Find Local Help Upkeep Tool User Guide for Assisters

November 2024. This communication was printed, published, or produced and disseminated at U.S. taxpayer expense. The information provided in this document is intended only to be a general informal summary of technical legal standards. It is not intended to take the place of the statutes, regulations, or formal policy guidance upon which it is based. This document summarizes current policy and operations as of the date it was presented. We encourage readers to refer to the applicable statutes, regulations, and other interpretive materials for complete and current information.

Table of Contents

Table of Contents 1
Table of Figures 2
A. Introduction 4
1. Find Local Help 4
2. Find Local Help Upkeep Tool 4
3. Helpful Resources & Tips Before Getting Started 4
B. Accessing the Find Local Help Upkeep Tool 5
C. The Find Local Help Listing(s) Page 7
1. Listing/Unlisting an Organization 7
2. Navigating the My Find Local Help (FLH) Locations Table 9
3. Adding a Location 10
4. Adding a Duplicate Location Name 16
5. Correcting a Duplicate Location Address 17
6. Viewing a Location 17
7. Listing/Unlisting a Location 21
8. Editing a Location 22
9. Recalling a Location Request 23
10. Deleting a Location 24
11. Adding/Editing an Organization Location 25
12. Adding/Editing an Organization Acronym 26
13. Viewing Submission Confirmation 26
D. Email Communication 28

Table of Figures

Figure 1. Welcome to the FLH Upkeep Tool Screen 6
Figure 2. Contact Not Found Alert Message 6
Figure 3: Find Local Help Upkeep Tool Refresh Page 7
Figure 4: List Organization Button 8
Figure 5: List Organization Confirmation 8
Figure 6: Unlist Organization Button 8
Figure 7: Unlist Organization Confirmation 9
Figure 8: My Find Local Help (FLH) Locations Table 9
Figure 9: Sorting the My Find Local Help (FLH) Locations Table 10
Figure 10: Alert Banner Message 10
Figure 11: Add Location Button 11
Figure 12: Add Location Name Field 11
Figure 13: Fields for Assister Type, Coverage Type, Service Location State, and County(s) 12
Figure 14: Address Fields 12
Figure 15: Address Validation 13
Figure 16: Display Settings Selection 13
Figure 17: Contact Information Field 13
Figure 18: Specialized Services and Languages Menus 14
Figure 19: Hours of Operation Selection 15
Figure 20: Hours of Operation - Split Hours 15
Figure 21: Special Instructions Text Box 16
Figure 22: Navigation Buttons 16
Figure 23: Location Name Warning Message 17
Figure 24: Name Link on the FLH Listings Page 17
Figure 25: View Location on the FLH Listings Page 18
Figure 26: View Location Page 19
Figure 27: Back Button 20
Figure 27: Change Requested Warning 20
Figure 28: Location Status 21
Figure 29: List/Unlist Icon 21
Figure 30: Location Edit Icon 22
Figure 31: Edit Location Icon 22
Figure 32: Location Request Recall Icon 23
Figure 33: Recall Confirmation Message 23
Figure 34: Location Delete Icon 24
Figure 35: Delete Confirmation Message 24
Figure 36: Navigation Buttons 24
Figure 37: Location Edit Icon 25
Figure 38: Edit Locations Page 25
Figure 39: Organization Table Edit Pencil Icon 26

Figure 40: Organization Table Acronym Field and Save Icon 26
Figure 41: View Submission Confirmation Button 27
Figure 42: Submission Confirmation Page 27
Figure 43: Print PDF Button 27
Figure 44: Logout Button 28
Figure 45: Acknowledgement Email Communication Example 28

A. Introduction

1. Find Local Help

The Find Local Help (FLH) consumer tool (in Spanish, Encuentre Ayuda Local) allows consumers seeking health coverage in the Federally-facilitated Marketplace (FFM) to find assisters, by zip code, in their community who will provide application and enrollment assistance. Assisters include Navigator grantees, Certified Application Counselor Designated Organizations (CDOs) [which oversee Certified Application Counselors (CACs)], Enrollment Assistance Personnel (EAPs), and other non-Navigator assistance personnel certified by the FFM to provide impartial assistance with applying for and enrolling in Marketplace, Medicaid, and Children's Health Insurance Program (CHIP) coverage.

2. Find Local Help Upkeep Tool

Leadership contacts can manage their organization's assistance locations using the FLH Upkeep Tool.

Note: *Agents & Brokers cannot use the FLH Upkeep Tool to request an update or removal of their listing. If you are an Agent or Broker and need to update or delete your listing in the FLH directory, contact the Agent & Brokers Help Desk for instructions at FFMProducer-AssisterHelpDesk@cms.hhs.gov.*

---

3. Helpful Resources & Tips Before Getting Started

When an organization's leadership contacts submit a request in the Find Local Help (FLH) Upkeep Tool, it must be completed and submitted in one session to avoid losing the information entered. To ensure you have all necessary information before you start, reference this user guide to understand what information you need to complete when using the tool.

For additional FLH Upkeep Tool information, the following resources are available at the top of each page of the Find Local Help (FLH) Upkeep Tool and also at Training for navigators, agents, brokers, and other assisters:

- Find Local Help (FLH) Upkeep Tool Job Aid for Assisters – Provides a quick-start guide for completion and submission of the FLH Upkeep Tool request.
- Find Local Help Upkeep Tool for Assisters Frequently Asked Questions (FAQs) – Contains frequently asked questions about how and when to use the FLH Upkeep Tool.

An FLH Upkeep Tool Demonstration is also available.

Email any questions to FindLocalHelp_FFMAssisters@cms.hhs.gov. Be sure to include your organization's name and CDO, EAP, or Navigator ID in the body of your email.

B. Accessing the Find Local Help Upkeep Tool

To access the FLH Upkeep Tool:

Step 1. Navigate to the Welcome to the Find Local Help (FLH) Upkeep Tool page.

Note: *Only the leadership contacts on record with CMS for your organization can access the FLH Upkeep tool and modify the FLH listing(s) for the Consumer Tool. For example, the CDO leadership contacts are your CAC Project Director, Organization Senior Official, or Secondary Contact (if you have one).*

Step 2. Complete all required information on the "Welcome to the Find Local Help (FLH) Upkeep Tool" page:

a. First name
b. Last name
c. Email address
d. Assister ID. If you don't know your Assister ID, contact FindLocalHelp_FFMAssister@cms.hhs.gov for help.
    i. CDOs: Enter the 8-character CDO ID
    ii. EAPs: Enter the 8-character EAP ID
    iii. Navigators: Enter your 8-character Nav ID

Step 3. Check the reCAPTCHA box.

Step 4. Select the **Submit** button.

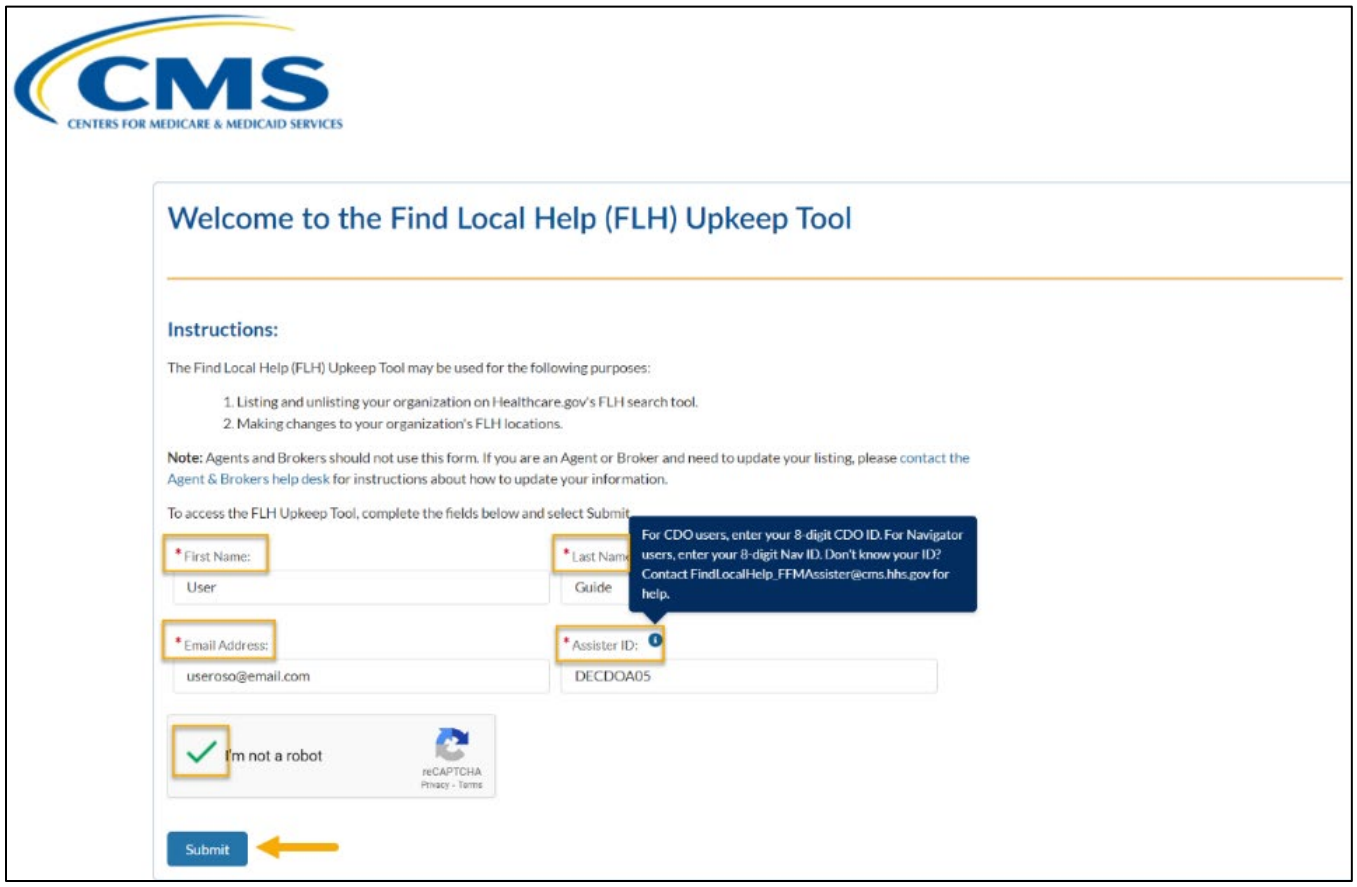


Figure 1. Welcome to the FLH Upkeep Tool Screen

If any of the information entered does not match exactly what is on file for you as a designated leadership contact, you will receive a Contact Not Found alert message, shown in **Figure 2**.

