



PROCESS GUIDE – EFFECT ENROLLMENT DATE FOR APPLICATIONS

Starts: December 24, 2013

Ends: TBD

*Your destination for affordable,
quality health care, including Medi-Cal*

This process is intended for CalHEERS users—Certified Enrollment Counselors, Certified Insurance Agents, Plan-Based Enrollers, Service Center Representatives, County Eligibility Workers, and Covered California Staff—keying in paper applications and/or completing online applications to effect enrollment coverage effective January 1, 2014.

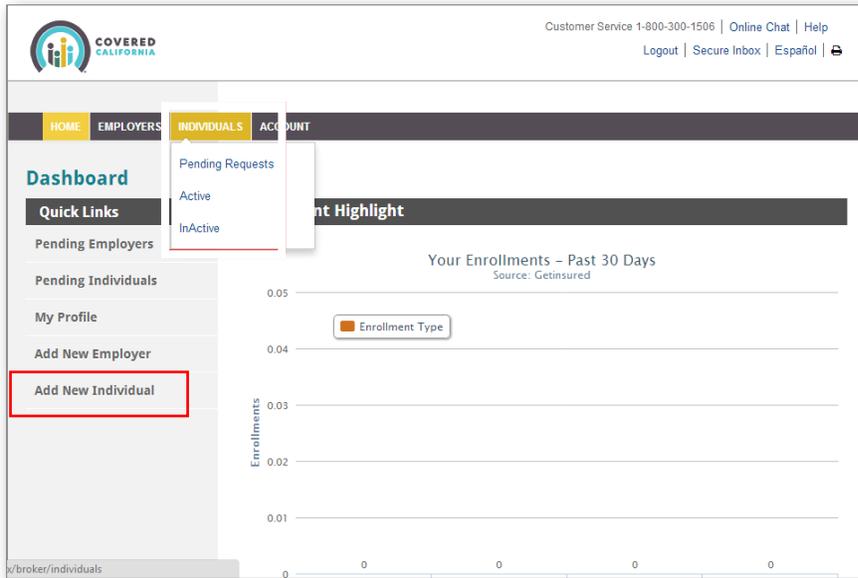
NOTE: This process applies to the Individual market only – not Employers or Employees in the SHOP market.

There are four scenarios to effect an enrollment date of 1/1/2014 for an application:

- 1. New Application**
- 2. Application In-Progress but no Eligibility Determination**
- 3. Application Completed to Eligibility Determination – Plan Enrollment Remains**
- 4. Application Completed with an Incorrectly Determined Enrollment of 2/1/2014**

NOTE: This fourth scenario can only be completed by a Service Center Representative or County Eligibility Worker.

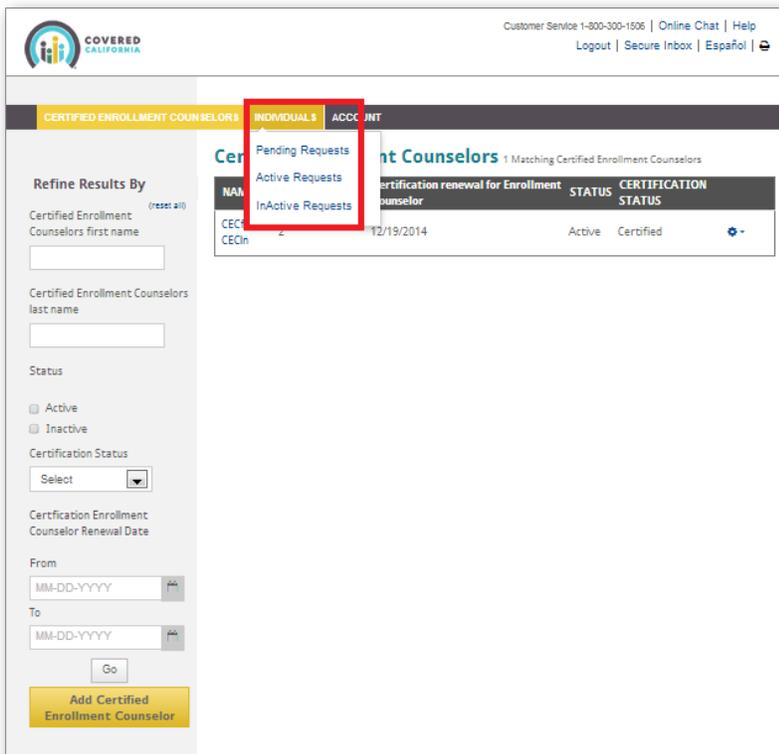
Attention: Certified Insurance Agents, when you log in to CalHEERS, your *Dashboard* will display:



To begin Scenario 1 – New Application – click on **Add New Individual** on your Agent Dashboard.

