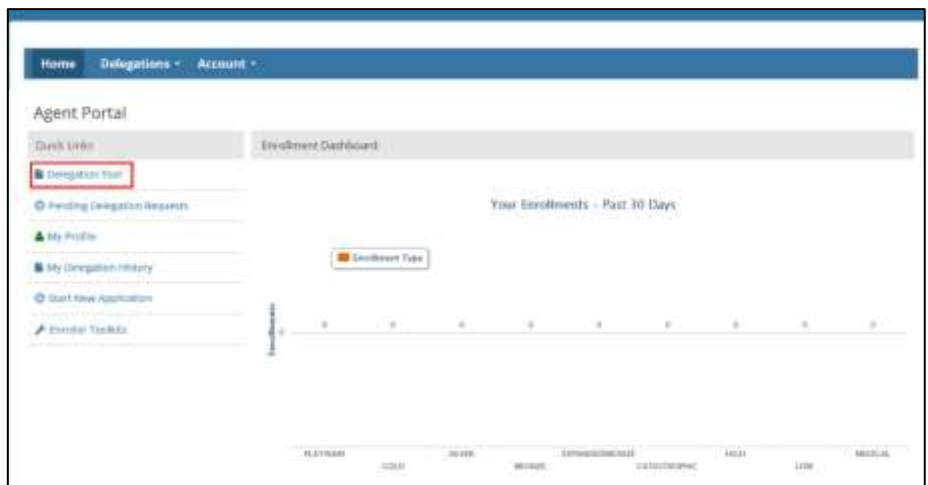


The Delegation Tool provides a means for Certified Counselors, Certified Insurance Agents, [Agency Managers](#), and [Approved Admin Staff Level 1 and Level 2](#) to self-serve and delegate a consumer's case to their Book of Business.

NOTE: Certified Enrollers are bound by Contract and/or State Regulations to only complete delegation requests at the express, present consent of a Consumer. Our system tracks and reports all Accelerated Delegation Requests made by every Certified Enroller, and suspicious use will be investigated. Certified Enrollers found fraudulently using this tool are at risk of having their Covered California certification revoked and their Book of Business permanently removed.

Certified Enrollment Counselors (CEC), Plan Based Enrollers (PBE), and Agents access the Delegation Tool link from the Quick Links section on their respective portal. For Agency Manager instructions, [click here](#). For Approved Agency Admin Staff instructions, [click here](#).

1. Log into the dashboard.
2. Select the **Delegation Tool** link on the left navigation panel from the enroller dashboard to display the *Consumer Delegation* page.
3. The user enters the following Consumer information on the Delegation Form:
 - First name
 - Last name
 - Date of birth



4. Does the Consumer have a Social Security number? field is optional and displays with a **Yes** and **No** radio button.

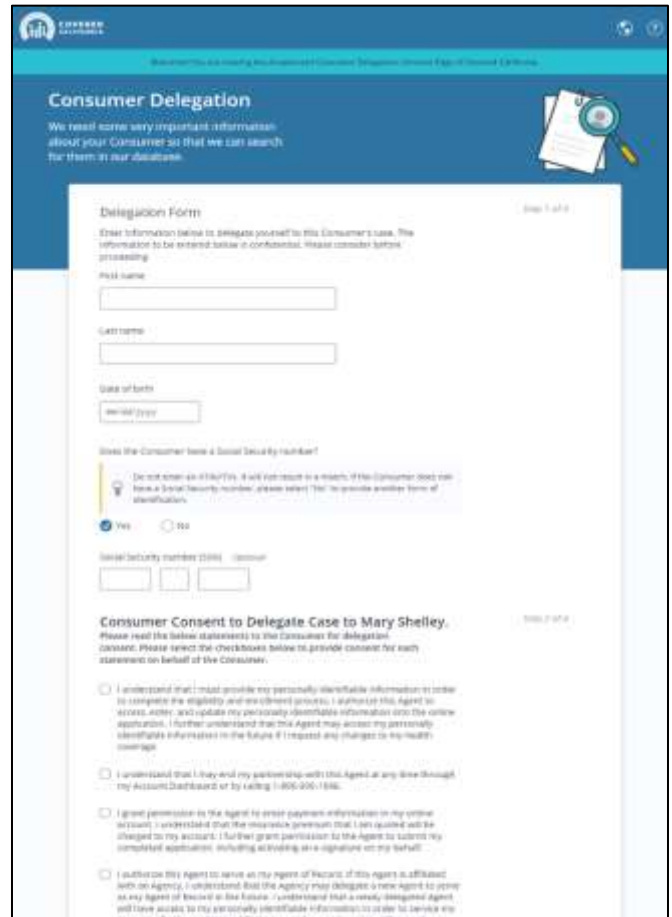
- The radio button defaults to **Yes** and displays the SSN field
 - Enter the SSN
 - An error message displays when the SSN is not a nine-digit number

Note: Searching by SSN is recommended.

