

### **Overview**

Covered California Certified Insurance Agents and Certified Enrollers (Certified Enrollment Counselors and Certified Application Counselors) can locate their delegated consumers within their portal. Search fields (filters) can be used to get a shorter, customized list for work on a specific customer set. See the tips below to use the search functionality effectively.

## **Steps**

1. Select Active Delegations under the My Delegations tab on the portal home page.

		Q s	Search				
Но	me	Entity 🗸	My Profile	My Delegations 🥆	∕ Re	sources 🗸	Help 🗸
				My Active Delegat	ions		
				My Pending Deleg	gations	come t	o your Entity Home Page!
				My Delegation His	story	DOOR OF	business, assist your consumers, and more.
Home	Enrolle	er Portal Not	tifications	Notifications Archive	Book of	f Business	Consumers by Metal Tier Plan
				Wel	come!		
	Ex	plore additi	onal choices	by navigating through	the tabs	on <mark>the r</mark> ight	or My Reports from the menu

- 2. Search Active Delegations using either of the following steps:
  - a. Click the filter icon in the top right corner of the *Active Delegations* page. Use the filter criteria to filter the list view.

	Home	Entity 🗸	My Profil	e My De	legations 🥆	∕ Re	sources 🗸	Help 🗸						
4 items	Delegati My Ac • Sorted I	ons tive Delegati	ions 🔻 🖈	tered by My deleg	ations - Deleg	gation Status	• Updated a few seco	nds ago		(	Q. Search this	ilist	Accept Delegations Decline Delegations	
		CalHEE ↑ ∨	Name 🗸	Date of 🗸	SSN 🗸	Pho 🗸	Email V	Househol v	Con 🗸	Delegation Sta 🗸	Delegat V		Filters X	
1		5193166863	June Jones	5/24/1975	3377		june@mail.com	Medi-Cal Only	2029	6/17/2024 2:25 PM	D-3433494			
2		5193166864	Mike Moore	9/24/1995	9946		mike@mail.com	Medi-Cal Only	2029	6/17/2024 2:47 PM	D-3433495			
3		5193166865	Rob Roberts	1/31/1975	3569		rob@mail.com	Medi-Cal Only	2029	6/17/2024 3:30 PM	D-3433496	•	Filter by Owner My delegations	
4		5193166866	Kris Kraft	10/31/2000	9832		kris@mail.com	Medi-Cal Only	2029	6/17/2024 3:57 PM	D-3433497	-	Delegation Status equals Active	

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b. Use the Search this list field to search for Active Delegations by case ID, and name.

	Home	Entity 🗸	My Profil	e My De	legations 🗸	Resources 🗸	Help 🗸					
4 items	Delegati My Ac	ions tive Delegat	ions 🔻 🖈 /Application ID • Fil	tered by My deleg	gations - Delegatior	n Status • Updated 2 minut	tes ago		ſ	Q. Search this list	Accept Delegations Decline Delegati	ons
		CalHEE ↑ ∨	Name 🗸	Date of 🗸	SSN v Pho	o 🗸 Email	∨ Househol ∨	Con ~	Delegation Sta 🗸	Consent Valid Through Cov	/erage Year,	×
1		5193166863	June Jones	5/24/1975	3377	june@mail.com	Medi-Cal Only	2029	6/17/2024 2:25 PH	Household Eligibility, and P searchable. Use filters or se	Phone aren't	_
2		5193166864	Mike Moore	9/24/1995	9946	mike@mail.con	n Medi-Cal Only	2029	6/17/2024 2:47 PH	fields instead.		
3		5193166865	Rob Roberts	1/31/1975	3569	rob@mail.com	Medi-Cal Only	2029	6/17/2024 3:30 PM	D-3433496 💌	My delegations	
4		5193166866	Kris Kraft	10/31/2000	9832	kris@mail.com	Medi-Cal Only	2029	6/17/2024 3:57 PM	D-3433497 💌	Delegation Status equals Active	

### Tips

- Filters <u>reduce</u> the number of matches in your search results, creating a list of consumers with the same criteria.
  - Example: If you use the "First Name" filter and type in "Jo", consumers named Joe, John or Johnny display. Unless the consumer's first name begins with the letters "Jo", they will not display.
- Type in the first letter of a name and get all consumers that have that first initial. Search is NOT case sensitive.
  - Example: Type "j" in the First Name field and get results such as Jay, John, Julia, etc.
- The more filters you use, the shorter your search results.
  - Example: If you search for consumer John, use the field "Insurer", and choose Kaiser, only consumers named John (or similar) AND who chose Kaiser will show up.
- If you use too many filters or filters that are not compatible, it is possible to have no results show up.
  - Example: Choosing "Case Inactive" for Current Status and "Pending" in Enrollment Status will not produce any results.



# **Search Results Options**

### **Current Status Search Filter**

Filter search results based on application or case status.

Search Results	Description
Application Not Started	Consumer has created an account and has delegated it, but application was not begun.
Application In Progress	New application was started but was not submitted.
Application Withdrawn	Application is no longer active and was withdrawn. The application was never completed (In other words, eligibility was not determined). If this is the first application ever, then no case will be created.
Case Inactive	Case has no active enrollments. An application was submitted at one point.
Renewal Opt Out	An Enroller has opted the case out of automatic renewals on behalf of the consumer.

#### **Next Steps Search Filter**

Filter search results based on action needed.

Search Results	Description
None	Default option - No filter
ROP Expiring	Reasonable Opportunity Period (ROP) refers to the 95 days that consumers have to provide required documentation to clear their "conditional eligibility" status.
Complete Report a Change	A Report a Change was started and needs to be submitted to determine eligibility.
Complete Plan Selection	Consumer needs to choose a health plan or choose/opt out of a dental plan. This may happen for a new application or during a Report a Change process.
Complete Renewal	Consumer will be a part of the auto-renewals. Combine "Complete Renewal" with the Enrollment Status filter of "Pending" to see cases that will not be auto-enrolled and will need to actively renew.