Job Aids for

Certified Enrollment Counselors

#	CoveredCA Job Aids
1	Navigating the Covered CA Home Page
2	Logging into Covered California
3	Create an Individual Account
4	Create an Employer Account
5	Create a Certified Enrollment Counselor Account
6	Create and Manage Authorized Representatives
7	Uploading Verification Documents
8	Complete an Individual Application
9	Complete a SHOP Application
10	Review Eligibility Results
11	Covered California Plan Selection
12	Retrieve Account Security Details
13	Accessing Covered California Support Tools

October 1, 2013

JOB AID: NAVIGATING THE COVERED CALIFORNIA HOME PAGE

October 1, 2013

Get to know the Covered California home page, including available support tools.

Covered California is a self-service portal – all Covered California functions are available directly from the site. The Covered California portal will be your main tool for assisting consumers in applying for healthcare coverage, evaluating their options and ultimately enrolling in a Covered California health plan.

Support Tools include:

- Live Chat
- Help
  - FAQs
  - Video Demonstrations
  - Locate Assistance
- Contact Us
- Pre-screen Household Eligibility
- Household Subsidy Calculator

Utility Bar

The utility bar is always located in the header regardless of the page you are on. It includes global links and buttons to resources and site functions. Utility Bar features include:

Home Button

After you log in, the **Home** button will always display in the utility bar. Use the Home button to jump back to the *Home* page from any location on the site.

NOTE: there is no **Home** button on the pre-login landing page.

Create Account link

The **Create Account** link is the starting point for creating an account with Covered California. You will provide personal information and create a username, password, Electronic Signature Personal Identification Number (PIN), and security questions.

NOTE: Creating an account is only the first step in applying for coverage; it does not commit you to applying or enrolling in a plan.

Log In link

After you set up a Covered California account, you can sign in through the **Log In** link.

Text Size Selector

The **Text Size Selector** lets you change the page text size. Medium is the default text size.

- Click on largest **"A"** in the **Text Size Selector** link to increase the font size to large
- Click on the smallest **"A"** in the **Text Size Selector** link decrease the font size to small
- Click on the middle **"A"** in the **Text Size Selector** link return the font size to medium

Language Selector

The **Language Selector** link lets you switch between English content and Spanish content.

- Click on the **Español** link to view the page in Spanish
- Once the page is in Spanish, the **Language Selector** link displays in English
- Click on the **English** link to view the page in English

Online Chat

You can connect with a Service Center Representative (SCR) through live chat.

- Click on the **Online Chat** link
- The *Live Chat* popup displays
- This dialog connects you to a Covered California Service Center employee who can answer your questions.
- Click on the **Español** link in the upper left-hand corner of the *Live Chat* popup to get help from a Spanish speaking SCR.

Find Help Near You

Consumers will use the **Find Help Near You** link to find a Covered California Certified Enrollment Counselor or Certified Insurance Agent in their area.

Help

The **Help** button gives you access to support resources.

Announcements

The **Announcements** section displays messages about policy updates, deadlines, and events.

Information

You can find more information about health care plans for an **Individual or Family**, an **Employer**, or an **Employee**.

- Click on the **Go** button in the relevant panel to view additional information for that type of consumer

Contact Us

The **Contact Us** page displays various modes of communicating with Covered California. Communicate with Covered California by:

- Phone number
- Online Chat
- Mail

Consumers will use **Locate Assistance** to identify and contact an Assister in their area.

External Links

The **External Links** section contains links to Covered California partners. Explore any of these links to learn about the policies that drive Covered California.

Footer

The footer area contains the following links:

About Us

The **About Us** link opens a page with general information about the purpose of Covered California.

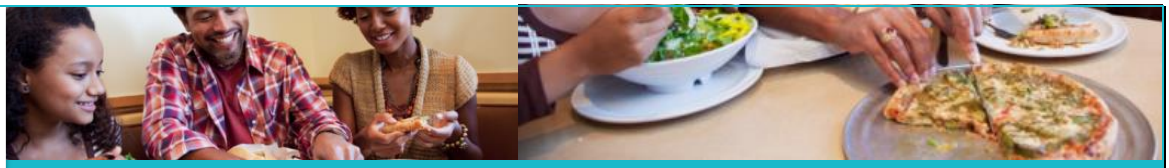
Mission Statement

The **Mission Statement** link takes you to Covered California's Mission Statement.

Contact Us

The **Contact Us** page displays various modes of communicating with Covered California. Communicate with Covered California by:

- Phone number
- Online Chat



JOB AID: LOGGING INTO COVERED CALIFORNIA

October 1, 2013

Log into your Covered California account

If you already have a Covered California account, here is how to log in:

- Go to the Covered California home page at www.CoveredCA.com
- Click the **Log In** link at the top of the page – the *Log In* page displays
- Select the **Username** field, type in your username
- Select the **Password** field, type in your password
- Click the **Login** button

If you correctly entered your valid username and password, the *Select Role* page displays.

You may have one or more roles linked to your username. For example you have an account for yourself and your family, but you also act as an Authorized Representative for someone else, or perhaps you have an account as an Insurance Agent. The **Select Role** section allows you to select the role you use to log into Covered California.

Problems?

If you cannot remember your username or your password:

- Click on the **Forgot your username or password?** link
- The *Retrieve Account Details: Your Information* page will display
- Enter your information, verify your identity and retrieve your information
- Call Covered California Customer Service if you need assistance recovering your username or resetting your password

Multiple Attempts

Note that after three or more consecutive unsuccessful log in attempts, your account is automatically locked for 24 hours.

- Click on the **Forgot your username or password?** link
- The *Retrieve Account Details: Your Information* page will display
- Call Covered California Customer Service for help unlocking your account, and with recovering your username or resetting your password, if needed

JOB AID: CREATE AN INDIVIDUAL ACCOUNT

October 1, 2013

Your Covered California Account

If you are new to Covered California, you must first create an account before you can apply for health care coverage for your family or yourself. With your Covered California account you can start the process of comparing health insurance plans, seeing if you qualify for premium assistance, and applying for a plan for you and your family. Your account is where you will manage and keep track of your coverage once you're enrolled in a plan.

- Go to the Covered California home page at www.CoveredCA.com
- Click the **Create Account** link at the top of the page – the *Create a New User Account* page displays
- Click on the **Continue** button in the **INDIVIDUAL OR FAMILY** box

Account Creation Process

The left-side navigation panel shows five steps to create an account. After completing each section, a check mark replaces the step number. Fields that require information are marked with red asterisks.

