

Sharing Information with Navigators/IPAs/Brokers

Navigators, In Person Assisters (IPAs) and brokers play a major role in connecting people to health care coverage. To facilitate the application process there is information we can share without the client present or without an authorized representative (AREP) designation. This means navigators/IPAs/Brokers do not need to be designated an AREP when information is needed to administer a program.

Information that can be shared to administer a program

It is permissible to provide assistance or share the following information when needed to administer a program:

Technical help

- Child aging out needs to be removed from the application due to multiple applications
- Resolving error codes

Status of application

- Application is pending for additional information
- Documents have been received but are still waiting to be processed
- Application was forwarded to Community Services Division (CSD) for processing and why
- Application is awaiting financial approval
- Application is awaiting clinical approval

Pending AEM applications

- Anything mentioned above
- Financial eligibility has not been approved so a clinical referral has not been made
- Financial eligibility has been approved; however, we are still waiting on a clinical decision
- Clinical requests for additional information sent through ProviderOne. Please note: We cannot disclose the client has cancer, instead of stating we need a cancer treatment plan, we should state we need verification of the treatment plan.

Information that cannot be disclosed under any circumstances

- Security numbers (SSN)
- Birthdates
- Home or mailing address
- Places of employment
- Estimated due date (EDD)
- Medical conditions or diagnosis