Cancel and Disenroll Coverage Job Aid Certified Enroller
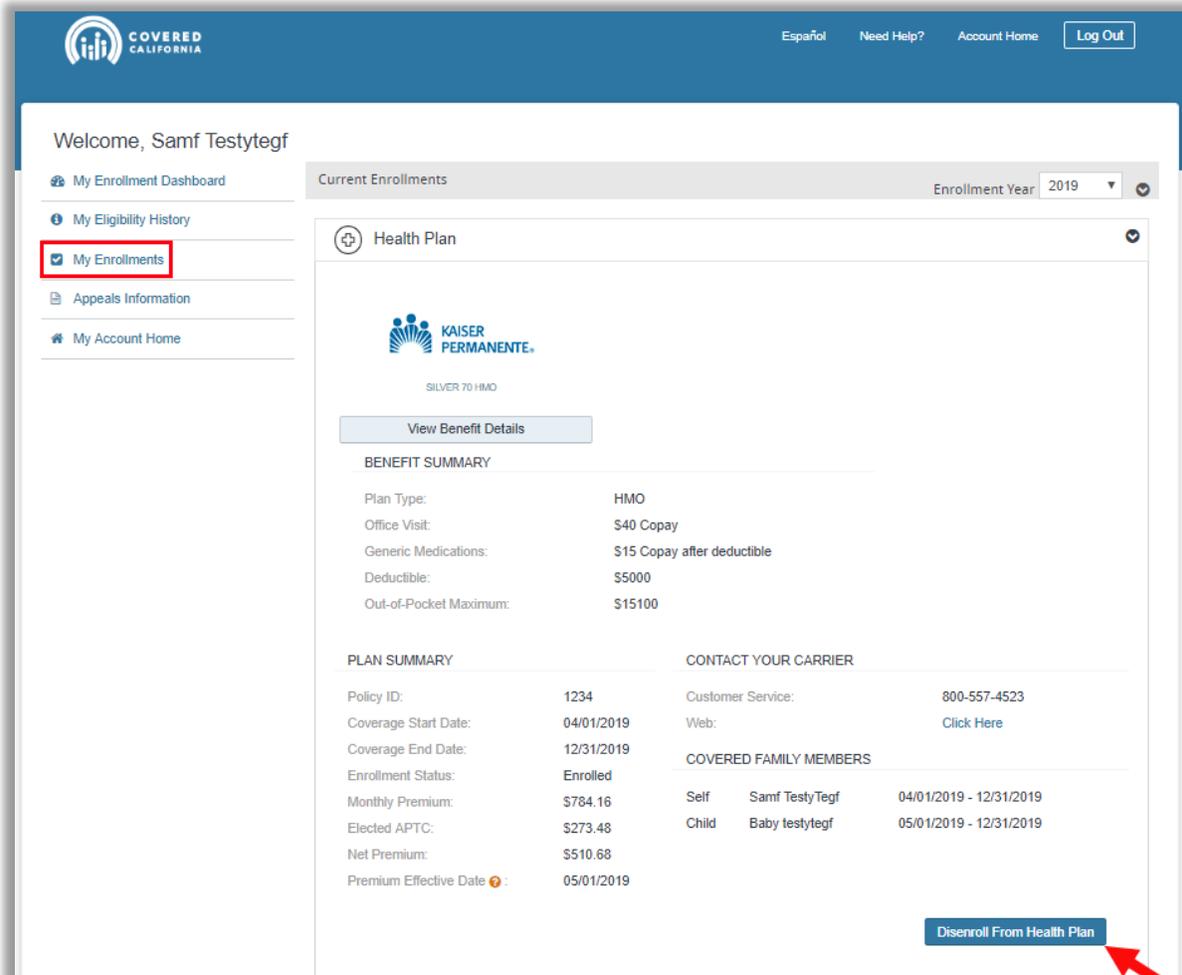
Overview

This Job Aid is intended for Certified Enrollers assisting consumers who want to disenroll or cancel their current health and/or dental plan. Canceling coverage can only take place if the health or dental plan has not started yet. Disenrolling from coverage can only take place once the health or dental plan has already started.