To begin Scenario 2 or 3 – click on the **Active** link from the **Individual** tab on your Dashboard. If the application in progress has been delegated to you but not accepted yet, it will appear in **Pending Requests**.

Attention: Certified Enrollment Entities, Certified Enrollment Counselors, and Plan Based Enrollers when you log in to CalHEERS, your **Dashboard** will display:



To begin Scenario 1 – New Application – click on the **Pending Requests** link in the dropdown from the **Individuals** tab on your Dashboard.

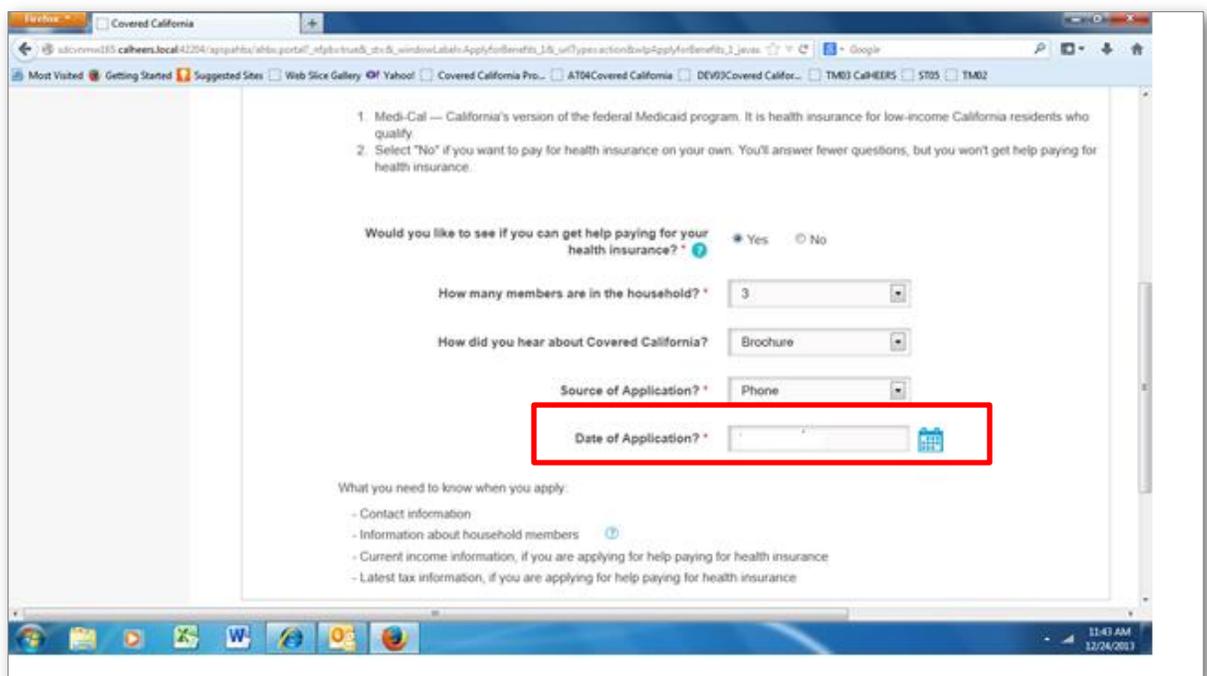
To begin Scenario 2 or 3 – Application In-Progress or Application Completed up to Eligibility Determination – click on the **Active Requests** link from the **Individual** tab on your Dashboard.

Scenario 1: Complete New Application with Coverage Effective 1/1/2014

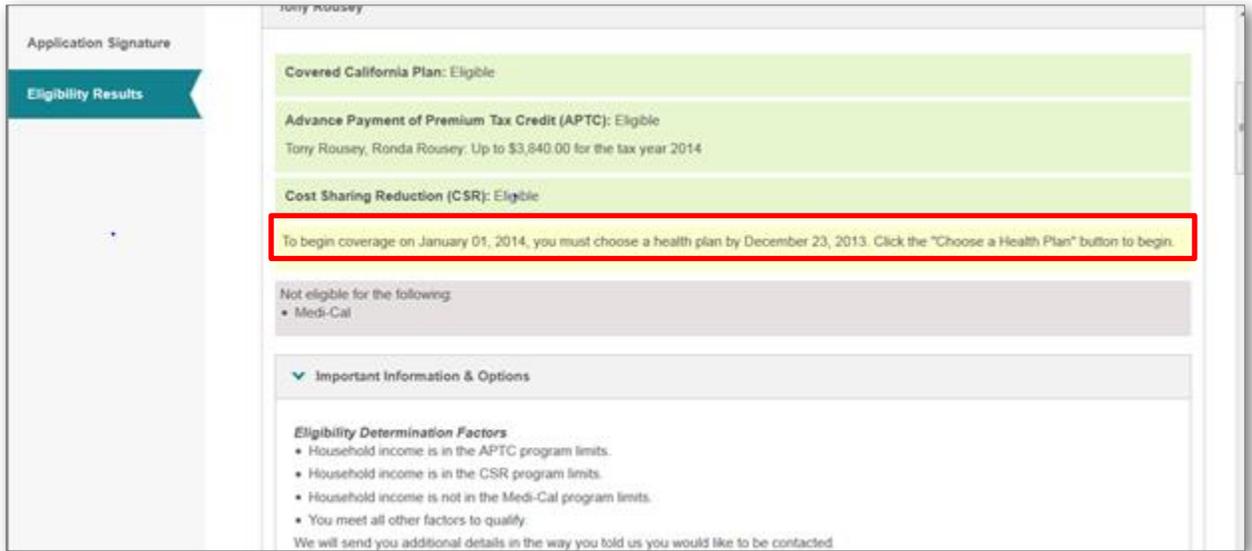
1. Login to CalHEERS.
2. From your **Administration** page, click on the **Apply Now** button.
3. **From the Overview page of the application**, click on the **Continue** button. The *Start Here* page displays.



