



Delegation Change Policy Quick Guide for Certified Enrollers

Overview

Consumers can delegate their application to Certified Insurance Agents (Agents) or Certified Enrollment Counselors (CECs) in CalHEERS to assist them with the application process, which includes filling out the application, submitting the application, making changes, ending coverage, enrolling into a health/dental insurance plan, etc.

How Consumers Delegate Applications

Consumers can delegate their case to a Certified Enroller via text message. Follow the [Accelerated Consumer Delegation Consent Quick Guide](#) to review the steps enrollers can take to self-serve and delegate a consumer's case using the Accelerated Consumer Delegation Consent tool.

Consumers can delegate to an Agent or CEC at any point in the application process using the [Find Local Help](#) link after a consumer has created an account, or by selecting *Get Free Enrollment Assistance from a Covered California Certified Partner* on the Plan Selection Dashboard. They can then search for Agents and Certified Enrollment Entities (CEEs) based on location and language. Once they find the Agent or CEC of their preference, consumers can send their delegation request to the Agent or CEC. Agents and CECs can then accept pending delegation requests once they login to their CalHEERS portal. Once the delegation is accepted, they can view the consumer's application and assist with the enrollment process.

Agents and CECs can also start a new application on behalf of consumers from their CalHEERS portal. When an application is created directly from the Enroller Portal, the delegation is automatically created. The consumer can view the delegation details under the **Manage Delegates** link found in the footer of their CalHEERS home screen.

Consumers can Manage their Delegations

A consumer may login to their account at any time and remove any delegation from the **Manage Delegates** link found in the footer of their CalHEERS home screen. Consumers can delegate to Agents or CECs and can remove delegations at any time. Consumers may also contact the consumer Service Center (800) 300-1506 to request additions or changes of a delegation at any point. Covered California will honor all authorized consumer requests.

Important Delegation and Appointment Information

Covered California Service Center Representatives (SCRs) may assist consumers with delegating applications to Agents or CECs or removing delegations at the consumer's request. SCRs are never delegated to applications the way Agents and CECs are delegated. When SCRs assist consumers with application or delegation requests, they don't remove the Agent or CEC delegation unless the consumer specifically requests to remove the delegation. SCRs do not have goals or quotas for consumer delegations.

CEC delegations are not reported to Covered California health insurance companies.

Agent Delegation information is reported to Covered California health insurance companies to be processed. The Covered California health insurance companies are required to approve Certified Insurance Agent appointments and update their systems within 5 days.



Delegation Change Policy Quick Guide for Certified Enrollers

The health insurance companies may delegate the agency, or primary agent at the agency, in lieu of the specified Agent who enrolled the consumer. **Agents and agencies should ensure that they have been appropriately appointed with each company, and that each company has the correct appointment information for agents affiliated to agencies, sole proprietorships, etc.**

Consumers may authorize changes to their delegated Agent or CEC at any point in time. Approval of Covered California health insurance companies is not required. **The delegation must be approved and updated in the insurance companies' systems within 5 days and notify the existing Agent of the delegation change within ten business days.**

Covered California Family Dental Plan Delegations and Appointments

Delegations in the online application apply to both the health and dental insurance plans. Certified Insurance Agents are required to be appointed directly with each Covered California dental insurance company.

Delegation Requests at Covered California Service Centers

Consumer Service Center: (800) 300-1506

- Agents, CECs, and consumers can request delegation additions, changes, and removals
- Covered California will honor all consumer requests to delegate and remove delegations
- If an Agent or CEC caller requests a delegation addition or change, Covered California must authenticate the consumer's identity
- The consumer must be on the telephone line when requesting delegation additions or changes

Agent Service Center: (877) 453-9198

- Agents can request delegation additions, changes, and removals
- Covered California must authenticate the consumer's identity
- The consumer must be on the telephone line when requesting delegation additions or changes
- Covered California will honor all consumer requests to delegate and remove delegations, without regard to existing delegations



Delegation Change Policy Quick Guide for Certified Enrollers

Agent Delegation-Only Line: (888) 680-2575

CEC/PBE Help Line: (855) 324-3147

- CECs can request delegation additions, changes, and removals
- Covered California must authenticate the consumer's identity
- The consumer must be on the telephone line when requesting delegation additions or changes
- Covered California will honor all consumer requests to delegate and remove delegations, without regard to existing delegations

CEC/CAC Delegation-Only Line: (888) 680-2565

For assistance with Counselor Certification – Please email your request or question to:
CommunityPartnerCertSupport@covered.ca.gov