

Broker Assistance Transfer

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Overview

- Virtual Call Center of Authorized Producers (brokers)
- Warm transfer from CSR to broker
- Broker performs enrollment

Benefits

- Consumer – Expert advice on plan selection
- Broker – Pre-qualified leads & commission
- Call Center – Shorten call handle time



How it Works

Broker Setup

- Call Center phone software installed on broker computer
- Brokers supply their own headset
- Brokers log into a special queue in phone system

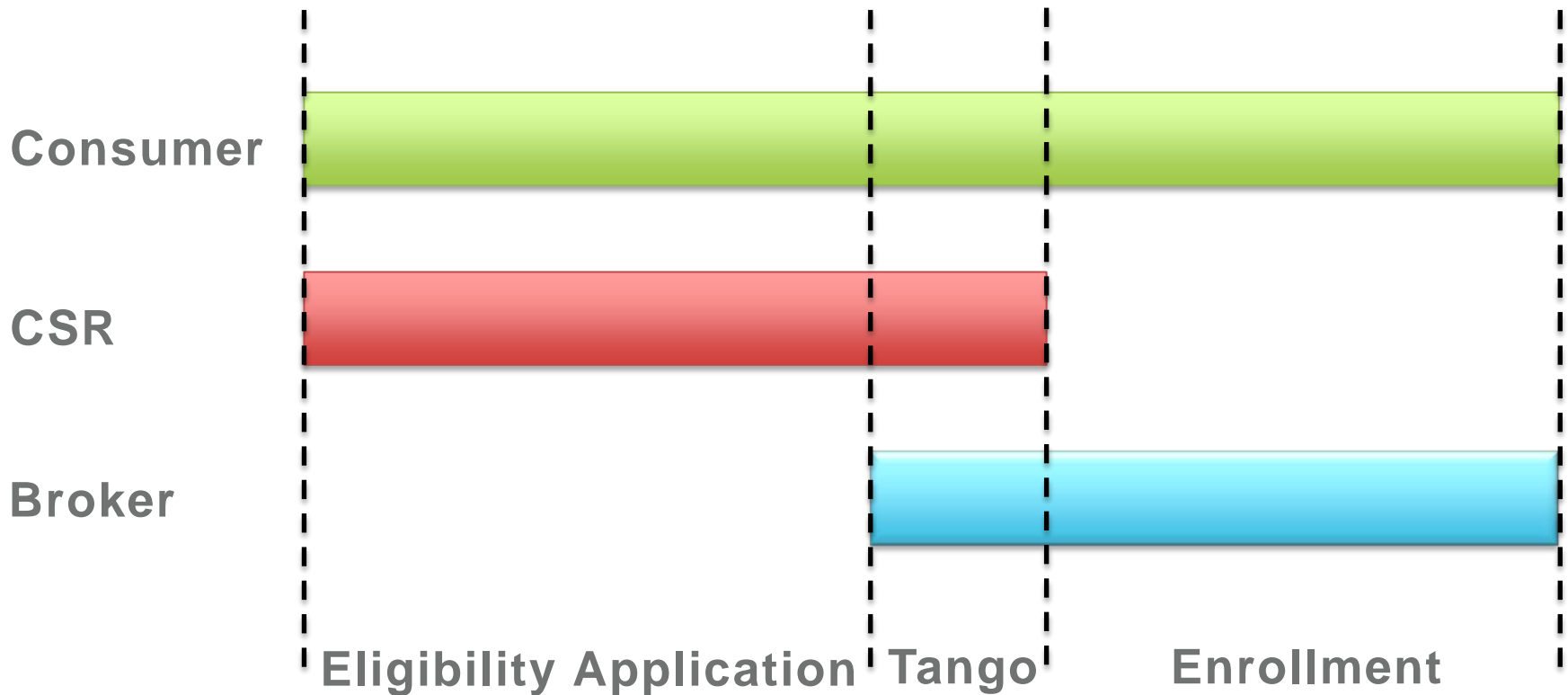
Call Center Setup

- Call Center builds the Broker Assistance Transfer queue

Call Procedure

- CSR & Consumer - Eligibility application as normal
- Eligibility APTC or unassisted, CSR offers broker
- CSR dials broker queue, three-way call
- Broker & CSR perform “Tango”
- CSR hangs up, Broker performs enrollment

Call Procedure contd.





Implementation Plan

Project Phases

- Phase 1: Proof-of-concept – Complete
- Phase 2: Onsite test – Proposed 9/15-9/16
 - 2 brokers, 2 days – goal is 12 transactions
- Phase 3: Pilot – Open Enrollment Nov 1 – Jan 31
 - 25 brokers
- Phase 4: Full Rollout – 2016 & Beyond

Phase 3 Broker Selection

Selection Considerations

- Experience – Brokers who know how to use MHC
- Proximity – Brokers may need on-site IT support
- Availability – Brokers who will commit to time in the queue

Implementation Challenges

- Cost – Phone software licenses
- Liability – Agreements between Maximus, MHBE, brokers
- Oversight & Administration
 - Call recording/monitoring
 - Remote IT support
 - Broker SLAs

Looking Ahead



Future Potential

- Improve Maximus SLA & overall Call Center performance
- Support robust broker ecosystem
- Expand beyond brokers: Get the Experts on the phone
 - Navigators – Medicaid, health literacy
 - Caseworkers – Medicaid & other public programs
 - MHBE, HEAU, MIA – Complaints & investigations
 - SHOP Administrators – small business queries