4. Complete the required fields on the **Start Here** page. Enter the **Date of Application** as **12/22/2013** or the actual date of the application if earlier.



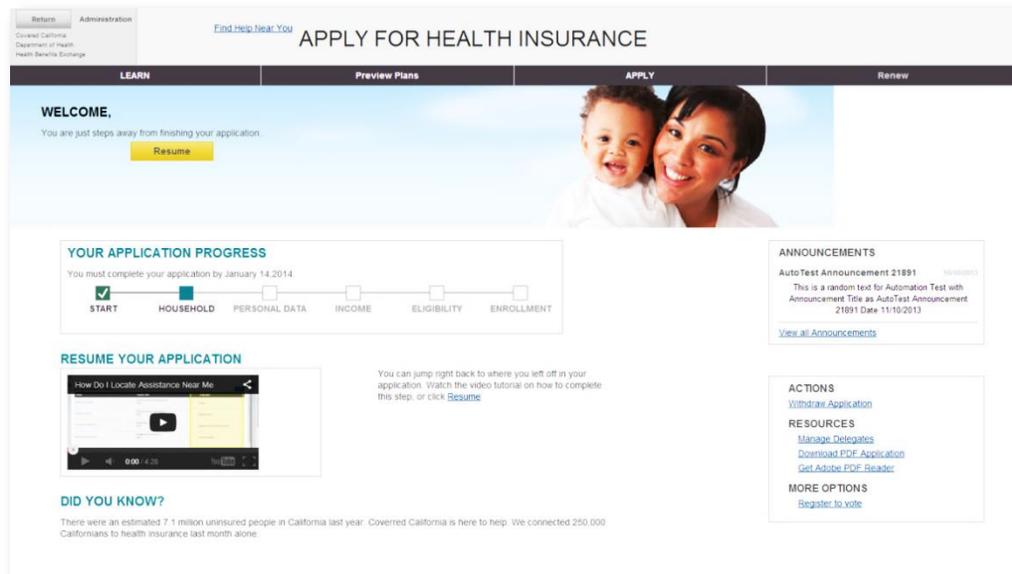
5. Click the **Continue** button. Continue through the application to complete all required sections.
6. Once you reach the **Application Signature** page, click **Submit** to run eligibility on the application. Confirm the **Eligibility Results** page section reads, "To begin coverage on January 01, 2014...."



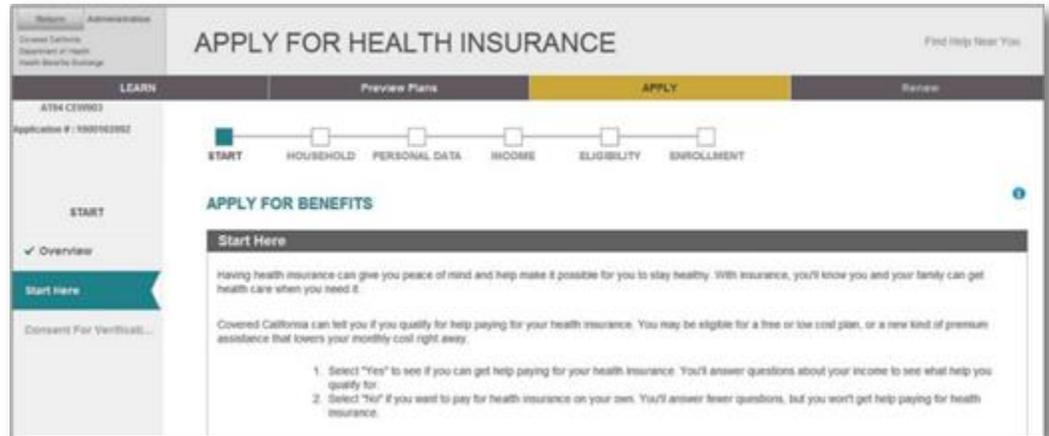
7. Upon confirmation of a 1/1/2014 eligibility effective date, proceed to plan selection by clicking on the **Choose a Health Plan** button at the bottom of the Eligibility Results.

