

Overview

This Task Guide demonstrates how to generate and print plan summaries for Certified Enrollers and anonymous users. When accessing the shop and compare function from the Enroller Portal, the Enroller's information will populate on the take away pages. If accessing the function through CCA.com, the Enroller's information will not populate. Enrollers will also be able to utilize the *print page* function through the *Change Plan* flow.

Steps

- 1. Complete the steps in Shop and Compare with up to 3 plans on the *Compare Health Plans* page or a single plan on the *Health Plan Details* page.
- 2. Click the **Print Page Summary** link

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3. Once the link has been selected, the *Choose Your Categories* popup displays instructing the user to select the categories that are important to them. The user will have the ability to select all, some, or none of the categories.

The popup displays two main categories:

- Included Information
- Optional Content

All sections are selected by default. Users may select sections they would like included in the results.

- Deselect All link displays when at least one section is selected
- Select All link displays when no section is selected

Selecting a checkbox for a selection adds the section to the print preview.

- **Cancel** button closes the popup
- Print Preview button generates the PDF in a new tab for review and printing

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4. Once categories have been selected and the *Print Preview* tab is selected, a preview of the user's printout will display.



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5. When the user is satisfied with the printout, they can either print the document or download it and save to their computer.