Selecting the **No** radio button displays the following and requires at least one search criteria option:

- Message: *You must provide at least one of the following search criteria before you can proceed with delegation*
- Search criteria options: **Home Address, Cell Phone Number, or Email Address**. An **Add** button displays next to each option
 - Selecting an option dynamically displays a required entry field
 - Selecting the **Remove** button removes the selected search option

Note: Searching by Home Address is recommended if SSN is unavailable.



5. Read all 4 statements out loud to the Consumer. Then, check the box next to each statement to indicate that the Consumer consents to allow the Enroller to act on their behalf.

- An error message displays when a checkbox is unchecked
- Selecting all the checkboxes enables the **Check for Consumer** button

Note: Clicking the Cancel button navigates the Enroller to their respective dashboard.

6. Select the **Check for Consumer** button to initiate a search based on the criteria entered.
7. The system conducts a match based on the information entered. One of the following displays:



- *No Match Found* – No existing match found in the system
- *Multiple Matches Found* – Multiple matches found in the system
- *Match Already Delegated* – Match found and is currently delegated to the Enroller
- The *One Match Found* page displays when an exact match is found

No Match Found

Based on the details you provided, we were unable to make a match to our database. If you would like to start a new application, please select the Return to Enroller Dashboard button to begin the process. If you would like to try again, please select the Start Over button to re-enter details. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

[Return to Enroller Dashboard](#) [Start Over](#)

Multiple Matches Found

Based on the details you provided, we were not able to find a single match in our database. If you would like to try again, please select the button below. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

[Return to Enroller Dashboard](#)

Match Already Delegated

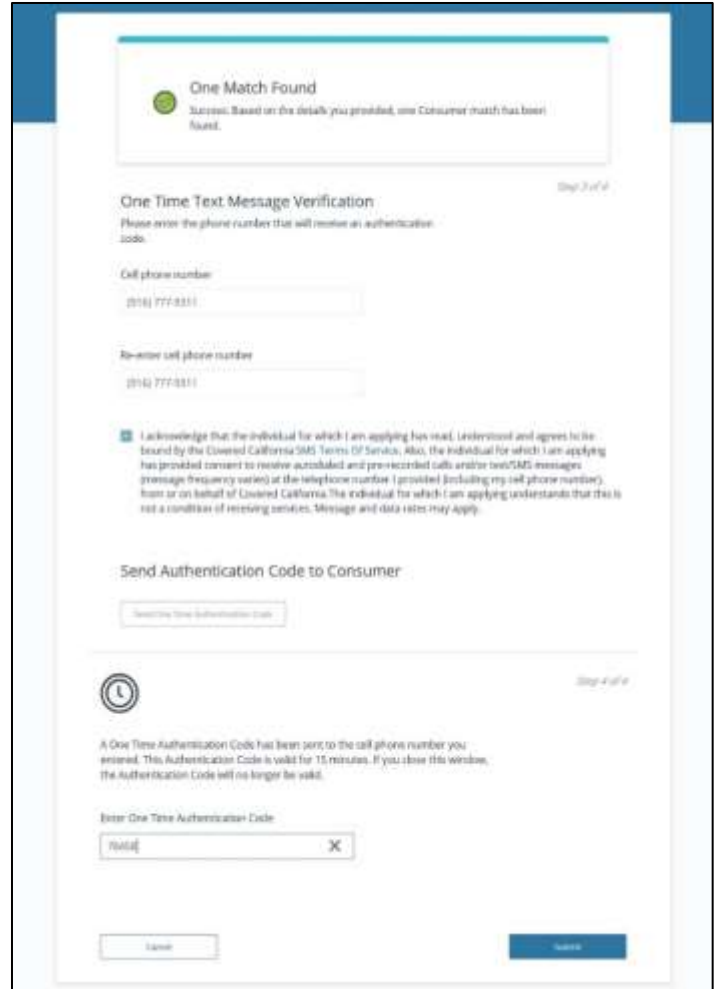
Based on the details you provided, we found a match in our database that is already delegated to your book of business. If you would like to try again, please select the button below. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

[Return to Enroller Dashboard](#)

