**EXCERPTS FROM SECTIONS RELATING TO NAVIGATORS AND IN-PERSON ASSISTANCE IN THE EXCHANGE ESTABLISHMENT GRANT FUNDING OPPORTUNITY ANNOUNCEMENT AND**

**EXCHANGE BLUEPRINT**

**For State-Based Exchanges**

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**Navigators (Required)**

The  Exchange  has  established  or  has  a  process  in  place  to  establish  and  operate  a  Navigator   program  that  is  consistent  with  the  applicable  requirements  of  the  program  specified  in  45  CFR   §  155.210,  including  the  development  of  training  and  conflict  of  interest  standards,  and   adherence  to  privacy  and  security  standards  specified  in  45  CFR  §  155.210  and  45  CFR  §   155.260.

**In-Person Assistance Program (Optional)**

The  Exchange  has  established  an  in­person  assistance  program  distinct  from  the  Navigator   program,  and  has  a  process  in  place  to  operate  the  program  consistent  with  the  applicable   requirements  of  45  CFR  155.205(c),  (d),  and  (e).

CFR 45 §155.205 (c) Accessibility. Information must be provided to applicants and enrollees in plain language and in a manner that is accessible and timely to—

(1) Individuals living with disabilities including accessible Web sites and the provision of auxiliary aids and services at no cost to the individual in accordance with the Americans with Disabilities Act and section 504 of the Rehabilitation Act.

(2) Individuals who are limited English proficient through the provision of language services at no cost to the individual, including

(i) Oral interpretation; (ii) Written translations; and (iii) Taglines in non-English languages indicating the availability of language services.

(3) Inform individuals of the availability of the services described in paragraphs (c)(1) and (2) of this section and how to access such services.

(d) Consumer assistance. The Exchange must have a consumer assistance function that meets the standards in paragraph (c) of this section, including the Navigator program described in § 155.210, and must refer consumers to consumer assistance programs in the State when available and appropriate.

(e) Outreach and education. The Exchange must conduct outreach and education activities that meet the standards in paragraph (c) of this section to educate consumers about the Exchange and insurance affordability programs to encourage participation.

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**Navigators**

2.6 The Exchange has established or has a process in place to establish and operate a Navigator program that is consistent with the applicable requirements of 45 CFR 155.210, including the development of training and conflict of interest standards, and adherence to privacy and security standards specified in 45 CFR 155.210 and 45 CFR 155.260.

2.6a The Exchange has established or has a process in place to establish and operate a Navigator program that is consistent with the applicable requirements specified in 45 CFR 155.210 and 45 CFR 155.260.

2.6b The Exchange has a plan for the ongoing funding of an Exchange Navigator program, in order to award at least two (2) types of entities, one of which is a community or consumer- focused organization or non-profit entity. Grant agreements ensure that Navigator grantees (“Navigators”) will conduct the five (5) duties outlined in 45 CFR 155.210(e).

2.6c The Exchange has begun to develop training and conflict of interest standards for Navigators.

Supporting Documentation

Brief description of Exchange’s plan to operate a Navigator program, including documentation outlining the Exchange’s progress in developing conflict of interest and training standards; how it will ensure Navigators are appropriately trained and meet the Exchange’s conflict of interest, privacy and security standards; and a timeline and strategy for funding for the Navigator program and making the program fully operational.

**In-Person Assistance**

2.7 *If applicable:* The Exchange has established an in-person assistance program distinct from the Navigator program and has a process in place to operate the program consistent with the applicable requirements of 45 CFR 155.20(c), (d), and (e).

Documentation Required

Brief description of Exchange’s plan to operate an in- person assistance program distinct from the Navigator program, which provides in-person assistance to consumers, including documentation outlining the Exchange’s progress in developing conflict of interest and training standards; how it will ensure in-person assistance program staff are appropriately trained and meet the Exchange’s conflict of interest, accessibility, and privacy and security standards; and a timeline and strategy for funding for the in-person assistance program and making the program fully operational.

**For State Partner Exchange Activities**

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Consumer and Stakeholder Engagement and Support

**Navigators**

The  appropriate  State  entity  has  established  or  has  a  process  in  place  to  support,   administer,   and  oversee  (as  applicable)  aspects  of  the  FFE  Navigator  program  consistent   with  the  applicable  requirements  of  45  CFR  155.210,  including  ensuring  that  Navigators  are   adhering  to  the  training  and  conflict  of  interest  standards  established  by  the  FFE  and  to  the   privacy  and  security   standards  developed  by  the  FFE  pursuant  to  45  CFR  155.260.

**In-Person Assistance**

The appropriate State entity has established an in-person assistance program distinct from the Navigator program, and has a process in place to operate the program consistent with FFE guidance, policies and procedures.

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**13.3a Navigators**

The appropriate State entity has established or has a process in place to support, administer, and oversee (as applicable) aspects of the Federally-facilitated Exchange Navigator program consistent with the applicable requirements of 45 CFR 155.210, including ensuring that Navigators are adhering to the training and conflict of interest standards established by the Federally- facilitated Exchange and to the privacy and security standards developed by the Federally-facilitated Exchange pursuant to 45 CFR 155.260.

Documentation Required

Brief description of the appropriate State entity’s plan to operate a Navigator program, including how it will ensure Navigators are appropriately trained and meet the Federally-facilitated Exchange’s conflict of interest, privacy and security standards.

**13.3b In-Person Assisters**

The appropriate State entity has established an in-person assistance program distinct from the Navigator program, and has a process in place to operate the program consistent with Federally-facilitated Exchange guidance, policies, and procedures.

Documentation Required

Brief description of the appropriate State entity’s plan to operate an in-person assistance program including documentation outlining how it will meet the requirements set out in Federally-facilitated Exchange guidance, policies, and procedures.