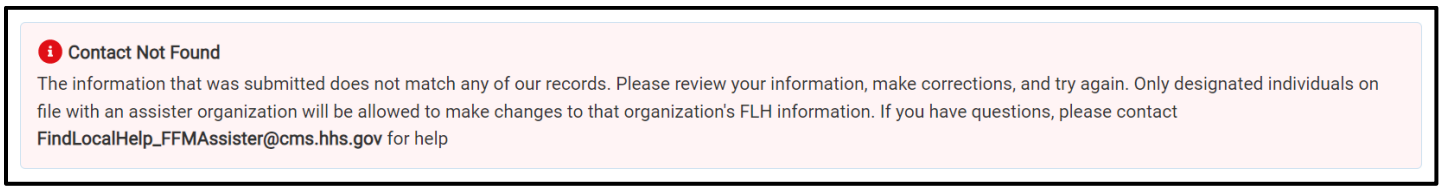


Figure 2. Contact Not Found Alert Message

If this happens, refresh your browser to return to return to a reset "Welcome to the Find Local Help (FLH) Upkeep Tool" page. Follow steps 2 through 4 above and be sure to enter your correct information.

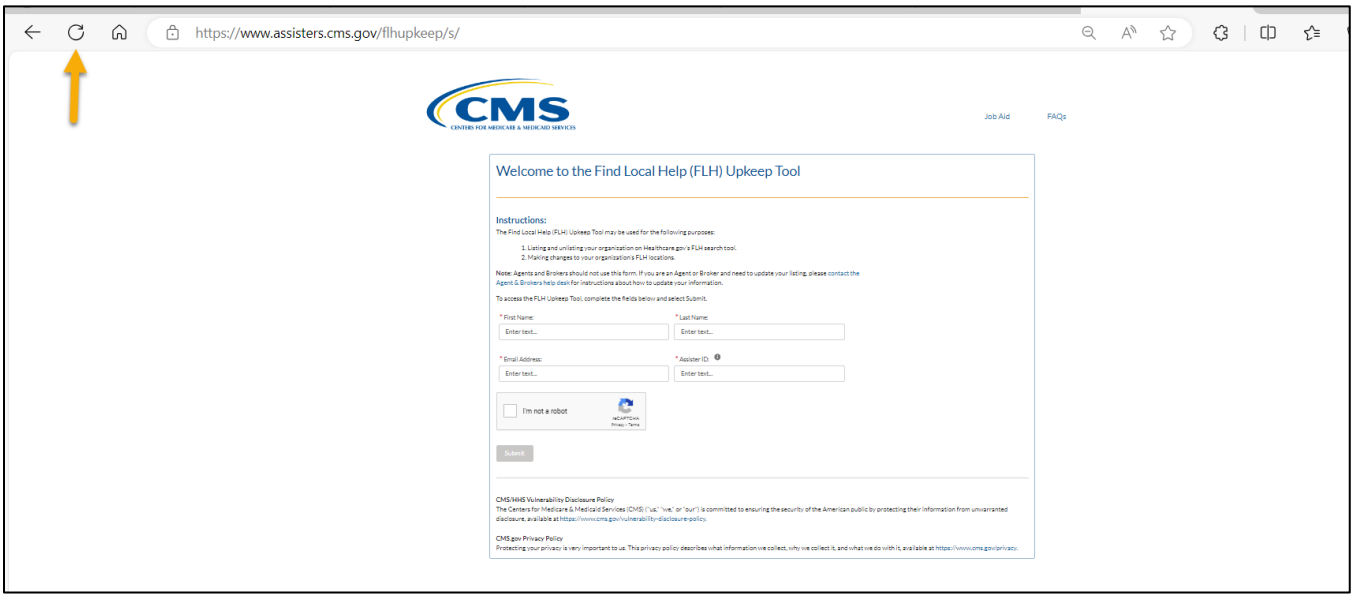


Figure 3: Find Local Help Upkeep Tool Refresh Page

C. The Find Local Help Listing(s) Page

The "FLH Listing(s)" page on the FLH Upkeep Tool provides the option to list/unlist your organization from the Find Local Help consumer tool. It also shows the associated FLH locations and the FLH submission confirmations for your session.

From this page, you can add or edit your organization's acronym; list or unlist your organization; add, edit, delete, list, or unlist locations; and view your FLH submission confirmations for your current session.

The FLH upkeep tool cannot be used to modify your service location (such as your counties and states) or to modify any organization's leadership contact. CDO Leadership Contacts should use the Organizational Maintenance Web Form, and Navigator and EAP Leadership Contacts should contact their Project Officers.

1. Listing/Unlisting an Organization

The Current FLH Status indicates the status of your organization on the Consumer Tool.

- "Listed" status means a user can find their organization by using the Search feature on the "Find Local Help Consumer Tool" page. When your organization's status is listed, you can add, edit, delete, list, or unlist your assister locations for your organization.
- "Unlisted" status means your organization and any associated assister locations are removed from the Find Local Help (FLH) Consumer Tool. If you do unlist your organization, you can list it again in the future using the Find Local Help (FLH) Upkeep Tool.

If your organization is not currently listed, the Current FLH Status will show as "Unlisted." To list your organization:

Step 1. On the "FLH Listing(s)" page, select **List Organization** in the Current FLH Status box.

Figure 4: List Organization Button

Step 2. Select **Yes** to confirm that you want to list your organization.

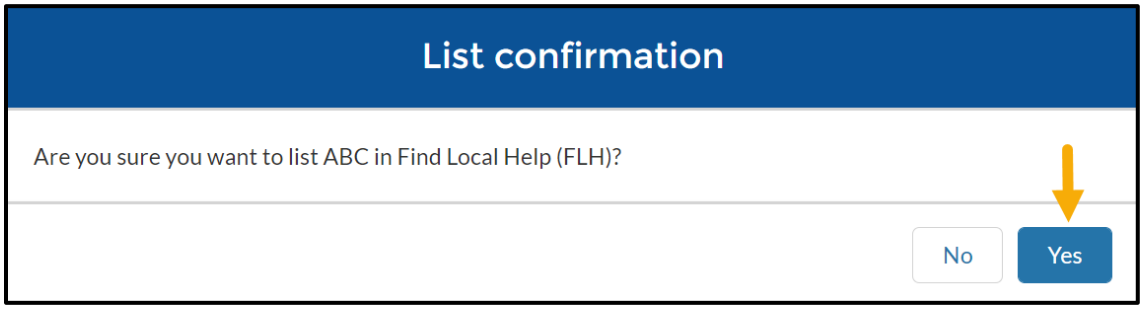


Figure 5: List Organization Confirmation

If your organization is already listed, the Current FLH Status will show as "Listed."

To unlist your organization:

Step 1. Select **Unlist Organization** in the Current FLH Status box on the "FLH Listing(s)" page.

Figure 6: Unlist Organization Button

Step 2. Select **Yes** to confirm that you want to unlist your organization.

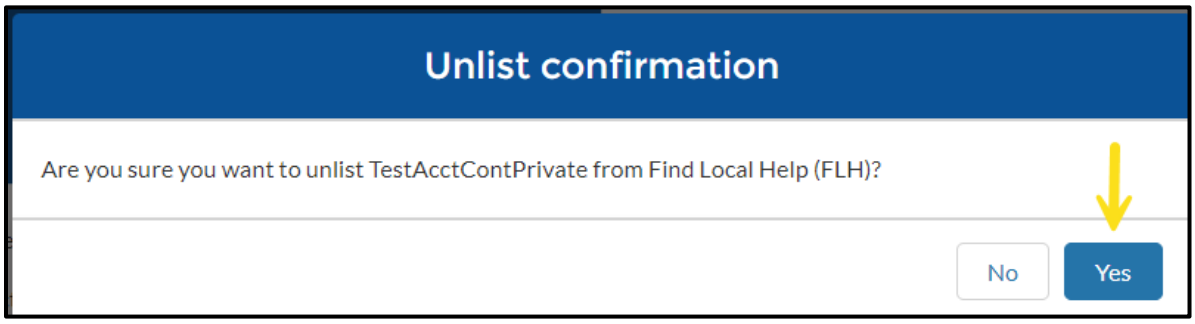


Figure 7: Unlist Organization Confirmation

2. Navigating the My Find Local Help (FLH) Locations Table

The My Find Local Help (FLH) Locations table displays all locations, either listed or unlisted, for your organization on the Consumer Tool. The table displays the name, address, phone number, email address, and status of each location for your organization. The Action column displays actions you may want to make for any of the locations.

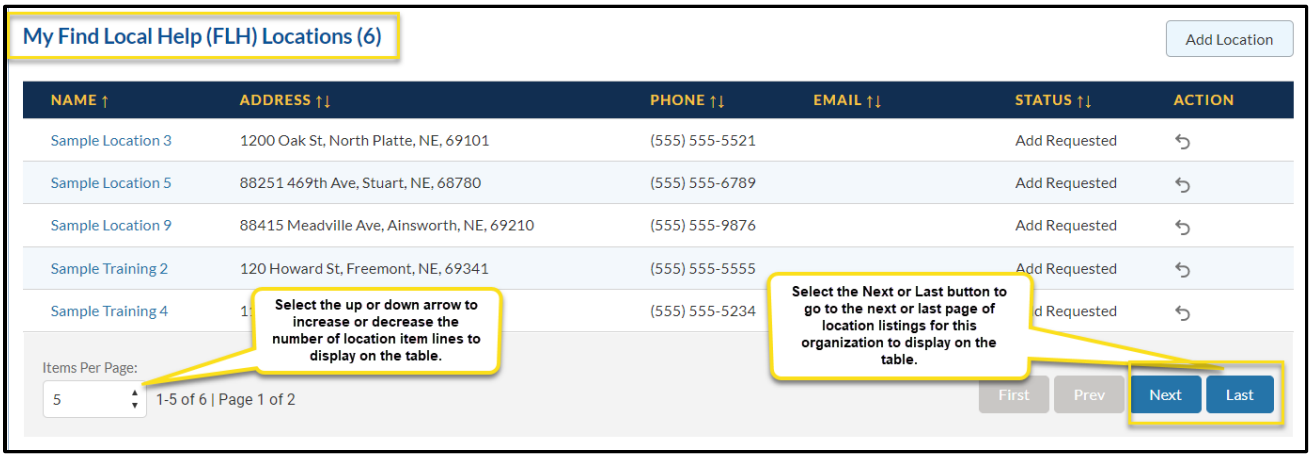


Figure 8: My Find Local Help (FLH) Locations Table

The entries in the My Find Local Help Locatio**ns** table can be sorted by name, address, phone number, email address, or status. Select the desired column title once to sort by ascending order or again to sort by descending order. An arrow appears next to the column title selected, indicating which direction the list is being sorted.