Scenario 2: Complete In-Progress Application for Coverage Effective 1/1/2014

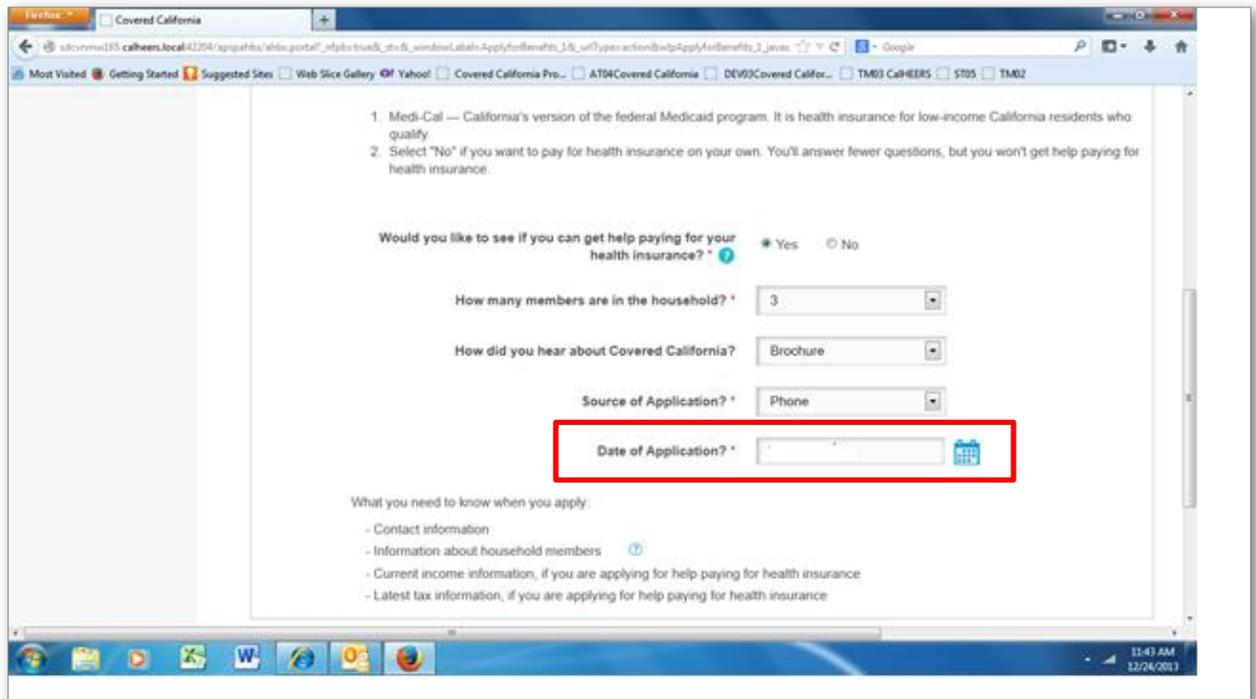
1. Login to CalHEERS. Your *Welcome* page displays.
2. Scroll to the **Actions** section on the lower right-hand side of the page, click the **Search for Individual** link.
3. Select an option from the **Search By** dropdown. Search by **Case ID** or **Application ID** and enter the number, otherwise, search by **Combo**, and enter First Name, Last Name, SSN, or other information available. Click the **Search** button. The *Search Results* displays.
4. From the Search Results, click on the radio button next to the applicable Application, and click on the **View Home** button. The Consumer's *Welcome* page displays.



5. Click on the **Resume** button to continue the application in progress.
6. From the **Overview** page of the application, click on the **Continue** button. The *Start Here* page displays.

