



Accelerated Consumer Delegation Consent Quick Guide

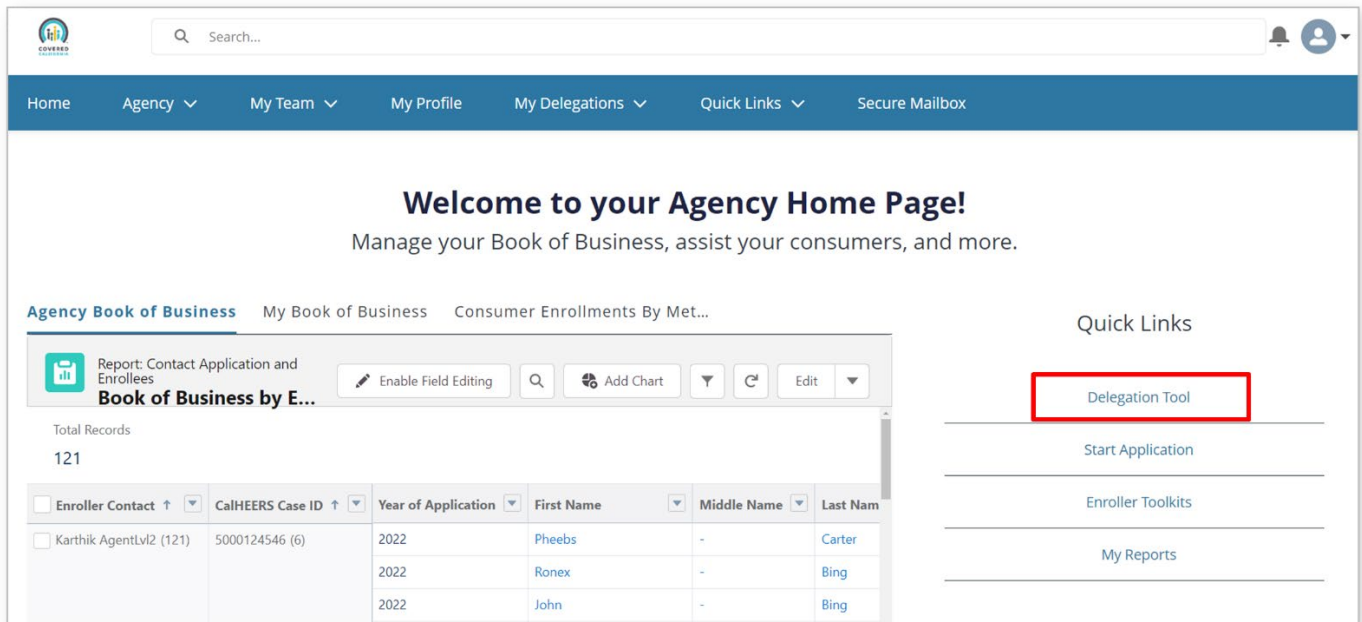
Overview

The Delegation Tool provides a means for Enrollers (including Agency Managers 1 and 2) to delegate a Consumer's case to their Book of Business. Admin Staff also can use the Delegation Tool and delegate a Consumer's case to an Enroller's book of Business on their behalf.

NOTE: Certified Enrollers are bound by Contract and/or State Regulations to only complete delegation requests at the express, present consent of a Consumer. Our system tracks and reports all Accelerated Delegation Requests made by every Certified Enroller, and suspicious use will be investigated. Certified Enrollers found fraudulently using this tool are at risk of having their Covered California certification revoked and their Book of Business permanently removed.