Figure 9: Sorting the My Find Local Help (FLH) Locations Table

3. Adding a Location

Assisters can select the **Add Location** button to submit a request to add a new location listing on the FLH Consumer Tool.

Your organization must be in a "Listed" status as shown in the blue Current FLH Status box on the "FLH Listing(s)" page. If your organization is "Unlisted" or in "Change Requested" status, you cannot add a location—the system will disable the **Add Location** button, and you will receive an alert banner message as shown in **Figure 10**.

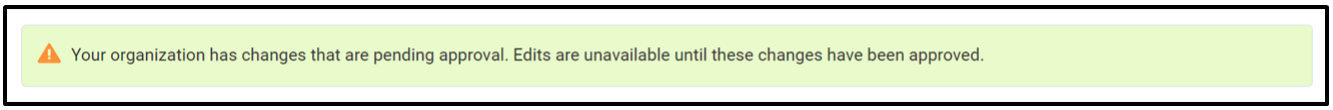


Figure 10: Alert Banner Message

To add a location:

Step 1. Select the **Add Location** button above the My Find Local Help (FLH) Locations table on the "FLH Listing(s)" page of the FLH upkeep tool.

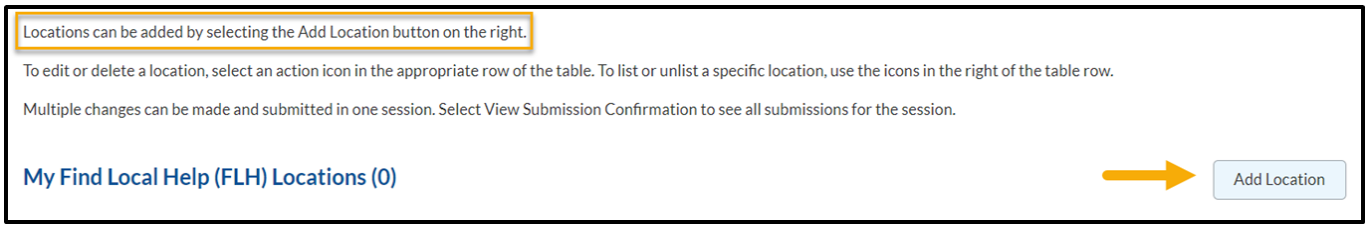


Figure 11: Add Location Button

Step 2. On the "Add Location" page, enter the unique location name. This name will display on the FLH Consumer Tool. Be sure this is the name you want your consumers to view and the name they will recognize.

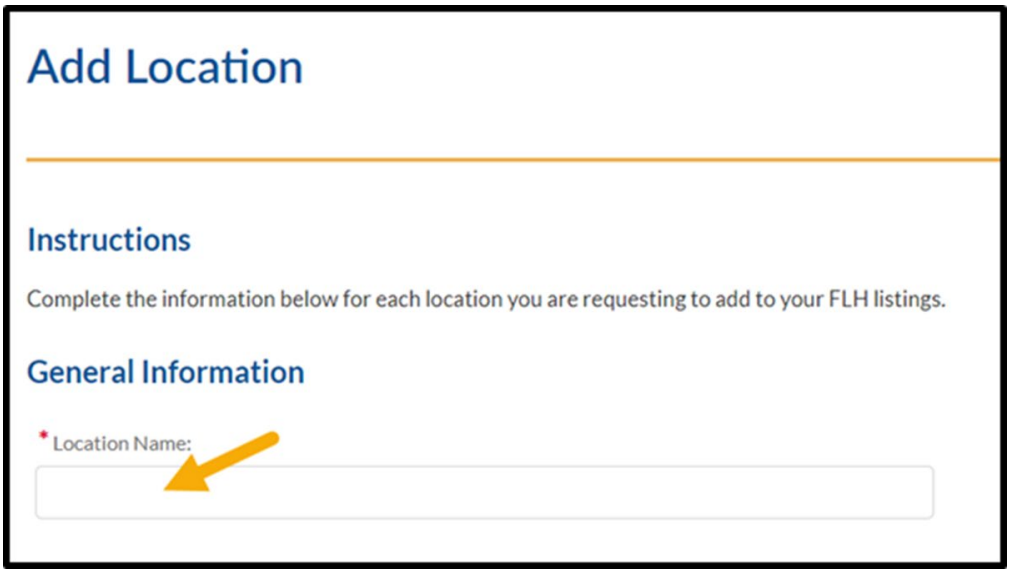
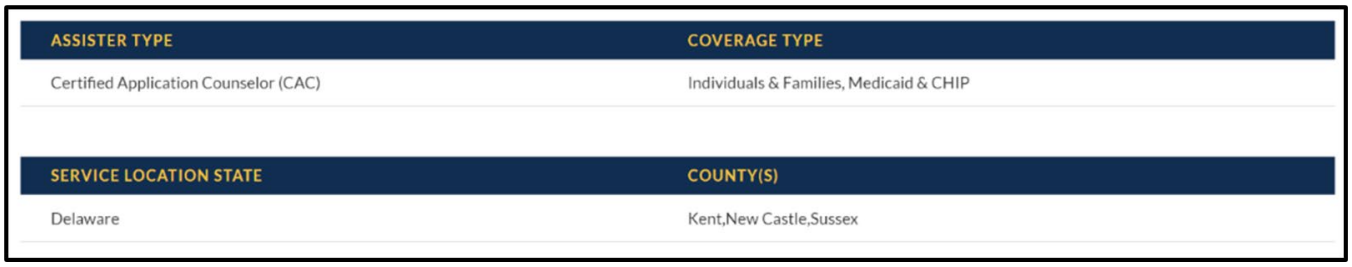


Figure 12: Add Location Name Field

Step 3. The fields Assister Type, Coverage Type, Service Location State, and County(s) for your organization will automatically populate from what is in the system for your CDO, EAP, or Navigator Grantee organization.



ASSISTER TYPE	COVERAGE TYPE
Certified Application Counselor (CAC)	Individuals & Families, Medicaid & CHIP

SERVICE LOCATION STATE	COUNTY(S)
Delaware	Kent,New Castle,Sussex

Figure 13: Fields for Assister Type, Coverage Type, Service Location State, and County(s)

Step 4. Enter the address. The drop-down list for the state field will contain only the state(s) shown in the Service Location State column on the above table. If the Service Location State(s) or County(s) need to be updated, CDOs use the Organizational Maintenance Web Form. Navigators and EAPs should contact your Project Officer.

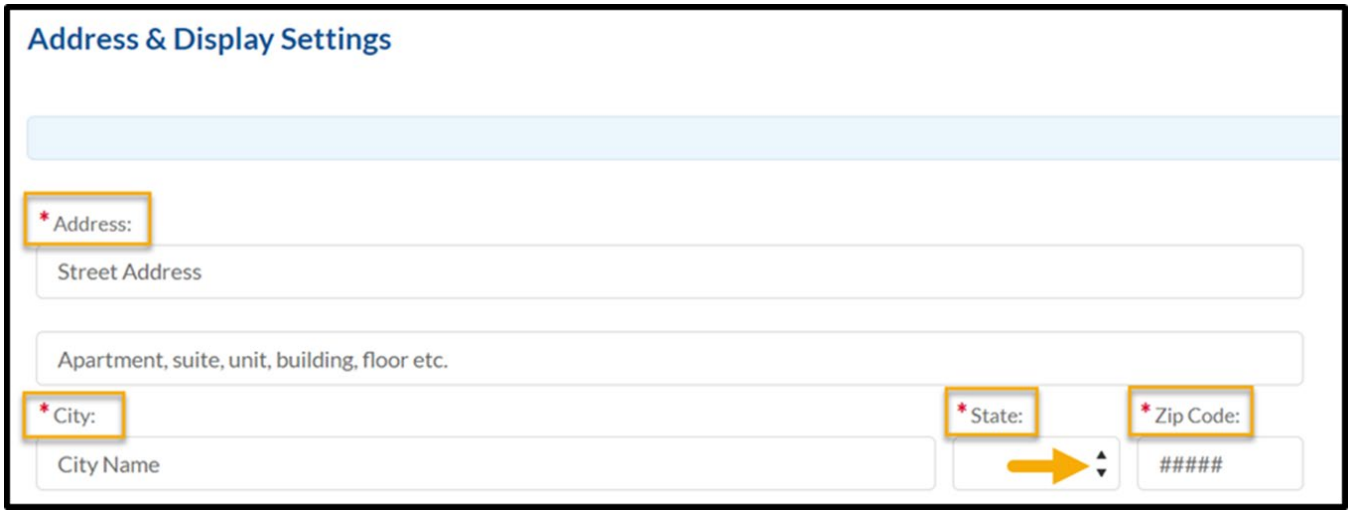


Figure 14: Address Fields

Step 5. After selecting the **Submit** button, a pop-up will appear showing the Entered Address and a Suggested Address. Choose the best option, or select the **Edit Entered Address** button to make necessary changes.

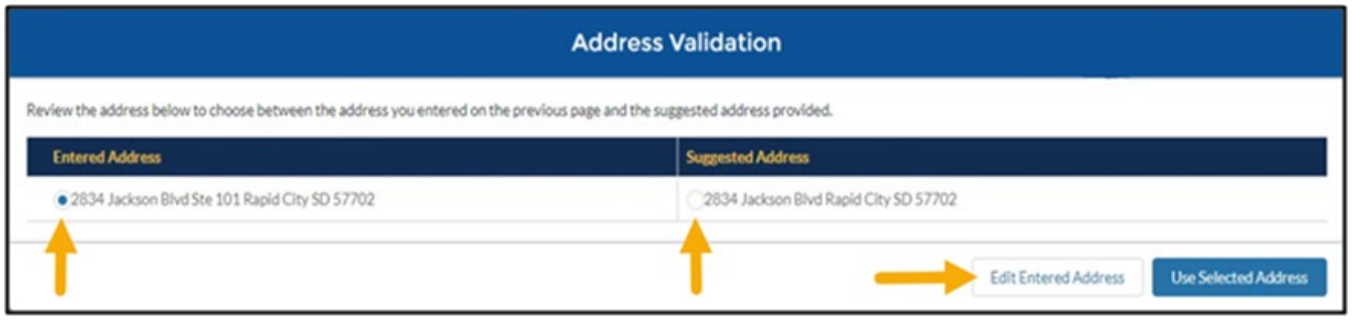


Figure 15: Address Validation

Step 6. Select one of the radio buttons under Display Settings.