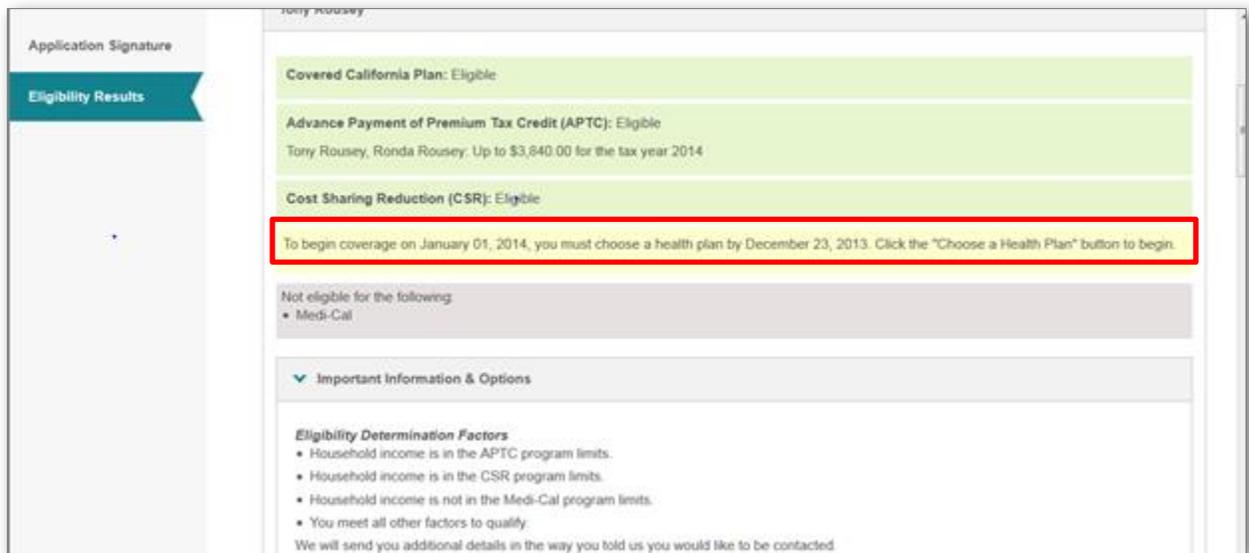


- Complete the required fields on the **Start Here** page. Enter the **Date of Application** as **12/22/2013** or the actual date of the application if earlier.



- Click on the **Continue** button. Navigate through the application sections to confirm information previously entered and enter any missing information until all sections are completed

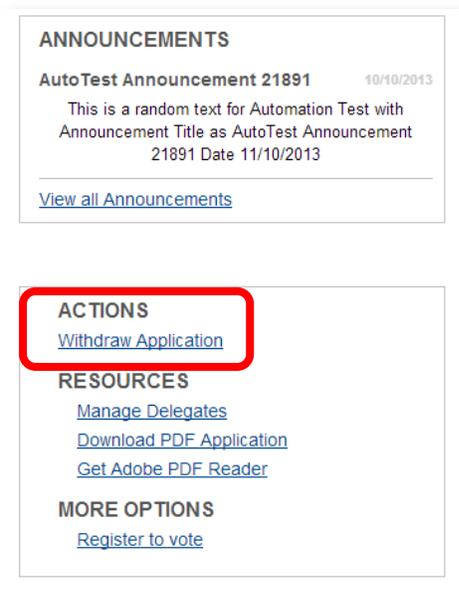
- Once you reach the **Application Signature** page, click **Submit** to run eligibility on the application. Confirm the **Eligibility Results** page section reads, "To begin coverage on January 01, 2014...."



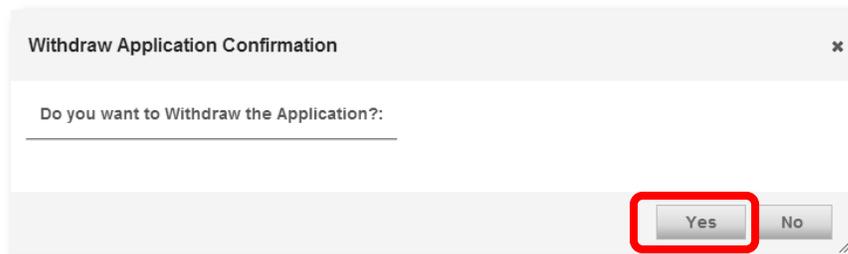
- Upon confirmation of a 1/1/2014 eligibility effective date, proceed to plan selection by clicking on the **Choose a Health Plan button** at the bottom of the Eligibility Results.

Scenario 3: Application Completed to Eligibility Determination – Plan Enrollment Remains

1. Login to CalHEERS. Your *Welcome* page displays.
2. Scroll to the **Actions** section on the lower right-hand side of the page, click the **Search for Individual** link.
3. Select an option from the **Search By** dropdown. Search by **Case ID** or **Application ID** and enter the number, otherwise, search by **Combo**, and enter First Name, Last Name, SSN, or other information available. Click the **Search** button. The *Search Results* displays.
4. From the Search Results, click on the radio button next to the applicable Application, and click on the **View Home** button. The Consumer's *Welcome* page displays.
5. From the Consumer's Home page, scroll to the **Actions** section on the lower right-hand side of the page. Click on the **Withdraw Application** link.