Steps

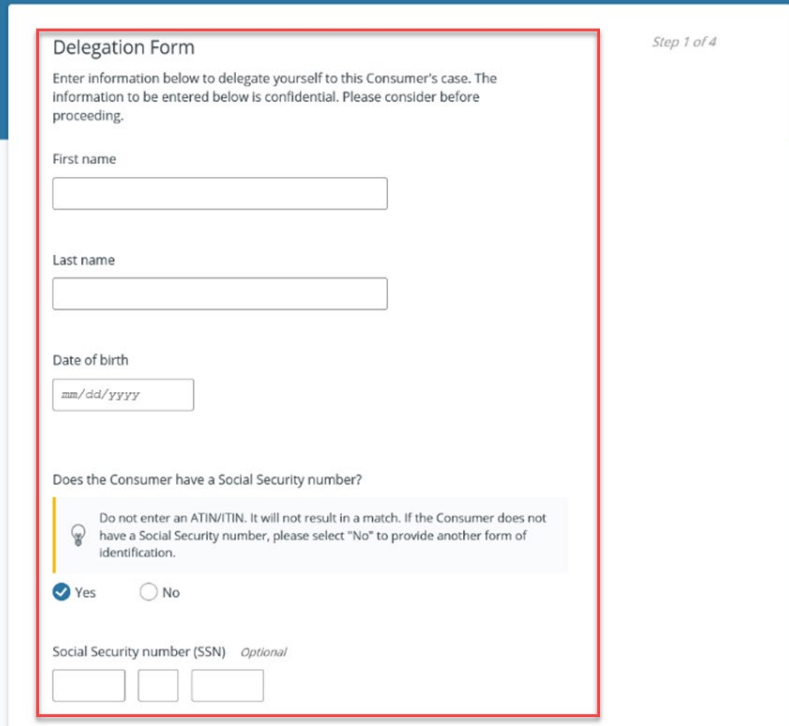
Enrollers can access the Delegation Tool link from the Quick Links section on their Enroller Portal.



1. Log into the Enroller Portal.
2. Select the **Delegation Tool** link from the Quick Links section on the righthand side of the page.
3. The user enters the following Consumer information on the Delegation Form:
 - First name
 - Last name
 - Date of birth

Consumer Delegation

We need some very important information about your Consumer so that we can search for them in our database.



Delegation Form Step 1 of 4


Enter information below to delegate yourself to this Consumer's case. The information to be entered below is confidential. Please consider before proceeding.

First name

Last name

Date of birth

Does the Consumer have a Social Security number?

 Do not enter an ATIN/TIN. It will not result in a match. If the Consumer does not have a Social Security number, please select "No" to provide another form of identification.

Yes No

Social Security number (SSN) *Optional*

Please note: An error message will display on the *Consumer Delegation* page if users enter a first name containing a hyphen. To proceed with the self-delegation, enter the first name with a space instead of a hyphen in the First Name field.

4. *Does the Consumer have a Social Security number?* field is optional and displays with a **Yes** and **No** radio button.

- The radio button defaults to **Yes** and displays the SSN field
 - Enter the SSN
 - An error message displays when the SSN is not a nine-digit number

Note: Searching by SSN is recommended.

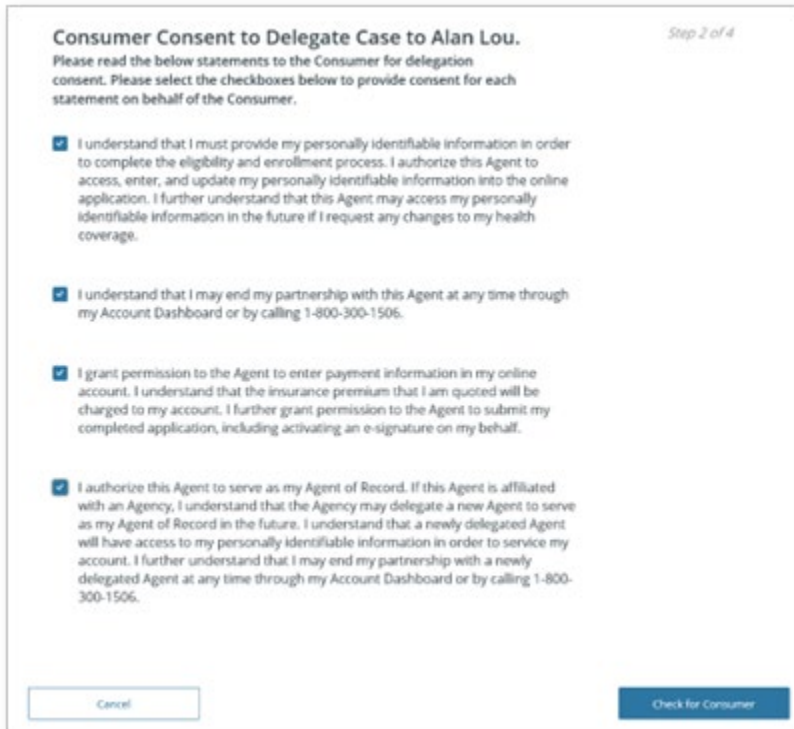
Selecting the **No** radio button displays the following and requires at least one search criteria option:

- Message: *You must provide at least one of the following search criteria before you can proceed with delegation*
- Search criteria options: **Home Address**, **Cell Phone Number**, or **Email Address**. An **Add** button displays next to each option
- Selecting an option dynamically displays a required entry field
- Selecting the **Remove** button removes the selected search option

Note: Searching by Home Address is recommended if SSN is unavailable.

5. Read all 4 statements out loud to the Consumer. Then, check the box next to each statement to indicate that the Consumer consents to allow the Enroller to act on their behalf.
 - An error message displays when a checkbox is unchecked
 - Selecting all the checkboxes enables the **Check for Consumer** button

Note: Clicking the **Cancel** button navigates the Enroller to their respective dashboard.

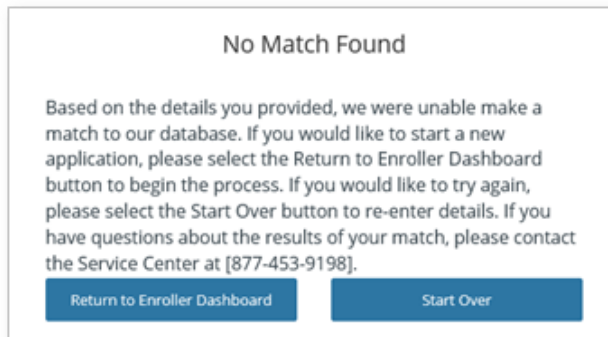


Consumer Consent to Delegate Case to Alan Lou. Step 2 of 4

Please read the below statements to the Consumer for delegation consent. Please select the checkboxes below to provide consent for each statement on behalf of the Consumer.

- I understand that I must provide my personally identifiable information in order to complete the eligibility and enrollment process. I authorize this Agent to access, enter, and update my personally identifiable information into the online application. I further understand that this Agent may access my personally identifiable information in the future if I request any changes to my health coverage.
- I understand that I may end my partnership with this Agent at any time through my Account Dashboard or by calling 1-800-300-1506.
- I grant permission to the Agent to enter payment information in my online account. I understand that the insurance premium that I am quoted will be charged to my account. I further grant permission to the Agent to submit my completed application, including activating an e-signature on my behalf.
- I authorize this Agent to serve as my Agent of Record. If this Agent is affiliated with an Agency, I understand that the Agency may delegate a new Agent to serve as my Agent of Record in the future. I understand that a newly delegated Agent will have access to my personally identifiable information in order to service my account. I further understand that I may end my partnership with a newly delegated Agent at any time through my Account Dashboard or by calling 1-800-300-1506.

6. Select the **Check for Consumer** button to initiate a search based on the criteria entered.
7. The system conducts a match based on the information entered. One of the following displays:
 - *No Match Found* – No existing match found in the system



No Match Found

Based on the details you provided, we were unable make a match to our database. If you would like to start a new application, please select the Return to Enroller Dashboard button to begin the process. If you would like to try again, please select the Start Over button to re-enter details. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].



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- **Multiple Matches Found** – Multiple matches found in the system

Multiple Matches Found

Based on the details you provided, we were not able to find a single match in our database. If you would like to try again, please select the button below. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

[Return to Enroller Dashboard](#)