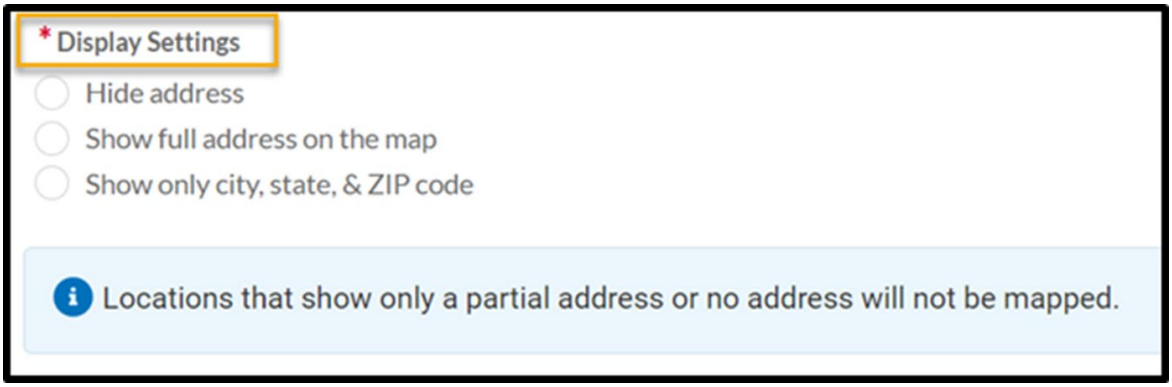


Figure 16: Display Settings Selection

Step 7. Enter your organization's contact information. The only required field is the main phone number; however, any additional contact information you can add is always helpful.

Figure 17: Contact Information Field

Step 8. Select all Specialized Services and Languages that you may offer at this location from the drop-down menus.

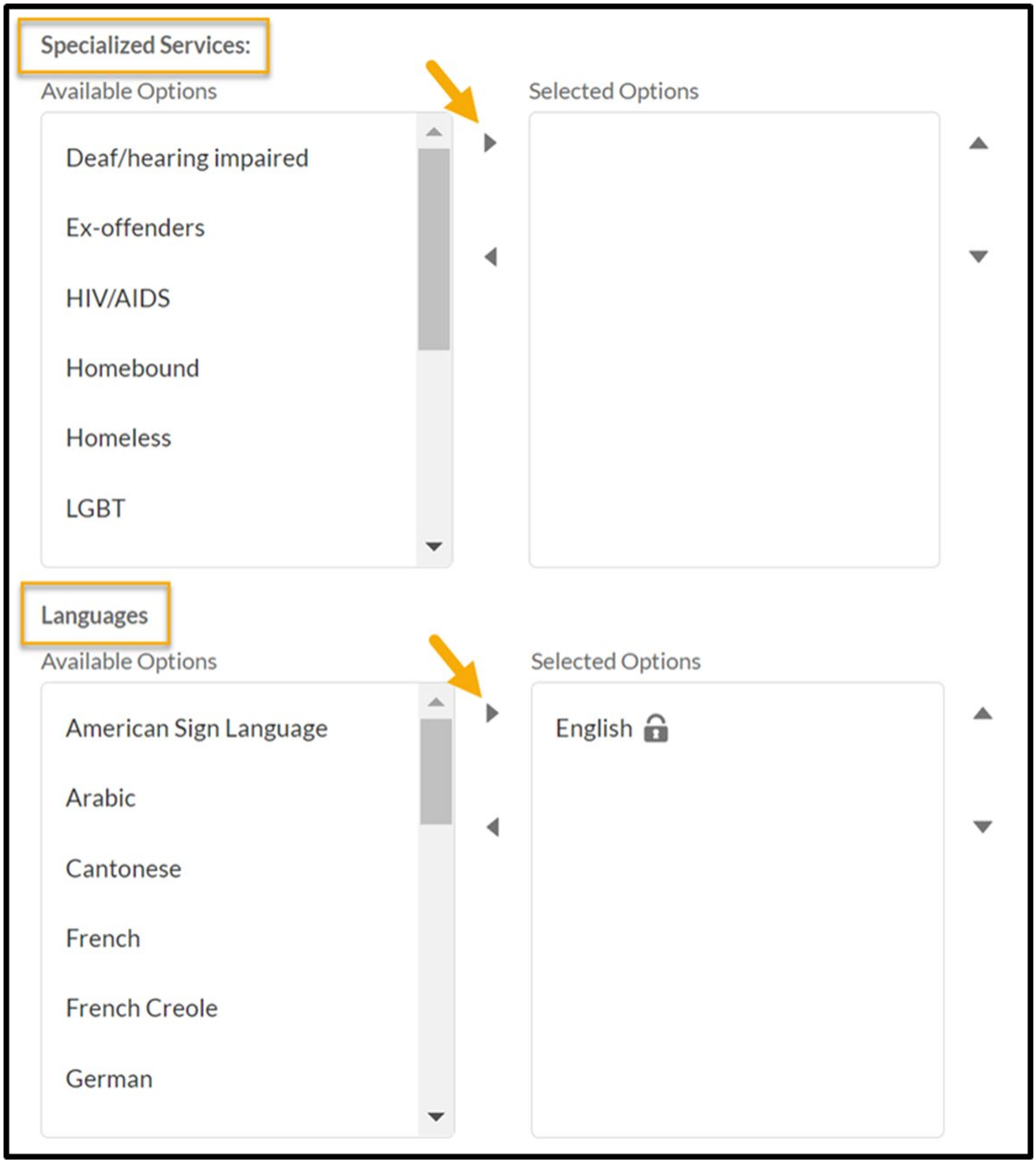


Figure 18: Specialized Services and Languages Menus

Step 9. Enter hours of operation. Select the box next to each day of the week this location offers assistance and select the hours from the drop-down menu.

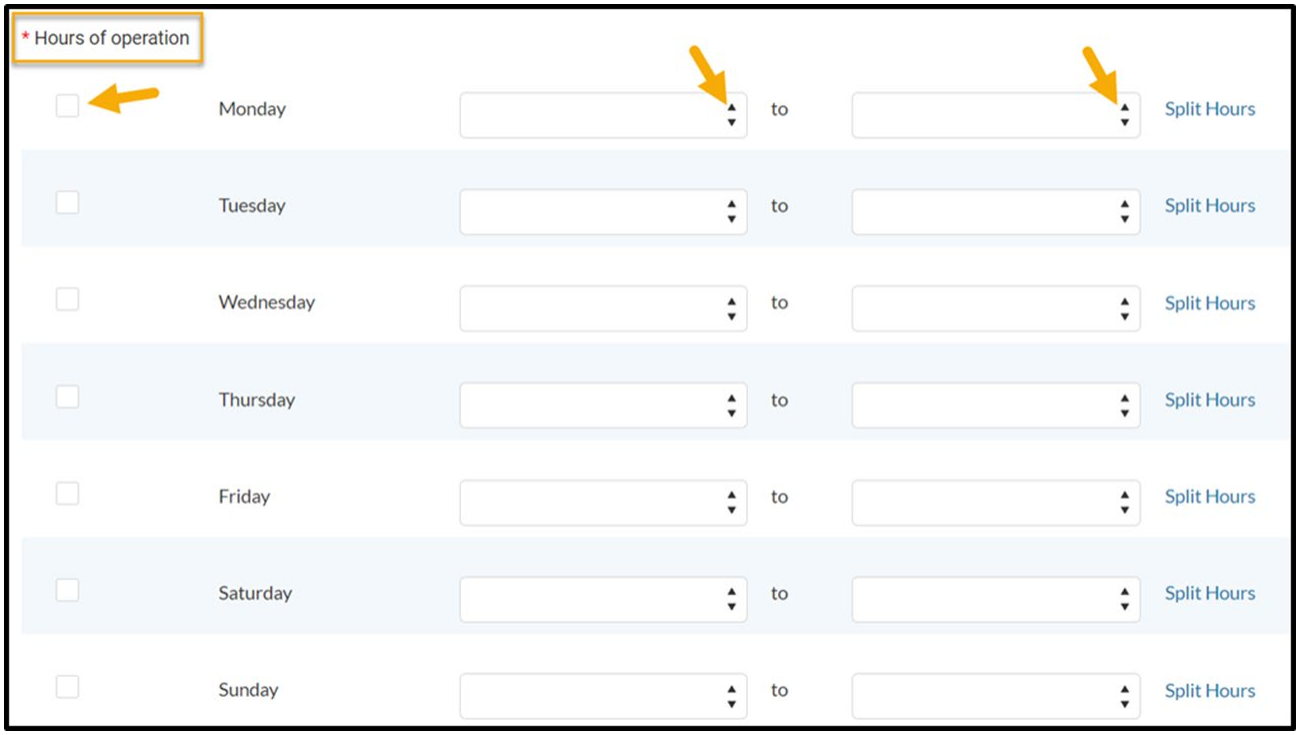


Figure 19: Hours of Operation Selection

Step 10. If applicable for this location, select **Split Hours** and enter the hours of operation. For example, this location may be available with the split hours of 9:00 AM to 3:00 PM and 5:00 PM to 8:00 PM on Monday and straight hours of 9:00 AM to 5:00 PM on Tuesday.

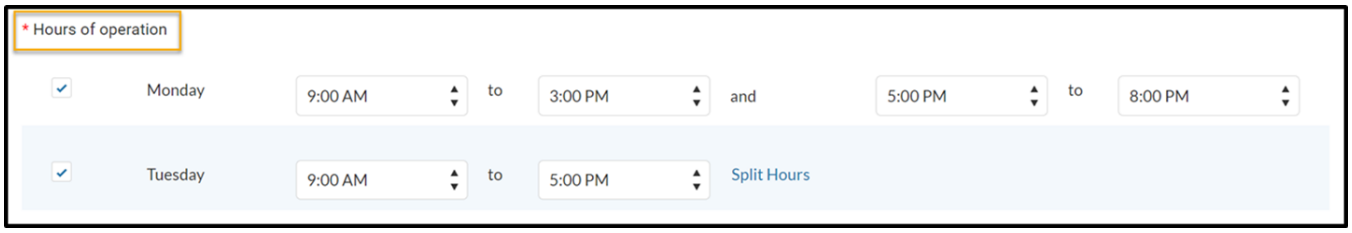


Figure 20: Hours of Operation - Split Hours

Step 11. Enter any instructions in the Special Instructions field as needed for this location. For example, if you want your consumers to use a particular entrance of your location's building, enter "Please use side entrance."