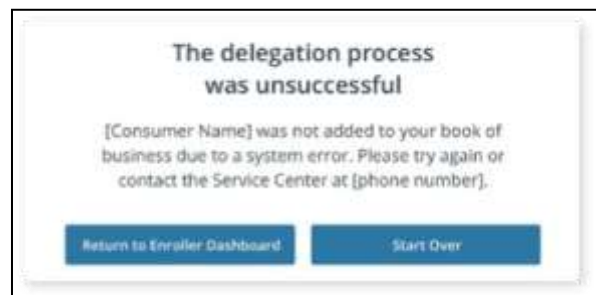
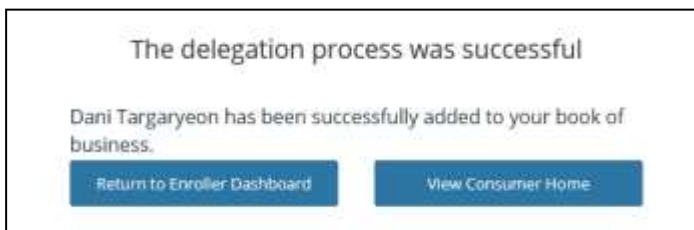
8. The next step in the delegation process is to authenticate the consumer. On the **One Match Found** page, enter the Consumer's cell phone in the cell phone number fields.

9. Check the **SMS Terms Of Service** checkbox to continue.
10. Select the **Send One time Authentication Code** button. A code is sent to the cell phone number entered.
 - Up to three authentication codes can be requested. The user has three attempts to successfully enter each code.
 - A total of nine attempts with the incorrect code disables all fields with the exception of the **Return to Enroller Dashboard** button.

*Note: The authentication code becomes invalid after 10 minutes, or when the page is closed. Selecting the **Cancel** button navigates the user to their respective dashboard.*

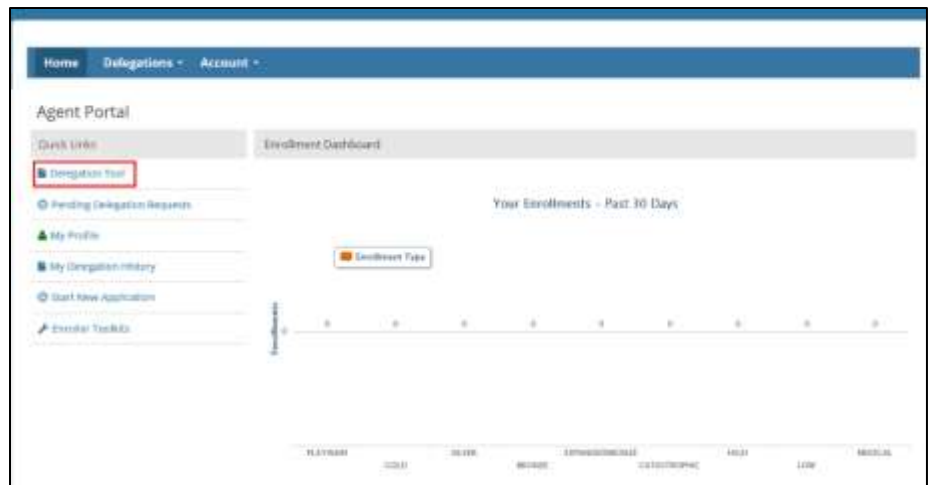
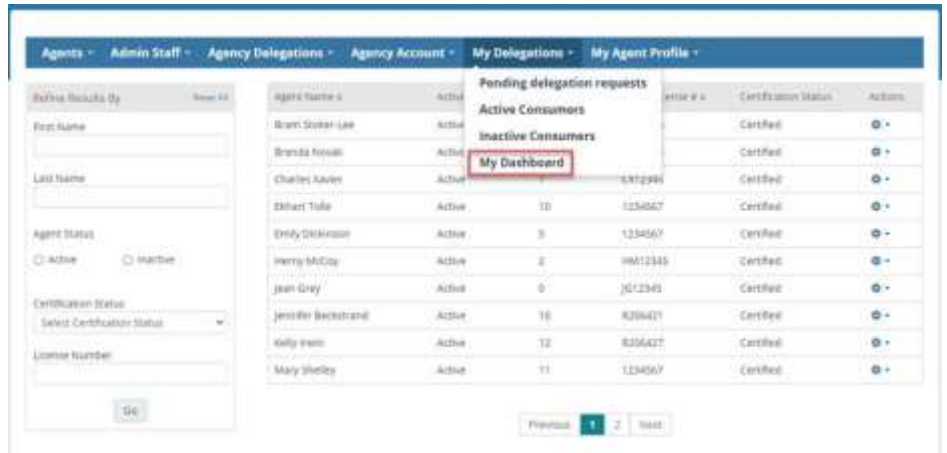


11. Select the **Submit** button on the One Match Found page. One of the following popups displays:
 - The delegation process was successful – Consumer’s case is successfully delegated
 - The delegation process was unsuccessful – Due to a system error



Agency Managers access the Delegation Tool link from the My Dashboard link in the My Delegations dropdown menu.

