

Consumer Delegation Quick Guide

Covered California consumers can choose to delegate a Certified Enroller through their <u>CalHEERS</u> <u>account</u> 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 "<u>Certified Enroller</u>" 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. Login to your Covered California account by selecting **"Sign In"** from the <u>www.coveredca.com</u> homepage.



2. Enter your "Username" and "Password" to access your Consumer homepage.

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3. From the consumer homepage, select the



dropdown option, to select "Find Local Help".



4. In the next window, select either **"Find an Agent"** or **"Find Certified Enrollment Counselor"** to search for a Certified Enroller.





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5. All Certified Enrollers can be searched by ZIP code and language(s) spoken. Certified Insurance Agents can be searched by their name or their Agency's name. Certified Enrollment Counselors can be searched by their Organization's name.

Agent View		Certified Enrollmen	t Counselor View
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- 6. From the results page, click on the name of the Certified Enroller to view their details.
- 7. If you wish to delegate a Certified Enroller, click "Select" to add the Agent or Certified Enrollment Counselor to continue the delegation process.

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8. Before delegating a Certified Enroller, you must read each attestation statement and select each box to acknowledge the statement was reviewed and accepted.

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- 9. An **E-Signature** is required to delegate the Certified Enroller. Type your full legal name in the **"Applicant E-Signature"** box.
- 10. Next, select **"Confirm"** and a congratulation message pops up to acknowledge the Certified Enroller was successfully delegated.

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11. Lastly, a delegation request is sent to the Certified Enroller. He or she must accept the delegation on their "Pending Delegations" page in the CalHEERS Portal to obtain access to your application.