855-805-4325**