1. Log into the dashboard.
2. Select the **My Delegations** dropdown and then **My Dashboard**.
3. Select the **Delegation Tool** link on the left navigation panel from the enroller dashboard to display the *Consumer Delegation* page.
4. The user enters the following Consumer information on the Delegation Form:
 - First name
 - Last name
 - Date of birth



5. Does the Consumer have a Social Security number? field is optional and displays with a **Yes** and **No** radio button.

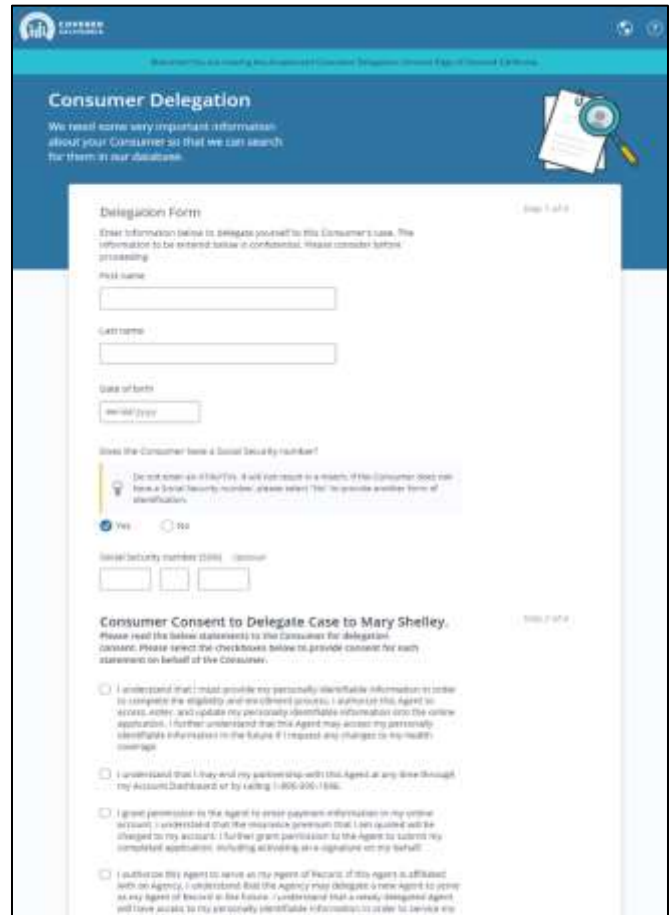
- a. The radio button defaults to **Yes** and displays the SSN field
 - o Enter the SSN
 - o An error message displays when the SSN is not a nine-digit number

Note: Searching by SSN is recommended.

Selecting the **No** radio button displays the following and requires at least one search criteria option:

- o Message: *You must provide at least one of the following search criteria before you can proceed with delegation*
- o Search criteria options: **Home Address, Cell Phone Number, or Email Address.** An **Add** button displays next to each option
 - Selecting an option dynamically displays a required entry field
 - Selecting the **Remove** button removes the selected search option

Note: Searching by Home Address is recommended if SSN is unavailable.

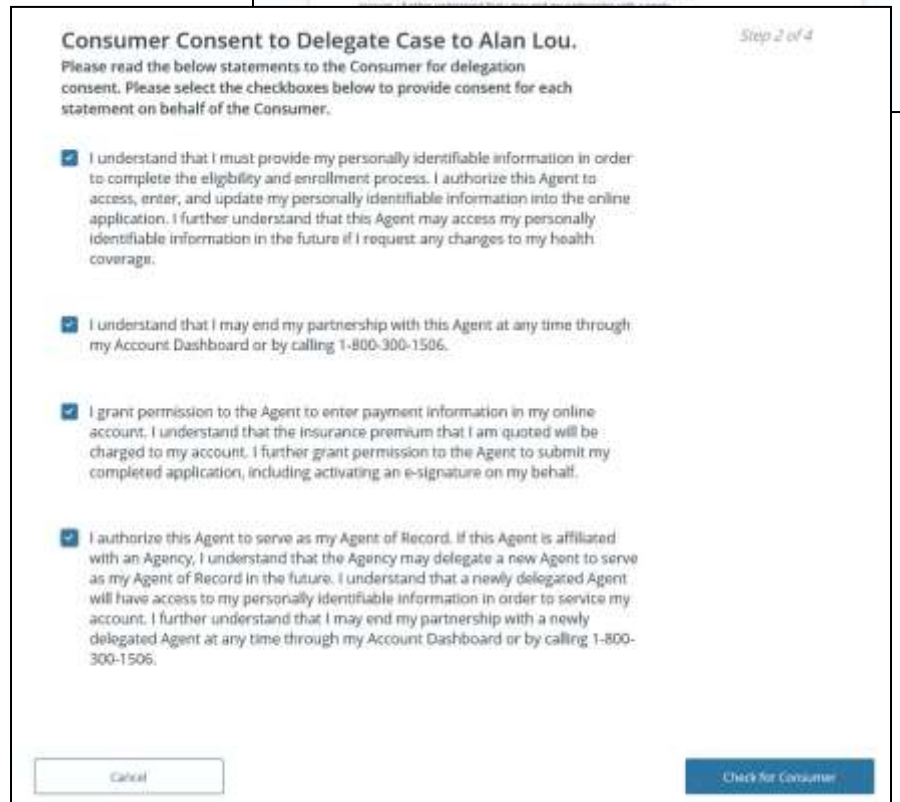


6. Read all 4 statements out loud to the Consumer. Then, check the box next to each statement to indicate that the Consumer consents to allow the Enroller to act on their behalf.