1. Agree to the **Terms and Conditions**:
    a. Click on the **View the Terms and Conditions** link and read the information that displays in the **Terms and Conditions** popup
    b. Click on the **Close** button in the popup
    c. Click on the **Check this box to show you agree to the terms and conditions** checkbox
    d. Click **Continue**
2. Enter information about you (**User Information**):
    a. Enter the **First Name** field
    b. Enter the **Last Name** field
    c. Enter the **Date of Birth** field
    d. Enter the **Social Security Number** field (optional)
    e. Covered California sends notifications to a personal secure mailbox that is part of your account. You can also tell us how to let you know that a message is waiting (note that we are required to send some information by mail). Tell us your preferred method of communication, choosing either Email, Phone, or Mail:
        i. Select the **Preferred method of communication** dropdown
        ii. Select **Email, Mail or Phone** from the dropdown list
    f. Click **Continue**

System Check for Duplicates

At this point, the system checks what you have entered to see if you already have an account. This prevents duplicate accounts. A popup will display advising you to log into that account, continue and create a new account, or contact the Covered California Service Center if you need help resolving the issue.

3. Enter your **Contact Information:**
   a. Enter the **Street Address 1** field
   b. Enter the **Street Address 2** field (optional)
   c. Enter the **City** field
   d. Confirm that **CA** displays in the **State** field, or select a different state if your address is in a different state
   e. Enter the **Zip Code** field
   f. Enter the **Email** field (optional)
   g. Enter the **Phone Number** field (optional)
   h. Click **Continue**

Postal Address Validation

Before moving on, we validate the address you entered against the United States Postal Service. A popup dialog appears showing any close or exact matches with your address. You may select an address presented from the USPS comparison or choose to keep your own entry.

4. Create your **Username and Password** – this is your first line of defense in keeping your information safe and confidential. To make it more difficult to break, your username must contain eight or more characters and your password must have eight or more characters, including at least one letter and one number. Your password cannot be the same as or similar to your username.
   a. Type your chosen username into the **Username** field
   b. Type your password into the **Password** field
   c. Retype your password into the **Re-enter Password** field to confirm it

   You are also asked to create an **Electronic Signature Personal Identification Number**. You use this **PIN** to sign documents electronically. Your **PIN** must have four numbers.

   d. Type a 4-digit PIN of your choice into the **Electronic Signature PIN** field
   e. Retype your PIN into the **Re-enter Electronic Signature PIN** field to confirm it
   f. Click **Continue**
5. View your **Account Summary** – When you finish entering information for your account and there are check marks next to the first four steps in the left navigation panel, you can give your information one last review. The screen will show three sections – User Information, Contact Information, and Username & Password.
   a. Click the **Edit** button within a section if you need to update any information

b. Otherwise, click **Continue** to save your information and create your account
c. You'll see a popup indicating that you successfully created an account. Click the **Log In** button to go to the *Log In* page and get started.

JOB AID: CREATE AN EMPLOYER ACCOUNT

October 1, 2013

Your Covered California Employer Account

Before you can apply for the Small Business Health Options Program (SHOP) through Covered California and select health insurance plans to offer your employees, you must create an account. With an account you can start the SHOP application process, check your eligibility for tax credits, and compare Covered California plans. Your Employer account is where you submit your SHOP application, add your employee roster, select your contribution amount, and much more.

- Go to the Covered California homepage at www.CoveredCA.com
- Click the **Create Account** link at the top of the page – the *Create an Account* page displays
- Click the **Continue** button in the **Employer** box

Account Creation Process

The left-side navigation panel shows six steps to create an account. After completing each section, a check mark replaces the step number. Fields that require information are marked with red asterisks.

1. Agree to the **Terms and Conditions**:
    a. Click on the **View the Terms and Conditions** link and read the information that displays in the **Terms and Conditions** popup
    b. Click on the **Close** button in the popup
    c. Click on the **Check this box to show you agree to the terms and conditions** checkbox
    d. Click **Continue**
2. Enter your **Business Information** on the next page
    a. Enter your **Business Legal Name**
    b. Enter your **Federal Employer Identification Number**
    c. Enter your **State Employer Identification Number**
    d. If necessary, check the box to indicate that one or both employer identification numbers are not available
    e. Click **Continue**

System Check for Duplicates

At this point, the system checks what you have entered to see if you already have an account. If so, a popup will display advising you to log into that account or contact the Covered California Service Center if you need help resolving the issue.

3. Enter information about you (**User Information**):
    a. Enter the **First Name** field
    b. Enter the **Last Name** field
    c. Enter the **Date of Birth** field
    d. Enter the **Social Security Number** field
    e. Covered California sends notifications to a personal secure mailbox that is part of your account. You can also tell us how to let you know that a message is waiting (note that we are required to send some information by mail). Tell us your preferred method of communication, choosing either Email, Phone, or Mail:
        i. Select the **Preferred method of communication** dropdown
        ii. Select **Email, Mail or Phone** from the dropdown list
    f. Click **Continue**
4. Enter your **Contact Information:**
    a. Enter the **Street Address 1** field
    b. Enter the **Street Address 2** field (optional)
    c. Enter the **City** field
    d. Enter the **Zip Code** field
    e. Enter the **Email** field
    f. Enter the **Phone Number** field
    g. Click **Continue**

Postal Address Validation

Before moving on, we validate the address you entered against the United States Postal Service. A popup dialog appears showing any close or exact matches with your address. You may select an address presented from the USPS comparison or choose to keep your own entry.

5. Create your **Username and Password** – this is your first line of defense in keeping your information safe and confidential. To make it more difficult to break, your username must contain eight or more characters and your password must have eight or more characters, including at least one letter and one number. Your password cannot be the same as or similar to your username. You are also asked to create an **Electronic Signature Personal Identification Number (PIN)**. You use this PIN to sign documents electronically. Your PIN must have four numbers.
    a. Type your chosen username into the **Username** field – 8 or more letters and numbers

   b. Type your password into the **Password** field – 6 or more letters and numbers
   c. Retype your password into the **Re-enter Password** field to confirm it
   d. Type a 4-digit PIN of your choice into the **Electronic Signature PIN** field
   e. Retype your PIN into the **Re-enter Electronic Signature PIN** field to confirm it
   f. Click **Continue**

6. View your **Account Summary** – When you finish entering information for your account and there are check marks next to the first five steps in the left navigation panel, you can give your information one last review. The screen will show three sections – User Information, Contact Information, and Username & Password.
   a. Click the **Edit** button within a section if you need to update any information
   b. Otherwise, click **Continue** to save your information and create your account
   c. You'll see a popup indicating that you successfully created an account. Click the **Log In** button to go to the *Log In* page and get started.

JOB AID: CREATE A CERTIFIED ENROLLMENT COUNSELOR ACCOUNT

October 1, 2013

Your Covered California Certified Enrollment Counselor Account

When you complete and pass all the requirements of your Certified Enrollment Counselor training, that information is recorded in the Covered California Learning Management System (LMS). An Enrollment Counselor Manager for Covered California manually verifies this and changes your Certification Status to **Certified**.