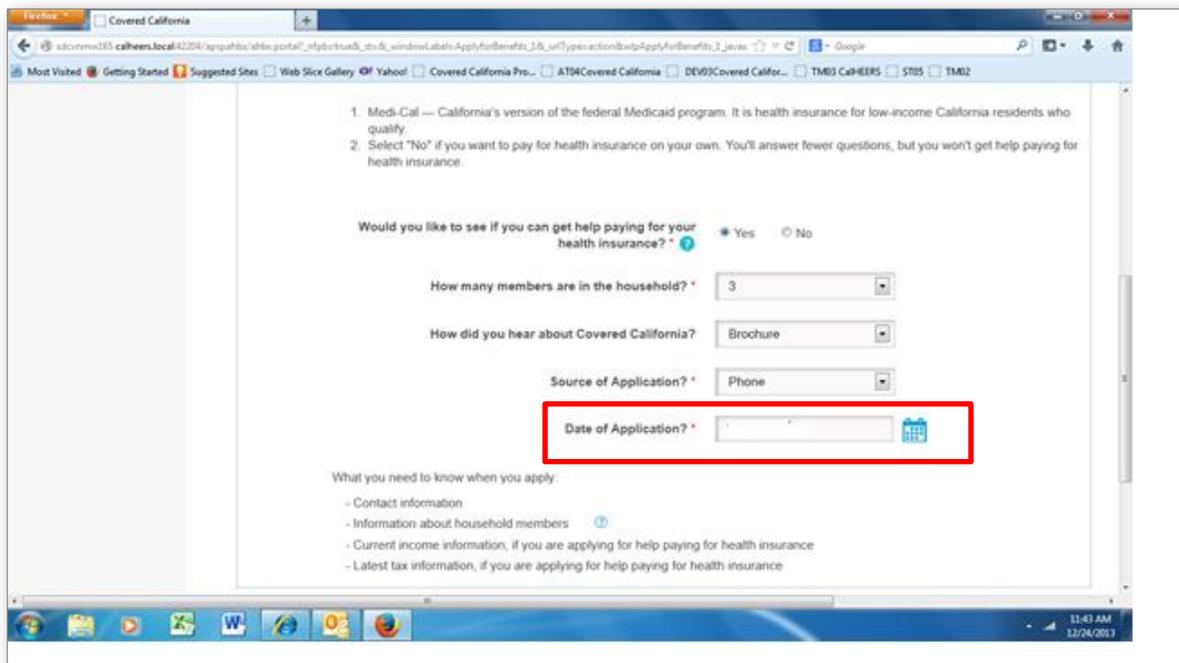
6. When the *Withdraw Application Confirmation* popup displays, click on the **Yes** button to confirm.



7. The Consumer's **Welcome** page displays. Click on the **Apply Now** button.
8. From the **Overview** page of the application, click on the **Continue** button. The **Start Here** page displays.

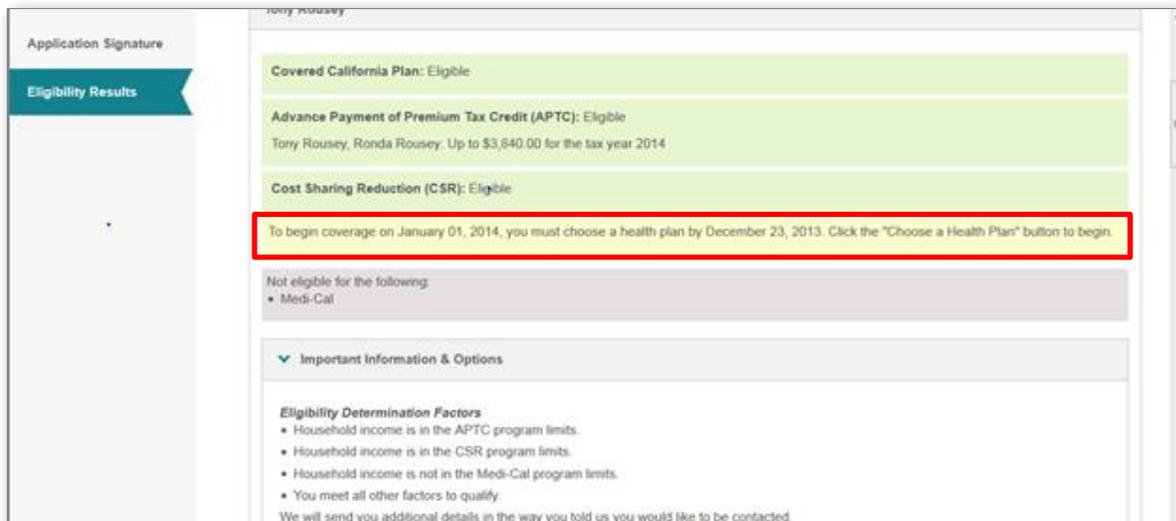


9. Complete the required fields on the **Start Here** page. Enter the **Date of Application** as **12/22/2013** or the actual date of the application if earlier.



10. Click the **Continue** button. Continue through the application to complete all required sections.

11. Once you reach the **Application Signature** page, click **Submit** to run eligibility on the application. Confirm the **Eligibility Results** page section reads, “To begin coverage on January 01, 2014....”