- a. An error message displays when a checkbox is unchecked
- b. Selecting all the checkboxes enables the **Check for Consumer** button

Note: Clicking the Cancel button navigates the Enroller to their respective dashboard.

7. Select the **Check for Consumer** button to initiate a search based on the criteria entered.
8. The system conducts a match based on the information entered. One of the following displays:
 - a. **No Match Found** – No existing



match found in the system

- b. *Multiple Matches Found* – Multiple matches found in the system
- c. *Match Already Delegated* – Match found and is currently delegated to the Enroller
- d. The *One Match Found* page displays when an exact match is found

No Match Found

Based on the details you provided, we were unable to make a match to our database. If you would like to start a new application, please select the Return to Enroller Dashboard button to begin the process. If you would like to try again, please select the Start Over button to re-enter details. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

[Return to Enroller Dashboard](#) [Start Over](#)

Multiple Matches Found

Based on the details you provided, we were not able to find a single match in our database. If you would like to try again, please select the button below. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

[Return to Enroller Dashboard](#)

Match Already Delegated

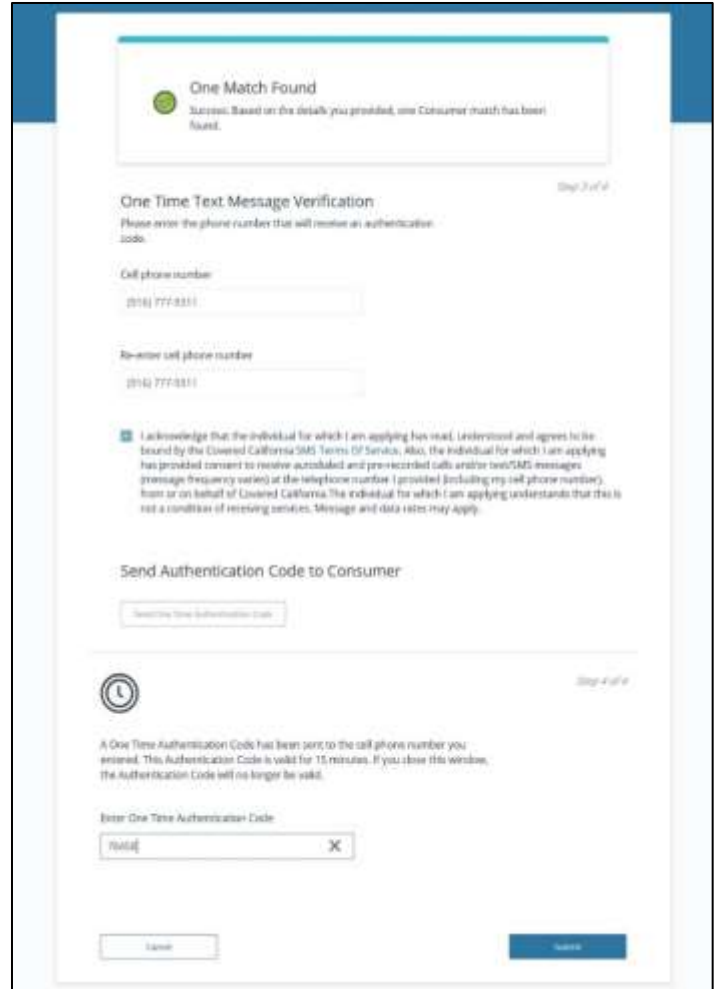
Based on the details you provided, we found a match in our database that is already delegated to your book of business. If you would like to try again, please select the button below. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

[Return to Enroller Dashboard](#)

9. The next step in the delegation process is to authenticate the consumer. On the **One Match Found** page, enter the Consumer's cell phone in the cell phone number fields.

10. Check the **SMS Terms Of Service** checkbox to continue.
11. Select the **Send One time Authentication Code** button. A code is sent to the cell phone number entered.
 - a. Up to three authentication codes can be requested. The user has three attempts to successfully enter each code.
 - b. A total of nine attempts with the incorrect code disables all fields with the exception of the **Return to Enroller Dashboard** button.