CalHEERS, the Covered California system, sends a notice to your Certified Enrollment Entity (your employer) that includes your certification number and delegation code. Your Certified Enrollment Entity then gives you your delegation code, certification number, and the Entity's legal business name, which you use to create your Certified Enrollment Counselor Account on the portal.

You may be employed by more than one Enrollment Entity. You will have only one Certification Number given to you by Covered California; however, you will receive a new Delegation Code and create a new account for each of your Enrollment Entities.

- Go to the Covered California homepage at www.CoveredCA.com
- Click the **Create Account** link at the top of the page – the *Create a New User Account* page displays
- Click **Continue** in the **Certified Enrollment Counselor** box

Account Creation Process

The left-side navigation panel shows six steps to create an account. After completing each section, a check mark replaces the step number. Fields that require information are marked with red asterisks.

You must have a delegation code, your certification number and your Certified Enrollment Entity's business legal name to create your Certified Enrollment Counselor account. If you do not have this information, contact your Certified Enrollment Entity.

1. After clicking **Continue**, the *Set Up an Account – With Your Delegation Code* page displays
    a. Enter your delegation code in the first field labeled **Delegation Code**
    b. Enter the legal **Business Name (Legal)** of the Enrollment Entity with which you are associated
    c. Enter your **Certification Number**
    d. Click **Continue**

2. Agree to the **Terms and Conditions**:
    a. Click on the **View the Terms and Conditions** link and read the information that displays in the **Terms and Conditions** popup
    b. Click on the **Close** button in the popup
    c. Click on the **Check this box to show you agree to the terms and conditions** checkbox
    d. Click **Continue**
3. Enter information about you (**User Information**):
    a. Enter the **First Name** field
    b. Enter the **Last Name** field
    c. Enter the **Date of Birth** field
    d. Enter the **Social Security Number** field
    e. Covered California sends notifications to a personal secure mailbox that is part of your account. You can also tell us how to let you know that a message is waiting (note that we are required to send some information by mail). Tell us your preferred method of communication, choosing either Email, Phone, or Mail:
        i. Select the **Preferred method of communication** dropdown
        ii. Select **Email, Mail or Phone** from the dropdown list
    f. Click **Continue**
4. Enter your **Contact Information:**
    a. Enter the **Street Address 1** field
    b. Enter the **Street Address 2** field (optional)
    c. Enter the **City** field
    d. Enter the **Zip Code** field
    e. Enter the **Email** field
    f. Enter the **Phone Number** field
    g. Click **Continue**

    ### Postal Address Validation

    Before moving on, we validate the address you entered against the United States Postal Service. A popup dialog appears showing any close or exact matches with your address. You may select an address presented from the USPS comparison or choose to keep your own entry.

5. Create your **Username and Password** – this is your first line of defense in keeping your information safe and confidential. To make it more difficult to break, your username must contain eight or more characters and your password must have eight or more

characters, including at least one letter and one number. Your password cannot be the same as or similar to your username.

a. Type your chosen username into the **Username** field

b. Type your password into the **Password** field

c. Retype your password into the **Re-enter Password** field to confirm it

You are also asked to create an **Electronic Signature Personal Identification Number**. You use this **PIN** to sign documents electronically. Your **PIN** must have four numbers.

d. Type a 4-digit number of your choice into the **Electronic Signature PIN** field

e. Retype your PIN into the **Re-enter Electronic Signature PIN** field to confirm it

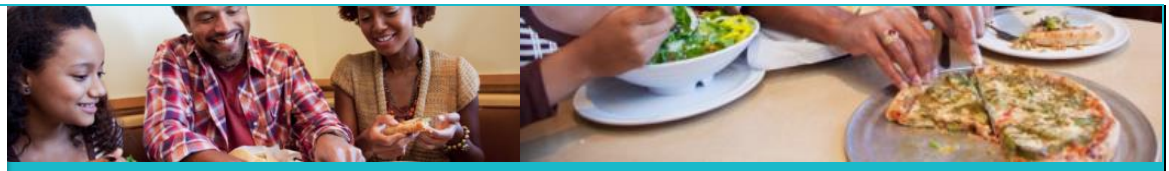
f. Click **Continue**

6. View your **Account Summary** – When you finish entering information for your account and there are check marks next to the first five steps in the left navigation panel, you can give your information one last review. The screen will show three sections – User Information, Contact Information, and Username & Password.

   a. Click the **Edit** button within a section if you need to update any information

   b. Otherwise, click **Continue** to save your information and create your account

   c. You'll see a popup indicating that you successfully created an account. Click the **Log In** button to go to the *Log In* page and get started.



JOB AID: CREATE AND MANAGE AUTHORIZED REPRESENTATIVES

October 1, 2013

Authorized Representatives

An Authorized Representative is someone you've asked to perform functions on your behalf with Covered California, and whom you give full access to your Covered California account. This job aid covers creating and managing an Authorized Representative, and creating a new delegation code.

Requesting an Authorized Representative

After logging into your Covered California homepage, click on the **Manage Delegates** link in the **Resources** panel.

- The *Manage Delegates* page displays. The **Users List** table will show any existing Authorized Representatives for your account.
- Click **Delegate Access**
- The *Authorized Representative Information* page displays. Enter the contact information (name, address, and phone numbers) for the person you wish to act on your behalf. All required fields are marked with a red asterisk
- Next, identify the communication and language preferences of your Authorized Representative
- Indicate whether you want the Authorized Representative to receive notices on your behalf
- To add another Authorized Representative, click on the **Add Another** button
- If you are finished adding representatives, to confirm your request click on the **Continue** button
    - If you get an address confirmation popup, confirm that the correct address is selected, then click **OK**.
    - A popup message titled *Delegate Access Confirmation* appears, explaining that you are delegating authority for full access to your account and for making plan selections on your behalf
    - The popup asks you to confirm by clicking the **Delegate Access** button, or return to the previous screen

- If you confirm your action, the system displays another popup message showing you a Delegation Code to give to your Authorized Representative
    - The code is a six character string of letters and numbers and is case sensitive

Now your Authorized Representative must create his or her own account with Covered California. On creating the account, the system asks your Authorized Representative for the delegation code you provide. When the Authorized Rep logs in using their Authorized Rep username and password they will be able to act on your behalf.

Manage Authorized Representatives

To manage your Authorized Representative(s), select **Manage Delegates** from your homepage.

- The *Manage Delegates* page displays your list of Authorized Representatives

To create a new delegation code or reset the existing delegation code associated with an Authorized Representative, select the representative and click **Delegate Access**.

- The *Delegate Access* popup displays the updated delegation code
- Select a row to view details of an Authorized Representative. To take away a representative's access to your account and drop them from the list, click **Remove**
- To update the Authorized Representative's information, select **Modify**

As you delegate access to your account, it is important to remember that Authorized Representatives have complete access to your account. Delegation codes should only be given to those you trust.

