Conditional Eligibility Quick Guide

Overview

Covered California consumers in a conditional eligible status will receive a reminder notice from Covered California that informs them they need to provide documents to prove they are eligible to continue their health insurance and/or financial assistance through Covered California.

For more information on the Conditional Eligibility notice and next steps for consumers in a conditional eligibility status, review our Conditional Eligibility, Understanding ROP, and Auto-Discontinuance Guide.
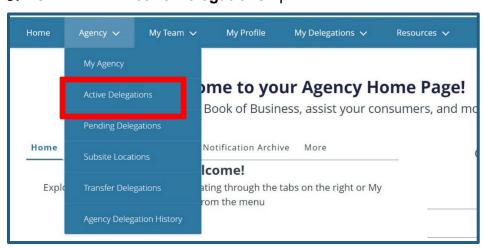
Conditional Eligibility in Book of Business – How You Can Help

Help consumers maintain their APTC and/or coverage by reminding them to upload verification documents before their reasonable opportunity period ends. You can find out which of your consumers are conditionally eligible by extracting your current Book of Business from the Agent Portal. Instructions on how to do that can be found in the Book of Business Export for Agency and Agency Manager Quick Guide.

- The Book of Business is provided as an Excel document, giving the flexibility to sort and filter data to assist your consumers. Remind consumers to submit acceptable documentation to clear their conditional eligible status or help them upload their documents. If the requested documents were previously uploaded via the **Submit Documents** link (check the documents and correspondence section on the consumer's home page), the consumer can call the Consumer Service Center at (800) 300-1506 and request the documents be verified over the phone.

Access the Program Eligibility Page

1. Login to the CalHEERS portal.
2. Click on the Agency dropdown on the top of the page.
3. Click on the **Active Delegations** option.

4. Find the consumer from the list and click on their name.

5. Click on the **Consumer Case** hyperlink located under **Quick Links**.

Quick Links

Consumer Case

6. Scroll down the page until you reach the section **Manage Your Application**.

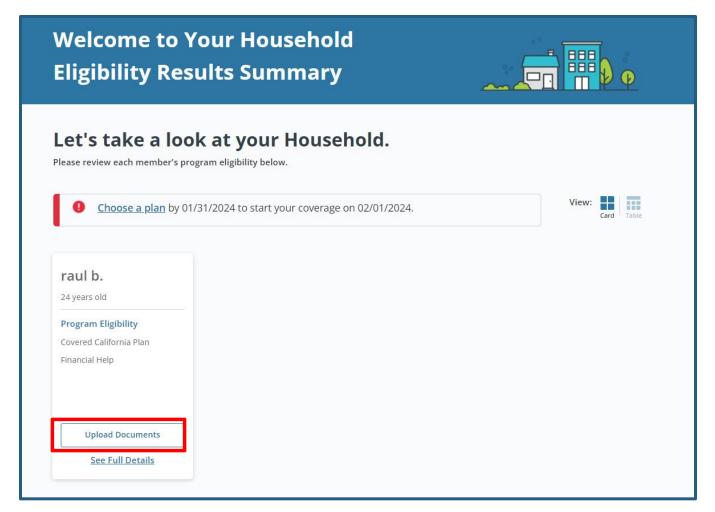**Manage Your Application**   Case #: 5193228103

Review Application   Eligibility Results   Enrollment Dashboard   More Actions
View your most recently   Learn about how your   Shop for health plans,   Make changes to your
submitted application.   eligibility was determined. manage coverage, and view   coverage and compare plans.
                                                          enrollment status.ⓘ

7. Click on **Eligibility Results**. This will take you to where you can upload the approved documents.

8. Click the **Upload Documents** hyperlink located under the consumer's name.
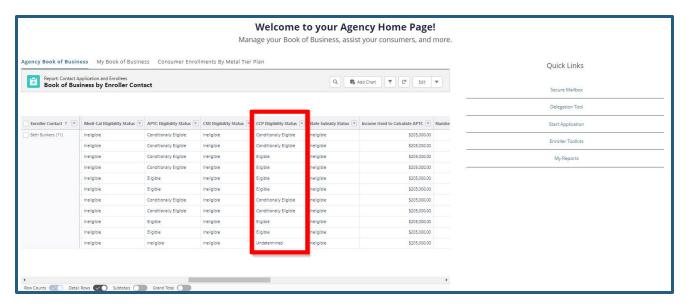
9. Click on **Submit for Review** at the bottom of the page once the documents are uploaded.