*Note: The authentication code becomes invalid after 10 minutes, or when the page is closed. Selecting the **Cancel** button navigates the user to their respective dashboard.*

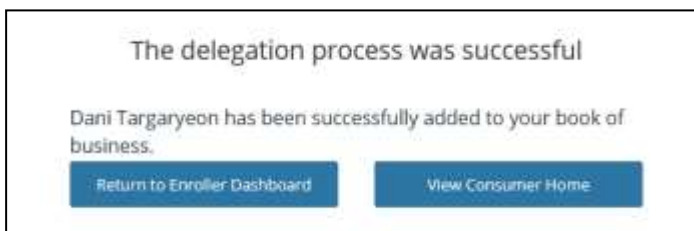


The screenshot shows two steps of a verification process.
 Step 3 of 4: **One Match Found**. A success message states: "Success: Based on the details you provided, one Consumer match has been found." Below this is a section for **One Time Text Message Verification**. It asks the user to enter the phone number that will receive an authentication code. There are two input fields for the phone number, both containing "(014) 777-8311". A checkbox is checked, indicating the user acknowledges the SMS Terms of Service. A button labeled "Send Authentication Code to Consumer" is visible.
 Step 4 of 4: This step shows a message: "A One Time Authentication Code has been sent to the cell phone number you entered. This Authentication Code is valid for 15 minutes. If you lose this window, the Authentication Code will no longer be valid." Below this is an input field for the "Enter One Time Authentication Code" with the value "12345" and a clear button (X). At the bottom, there are "Cancel" and "Submit" buttons.

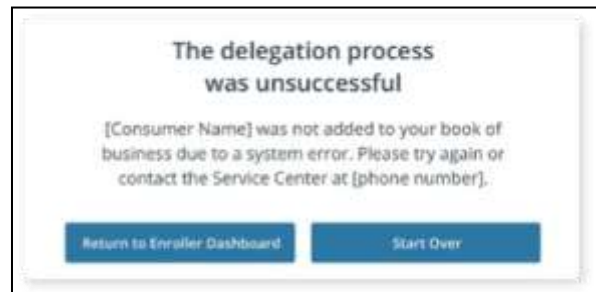


This screenshot shows a page titled "Return to Enroller Dashboard". It contains a message: "A One Time Authentication Code has been sent to the cell phone number you entered. This Authentication Code is valid for 15 minutes. If you lose this window, the Authentication Code will no longer be valid." Below the message is a "Return to Enroller Dashboard" button.

12. Select the **Submit** button on the One Match Found page. One of the following popups displays:
 - a. The delegation process was successful – Consumer’s case is successfully delegated
 - b. The delegation process was unsuccessful – Due to a system error



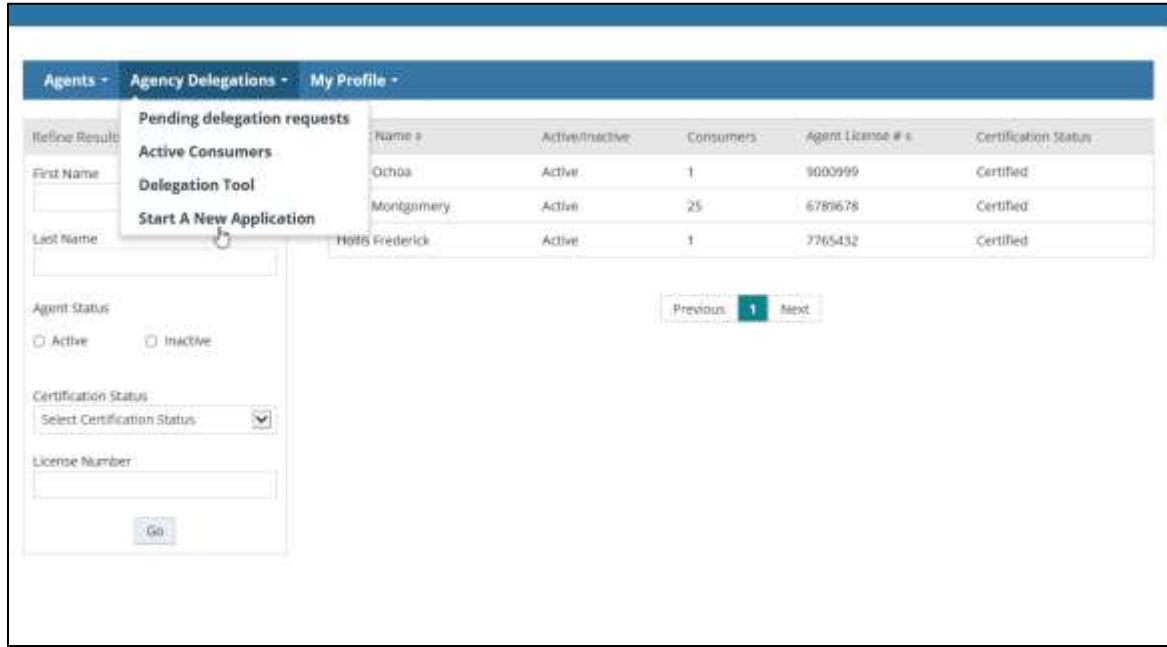
The screenshot shows a popup titled "The delegation process was successful". The message reads: "Dani Targaryeon has been successfully added to your book of business." At the bottom, there are two buttons: "Return to Enroller Dashboard" and "View Consumer Home".