JOB AID: UPLOADING VERIFICATION DOCUMENTS

October 1, 2013

Verification Documents

Consumers applying for health coverage and financial assistance may need to upload Verification Documents when their Eligibility Result is either Conditional or Pending. This happens when Covered California needs additional information to determine eligibility, or when the information provided by the applicant does not match information provided by our electronic data sources, such as the Federal Data Services Hub (DSH) or the Employment Development Department (EDD).

The applicant can upload verification documents immediately after receiving an Eligibility Determination of Conditional Eligibility by clicking on the **Submit Documents** link on the *Eligibility Results* page. However, the applicant may not immediately have access to the required documentation. In that case, they can come back later to their *Individual* homepage and navigate to the *Manage Verifications* page from there.

Below are instructions for how an applicant would upload documents to support verification. The process is documented from the applicant's viewpoint, so that in your particular role you can better understand and support the procedure.

How to Upload Verification Documents

Uploading verification documents in Covered California is a simple process:

1. Navigate to the *Manage Verifications* page from the *Individual* homepage
2. Complete the *Submit Verifications* page
3. Upload and categorize the Verification Document(s)
4. Submit the verification document for Service Center Representative review

Once you have submitted the Verification Document, a Service Center Representative will review the document to finalize Eligibility. They may request additional documentation or otherwise contact you about the documents provided. They can communicate with you through the Comments on the *Manage Verification* page or through your Preferred Communication Method.

Navigating to the *Manage Verifications* Page

After Logging into the Covered California website, you begin on your homepage.

1. If you are an Certified Enrollment Counselor or Certified Insurance Agent:

   a. Navigate to your *Active Individuals* Page
   b. Select the Individual who needs to upload Verifications
   c. Click on the **View Account** button to navigate to their homepage
   d. Click on the **Manage Verifications** link in the Actions bar

2. If you are a Service Center Representative:
   a. Click on the **Search Individual** link
   b. Search for the Individual by Social Security Number, Combination Search, or other criteria
   c. Select the Individual or **Case**
   d. Click on the **View Home** button
   e. Click on the **Manage Verifications** link in the Actions bar

The *Manage Verifications* Page

This page is only available for cases that have uploaded or need to upload verifications. Information will only be available for household members who have a status of Conditionally Eligible or Pending Eligible.

Complete the *Submit Verifications* Page

Access the *Submit Verifications* page by clicking on the **Submit Verifications** tab on the left side of the *Manage Verifications* page, or by clicking the **Submit Documents** link on the *Eligibility Results* page.

1. Review the **Household Information** section to confirm it is the correct case
2. Review the **Required Documents** section
   a. The **Required Documents** section will display for every household member who needs to provide additional verification documents
   b. Only Household Members with a **Required Documents** section need to provide the documents listed
   c. For each document category, click on the **Upload** button

Upload and Categorize the Verification document(s)

On the *Upload Documents* page you can submit one or more documents for each required verification.

1. Select a document type
   a. Select the relevant **Document Type** from the dropdown

2. Browse for the document
    a. Click on the **Browse** button
    b. Browse your computer for the document to upload
    c. Double-click that document
3. Upload the document
    a. Click the **Upload** button
    b. The document appears in the **Documents Uploaded** table
        i. View the uploaded document by clicking the **View** link
        ii. Remove the uploaded document by clicking the **Remove** link
4. Repeat these steps for each additional verification related to this document category
5. Click on the **Back** button to return to the *Submit Verifications* page

Submit the Verification Document for Service Center Representative review

Review the **Required Documents** section for each household member. You should see the uploaded documents for each one displayed as links. These links will open copies of the uploaded document. You can also see the status of the document.

1. Before submitting the verification, add comments about the documents uploaded in the **Comments** section
2. If you are not prepared to submit these documents at this time, click on the **Save and Exit** button
3. If you do not wish to save these uploaded documents, click on the **Close** button
4. When you are ready to submit these uploaded documents for Service Center Representative review, click on the **Submit** button

Next Steps

A Service Center Representative reviews the verification documents and may need to follow up for questions or clarifications. If Covered California determines that an uploaded document is incorrect or otherwise does not address the required verification, the applicant or assister can use the **Withdraw** button to remove it.

The applicant can now view these uploaded documents from the *Manage Verifications* page. The applicant may click on **Edit** to edit the submission while it is unverified, or click on **Withdraw** to cancel submission of a document. The applicant can also click on **View** to display the document.

JOB AID: COMPLETE AN INDIVIDUAL APPLICATION

October 1, 2013

The Individual Application for Health Coverage

Training courses cover all you need to know about how to complete the Individual Application in Covered California, but this job aid also provides an overview of the process for completing the online application for an individual, family, or employee applicant.

Completing the Individual Application

Completing the Application in Covered California is a simple process:

1. The applicant must **create an account** on the Covered California portal
2. **Begin the application process –** You can initiate the application on behalf of the applicant and tell us about the members of the applicant's household
3. **Add personal Information –** Complete the *Demographic, Tax, Health Care,* and *Optional Data* pages
4. **Add income –** Complete the *Employment, Self-Employment, Other Income,* and *Deductions* pages.
5. **Review and eSign –** Review the information entered and eSign the application

Creating a Covered California Account

You can view a different Job Aid covering the details of how to create a Covered California account.

Begin the Application Process

The left-side navigation panel shows the steps for beginning the application. After completing each section, a check mark replaces the step number. Fields that require information are marked with red asterisks.

1. Tell us about the type of application on the *Apply for Benefits* page
    a. Tell us if the applicant wants to apply for Financial Assistance
    b. Tell us how many Household Members are in the applicant's home
    c. Tell us how the applicant heard about the Exchange
2. Agree to our verification process on the *Consent to Verification* page
3. Identify the **Primary Contact** for this household:

a. Complete the **Primary Contact – Name** fields

b. Complete the **Primary Contact – Address** fields

c. If the Primary Contact has a separate address, complete the **Primary Contact – Mailing Address** fields

d. Complete the **Communication and Language Preferences** fields

e. Click **Continue**

Page and Field-Level Validation

When you click the **Continue** button, we check each field to confirm that the information entered meets the requirements regarding the types of Characters and selections that have been entered. If a field includes invalid characters or formatting, it will be highlighted for you to correct before navigating further through the application.

4. Enter any **Authorized Representative Information:**

   a. If an Authorized Representative is desired for this case, add one on this page

      i. Enter Contact information for the Authorized Representative
      ii. If the Authorized Representative should receive Notices for the household, indicate that
      iii. If there is more than one Authorized Representative, click on the **Add Another** button and repeat these steps

5. Add **Household Members**

   a. Complete the **Name**, **Date of Birth**, and **Gender** fields for each Household Member

   b. If they are applying for Coverage, click on the **Applying for Coverage** radio button

   c. Enter a **Social Security Number** for all applicants who have one; enter optional Social Security Numbers for non-applicants to make the eligibility process go faster

   d. If someone is not a US citizen or national, enter the document type and other information for all members with **Eligible Immigration Status**

   e. Confirm the name as it appears on their document

   f. Click **Continue**

6. Add **Relationships**

a. Enter a relationship for each household member in the case

Add Demographic Information

The left-side navigation panel shows the steps for beginning the application. After completing each section, a check mark replaces the step number. Fields that require information are marked with red asterisks.