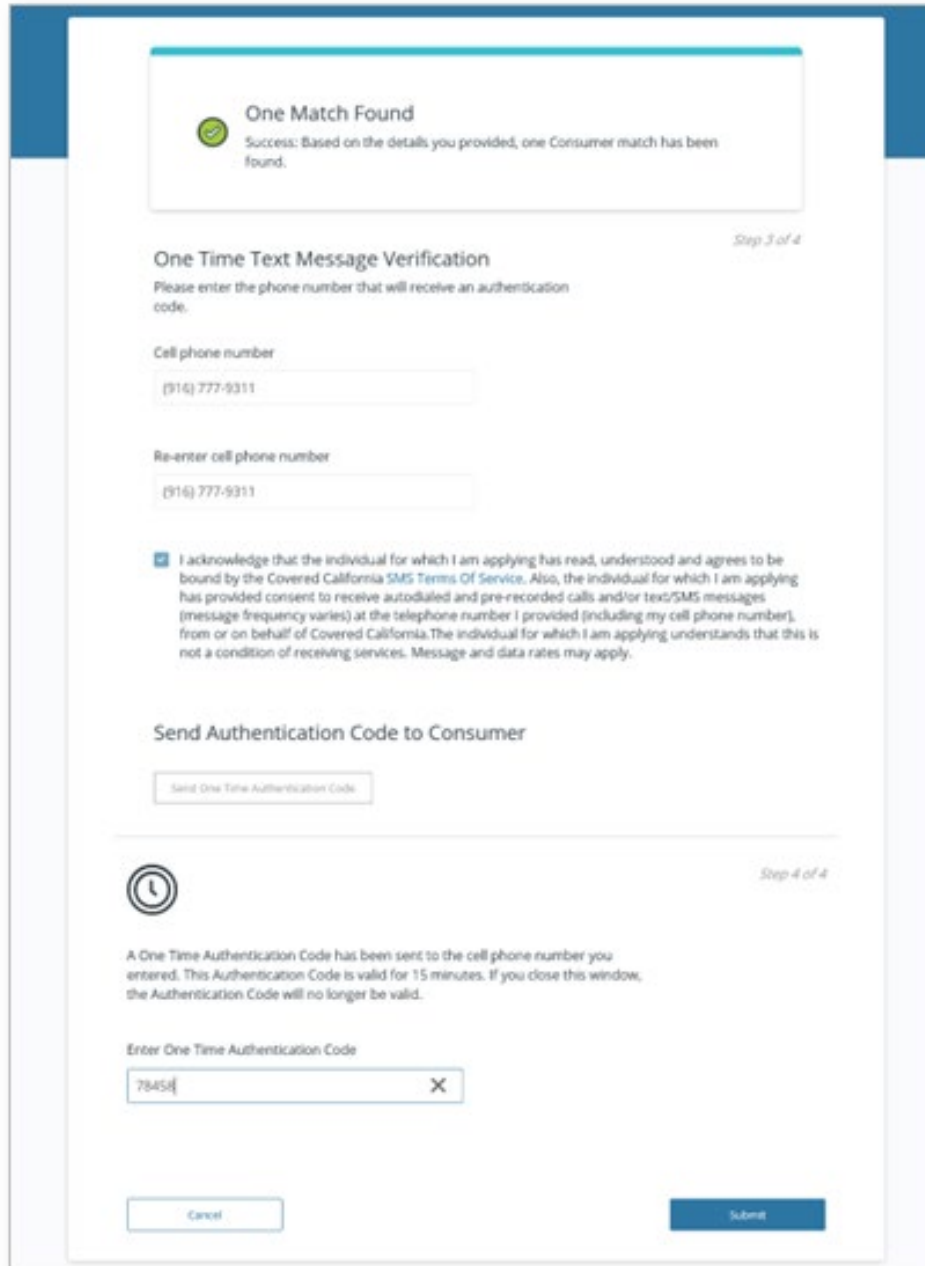
- **Match Already Delegated** – Match found and is currently delegated to the Enroller

Match Already Delegated

Based on the details you provided, we found a match in our database that is already delegated to your book of business. If you would like to try again, please select the button below. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

