

Assistance Network Screen Sharing for Virtual Appointments Guidance

Purpose

Assistance Sites and Certified Application Counselor-designated Organizations (Assister organizations) contract with Connect for Health Colorado to provide application and enrollment assistance. Assister organizations partner with Connect for Health Colorado to meet the goals of increasing the number of people enrolling in health insurance, including in rural areas. Assister organizations cannot support customers with any task that requires accessing the customer's account unless the customer is physically present, this includes when the customer is on the phone. Using web meeting and screensharing software may increase Assister reach and efficiency in their work.

References

Sources referenced below should be used in conjunction with this guidance:

- Security Awareness training module
- Personally Identifiable Information (PII) and Protected Health Information (PHI) training module

This guidance should be maintained by Connect for Health Colorado to maintain compliance with standards, and to provide direction to Assister organizations. The guidance is an internal and external document.

Virtual Customer Assistance from Assister Organizations

Assister organizations are available in different areas of the state and are open at different times. Customers may not be in proximity to an Assister organization but may be able to use their services through use of screensharing software. None of this guidance is meant to replace other training regarding privacy and security. The Assister organization should maintain a private workspace with access to high-speed internet and telephone.

Suggested Process

- In the Assistance Network Scheduler, update your location notes and appointment reminders to let customers know you can provide virtual support to customers with high-speed internet.
- Login to the web meeting software and send an invitation to the customer's email address.
 - Customers should be advised to use a high-speed internet or data connection for the meeting.
 - Customers using phones for the meeting should be advised they will need to download the app.
- Before screen sharing or discussing PII, verify all participants and callers to the meeting and obtain proper authorization. (Note: Use more recent guidance from the Assistance Network Team regarding the Customer Authorization Form.)
- Web meeting software can then be used to share screens and/or control screens.
- When the meeting is complete, end the meeting for all participants and ensure no PII remains on the shared screen.