



Consumer Delegation for Certified Enrollers Quick Guide

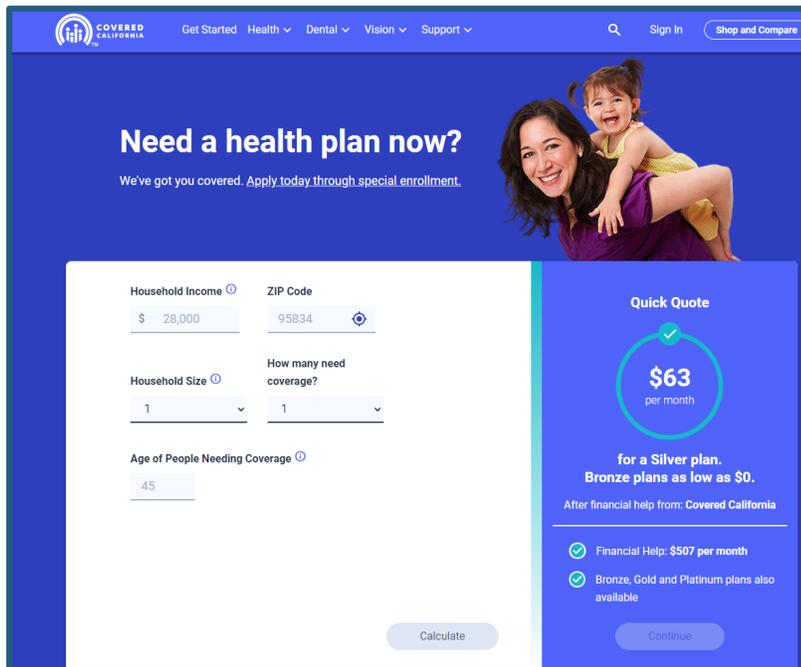
Overview

Covered California consumers can choose to delegate a Certified Enroller through their [CalHEERS account](#) to assist them with the application and enrollment process. Consumers can follow the steps below to assist them with the delegation process.

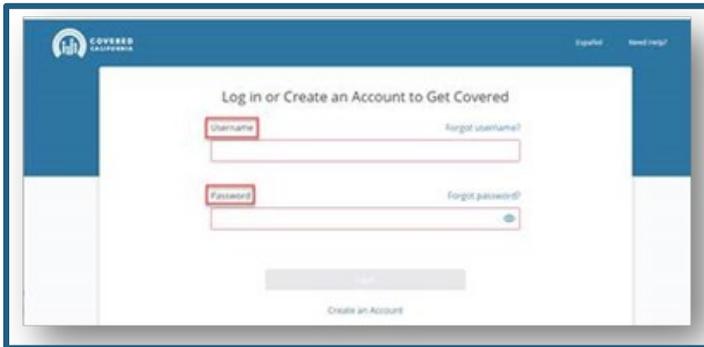
Note: The term “Certified Enroller” refers to Certified Insurance Agents, Certified Enrollment Counselors, and Certified Application Counselors. All Certified Enrollers are Certified with Covered California to assist consumers.

Delegate a Certified Enroller

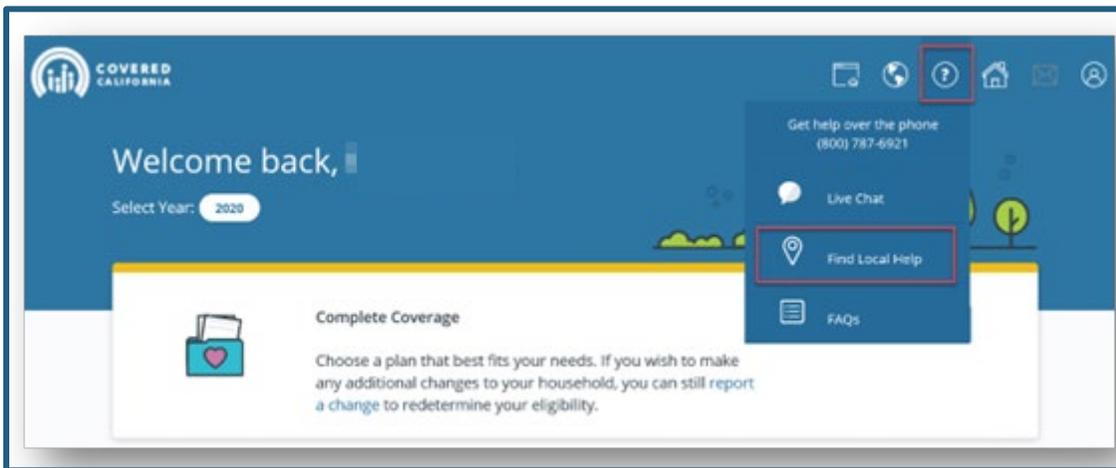
1. Sign in at the Covered California homepage.