Figure 21: Special Instructions Text Box

Step 12. Select the appropriate navigation action to continue:

a. **Back** – Information is not submitted, and the system returns you to the "FLH Listings" page.

b. **Submit** – The system submits your request and returns you to the "FLH Listing(s)" page, and your request is viewable in the My Find Local Help (FLH) Locations Table.

c. **Submit & Add** – The system submits your request, and you remain on the "Add Location" page with all fields on the page reset so you can add another location.

d. **Logout** – You receive a message to confirm your logout. If you've entered No, the system returns you to the "Add Location" page**.** If you've entered Yes**,** the system returns you to the "Welcome" page.

Figure 22: Navigation Buttons

4. Adding a Duplicate Location Name

You can add multiple locations with the same location name and different location addresses. For example, you may have multiple locations with the same organization name. If the location name already exists in FLH for your organization, or you previously submitted a request for this location, you will receive a warming message when you submit the request.

To submit the request:

Step 1. Follow steps 1 through 12 in Section 3. Adding a Location.

Step 2. In the warning message box, select either **Change Location Name** or **Continue with Duplicate Name**.

a. **Change Location Name** – The system returns you to the Location Name field on the "Add Location" page for you to change the location name.

b. **Continue with Duplicate Name** – The system accepts the name you entered and returns you to the "FLH Listing(s)" page.

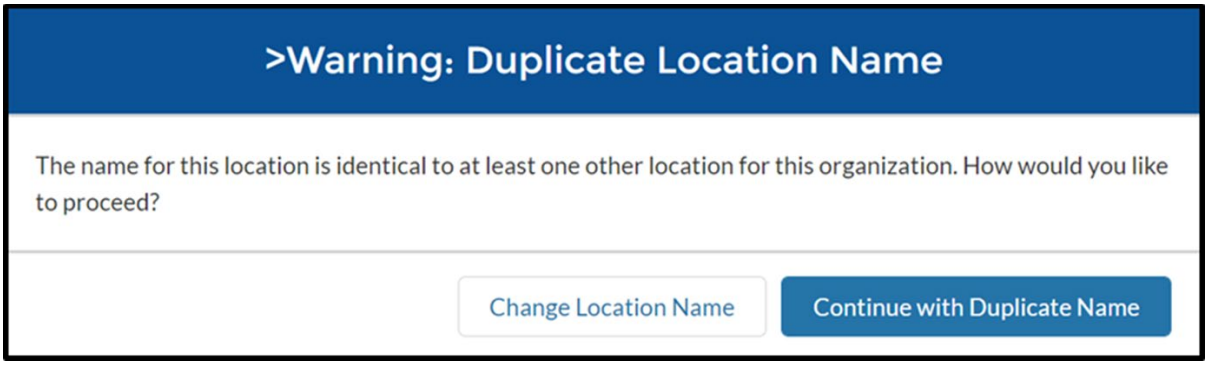


Figure 23: Location Name Warning Message

5. Correcting a Duplicate Location Address

You cannot add locations with the same location address for the same organization. If the location address already exists in the FLH tool for your organization, or you previously submitted a request for this location address, you will receive an error message when you submit the request. The system will return you to the "Add Location" page.

To correct a duplicate location address:

Step 1. Follow steps 1 through 10 in Section 3. Adding a Location.

Step 2. Select **Submit.**

6. Viewing a Location

To view a location:

Step 1. In the My Find Local Help (FLH) Locations table on the "FLH Listing(s)" page, select the location **Name** link.

Figure 24: Name Link on the FLH Listings Page

Step 2. Review the location information on the "View Location" page; you cannot edit any information on that page.

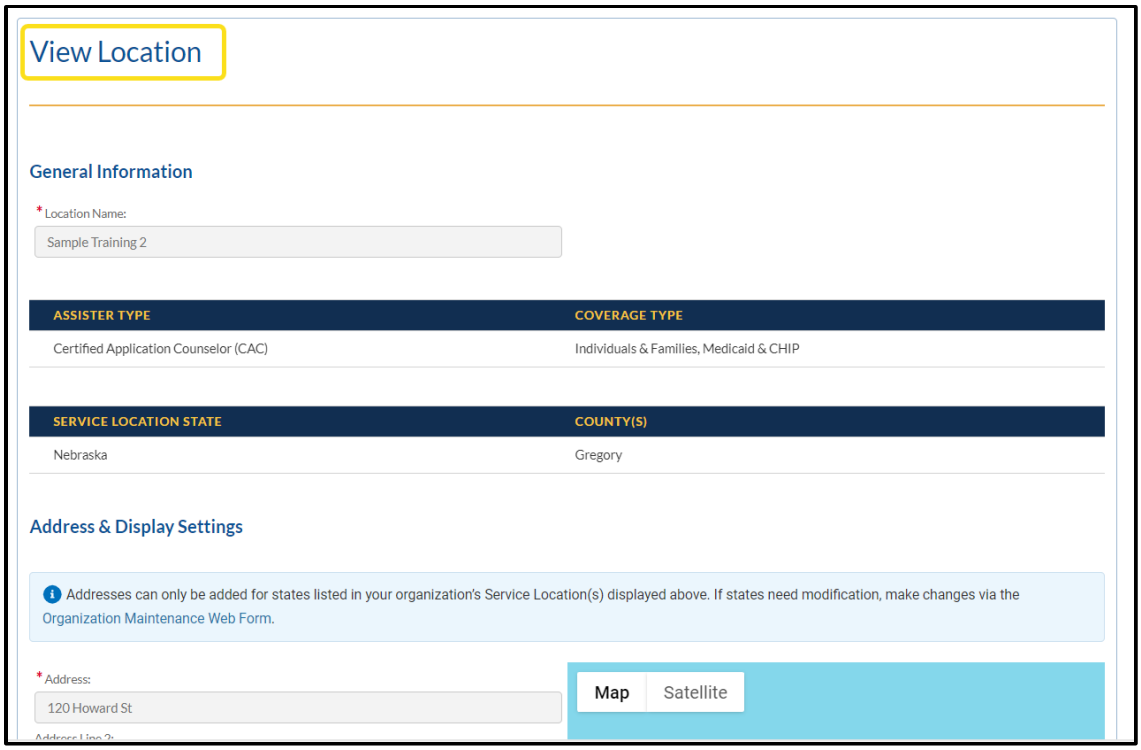


Figure 25: View Location on the FLH Listings Page

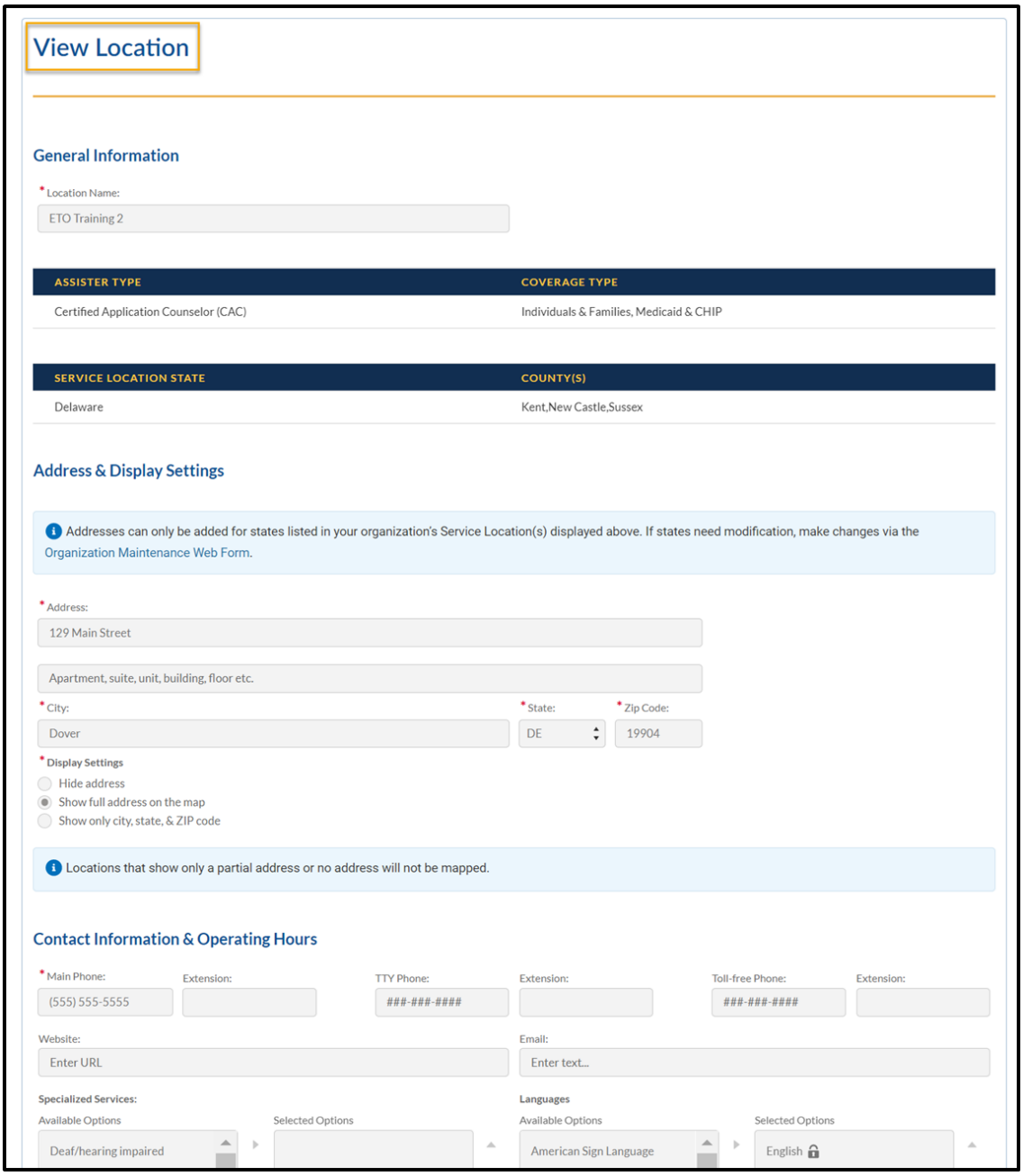


Figure 26: View Location Page

Step 3. Select the appropriate navigation action to continue.

a. **Back** – The system returns you to the "FLH Listing(s)" page.

b. **Logout** – You receive a message to confirm your logout:

i. No – the system returns you to the "View Location" page
ii. Yes – the system returns you to the "Welcome" page.

Figure 27: Back Button

Submitted locations are reviewed and either approved or rejected. To view the status:

Step 1. Go to the **My Find Local Help (FLH) Locations** table on the "FLH Listing(s)" page.

Step 2. Locate the Status column.

