



## **Producers Advisory Committee Meeting Agenda**

Friday, August 23, 2013, 2:00-3:30pm  
441 4th Street NW (One Judiciary Square)  
Room 707N - 7th Floor,  
Washington, DC 20002

Call-In Information:  
1-866-614-6778; Access Code: 8816591

- I. **Welcome and Update on Most Recent Activity** – Lee Bethel
- II. **Update- Broker Training for DC Health Link** – Janet Trautwein, NAHU
- III. **Update - In-Person Assister Program (IPA)** – Ikeita Cantu Hinojosa, HBX
- IV. **Discussion**  
**Broker Handoff Procedures through Contact Center**
- V. **Summary/Action Items**
- VI. **Closing Remarks**

## Broker Handoff Procedures through Contact Center

- A. Call Center Worker advises consumer of ability to select broker and gives consumer option of transfer:
  - 1. Provide the caller with instructions on how to select a producer by using the DC Health Link website. The call center worker shall stay on the call until the individual or employer has selected a producer using the DC Health Link website. We recommend that the website be customized to provide a random selection process for consumers to select a producer.
  - 2. Urge that the call center be required to execute a “live handoff” for producer selection. The call center worker would then transfer the caller directly to a broker for a “Warm Transfer”.
- B. Option one: Hand off to occur 8-5 m-f, except holidays  
Option two: 24/7 coverage during open enrollment period, Brokers to sign-up for coverage shifts.
  - 1. Next day priority given for full day
  - 2. Next day priority for peak hours; or
- C. Ask the caller if they would like to be contacted by 5 PM on the next business day to be formally assigned a producer. For these calls, a selected producer shall receive notification from the call center by 5 PM on the next business day that they have been selected by an individual or employer to assist them in placing their coverage. The call center worker shall also provide the selected producer all pertinent contact information for the new client. It is the selected producer’s responsibility to contact the new client in a timely manner to work with the new client to finalize the placement of coverage on the client’s behalf.