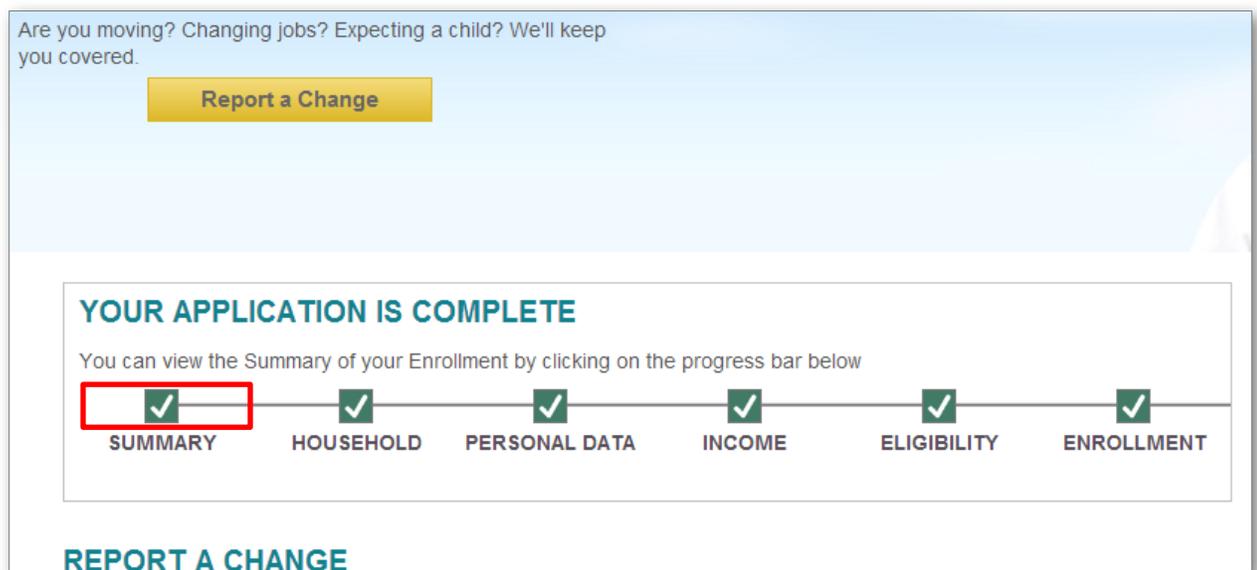


12. Upon confirmation of a 1/1/2014 eligibility effective date, proceed to plan selection by clicking on the **Choose a Health Plan button** at the bottom of the Eligibility Results.

Scenario 4: Application Completed with Incorrectly Determined Enrollment of 2/1/2014

NOTE: This scenario can only be completed by a Service Center Representative or County Eligibility Worker.

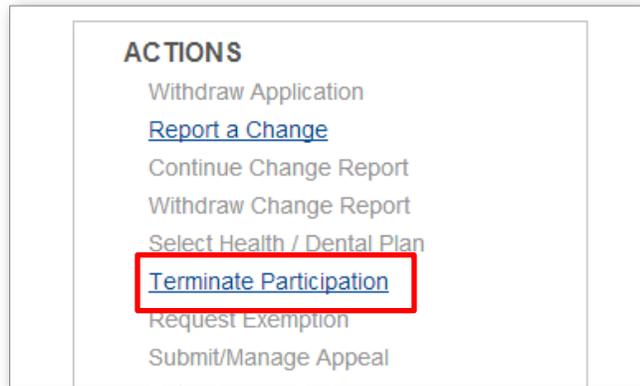
1. Login to CalHEERS. Your *Welcome* page displays.
2. Scroll to the **Actions** section on the lower right-hand side of the page, click the **Search for Individual** link.
3. Select an option from the **Search By** dropdown. Search by **Case ID** or **Application ID** and enter the number, otherwise, search by **Combo**, and enter First Name, Last Name, SSN, or other information available. Click the **Search** button. The *Search Results* displays.
4. From the Search Results, click on the radio button next to the applicable Application, and click on the **View Home** button. The Consumer's *Welcome* page displays.
5. From the Consumer's application *Report a Change* home page, click on the **Summary** checkbox from the breadcrumb navigation menu



6. Note the Plan Selection information for each family member. Click on the **Enrollment** section and print the screen if necessary.

NOTE: It is important to record this information before continuing. Once you terminate the application in the next step, the plan selection enrollment information will be lost.

7. On the application **Home** Page, in the **Actions** section, click on the **Terminate Participation** link.



- The *Terminate Participation* page displays. Complete the fields on this page. Select **Other** from the **Termination Reason** dropdown. The *Carrier Approval Reference ID* dynamically displays.

Case #5000450307 (Primary Contact:)

Termination Reason * Effective Date ?

