Account Creation FAQs

10/2014

- **What is the intent of the account creation process?**

The account creation process enables OHA to manage the hundreds of assisters effectively, ensuring all are trained and certified, and providing a system for connecting assisters with their clients.
With the shift from the Cover Oregon portal to the federal marketplace, we were able to simplify and streamline the process, a process dependent on each organization re-submitting both organization and limited individual assister information.

- **What is the process for getting a new Criminal History Check (CHC)?**

In order for us to complete a CHC for new assisters we need the following:

1. First and Last name
2. Date of birth
3. Email address
4. Organization name employing the individual
5. Confirmation that a supervisor has verified the individual's identity

Please send this info to rosa.d.jensen@state.or.us; she will submit it to the OHA Background Check Unit, which automatically generates an email directly to the individual. It is then the individual's responsibility to respond to the system-generated email in the timeframe specified (21 days from initiation).

CHCs will be processed through OHA at no expense to the partner organization, with the exception of potential fingerprint fees.

- **What is an Assister ID and how do I get one?**

Assister IDs are assigned to each individual assister by OHA when a completed account creation spreadsheet is received. Each Assister ID will be 7 digits long, including the four-letter Org ID and a number (ex. ABCD001). Going forward, individual Assister IDs will be listed on applications. Previously, only Org IDs (previously known as date stamps) were listed.

Assister IDs will be used to identify assisters connected to applications when calling OHP Customer Service.

NOTE: the new Assister IDs include the Org ID, allowing multiple assisters within a given organization to obtain updates from OHP Customer Service on shared clients.

If an assister serves more than one organization, the primary contact of each organization must include that assister on their account creation submission. In this situation, the assister will be assigned more than one Assister ID, one related to each organization.

- **What is an Org ID and how do we get one?**

An Org ID is assigned by OHA, when we receive an initial account creation spreadsheet from your organization. Most Org IDs will be revised as part of the new account creation process. Several locations may have the same Org ID if they operate under one Tax ID number.

The Org ID forms the basis for the Assister IDs. Going forward, Assister IDs will be listed on applications. The new Assister IDs include the Org ID and are therefore a more complete identifier. Since the Assister ID will be used, the Org ID should be seen as a tracking mechanism; it doesn't have purpose on its own.

- **May our organization continue to provide application assistance after taking the training but before we have received our new Org ID and Assister IDs?**
  Yes; if your assisters have met all the certification requirements, you may use your current Org ID to identify your organization on applications. Your primary contact will be sent the new Assister IDs which will replace the use of the old Org ID, and the new IDs should be used as soon as they are received. The latest the old IDs will be accepted on new applications will be December 15th.

- **If my organization has more than one location, will I need to fill out more than one account creation sheet?**
  Yes. If your multiple locations share a Tax ID number, we will assign the same Org ID to both (or all) locations. If your organizations have different Tax IDs, then they will be assigned different Org IDs, and we ask that you fill out separate spreadsheets. This will help us distinguish which assisters are serving which location.

- **Will my Assister ID be used in the healthcare.gov application, and will it allow me to get updates from HealthCare.gov's customer service center?**
  Your Assister ID should be listed in the suggested field when assisting a client, although system limitations currently prevent any follow-up access this way.

  A separate process exists for assisters to be connected to applications through HealthCare.gov. In essence, the process will require the client to call HealthCare.gov's customer service center with assister on the phone, providing verbal authorization for the assister to serve as the client's third party representative. That certification will be valid for 12 months.

  Applications submitted through HealthCare.gov that result in an eligibility determination for OHP will require a consent form to allow the assister to obtain updates from OHP Customer Service, as the Assister ID data entered on the HealthCare.gov application will not be transmitted to OHP. More information on this process will be provided closer to November 15th.

  NOTE: There will no longer be a portal-type application into which assisters log in and through which they assist clients; clients will be applying directly in their own accounts, with the support of assisters.

- **What is required to become an active assister?**
  - Being employed by, or volunteering for, an active community partner organization
  - Having a current CHC on file with your organization
  - Completing training on the federal marketplace (through the MLN network) and providing the certificate of completion to OHA
  - Completing the Oregon-specific training (either in person or via webinar)
  - Confidentiality agreement on file with your organization

- **What is required to become an active organization?**
  - Have at least one active assister
  - Complete the process to become a Volunteer Organization or a MAP Contracted Provider(or be a current grantee)
  - Complete the account creation process with OHA

- **Do I need to complete both trainings to become, or continue to be, an assister?**
  Yes; in order to provide application assistance from November 15th onwards, assisters must have completed both trainings and sent in the required documentation for the FFM training. The outreach team will track completion of the Oregon-specific training for you.

- **What if an organization or assister's information changes?**
  Changes in an organization's information, assister staff, assister contact information etc. should be reported by the primary contact within one week of the change to Jen Denslow via email.
  Assisters may also update their own information at any time by emailing Jen Denslow directly.

- **What are the responsibilities of the Primary Contact?**
  - Submitting certificates of completion for all assisters that have completed the FFM training (in batches as much as possible, via an email listing out the names of the assisters for who certificates are attached)
  - Completing the account creation process for the organization and all certified assisters
  - Completing the account creation process as new assisters join the organization, and informing OHA of staffing changes or other information changes
  - Verifying the identity of all assisters for whom they submit account creation

- **I would like to become a Volunteer Organization, what do I need to do?**
  Organizations interested in helping individuals and families apply for health insurance on a volunteer basis can request an application by e-mailing Perry DeJoode at perry.b.dejoode@state.or.us or calling at 503-945-6525. Please contact Perry with any related questions.

- **I am a MAP contracted Provider interested in providing application assistance; what should I do?**
  As a Medicaid provider, your organization should complete and return a Provider Outreach Enrollment Addendum (OHA 3128) to Elizabeth.S.Thielman@state.or.us or contact her at 971-301-3168 with related questions. This Addendum allows provider locations to offer enrollment assistance, and to forego completing the longer Volunteer Organization Agreement required of other community partners.

- **Who should I contact if I have any questions about account creation?**
  You may email Jen Denslow at jennifer.j.denslow@state.or.us or call her at 503-945-5994. You may also contact your Regional Outreach Coordinator (ROC). The account creation documents themselves are to be sent to cp.business@state.or.us.

- **How can I get a secure email?**
  If you need a secure email to submit confidential information via email to our office, you can request one from Jen Denslow or your ROC.