1. Add **Address and Contact Information** for the Household Members

    a. If a household member lives somewhere different than the Primary Contact, list their address. They can also receive mail in a separate location.

    b. Add additional phone numbers and email addresses for household members

2. Review offers from a Small Employer

    a. The Small Employer section displays Small Employers who have plans available to this household

    b. If a Small Employer is not present, the applicant may need to ask their employer to include their name on an Employee Roster so they can obtain one of their plans. You can still check the availability of Subsidized and Unsubsidized plans from Covered California for the applicant.

    #### Postal Address Validation

    Before moving on, we validate the address you entered against the United States Postal Service. A popup dialog appears showing any close or exact matches with your address. You may select an address presented from the USPS comparison or choose to keep your own entry.

3. Add **Demographic Information**

    a. Different questions will display based on the Application type and the age, gender, and addresses of the applicants. Enter an answer for each question

    b. If a household member is pregnant, enter the number of babies and the expected date of delivery

    c. If the applicant is under 26, additional questions may be asked, such as

        i. Is this person temporarily out of the home?
        ii. Is this person a full time student?
        iii. Was this person in the Foster Care System on their 18th Birthday?
        iv. Who is the primary caretaker of this child?

4. Add **Tax Information**

    a. If a household is applying for a Subsidy or Medi-Cal, provide information about their previous year's tax filing status and upcoming filing status
    b. If they filed taxes, identify the filing status
    c. If they are a dependent, identify who claims them

    Tax Filing Status Impacts Available Programs

    Tax Filing Status will impact the available programs for each Household Member. In order to receive the Premium Tax Credit program, married couples have to file jointly. A dependent claimed by a non-custodial Parent can only receive a Premium Tax Credit on an application with that non-custodial Parent, but they can receive Medi-Cal with the parent they live with.

5. Add **Health Care Information**

    a. Certain types of Health Coverage meet the requirements of "Minimum Essential Coverage." If the applicant has any of these, they do not need subsidy help from Covered California.

    b. If the applicant needs Long Term Care or receive Medicare, there are programs available through the Medi-Cal program to help pay for these services. Covered California will refer the applicant to their County Social Services department to determine if they qualify for these programs.

6. Add **Optional Data**

    a. Optional Data is used to improve the services offered by Covered California. The applicant may answer these questions as they feel comfortable

Add Income Information

1. Employment

    a. Tell us about any money the applicant gets from work for an Employer

2. Self-Employment

    a. Tell us about the net income the applicant earned this month from self-employment

3. Other Income

    a. Enter any of the other sources of income listed on this page

4. Deductions

   a. Enter any deductions the applicant claims on the first page of a regular tax reform (i.e., a 1040)

5. Summary

   a. Review the information that is listed for income

   b. If the projected annual income is incorrect, enter the Projected Amount the applicant expects to get

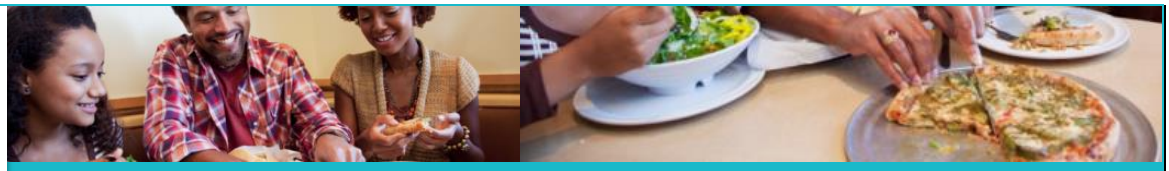
Review and eSign

1. Before Submitting the application, review the information entered for the household.
2. Click **Continue**
3. Choose a period during which Covered California will use the applicant's Tax Return during **Renewal** and **Periodic Verification**. You can choose zero years.
4. Applicants must agree to report changes to us.
5. Applicants must agree that the information they have provided is accurate.
6. Submit the application

   a. If an individual is completing the application, enter the applicant's full name and PIN.

   b. If a Service Center Representative is completing the application, check the box indicating they have obtained a signature from the applicant.

   c. Click **Submit**



JOB AID: COMPLETE A SHOP APPLICATION

October 1, 2013

The SHOP Application

This job aid covers the process of applying for Covered California's Small Business Health Options Program, known as SHOP. We will look at how the application is completed from the point of view of the employer, although Certified Insurance Agents and California Health Benefit Exchange personnel will also need to know the process.

The steps in the application process we will show here include:

1. Beginning the application
2. Entering company information
3. Primary contact information
4. Review and submit
5. Eligibility determination and verifications
6. Adding the employee roster

Before starting the application, sign into Covered California, which takes you to the *SHOP* homepage. You'll need the following for the application process:

- Company name, key addresses, and Tax Identification Number
- Primary contact name and contact details
- Number of employees and average annual salary

You can start the Application process by clicking **Begin Application**.

1. Beginning the Application

a. **Introduction –** The first page of the application is Introduction and Consent. It provides summary information about the SHOP application process. You need to respond to questions about your organization to determine your eligibility.

b. **Agent** – If a Certified Insurance Agent is helping with the SHOP application, type the Agent's name into the appropriate field. If you are completing the application on your own, leave that field blank.

c. **How did you hear about SHOP –** Next, tell us how you heard about the Exchange and the Small Business Health Options Program.

d. Terms & Conditions – Finally, select the **I agree to the terms and conditions** checkbox and click **Continue**

2. Company Information

The *Company Information* page displays where you enter company data that the system needs to determine SHOP eligibility. Some of this information may be prepopulated from information the Employer provided in creating the company's account, although that information can be edited here. Required fields include:

- Business Legal Name
- Organization type
- Average employee salary
- Total number of employees
- Number of full-time employees

Options on the page include going **Back** to the previous page, **Save and Exit**, which keeps this information available for the next time you log in, or **Continue**, which saves your information, validates what you have entered, and takes you to the next page in the application.

3. Primary Contact

Next is the *Primary Contact* page. Enter information about the person who will receive all official communications from Covered California. Enter a first and last name, phone number and or e-mail address, and select the preferred method of communication (other than the default Secure Mailbox that is part of your account). Click **Continue** to proceed with the application.

4. Review and Submit

The *Review and Submit* page shows you the information you entered in the application process. If anything is incorrect or incomplete, you can click the **Edit** button next to the appropriate section. This returns you to the page where you entered that data so you can make changes.

