

ConnectAurora Virtual Enrollment Assistance Guide

1. Introduce yourself, develop rapport over virtual divide, make sure consumer is able to talk freely and is in an appropriate place to provide personal information
2. Ask consumer what brings them in today?
3. Explain the role of a Health Coverage Guide and get a signed Customer Authorization Form from the customer based on Connect for Health Colorado guidance.
4. Collect necessary information for the Assistance Network reporting form on the Assistance Network Scheduler.
5. Explain Tax Household income and how it influences health insurance program and financial assistance
6. Begin the Enrollment Assistance Process, explain and guide the customer through each step
7. Review plan selection choices
8. Complete application/ help client understand what they are signing
9. If enrollment or application is not complete, identify next steps for customer and how and when to he/she should follow-up for assistance
10. Provide enrollment information. Make sure customer retains important information:

Important information for Peak and Medicaid or CHP+ enrollment

- Case number
- User Name and Password
- Income eligibility limits for Medicaid
- What documents may be required to verify identity, citizenship and income
- Importance of reporting income, job changes and address changes
- Stress importance of responding to Health First Colorado requests for information
- Email Health First Colorado Explainer

Important information for Connect for Health Colorado enrollment

- Account Number
- User Name and Password
- Enrollment ID and Phone Number
- Income eligibility limits for APTC
- What documents may be required to verify identity, citizenship and income.
- Explain documents that may be required to verify SEP
- Importance of reporting income, job changes, changes in age and family
- Importance of reporting changes in address for insurance company billing
- Email screen shot of Enrollment ID and Carrier phone number to call to make payment

11. Refer friends or family for health Insurance information and assistance
12. Customer Survey and future communications