



Special Enrollment Period Toolkit For Certified Enrollers

A “one-stop shop” for Covered California’s Special Enrollment Period where enrollers can find information on Qualifying Life Events, Special Enrollment Verification, Health, Dental and Vision Plan information, as well as resources to support Covered California consumers.

Check back frequently for updates.

Special Enrollment Period Resources

Resource	Type	Description
Special Enrollment Period	Quick Guide	Special Enrollment Period at a glance.
Special Enrollment Period Verification	Quick Guide	Information on Covered California’s Special Enrollment Period Verification process and how to assist consumers with Special Enrollment verification needs.
Special Enrollment Period Job Aid	Job Aid	Walkthrough of the online application for the Special Enrollment Period.
Special Enrollment FAQ	FAQ	Commonly asked questions and answers regarding the Special Enrollment Period.
Healthcare Stipend	Quick Guide	Information about health care stipends available to qualified individuals.
CalHEERS Online Application	Job Aid	A step-by-step guide to assist enrollers with the CalHEERS Online Application.

Health, Dental, and Vision Plans

Resource	Type	Description
Standard Benefit Design Chart	Handout	Handout to provide to consumers explaining the standard benefits and medical costs per metal tier.
Family Dental Plans	Reference Documents	Link to website outlining dental insurance companies and plan rates.
Prescription Drug Overview - Bronze	Guide	Prescription drug costs, according to metal tier, for Covered California Individual health insurance plans.

Prescription Drug Overview - Silver	Guide	Prescription drug costs, according to metal tier, for Covered California Individual health insurance plans.
Prescription Drug Overview - Gold	Guide	Prescription drug costs, according to metal tier, for Covered California Individual health insurance plans.
Prescription Drug Overview - Platinum	Guide	Prescription drug costs, according to metal tier, for Covered California Individual health insurance plans.
Health, Dental, and Vision Plan Provider Directories	Index	Use these links to contact the Health, Dental, and Vision Plans directly for more information on the provider directories.
Vision Coverage Quick Guide	Guide	EyeMed, VSP, and Superior Vision coverage quick guide for Certified Enrollers.
EyeMed Summary of Benefits	Chart	EyeMed vision coverage benefits and network summary.
VSP FAQ	FAQ	Commonly asked questions and answers regarding VSP individual vision plans for certified enrollers.

Helpful Tips & Tools

Resource	Type	Description
Shop and Compare	Job Aid	Instructions on how to navigate the updated Shop and Compare tool.
Conditional Eligibility	Quick Guide	Information on the reminder notice sent to consumers in a conditional eligibility status and how you can assist them in providing documentation to Covered California.
Tax Form 1095 Toolkit	Toolkit	Resources and reference materials to educate consumers about the purpose and importance of IRS Form 1095-A.
Individual Mandate and Penalty (Coming Soon)	Quick Guide	Information about the Individual Mandate and Penalty in California, link to FTB's penalty estimator, and rules regarding exemptions.

Agent & CEC Portal Search	Training Guide	Instructions on how to use the “Search” functionality effectively in the Agent or CEC Portal.
Assisting Medi-Cal Eligible Consumers (Coming Soon)	FAQ	Questions and answers regarding assisting consumers in Medi-Cal.
Consent for Verification Quick Guide	Quick Guide	Information on consumer consent for verification to avoid loss of Advanced Premium Tax Credit (APTC) or Cost-Sharing Reductions.
Delegation and Delegation Change	Policy	Guidance on consumer delegation for Certified Enrollers.
Documents to Verify ID for Eligibility Determination	Quick Guide	Details about identity proofing methods and the steps to complete this process within the application.
CalHEERS Password Reset	Job Aid	Instructions for how to assist consumers on resetting their password in the online application (CalHEERS).
Add an Event	Portal	Link to request to add an event to the Covered California Events page so consumers can attend enrollment events in their community.

Agent Resources

Resource	Type	Description
Book of Business for Agents	Quick Guide	Report of all your Covered California consumers.
Conditional Eligibility Extract	Quick Guide	Instructions on how to help consumers with a conditional eligibility status in your Book of Business.
Agency Manager Toolkit	Toolkit	Resources for Agency Managers to assist with viewing and exploring a Book of Business, transferring delegated consumers with the agency, adding new agents and admin staff to the agency, and much more.

Approved Admin Staff Role Toolkit	Toolkit	Resources for Approved Admin Staff to with the online application support, managing Agency delegations (Level 2 only) crating new profiles and Agents (Level 2 only), and much more.
Book of Business (Agency Manager Export)	Job Aid	Access an aggregate Agency Book of Business from the CalHEERS Agency portal.
Health Care Sharing Ministries Policy and Procedures	Policy	Outline of general policies, definitions of roles, and responsibilities of Covered California and Certified Insurance Agents
Health Care Sharing Ministry Consumer Acknowledgement and Full Disclosure Form	Form	Consumer Informed Consent and Acknowledgement form; side-by-side chart comparing Covered California Marketplace Plans and Health Care Sharing Ministries
Delegation Tool	Quick Guide	Guide outlining the steps for enrollers to self-serve and delegate a consumer’s case to their Book of Business using the new Accelerated Consumer Delegation Consent tool
Self-Delegation How-to Video	Video	Short video showing the steps for enrollers to delegate a consumer’s case to their Book of Business

Consumer-Facing Documents

Resource	Type	Description
How to Reset and Retrieve your Username	Quick Guide	Form to help consumers reset and/or retrieve their username or password in CalHEERS.
Consumer Delegation	Quick Guide	Form for consumers to use to delegate a Certified Enroller.

Income Guidance

Resource	Type	Description
Income Guidelines	Handout	Handout provided to consumers showing Federal Poverty Level Guidelines.

Income Guidelines (Spanish Version)	Handout	Handout provided to consumers showing Federal Poverty Level Guidelines.
Countable Sources of Income	Guide	Reference guide on what to count for income for APTC/CSR.
Income Section	Job Aid	A step-by-step guide to assist enrollers with the income section of the online application.

Documentation

Resource	Type	Description
Acceptable Administrative Documentation	Guide	Acceptable documentation that can be submitted to Covered California.
Attestation of Non-Incarcerations Status	Form	Form for consumers to use to attest to their Non-Incarcerations Status, if applicable.

Contact Covered California

Resource	Type	Description
Covered California Service Center Operating Hours	Schedule	Service Center hours of operation for consumers and certified enrollers.
Regional Field & Account Representatives	Handout	Contact information for our field and account team representative by region within California.
Covered California's SEP Verification Team	Contact Info	Extensions & Appeals: SpecialEnrollment@covered.ca.gov 888.217.9311 Questions regarding the notices & reporting fraud: ConsumerProtection@covered.ca.gov 888.217.9309