To submit your application, you have to sign it by typing in your name on the **Electronic Signature** field, and then enter your PIN in the **Electronic Signature PIN** field.

At this point in the application process you can:

- **Save & Exit –** save the application without submitting it
- **Save as PDF** – generate and save a PDF file of the page
- **Print PDF** – print the summary information
- **Submit** – complete the application and submit it for eligibility determination

5. Eligibility Determination, Verification

a. Eligibility Determination

After submitting the application, the *Eligibility Results* page comes up and shows your eligibility status and determination factors. The system checks the information you entered on the application and determines whether your company is 'Eligible', 'Contingent Eligible', or 'Ineligible'.

Contingent Eligible usually means that more information is needed or that information on the Application does not match data from other systems we check against when you submit your application. If you are Contingent Eligible, submit a verification request to provide additional information or to clear up any discrepancies in the Application.

b. Verification

- On the *Eligibility Results* page, click on the **Verify** button
- The *Submit Verification* page displays – you can submit an employer's verification documents through the *Submit Verifications* page, but review and confirm the company information that automatically displays here
- Scroll down to the **Verifications Category** dropdown list, which displays **SHOP Eligibility Determination** and cannot be changed
- Use the **Comments** field to enter any information or comments about what is being verified
- If you do not have any supporting documents to upload, select the **Submit** button to create the verification request.

c. Upload Documents

- If you need to submit supporting documentation, select the **Upload Documents** button, and the *Upload Documents* page displays
- In the **Documents Uploaded** section, you can view or remove any previously uploaded documents
- In the **Upload Document** section, the **Document Category** dropdown is pre-populated with **SHOP Verification**, and that value cannot be changed.
- In the **Document Type** dropdown, select the type of verification for which you are uploading a document – choose from **Business Address, Employer Workforce Size, Employer EIN,** or **Other**
- Select a file from your computer using the **Browse** functionality
    - Click on the **Open** button in the *Choose File to Upload* popup
    - the **Document Name** field is filled with the name of the file you selected

- Click on the **Upload** button to submit the document to support your verification
- Click **Back** to return to the *Submit Verification* page and complete your submission
- Finally, click the **Submit** button – the *Verification* popup appears

When you click **OK** on the *Verification* popup, the verification request is sent to Covered California and you are returned to the *Eligibility Results* page.

Your verification request and any documents uploaded to support it will be reviewed by a SHOP Manager, and you will receive notification of the final eligibility determination for your company.

- Click **Continue** to proceed to submitting your Employee Roster

6. Employee Roster

Once an Employer is determined eligible for SHOP, you need to prepare and enter or upload the company's Employee Roster. This is a crucial part of the SHOP process for several reasons:

1. The number of employees is an eligibility factor for SHOP
2. In order to remain eligible, at least 70% of the employees must enroll in a plan through Covered California
3. An employee must be on the Roster in order to enroll in a Covered California Plan through his or her employer

You can add the Employee Roster manually, or you can upload it directly to the system.

- The *Employees – Introduction* page displays
- Review the information and instructions here, then click **Continue**
- To add an employee manually, click **Add/Edit an Employee** on the left navigation panel
- The *Add/Edit Employee* page displays – enter information about the employee in the fields provided, including
  - First and last name
  - Address (including county)
  - Social security number
  - Date of birth
  - Annual salary
  - Whether the employee is full-time or part-time
  - Hire date
  - Email address, if available

- When you have supplied the required information, click **Continue**
- Repeat this process for the employees that need to be added to your roster

If it is more practical, you can upload a spreadsheet with the same information you would enter manually. The Covered California portal supplies a spreadsheet template you can download, fill out with your employees, and then upload to Covered California.

- Click the **Upload Spreadsheet** left navigation link, the *Upload Employee Spreadsheet* page displays
- Click the **Download Roster Template** link, a popup displays
- Click the **Open** button in the popup

Once the download finishes, a read-only copy of the employee roster spreadsheet template opens automatically in Microsoft Excel. Save your spreadsheet to your local drive. Include your company name in the spreadsheet's filename (for example, **Ramos Builders Employee Roster.xlsx**).

The columns in the spreadsheet mirror the fields we just reviewed on the *Add/Edit Employee* page. Fill out a row for each of your employees. When you have added all your employees, save and close the file to your local computer's drive so you then find and upload it to the Covered California portal.

- When you complete the roster spreadsheet and are ready to upload, navigate the *Upload Employee Spreadsheet* page and click the **Browse** button
- In the **File** dialog that displays, find and select your employee roster spreadsheet file where you saved it on your computer and click the **Open** button to select it
- Now click **Upload** to move the file to Covered California's portal
- The *Upload Employee Spreadsheet* page displays again, showing the Roster Total – a count of the number of records successfully added, and also a number of records with errors

The **Upload Errors** section displays the records from the roster template that have errors. Any errors must be fixed before these records will display in the **Employee Roster** table.

- Click on the **Edit** link for any record showing in the **Upload Errors** section
- Correct any errors you find in the record and click **Save**, then repeat for any other records in the section
- Click **Continue** once you have cleared any errors from the upload of the employee roster spreadsheet

At this point the SHOP Application and the Company Roster are complete. You have cleared up any eligibility problems and have an "Eligible" status, and your employees have all been entered, either manually or by uploading the employee roster spreadsheet. You are now ready to start Plan Selection.

JOB AID: REVIEW ELIGIBILITY RESULTS

October 1, 2013

Reviewing Eligibility Results

Once an Application is complete, you will see the *Eligibility Results* page. This page explains the programs available to each applicant and their next steps.

Features of the *Eligibility Results* page

The *Eligibility Results* page has the following features:

1. **Eligibility Results** for each applicant
2. **More Information and Options** section for each Eligibility Result
3. **View Submitted Application**
4. **View Eligibility Confirmation**
5. **View/Choose a Health Plan**

Eligibility Results for each household member

The eligibility results displayed are based on the information entered for each applicant. There are four main categories of eligibility.

1. **Covered California Plan:**
    a. If a household member is Covered California Plan eligible, they will not receive financial assistance paying their premium, but will still benefit from the quality of benefits and guaranteed issue provided by the plans under Covered California.
2. **Advance Payment of the Premium Tax Credit (APTC):**
    a. If a household member is APTC eligible, the government will help them pay their monthly premium based on their household income.
    b. If a household member is Conditionally eligible, they need to provide additional Verifications. Refer to the Uploading Verifications Job Aid for details on how to process Conditional Eligibility.
3. **Cost Sharing Reduction (CSR):**
    a. If a household member is CSR eligible, the government can help reduce their out-of-pocket costs for things like doctor's visits and copays.

   b. If a household member is Conditionally eligible, they need to provide additional Verifications. Refer to the Uploading Verifications Job Aid for details on how to process Conditional Eligibility.