Disenrollment on Behalf of the Consumer

A Certified Enroller or consumer may disenroll from coverage if it is after the coverage start date. To assist a consumer in disenrolling from their current health and/or dental plan:

1. Navigate to the consumers *Home* page.
2. Select the **View Enrollment Dashboard** link located under *Manage My Application* section.
3. The Certified Enroller is navigated to the *Enrollment Dashboard* page.
4. Select the **My Enrollments** link from the left navigation panel.
5. The Certified Enroller is navigated to the consumers *Current Enrollment* page.
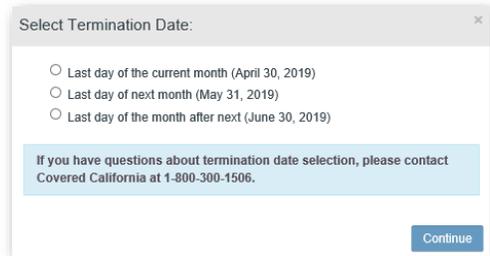
6. Select the **Disenroll From Health (Dental) Plan** button.
7. The *Voluntary Disenrollment Survey* popup displays:
   - Why are you disenrolling from your plan?
     - Purchase coverage outside Covered California
     - Moving out of Covered California area dental plan
     - Gained Employer Sponsored coverage
     - Other
     - A message displays informing the user that if the intent is to report a change rather than disenrolling from coverage, they may do so via the **Report a Change** link on the *Account Home* page

   *Note: This survey is voluntary*
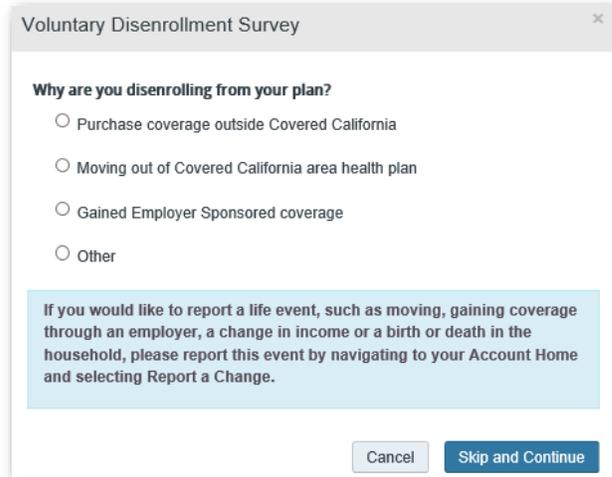
8. Select the **Cancel** button to cancel this action or;
9. If the consumer would like to answer the voluntary survey, select the appropriate response and select the **Continue** button to proceed or;
10. If the consumer does not want to answer the voluntary survey, select the **Skip and Continue** button to proceed.
11. The *Select Termination Date* popup displays with a required end date selection as follows:
   - Last day of the current month
    - Last day of the next month
    - Last day of the month after next
12. Select the option based on the consumers preference and select the **Continue** button.
13. The *Confirm your coverage end date* popup displays allowing the Certified Enroller to confirm the end date to proceed with the disenrollment.
    - To update the end date, select the **Update Termination Date** button. The Certified Enroller is returned to the *Select Termination Date* popup.
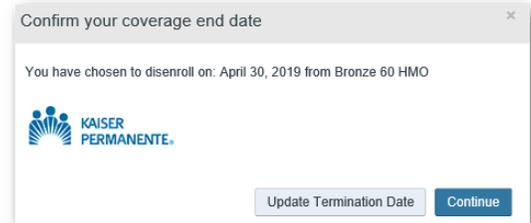
14. Select the **Continue** button on the *Confirm your coverage end date* popup to proceed with the disenrollment. A final *Confirmation* popup displays a message *Your coverage from [plan] will end [Month, Date, Year].* A note also displays informing the consumer to continue making premium payments if an end date was selected for a future month.
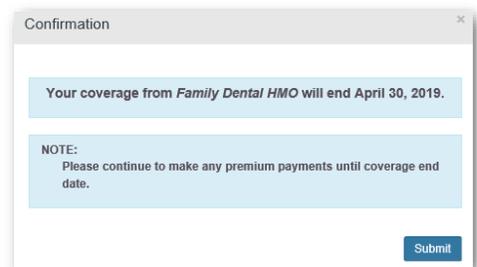
15. Select the **Submit** button to complete the disenrollment process. A *Voluntary Disenrollment Request Submitted* popup displays.

16. Select the **Go To Dashboard** button to return to the *Enrollment Dashboard*.
    Note: The Plan Summary for the disenrolled plan is updated to a status of Terminated

Cancel on Behalf of the Consumer

If a Health or Dental plan's coverage has not yet started, meaning the start date is in the future, the health and/or dental plan cannot be disenrolled. It can only be cancelled. The following steps illustrate how a Certified Enroller can cancel enrollment for a plan that has not yet started on behalf of the consumer.