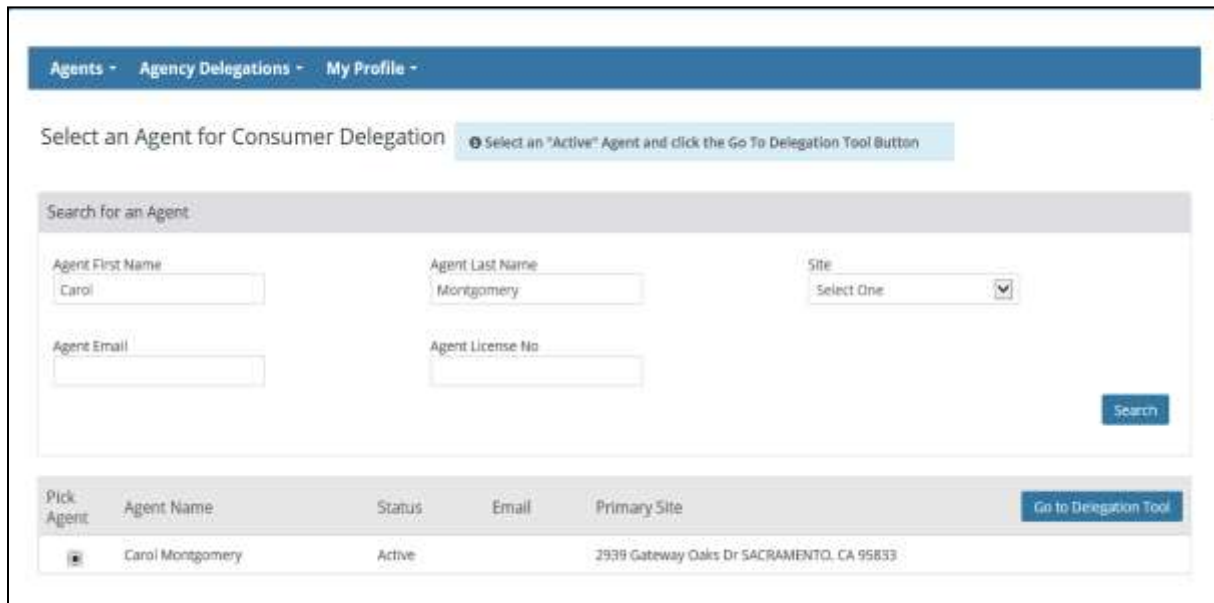
The screenshot shows a popup titled "The delegation process was unsuccessful". The message reads: "[Consumer Name] was not added to your book of business due to a system error. Please try again or contact the Service Center at [phone number]." At the bottom, there are two buttons: "Return to Enroller Dashboard" and "Start Over".

Approved Agency Admin Staff Level 1 and Level 2

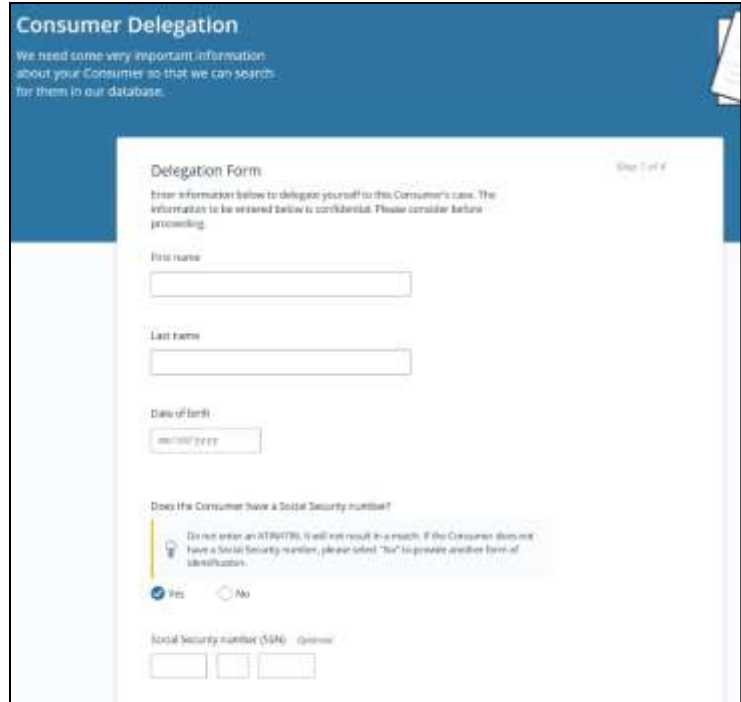
Approved Admin Staff Level 1 and 2 have the ability to delegate a Consumer on behalf of an Agent. Approved Admin Staff Level 1 and 2 access the Delegation Tool from the new Delegation Tool link on the Agency Delegation dropdown menu. The Admin Staff first conducts a search for an active Agent before continuing with the delegation process.