Each request will list one of the following statuses:

- **Add Requested** – Location submitted and awaiting review.
- **Listed** – Location is approved and is visible in the FLH Consumer Tool.
- **Unlisted** – Location is approved but is not visible in the FLH Consumer Tool.
- **Request Rejected** – Location request did not meet expectations. Changes are required to have the location reviewed again.
- **Change Requested** – Submitter has made changes to their information and require review and approval to continue. No changes can be made to the location when in this state. A caution icon will appear with a pop-over warning when a change has been requested.

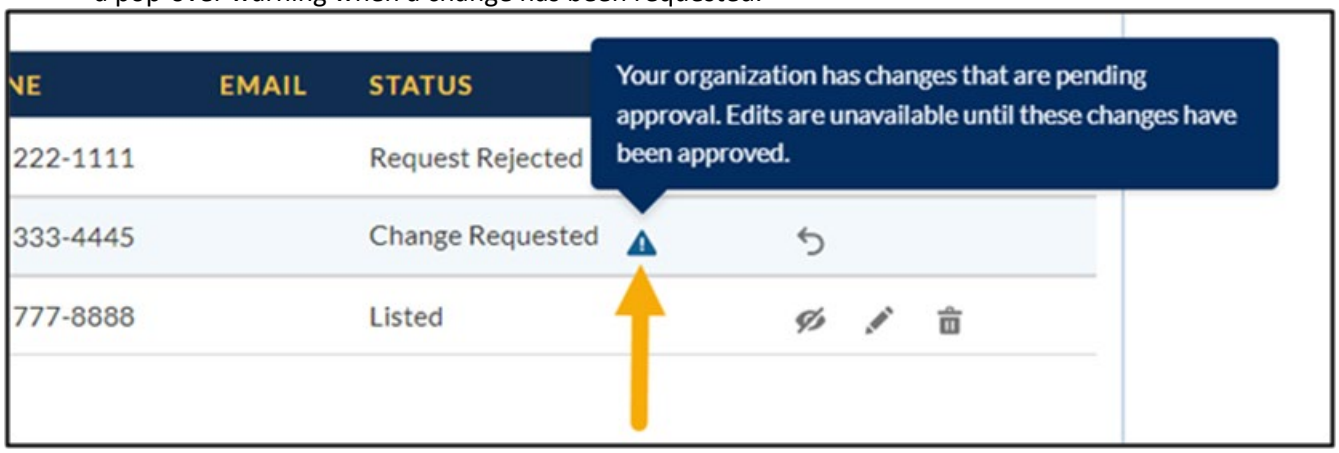


Figure 28: Change Requested Warning

7. Listing/Unlisting a Location

You can unlist a location, which will show it in an Unlisted status in the My Find Local Help (FLH) Locations table and will remove it from view in the FLH Consumer Tool. The removed location remains visible and accessible in the My Find Local Help (FLH) Locations table of the FLH Upkeep Tool for you to list again in the future if needed, such as for a seasonal location.

To list or unlist a location:

Step 1. On the "FLH Listing(s)" page, be sure the status of the location in the My Find Local Help (FLH) Locations table is in either Listed or Unlisted status.

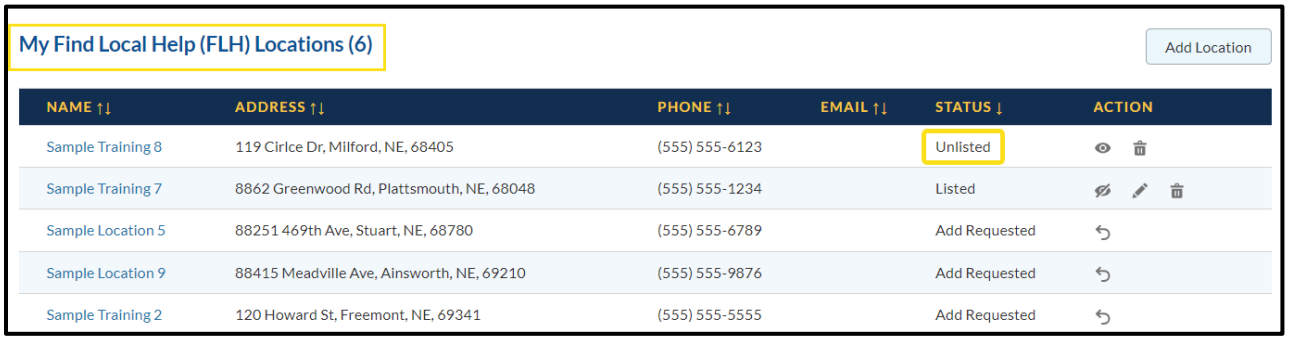


Figure 29: Location Status

Step 2. Select the list/unlist icon in the Action column on the My Find Local Help (FLH) Locations table to make the location visible or not visible on the FLH Consumer Tool.

Figure 30: List/Unlist Icon

8. Editing a Location

To edit a Find Local Help location:

Step 1. In the Action column on the My Find Local Help (FLH) Locations table of the "FLH Listing(s)" page, select the **pencil icon**.

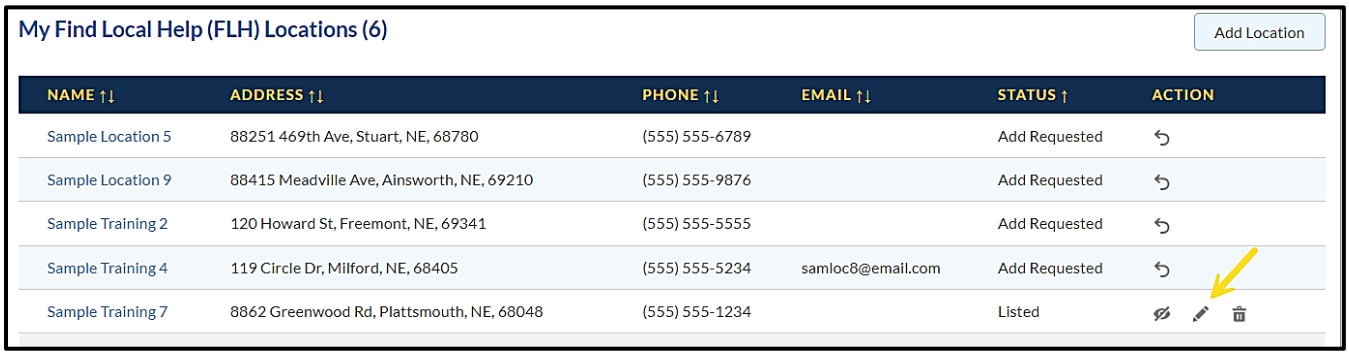


Figure 31: Location Edit Icon

Step 2. Review the information on the "Edit Locati**on"** page and edit as needed.

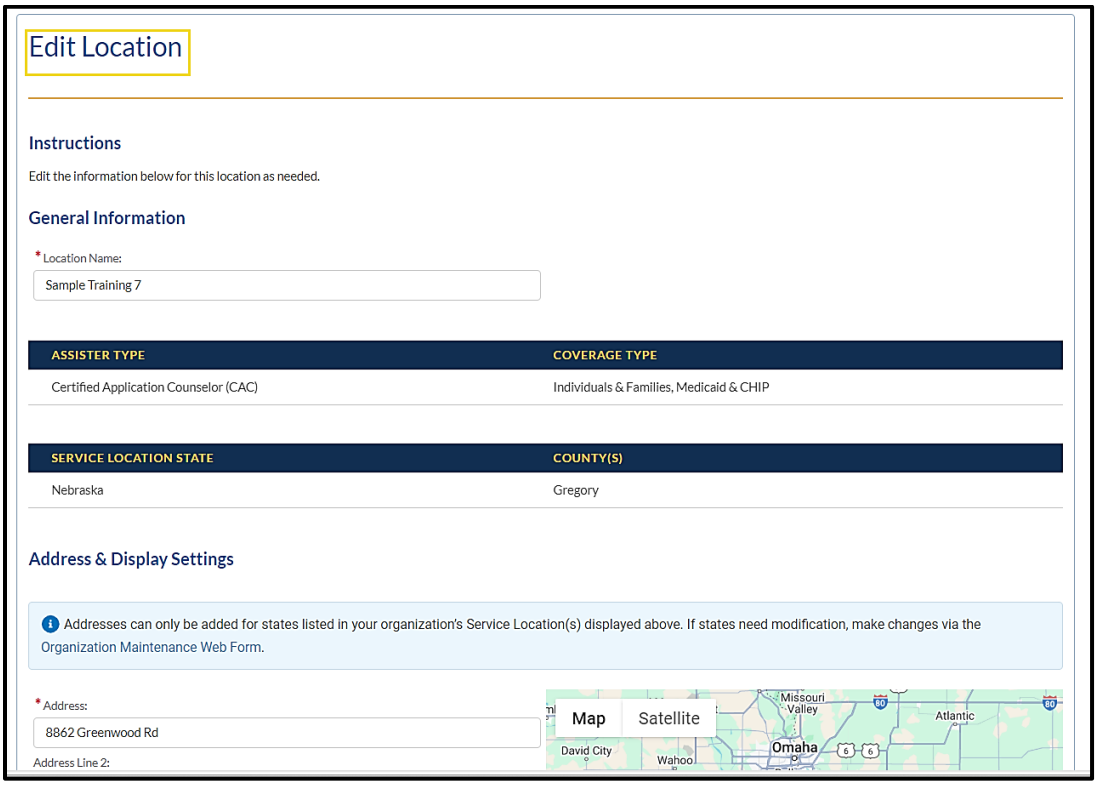


Figure 32: Edit Location Icon

Step 3. Select the appropriate navigation action.

a. **Back** – Information entered is not submitted, and the system returns you to the "FLH Listing(s)" page.
b. **Submit** – The system submits your request and returns you to the "FLH Listing(s)" page.
c. **Logout** – You receive a message to confirm your logout.
   i. **No** – The system returns you to the "Edit Location" page.
   ii. **Yes** – The system returns you to the "Welcome" page.

9. Recalling a Location Request

You can recall, or undo, a request while it is in a requested status by selecting the **recall icon**, and the system immediately removes the request.

To recall a location request:

Step 1. Select the **Recall icon** in the Action column on the My Find Local Help (FLH) Locations table.

Figure 33: Location Request Recall Icon

Step 2. Select **Yes** or **No** in the Recall Confirmation message window to confirm whether you want to recall the request.

a. Select **No** – The system returns you to the "FLH Listing(s)" page with no change to the request.
b. Select **Yes** – The system removes the request and returns you to the "FLH Listing(s)" page, and the request no longer displays on the My Find Local Help (FLH) table.