1. Navigate to the consumers *Home* page.
2. Select the **View Enrollment Dashboard** link located under *Manage My Application*.
3. The Certified Enroller is navigated to the *Enrollment Dashboard* page.
4. Select the **My Enrollments** link from the left navigation panel.
5. The Certified Enroller is navigated to the consumers *Current Enrollment* page.
6. Select the **Cancel Coverage** button.
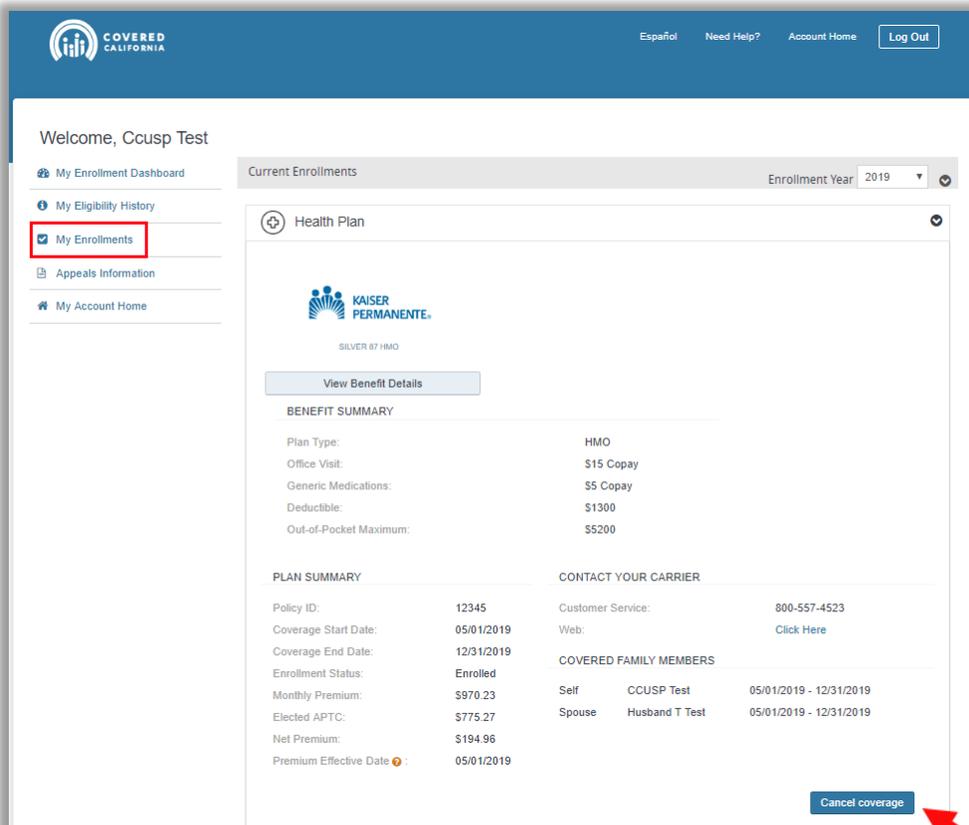
7. The *Voluntary Cancel Survey* popup displays:
   - Why are you disenrolling from your plan?
     - ○ Purchase coverage outside Covered California
     - ○ Moving out of Covered California area dental plan
     - ○ Gained Employer Sponsored coverage
     - ○ Other

     Note: This survey is voluntary

8. Select the **Cancel** button to cancel this action or;
9. If the Consumer would like to answer the voluntary survey, select the appropriate response and select the **Continue** button to proceed or;
10. If the consumer does not want to answer the voluntary survey, select the **Skip and Continue** button to proceed.
11. The *Cancel Coverage Request Submitted* popup displays confirmation of the action has been completed.
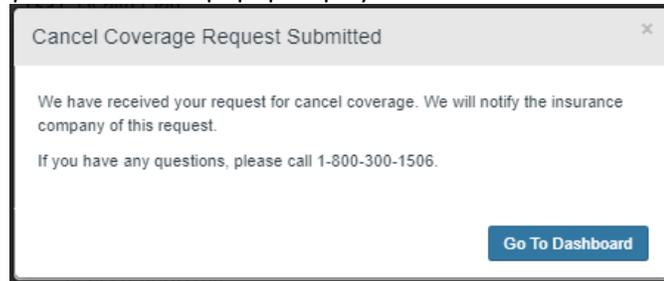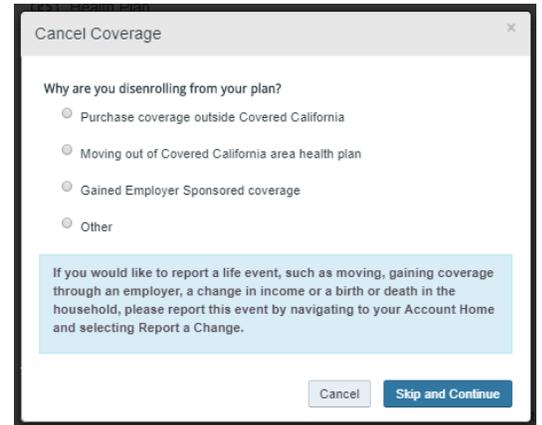
12. Select the **Go To Dashboard** button to return to the *Enrollment Dashboard* page.
    Note: In the Plan Summary section, the Enrollment Status displays the updated status as Cancelled.