2. Enter your username and password to access your consumer homepage.

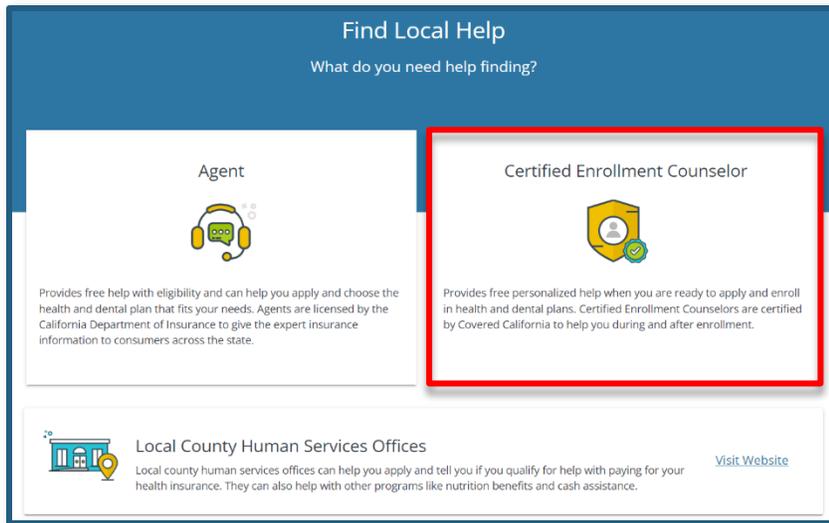


3. From the consumer homepage, select the dropdown option (Question Mark icon), to select **Find Local Help**.



Note: the images below are for searching and delegating Certified Enrollment Counselors. Consumer will choose the Agent tile when searching for Certified Insurance Agents and follow the steps to locate and delegate to their application.

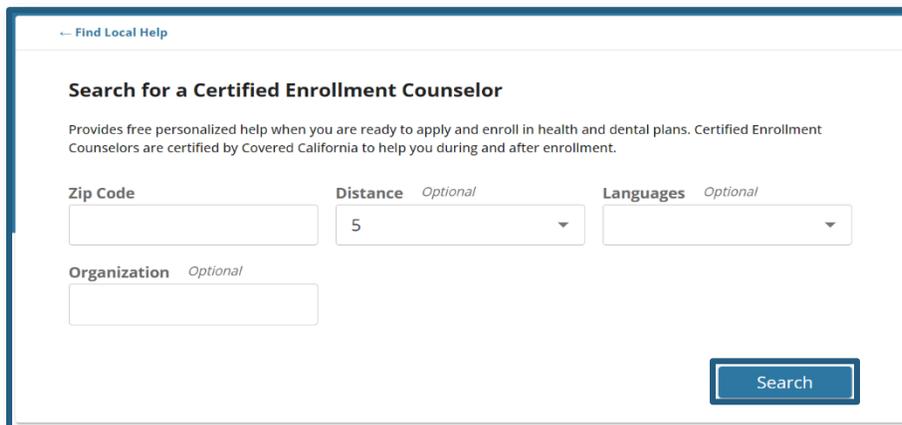
4. On the **Find Local Help** page, select the **Certified Enrollment Counselor** tile to search for a Certified Enroller.



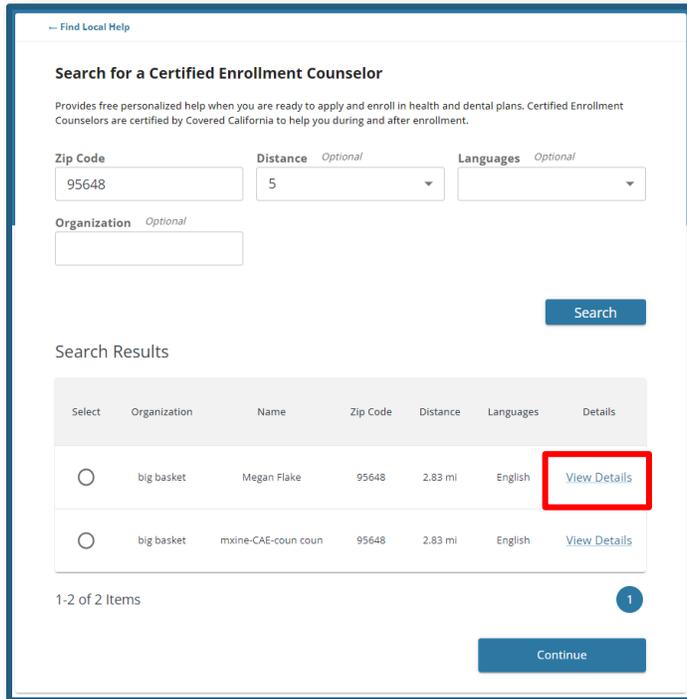
5. The *Search for a Certified Enrollment Counselor* page displays. Consumers can search using the following criteria:

- **Zip Code**
- **Distance**
- **Language**
- **Organization**

Note: Zip Code is the only required field.