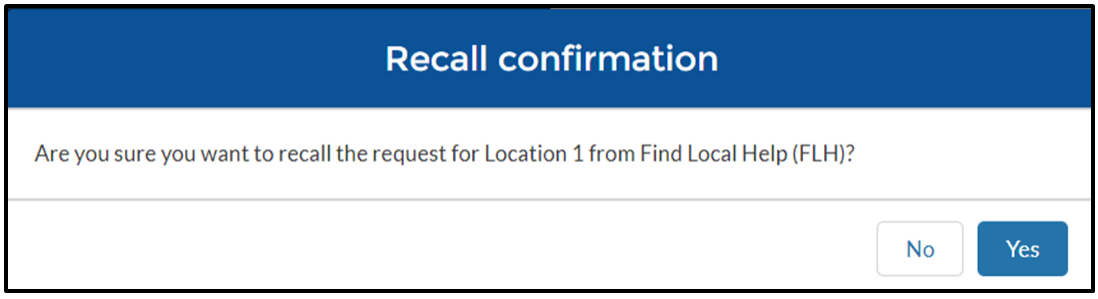


Figure 34: Recall Confirmation Message

10. Deleting a Location

You can permanently delete a location that is in an Unlisted status on the My Find Local Help (FLH) Locations table. Deleting the location will remove it from the My Find Local (FLH) Locations table and from the FLH Consumer Tool. The location will no longer be visible or accessible to you in the My Find Local Help (FLH) Locations table of the FLH Upkeep Tool.

To delete a location in Unlisted status:

Step 1. In the My Find Local Help (FLH) Locations table of the "FLH Listing(s)" page, select the **trash can icon** in the Action column.

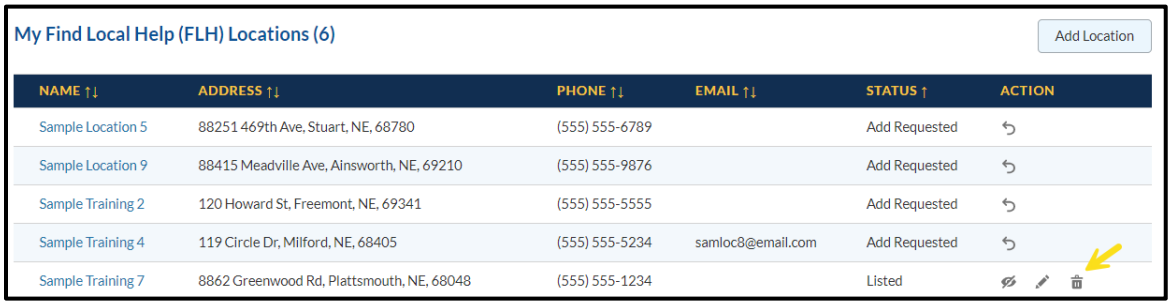


Figure 35: Location Delete Icon

Step 2. Select **Yes** or **No** in the Delete Confirmation message window to confirm whether you want to delete the location.

a. Select **No – T**he system returns you to the "FLH Listing(s)" page with no change to the location.

b. Select **Yes** – The system submits your request and returns you to the "FLH Listing(s)" page, and the location no longer displays on the **My Find Local Help (FLH)** table.

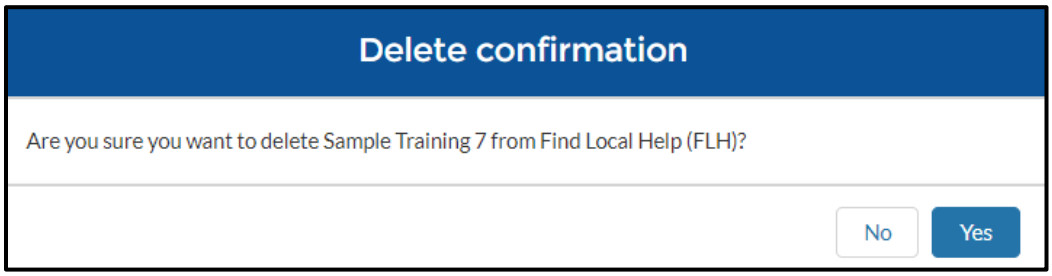


Figure 36: Delete Confirmation Message

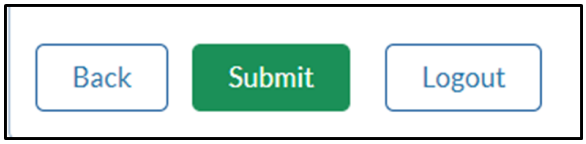


Figure 37: Navigation Buttons

11. Adding/Editing an Organization Location

To add or edit an organization location:

Step 1. In the Action column on the My Find Local Help (FLH) Locations table of the "FLH Listing(s)" page, select the **pencil icon**.

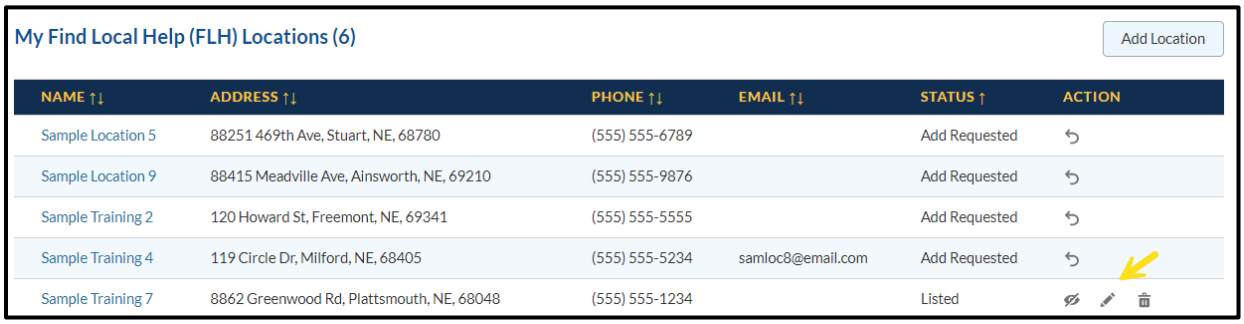


Figure 38: Location Edit Icon

Step 2. Review the information on the "Edit Location" page and edit the editable text fields as needed.

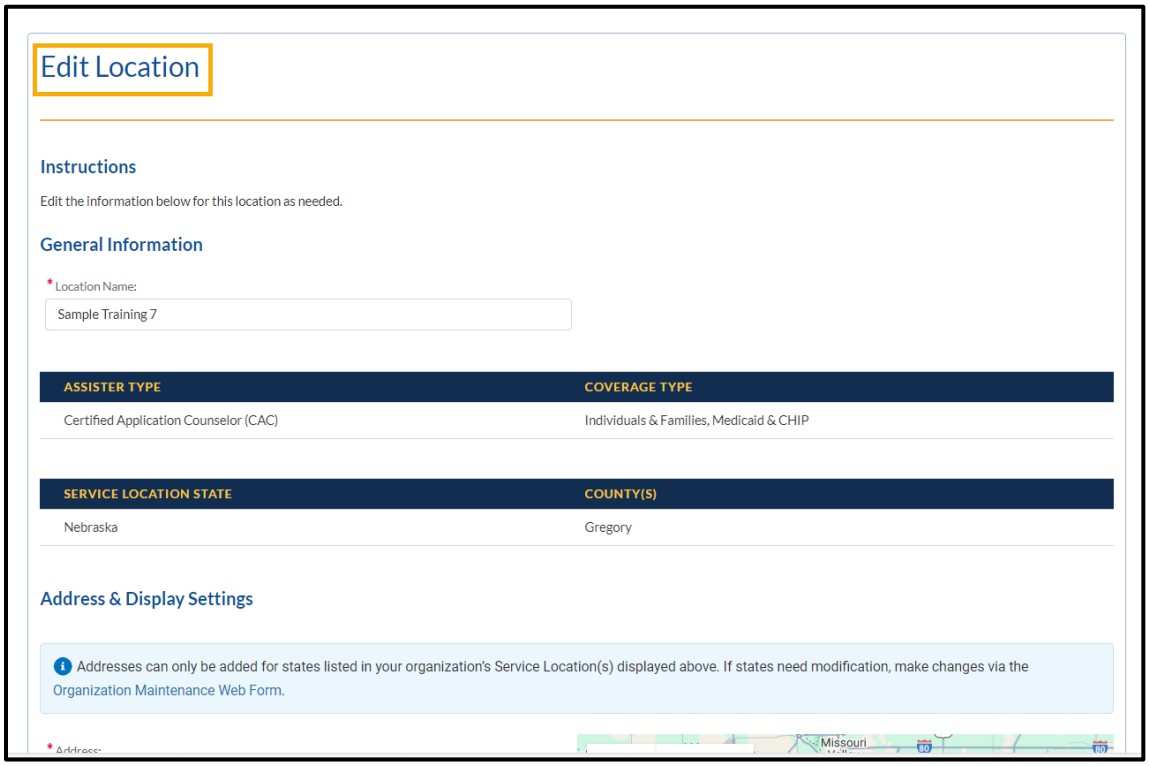


Figure 39: Edit Locations Page

Step 3. Select the appropriate navigation action:

a. **Back** – Information entered is not submitted, and the system returns you to the "FLH Listing(s)" page.
b. **Submit** – The system submits your request and returns you to the "FLH Listing(s)" page.
c. **Logout** – You receive a message to confirm your logout:
   i. **No** – The system returns you to the "Edit Location" page.
   ii. **Yes** – The system returns you to the "Welcome" page.

12. Adding/Editing an Organization Acronym

To add or edit an organization acronym:

Step 1. Select the **pencil icon** in the table at the top of the "FLH Listing(s)" page.

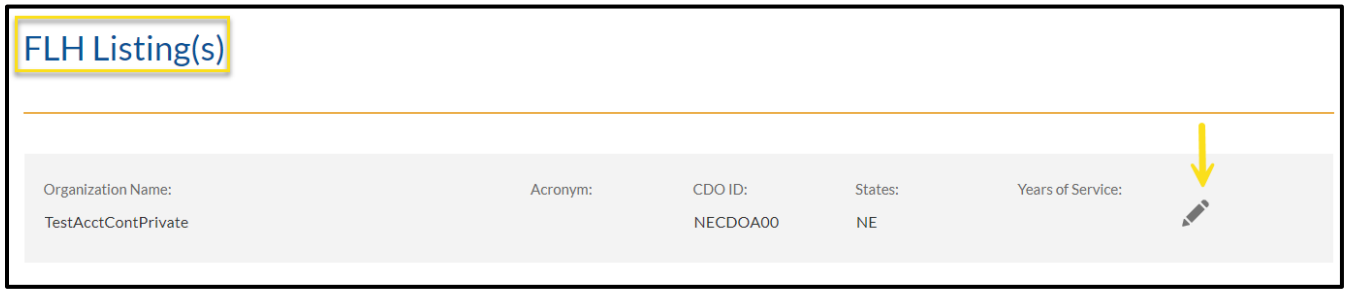


Figure 40: Organization Table Edit Pencil Icon

Step 2. Add or edit the acronym and select the **Save icon**.