4. **MAGI Medi-Cal**

   a. If a household member is MAGI Medi-Cal eligible, they can print out their benefits confirmation page and immediately visit a doctor. They will receive information on how to select a Managed Care Organization if one is available in their County.

   b. If a household member is Pending eligible, they need to provide additional Verifications. Refer to the Uploading Verifications Job Aid for details on how to process Conditional Eligibility. They will also receive communication from their County to provide these documents.

5. **Small Business Health Options Program (SHOP)**

   a. If a household member is SHOP eligible, they have been offered a plan by their Small Employer. The Small Employer may contribute some amount to the cost of their monthly premium, and may cover some dependent costs as well.

   b. A SHOP Plan may be determined Unaffordable if it exceeds 9.5% of a single Employee's income from that Employer, or 8% of the total household income if the Employer includes dependent coverage. In this event, the Employee has the option to decline coverage, and may be able to see their eligibility for the APTC and CSR programs (see above).

More Information and Options

The **More Information and Options** section provides additional details and actions. In it you can:

1. Review the **Eligibility Determination Factors** for each applicant
2. **Submit Documents** if Conditionally or Pending Eligible
   a. This action is available only if that status is present for an applicant
3. **Appeal Decision**
   a. If you think an Eligibility Result is incorrect, you can appeal it within 90 days
4. Request a **Referral to Other Programs**
   a. All applicants can request a full Medi-Cal determination
   b. MAGI Medi-Cal recipients can also request CalFresh and CalWORKS referrals
5. **Decline SHOP Coverage**

a. If you are a SHOP applicant, you may Decline SHOP Coverage if it is unaffordable. An Agent, Employer, and the Employee may work together to see if the coverage can be made affordable. If not, the Employee may seek coverage on the Individual Market.

View Submitted Application

The **View Submitted Application** button will display a PDF version of the submitted application for you to print or save locally.

View Eligibility Confirmation

If an applicant is MAGI Medi-Cal, clicking this button will display their **Eligibility Confirmation**. This page includes the information the applicant needs to go to a doctor immediately. A permanent benefits card will be mailed with this information as well.

Preview/Choose a Health Plan

Applicants eligible to select a Covered California Plan, with APTC or CSR, or an eligible SHOP Employee, can continue on to the plan selection process. You can also shop anonymously for plans in your area if you are Pending Eligible or if a SHOP Employer does not cover dependents.

JOB AID: COVERED CALIFORNIA PLAN SELECTION

October 1, 2013

Plan Selection

This Job Aid shows how to assist individuals and employees with reviewing, selecting, and enrolling in a Covered California health insurance plan. Individuals may choose the most appropriate plan for their needs, choosing from all plans offered by Covered California.

Individuals and employees may call on Certified Enrollment Counselors, Certified Insurance Agents, and Exchange employees for help, so people acting in these roles need a solid understanding of this process.

Individuals

The process outlined in this Job Aid illustrates how individual consumers shop for, select, and enroll in a Covered California plan. Individuals may select any plan from any tier, limited only by their ability to afford the coverage. If an individual applying for coverage is eligible for subsidized coverage based on their income or other factors, the plan pricing presented to them will include the financial assistance they may be eligible for. Determining the individual's or family's eligibility for subsidized health coverage is covered in another Job Aid and in other training courses.

The SHOP Program and Employees

The SHOP program helps small businesses provide affordable insurance to their employees. The employer selects a list of plans to offer employees. The employee selects a plan from this list, which is then tested for affordability based on the employee's income, if the employee is the only person covered. If the employer has set up coverage that includes dependents in the employee's household, the income of the employee's entire household is assessed for affordability of the selected plan.

Employees of a SHOP-eligible employer may choose a Covered California health insurance plan from the employer's pre-selected list. If any of these plans are affordable, the employee is required to accept coverage under the plan instead of receiving subsidized coverage. The opportunity for the employee to select and enroll in a plan is limited to the Open Enrollment timeframe set up by the employer.

The Plan Selection Process

- To start, click on the **Choose a Health Plan** button and the *Getting Started* page for plan selection displays

The *Getting Started* page provides an overview of the plan selection and enrollment process. The plan selection process includes asking for information about consumers' healthcare needs, matching them with a plan to suit those needs, and enrolling them in their chosen plan.

- After reviewing information on the *Getting Started* page, click on the **Next** button and the *User Preferences* page displays

User Preferences

The *User Preferences* page is the place to add a variety of preferences on the consumer's behalf. These preferences are gathered on separate pages that are all linked to the *User Preferences* page.

The **Estimate Costs** link lets you enter information about the consumer's basic healthcare needs in order to filter down to the most cost-effective plans.

If the consumer has an existing relationship with a doctor or medical facility, use the **Find Your Doctor or Facility** link to search for plans that support that relationship.

Children's dental coverage can be purchased separately or bundled with a regular health plan. Use the **Shop for Children's Dental** link to add a dental plan if the Consumer you are assisting needs dental coverage for his or her children.

After inputting the consumer's preferences, the plans displayed in the selection process are filtered to match those preferences.

You can also skip entering preferences and go directly to clicking on the **Next – Plan Selection** button at the bottom of the page to view the complete list of plans – without filtering for preferences – available to the consumer, whether in the Individual market or through the employee's workplace.

Estimate Costs

- Click the **Estimate Costs** link to display the *Estimate Costs* page
- Enter information about the consumer's projected medical and prescription usage
  - **Low** means 1-2 doctor visits per year; 1-2 lab tests per year; 1 prescription per year
  - **Moderate:** 5-6 doctor visits; several lab tests; 1-2 prescriptions
  - **High:** Monthly doctor visits; regular/ongoing lab tests; outpatient care; 2-3 ongoing prescriptions
  - **Very High:** 20 or more doctor visits; multiple ongoing lab tests; other needs such as a hospital stay or having a baby; 3 or more ongoing prescriptions

  Medical use and prescription use are captured separately, so a Consumer may fall into different categories for each area.

Plan Comparison

The *Plan Comparison* page allows you to see side-by-side the details of up to three available health plans at a time. If there are more than three plans available to the consumer, more plans can be viewed by clicking on the left or right arrows on either side of the plan logo panel.

Each plan's price is displayed along with a summary of the plan details. For employees, the plans available for comparison are limited to those within the metal tier that the employer selected during SHOP Employer Plan Selection. The monthly premium cost listed on this page represents the **net** cost to the consumer, after their financial assistance or employer premium contribution.

The sub-sections below are initially collapsed but can be expanded to display details of the following plan characteristics:

- Quality Ratings
- Deductibles & Out of Pocket Max
- Office or Clinic Visit
- Tests
- Drugs
- Outpatient Surgery
- Need immediate attention
- Hospital Stay
- Mental Health, Behavioral Health, or Substance Abuse needs
- Pregnancy
- Help recovering or other special health needs
- Children's Vision
- Children's Dental (if applicable)

Clicking on the arrow next to each plan feature expands to show the cost information for various visits, procedures, and products.

