

PLAN-BASED ENROLLERS

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Plan-Based Enroller Regulations Timeline

Activity	Proposed Timeline
Stakeholders Advisory Group Review of Plan-Based Enrollment Guidelines	May - August
Board Meeting (Discussion of Proposed Regulations)	August 22
Additional Stakeholder Input	August 26- September 6
Board Meeting (Approval of Proposed Regulations)	September 19

Draft Proposed Plan-Based Enrollment Regulations

Article and Sections of the Draft Proposed Plan-Based Enrollment Regulations:

Article 9. Plan-Based Enrollers	
Sections:	Table of Contents:
§ 6700	Definitions
§ 6702	Certified Plan-Based Enrollment Program Eligibility Requirements
§ 6704	Program Application
§ 6706	Training and Certification Standards
§ 6708	Certified Plan-Based Enroller Fingerprinting and Criminal Record Checks
§ 6710	Roles & Responsibilities
§ 6712	Conflict of Interest Standards
§ 6714	Compensation
§ 6716	Suspension and Revocation
§ 6718	Appeals Process

Draft Proposed Plan-Based Enrollment Regulations

Summary of § 6702

Certified Plan-Based Enrollment Program Eligibility Requirements

Exchange Target Populations:

- Non-Group Members
- COBRA Members
- Members Terminating Individual or Group Coverage, including 25 year-old dependents
- Individuals Interested in Obtaining Health Care Coverage through the Exchange
- Individuals Eligible for Other Insurance Affordability Programs, (e.g. Medi-Cal)

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Summary of § 6702

Certified Plan-Based Enrollment Program Eligibility Requirements

Eligible Entities and Individuals:

- Qualified Health Plan Issuers under contract with the Exchange
- Medi-Cal Managed Care Plans
- Customer Service Representatives or Captive Agents Employed by a Certified Plan-Based Enrollment Entity

Outstanding Issue:

- Customer Service Representatives as Plan-Based Enrollers

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Summary of § 6704

Program Application

- An entity or individual who is eligible for the Certified Plan-Based Enrollment program may apply to become a Certified Plan-Based Enrollment Entity or a Certified Plan-Based Enroller by following the process proposed in the regulations.
- The applicant Certified Plan-Based Enrollment Entity and any Certified Plan-Based Enroller included in the application shall submit an executed agreement conforming to the Roles and Responsibilities of the Certified Plan-Based Enroller Program

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Summary of § 6710

Roles & Responsibilities

- Offers at least one QHP in the Individual Exchange
- A Certified Plan-Based Enrollment Entity that is an MMCP, as defined in Section 6100, that does not offer at least one QHP in the Individual Exchange
- Prohibited Activities are defined in this section.

Outstanding Issues:

- Cold Calling
- Enrollment in Medi-Cal

Marketing Guidelines

- Currently Developing Marketing Guidelines
- Will seek review and input by Health Plans and Stakeholders
- Goal: Marketing Guidelines to mirror as closely as possible what is in the current plan contracts