Other 12/27/2013

Carrier Approval Reference ID *

Comments *

Review and Sign

Exchange requires that you certify the termination participation request by submitting an electronic signature (type your fullname) and electronic signature PIN

- Insurance Carrier has been contacted and early termination approval and Reference ID has been obtained.
- I hereby attest that the information submitted is accurate and true and has been verified with consumer
- Disclaimer has been read to the consumer explaining the tax penalty impacts by not having "minimum essential coverage"

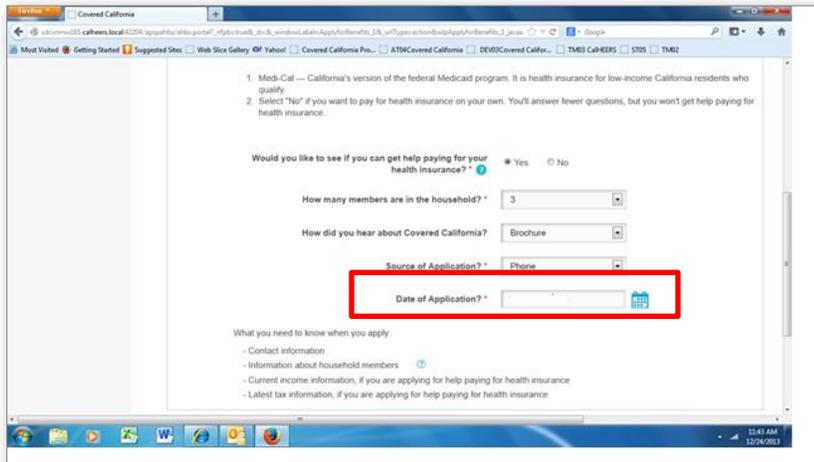
Cancel Submit

- Type **None** in the **Carrier Approval Reference ID** field. Enter the **Effective Date** of Termination and type required notes related to the case in the **Comments** field (e.g., *To effectuate coverage for application of 1/1/2014, case terminated and application re-entered.*)

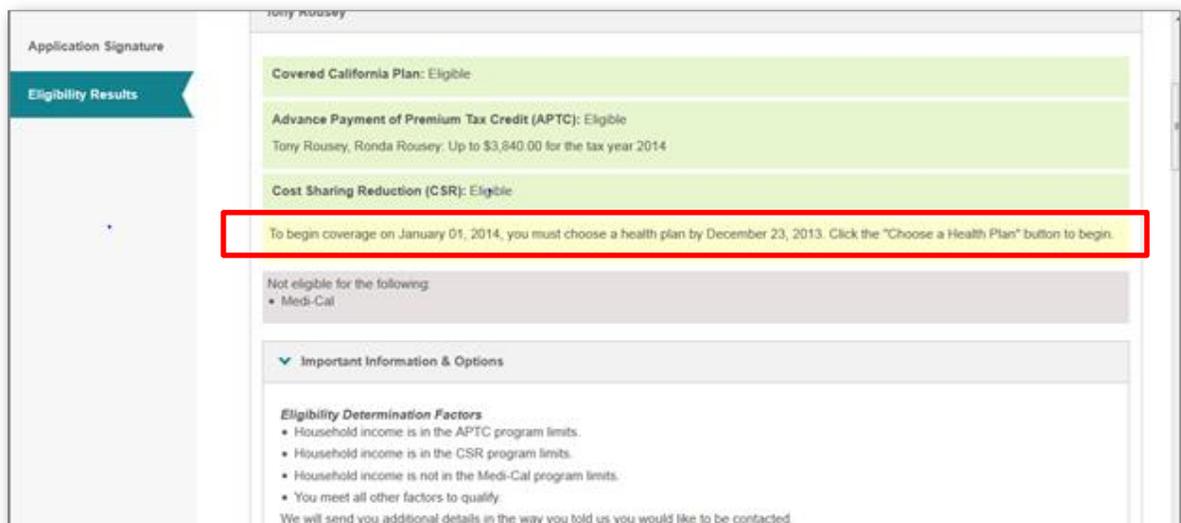
10. Complete the **Review and Sign** section at the bottom of the **Terminate Participation** page. Enter the **Electronic Signature PIN** number. Click the **Submit** button.

11. The Consumer's *Welcome* page displays. Click on the **Apply Now** button.
12. From the **Overview** page of the application, click on the **Continue** button. The *Start Here* page displays.

13. Complete the required fields on the **Start Here** page. Enter the **Date of Application** as **12/22/2013** or the actual date of the application if earlier. Click the **Continue** button.



14. Continue through the application to complete all required sections. Once you reach the **Application Signature** page, click **Submit** to run eligibility on the application. Confirm the **Eligibility Results** page section reads, “To begin coverage on January 01, 2014....”



15. Upon confirmation of a 1/1/2014 eligibility effective date, proceed to plan selection by clicking on the Choose a Health Plan button at the bottom of the Eligibility Results.