Plan Details

You can view in-depth plan information by clicking on the plan logo. This will take you out of plan comparison to view details for a single plan. The *Plan Details* page displays the Consumer costs at the top of the page.

For employees, the information here includes the base Monthly Premium, the Employer Contribution, and the employee's personal Monthly Payroll Deduction after the Employer contribution.

You can also view the plan's Annual Payroll Deduction, Out-of-Pocket Estimate, Product Type, and Overall Quality rating.

The Summary section displays high level information about the plan, including Estimated Total Costs, Quality, availability of any preferred Doctors, Facilities, or Dentists, and the Product Type.

You can scroll down the *Plan Details* page to review the different sections:

- Quality Rating
- Deductible & Out-of-Pocket costs
- Doctor Visits
- Tests
- Drugs
- Outpatient
- ER & Urgent Care
- Hospital
- Mental/Behavioral Health
- Pregnancy
- Other Special Needs
- Children's Vision
- Children's Dental

Once you have reviewed the plan details, you can click **Back** to return to the *Plan Comparison* page to select another plan to view in detail. You can repeat this process as often as needed until the Consumer finds a plan that meets their needs.

Once you are ready to select a plan, you will do so by clicking on the **Add** button on the *Plan Details* page.

Your Cart

The *Your Cart* page lists the plan that the Consumer wants to purchase. The Consumer's name and coverage Effective Date display across the top of the page.

In the next panel, you can view the plan logo, plan name, the total Monthly Premium, and the Employer Contribution. The Consumer's Payroll Deduction (Monthly Premium minus Employer Contribution) displays in the next row.

If the Consumer is purchasing plan(s) for a spouse and/or dependents, those plans and their related Monthly Premium, Employer Contribution, and Consumer Payroll Deduction will also display.

- Review the information on the *Your Cart* page, the click on **Checkout**, the *eSignature* page displays

The last step of the plan selection process is to confirm the Consumer's plan selection and sign electronically on behalf of the Consumer. You do this on the *eSignature* page.

- Click on the **I have read and agree to the terms of service in the Exchange Agreement** checkbox

- Click on the **Submit** button, the *Enrollment Confirmation* page displays

Enrollment Confirmation

The *Enrollment Confirmation* page displays a summary of the consumer's household members enrolled in the plan. You can view the person(s) covered, the coverage period, the selected plan, the gross premium, and the net premium to the consumer.

- Click on the **Done** button, the consumer's homepage displays

At this point, all of the steps have been taken to enroll the consumer in a plan. The consumer will be contacted soon by the health insurance company offering their selected plan. The health insurance company will send their Enrollment Confirmation and Benefits Package.

JOB AID: RETRIEVE ACCOUNT SECURITY DETAILS

October 1, 2013

Retrieve Your Username

- Click the **Log In** link at the top of the page – the *Log In* page displays
- Click on the **Forgot your username or password?** link. The *Retrieve Account Details: Your Information* page displays.
- Select the **First Name** field, type in your first name
- Select the **Last Name** field, type in your last name
- Select the **Date of Birth** field, type in your date of birth
- Click the **Continue** button. The *Retrieve Account Details - Verify Identity* page displays.
- Select three security questions and provide answers
- Click the **Continue** button. The *Retrieve Account Details – Retrieve Username* page displays.
- Your username displays

Retrieve Your Password

- Click the **Log In** link at the top of the page – the *Log In* page displays
- Click on the **Forgot your username or password?** link. The *Retrieve Account Details: Your Information* page displays.
- Select the **Username** field, type in your username
- Click the **Continue** button. The *Retrieve Account Details - Verify Identity* page displays.
- Select three security questions and provide answers
- Click the **Continue** button. The *Retrieve Account Details – Reset Password* page displays.
- Select the **New Password** field, type in your new password
- Select the **Reenter Password** field, retype your new password
- Click the **Continue** button. The *Sign In* page displays.

If your account is locked, retrieving your password removes the lock on the account.

Problems?

If you cannot remember your security questions:

- Click on the **Contact Us** link
- The *Contact Us* page will display
- Call Covered California Customer Service for assistance with recovering your username or resetting your password

JOB AID: ACCESSING COVERED CALIFORNIA SUPPORT TOOLS

October 1, 2013

Covered California support tools are essential in assisting consumers in applying for healthcare coverage, evaluating their options and ultimately enrolling in a Covered California health plan.

Support Tools include:

- Online Chat
- Help
- Find Help Near You
- Contact Us
- Preview Plans
- Online help
- Announcements
- Learn Tab

Online Chat

Through Online Chat, you will connect with a Service Center Representative (SCR).

- Click on the Online **Chat** link
- The *Live Chat* popup displays
- This dialog connects you to a Covered California Service Center employee who can answer your questions. If Spanish is your selected language, a Spanish-speaking Service Center representative will help you.

Help

The Help button gives you access to contact information for customer service support resources.

Find Help Near You

Consumers can use **Find Help Near You** to request in-person support from an Enrollment Counselor or Agent.

- Click the **Find Help Near You** link. The *Locate Assistance* popup displays
- Select **Find Certified Enrollment Counselor**, **Find Agents**, or **Find County Office**
  - If searching for a County Office:
    - Page is redirected to The California Department of Health Care Services County Offices to Apply for Medi-Cal page
  - If searching for an Assister:
    - Enter your **Zip Code**, select the **Distance**, and indicate your preferred **Language**, then click **Search**
      OR, if you want assistance from a specific organization:
    - Enter the **Organization Name** and click **Search**
    - The system will return organizations that meet your search criteria
    - Click the **Show Assisters** link
    - Select an Assister, the *Designate Assister* page displays
  - If searching for an Agent:
    - Enter your **Zip Code**, select the **Distance**, and indicate your preferred **Language**, then click **Search**
      OR, if you want assistance from a specific Agent:
    - Enter the Agent's **First Name**, **Business Name**, and **Last Name** and click **Search**
    - Select an insurance agent from the search results, the *Designate Agent* page displays
- Click the **Continue** button on the *Designate Assister* or *Designate Agent* page. The Designation *eSignature* page displays
- The Designate *eSignature* page displays attestation statements the Consumer must accept before designating an Assister or Agent. Click the **Confirm** button to submit the request
- A notification window confirms the request

Requests are sent to the Assister or Agent. They may choose to accept or decline the designation request.

Contact Us

The *Contact Us* page displays various modes of communicating with Covered California:

- Phone number
- Online Chat
- Mail

Preview Plans

By answering a few short questions consumers can find out which coverage programs or discounts on cost of insurance their household may qualify for.

Online Help

Every page displays a blue **"i"** online help button which provides information about the functionality and components specific to that page.

Announcements

The Announcements section displays messages about policy updates, deadlines, and events.

Learn Tab

The **Learn** tab takes you to a page with links to Tutorials and FAQs.