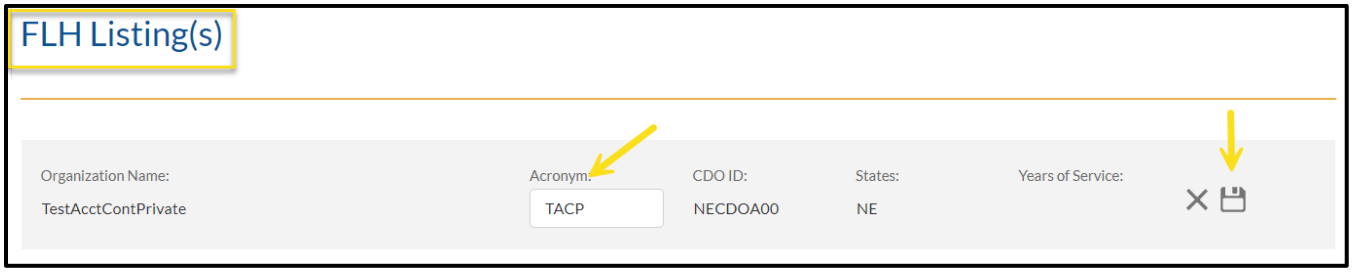


Figure 41: Organization Table Acronym Field and Save Icon

13. Viewing Submission Confirmation

To view and save confirmation of the submission(s) for your session:

Step 1. At the bottom of the My Find Local Help (FLH) Locations table on the "FLH Location(s)" page, select the **View Submission Confirmation** button.

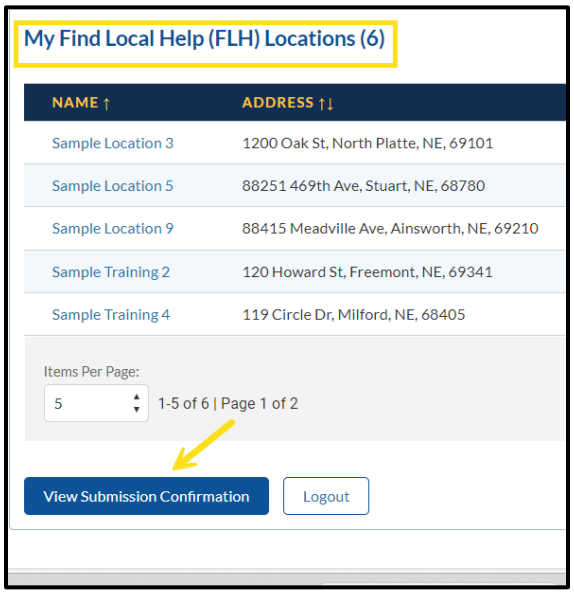


Figure 42: View Submission Confirmation Button

Step 2. Review the confirmation page of your session.

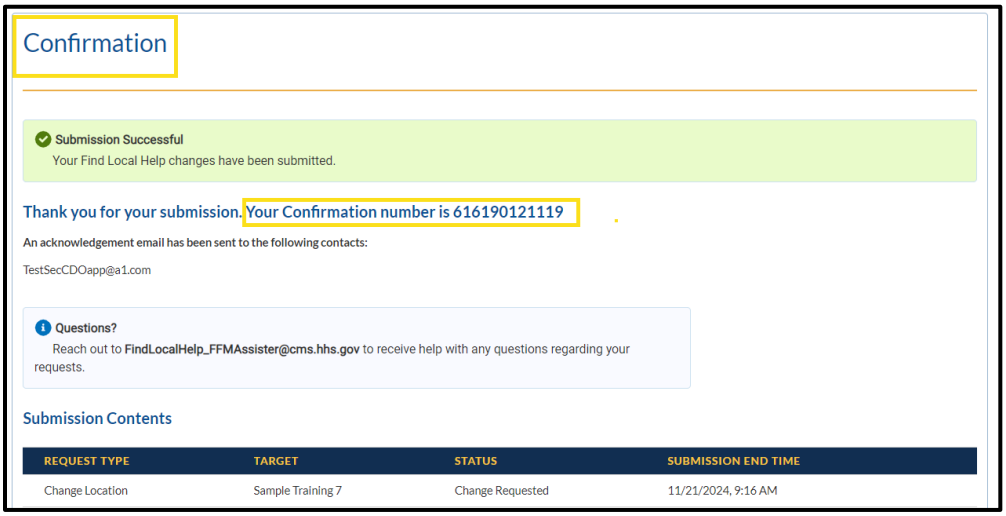


Figure 43: Submission Confirmation Page

Step 3. Select **Print PDF** to print or save the PDF confirmation for your records.

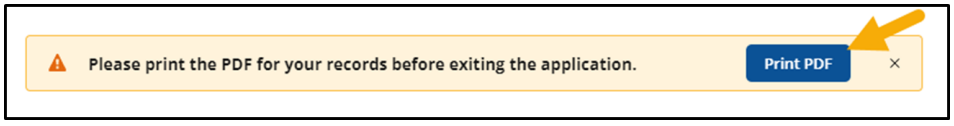


Figure 44: Print PDF Button

Step 4. Select **Logot** to end your session and return to the "FLH Welcome" page.

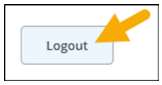
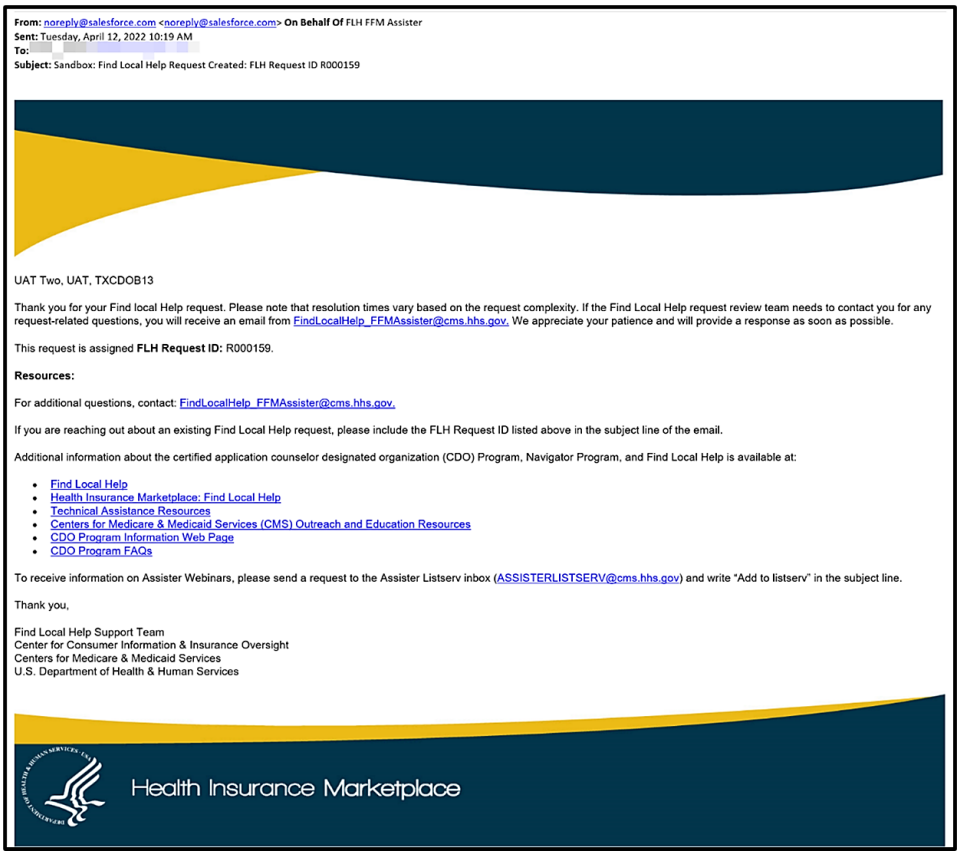


Figure 45: Logout Button

D. Email Communication

For each FLH Upkeep Tool request you submit, you will receive an acknowledgment email from FindLocalHelp_FFMAssister@cms.hhs.gov with a confirmation number and an email upon approval or rejection of your request. Email notifications keep you informed of your request from start to finish. A CMS team member may also contact you via email for additional information to process your request, if needed. Please be sure to check your spam or junk folder for these emails if you cannot find them in your inbox.

Figure 46 shows an example of an acknowledgment email you will receive upon submission of your FLH Upkeep Tool request.



From: noreply@salesforce.com <noreply@salesforce.com> **On Behalf Of** FLH FFM Assister
Sent: Tuesday, April 12, 2022 10:19 AM
To:
Subject: Sandbox: Find Local Help Request Created: FLH Request ID R000159

UAT Two, UAT, TXCDOB13

Thank you for your Find local Help request. Please note that resolution times vary based on the request complexity. If the Find Local Help request review team needs to contact you for any request-related questions, you will receive an email from FindLocalHelp_FFMAssister@cms.hhs.gov. We appreciate your patience and will provide a response as soon as possible.

This request is assigned **FLH Request ID:** R000159.

Resources:

For additional questions, contact: FindLocalHelp_FFMAssister@cms.hhs.gov.

If you are reaching out about an existing Find Local Help request, please include the FLH Request ID listed above in the subject line of the email.

Additional information about the certified application counselor designated organization (CDO) Program, Navigator Program, and Find Local Help is available at:

- Find Local Help
- Health Insurance Marketplace: Find Local Help
- Technical Assistance Resources
- Centers for Medicare & Medicaid Services (CMS) Outreach and Education Resources
- CDO Program Information Web Page
- CDO Program FAQs

To receive information on Assister Webinars, please send a request to the Assister Listserv inbox (ASSISTERLISTSERV@cms.hhs.gov) and write "Add to listserv" in the subject line.

Thank you,

Find Local Help Support Team
Center for Consumer Information & Insurance Oversight
Centers for Medicare & Medicaid Services
U.S. Department of Health & Human Services

Health Insurance Marketplace

Figure 46: Acknowledgement Email Communication Example

Email any questions to FindLocalHelp FFMAssisters@cms.hhs.gov. Be sure to include your organization's name and CDO, EAP, or Navigator ID in the body of your email. Note: Do not submit FLH requests to this email address. Submit change requests for the FLH Upkeep Tool at Assisters.cms.gov/flhupkeep.