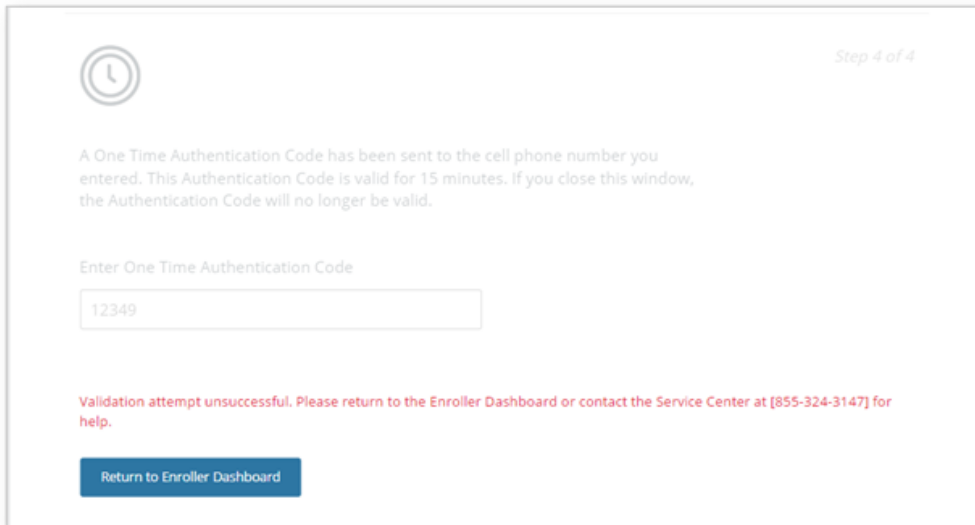
[Return to Enroller Dashboard](#)

- The *One Match Found* page displays when an exact match is found



8. The next step in the delegation process is to authenticate the consumer. On the **One Match Found** page (pictured above), enter the Consumer's cell phone in the cell phone number fields.
9. Check the **SMS Terms Of Service** checkbox to continue.

10. Select the **Send One time Authentication Code** button. A code is sent to the cell phone number entered.
- Up to three authentication codes can be requested. The user has three attempts to successfully enter each code.
 - A total of nine attempts with the incorrect code disables all fields except for the **Return to Enroller Dashboard** button.



Step 4 of 4

A One Time Authentication Code has been sent to the cell phone number you entered. This Authentication Code is valid for 15 minutes. If you close this window, the Authentication Code will no longer be valid.

Enter One Time Authentication Code

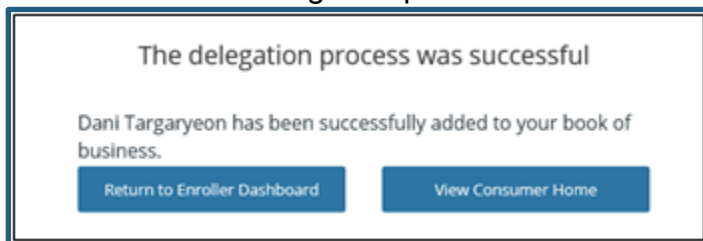
12349

Validation attempt unsuccessful. Please return to the Enroller Dashboard or contact the Service Center at [855-324-3147] for help.

Return to Enroller Dashboard

Note: The authentication code becomes invalid after 15 minutes, or when the page is closed. Selecting the **Cancel** button navigates the user to their respective dashboard.

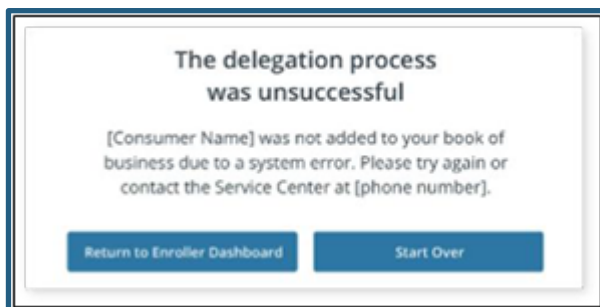
11. Select the **Submit** button on the One Match Found page. One of the following popups displays:
- The delegation process was successful – Consumer’s case is successfully delegated
 - The delegation process was unsuccessful – Due to a system error



The delegation process was successful

Dani Targaryeon has been successfully added to your book of business.

Return to Enroller Dashboard View Consumer Home



The delegation process was unsuccessful

[Consumer Name] was not added to your book of business due to a system error. Please try again or contact the Service Center at [phone number].

Return to Enroller Dashboard Start Over