6. Click the **Search** button. A Search Results section displays with a list of organizations that match the search criteria.
7. Click the **View Details** link to view more specific information about the Entity and the Counselor.



Search for a Certified Enrollment Counselor

Provides free personalized help when you are ready to apply and enroll in health and dental plans. Certified Enrollment Counselors are certified by Covered California to help you during and after enrollment.

Zip Code: 95648 Distance: 5 Languages: English

Organization:

Search

Search Results

Select	Organization	Name	Zip Code	Distance	Languages	Details
<input type="radio"/>	big basket	Megan Flake	95648	2.83 mi	English	View Details
<input type="radio"/>	big basket	mxine-CAE-coun coun	95648	2.83 mi	English	View Details

1-2 of 2 Items

Continue

8. The *Certified Enrollment Counselor Details* popup displays and includes the following information about the Entity and Counselor:
 - **[Entity Name]**
 - **Address**
 - **Hours of operation**
 - **Languages spoken**
 - **Languages written**
 - **Contact information**

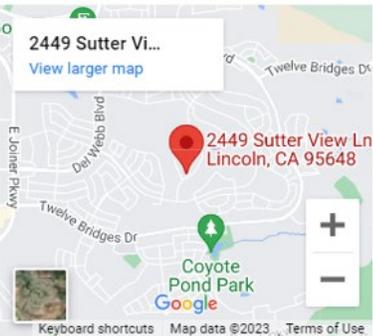
Certified Enrollment Counselor Details

big basket

Address
2449 SUTTER VIEW LN, LINCOLN CA CA, 95648

Hours of Operation

Mon	8:00 AM - 5:00 PM
Tues	8:00 AM - 5:00 PM
Wed	8:00 AM - 5:00 PM
Thurs	8:00 AM - 5:00 PM
Fri	8:00 AM - 5:00 PM
Sat	5:00 PM - 5:00 PM
Sun	8:00 AM - 5:00 PM



Languages Spoken

Languages Written

Megan Flake **Contact Information**



Phone Number
11234567656

Email

Languages Spoken
English

Close

9. Click the **Close** button to return to the Search for a Certified Enrollment Counselor page.
10. Click the **Select** radio button next to an organization.