1. Select the **Delegation Tool** link in the Agency Delegations dropdown to navigate to the Delegation Tool. The *Select an Agent for Consumer Delegation* page displays.



2. Enter one of the following search criteria:
 - Agent First Name - Like search
 - Agent Last Name - Like search
 - Site – Dropdown displays for the Agency, primary, and sub-sites
 - Agent Email – Exact match
 - Agent License No – Exact match
3. Select the **Search** button; the results display with a list of Agents matching the search criteria.
4. Select the **Pick Agent** radio button next to the Agent of choice. The **Go to Delegation Tool** button enables.
5. The *Consumer Delegation Consent* page displays to continue with the delegation process.
6. The user completes the delegation process similar to all other users.



Consumer Delegation

We need some very important information about your Consumer so that we can search for them in our database.

Delegation Form Step 1 of 4

Enter information below to delegate yourself to this Consumer's case. The information to be entered below is confidential. Please consider before proceeding.

First name

Last name

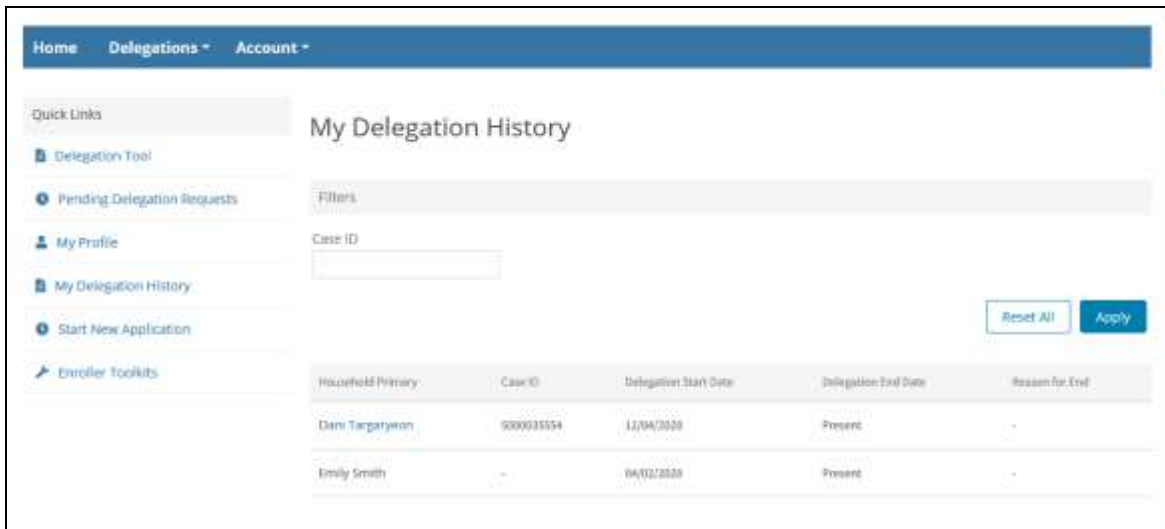
Date of birth

Does the Consumer have a Social Security number?

Do not enter an ATN4706. It will not result in a match. If the Consumer does not have a Social Security number, please select "No" to provide another form of identification.

Yes No

Social Security number (SSN)



Home Delegations Account

Quick Links

- Delegation Tool
- Pending Delegation Requests
- My Profile
- My Delegation History
- Start New Application
- Enroller Toolkits

My Delegation History

Filters

Case ID

Household Primary	Case ID	Delegation Start Date	Delegation End Date	Reason for End
Dani Tarqatyan	900035554	12/04/2020	Present	-
Emily Smith	-	04/02/2020	Present	-

7. The *My Delegation History* page displays with the delegated Consumer when the delegation process is successful. The following Consumer information displays:
 - Household Primary - Name of the Primary Member of the Household
 - Case ID - Household Case ID
 - Delegation Start Date – Delegation start date
 - Delegation End Date – Delegation end date
 - Reason for End - Reason the delegation was ended
 - Transfer within Agency/Entity
 - Consumer requested cancellation
 - Agent/CEC initiated de-delegation
 - Accelerated Consumer Delegation Consent
 - Agent/CEC certification ended