If the requested documents were submitted via fax or mail and are not displayed in the documents and correspondence section, no action is needed.
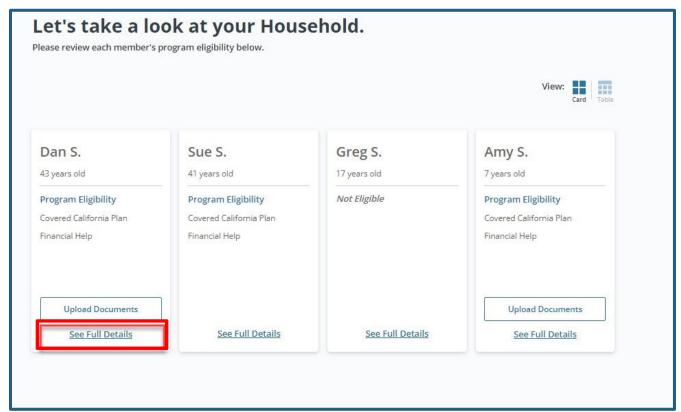
Exporting a Book of Business

You can export your own Book of Business, and an agency manager can export any individual agent's Book of Business in the agency or a combined extract of all enrollments under the agency. Details on how to extract a book of business are available in the Book of Business Export for Agency and Agency Manager Quick Guide.

The key column in the Book of Business report is CCP Eligibility Status (AS) -- filter for those cases delegated to you that are "Conditionally Eligible." Conditional eligibility means that your consumer's enrollment and/or assistance could end if these inconsistencies are not addressed and cleared.
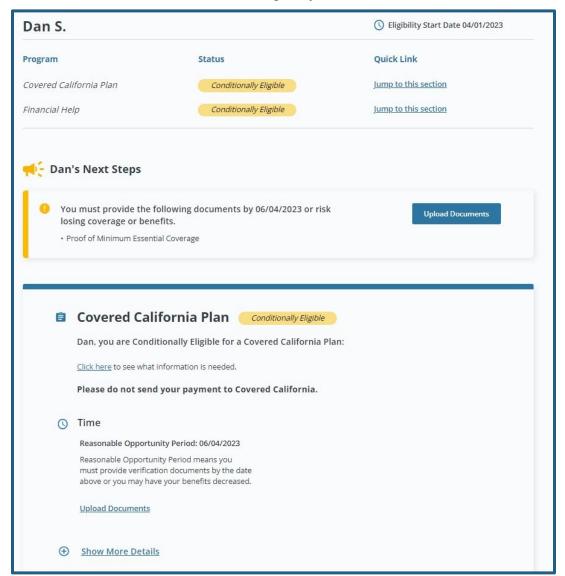
An agent can also view a consumer's eligibility within their case.

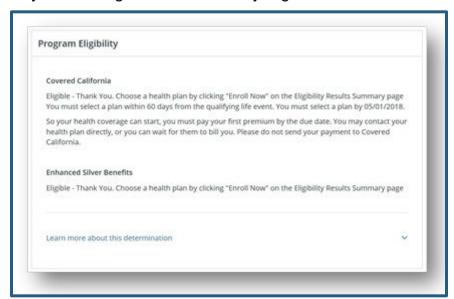1. Click on **See Full Details** on the consumer's home page.

You can now view the consumer's eligibility.

Dan S.

🕐 Eligibility Start Date 04/01/2023

Program	Status	Quick Link
Covered California Plan	Conditionally Eligible	Jump to this section
Financial Help	Conditionally Eligible	Jump to this section

📣 **Dan's Next Steps**

⚠️ You must provide the following documents by 06/04/2023 or risk losing coverage or benefits.

• Proof of Minimum Essential Coverage

Upload Documents

📄 **Covered California Plan**   Conditionally Eligible

Dan, you are Conditionally Eligible for a Covered California Plan:

Click here to see what information is needed.

Please do not send your payment to Covered California.

🕐 **Time**

Reasonable Opportunity Period: 06/04/2023

Reasonable Opportunity Period means you must provide verification documents by the date above or you may have your benefits decreased.

Upload Documents

⊕ **Show More Details**

Validating a Consumer's Eligibility Status

Once a consumer provides documentation and the documents have been Passed/E-Verified, they are no longer in a conditionally eligible status.

The Eligibility Results Page will no longer display the **Submit Documents** link.

Personally Identifiable Information (PII)

The Book of Business contains a client's Personally Identifiable Information (PII). Any PII found within the Book of Business must remain secure and confidential in accordance with Covered California's Agent Agreement and all applicable laws and regulations. It is the Agent's responsibility to ensure that they handle this information in the appropriate manner.