Search Results

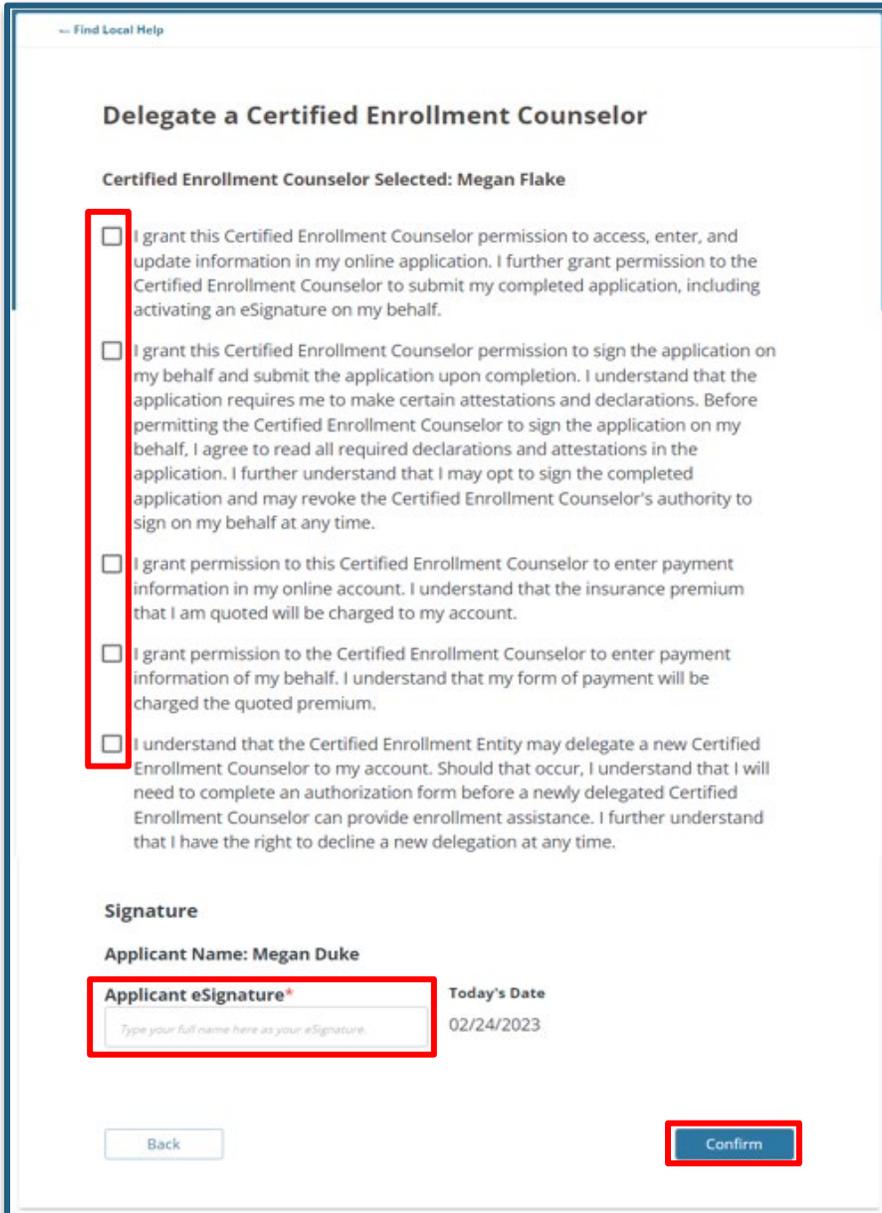
Select	Organization	Name	Zip Code	Distance	Languages	Details
<input type="radio"/>	big basket	Megan Flake	95648	2.83 mi	English	View Details
<input type="radio"/>	big basket	mxine-CAE-coun coun	95648	2.83 mi	English	View Details

1-2 of 2 Items 1

Continue

11. Click the **Continue** button. The Delegate a Certified Enrollment Counselor page displays.

12. A *Certified Enrollment Counselor Selected* indicator displays the name of the Counselor selected. Select the five attestation boxes granting permission to delegate the Counselor.



... Find Local Help

Delegate a Certified Enrollment Counselor

Certified Enrollment Counselor Selected: Megan Flake

- I grant this Certified Enrollment Counselor permission to access, enter, and update information in my online application. I further grant permission to the Certified Enrollment Counselor to submit my completed application, including activating an eSignature on my behalf.
- I grant this Certified Enrollment Counselor permission to sign the application on my behalf and submit the application upon completion. I understand that the application requires me to make certain attestations and declarations. Before permitting the Certified Enrollment Counselor to sign the application on my behalf, I agree to read all required declarations and attestations in the application. I further understand that I may opt to sign the completed application and may revoke the Certified Enrollment Counselor's authority to sign on my behalf at any time.
- I grant permission to this Certified Enrollment Counselor 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 grant permission to the Certified Enrollment Counselor to enter payment information of my behalf. I understand that my form of payment will be charged the quoted premium.
- I understand that the Certified Enrollment Entity may delegate a new Certified Enrollment Counselor to my account. Should that occur, I understand that I will need to complete an authorization form before a newly delegated Certified Enrollment Counselor can provide enrollment assistance. I further understand that I have the right to decline a new delegation at any time.

Signature

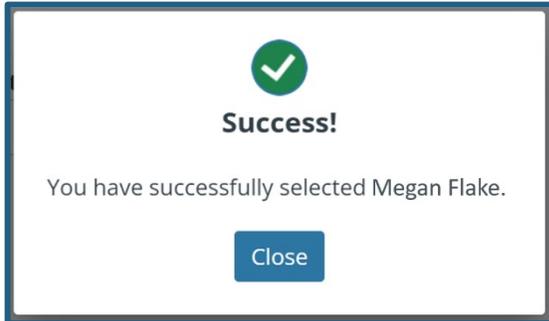
Applicant Name: Megan Duke

Applicant eSignature* **Today's Date** 02/24/2023

Type your full name here as your eSignature.

13. Enter your name in the **Applicant eSignature** field and click the **Confirm** button.

14. The Success popup displays with the message, “You have successfully selected [CEC Name].”



15. Clicking the **Close** button navigates the Consumer back the **Find Local Help** page.
16. Lastly, a delegation request is sent to the Certified Enroller. He or she must accept the delegation on their *Pending Delegations* page in the Enroller Portal to obtain access to your application.