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*.

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**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.
7. 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.

8. 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.
9. 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.”

![Eligibility Results](image)

10. 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.
8. 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.

9. 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.

![Review and Sign Screen](image)

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.

![Apply for Health Insurance](image)

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.