



JOB AID: CREATE AN INDIVIDUAL ACCOUNT

Your destination for affordable, quality health care, including Medi-Cal

July 9, 2014

The purpose of this Job Aid is to show the steps a consumer follows to create their Covered California account for the individual marketplace, and is written from the Consumer’s perspective.

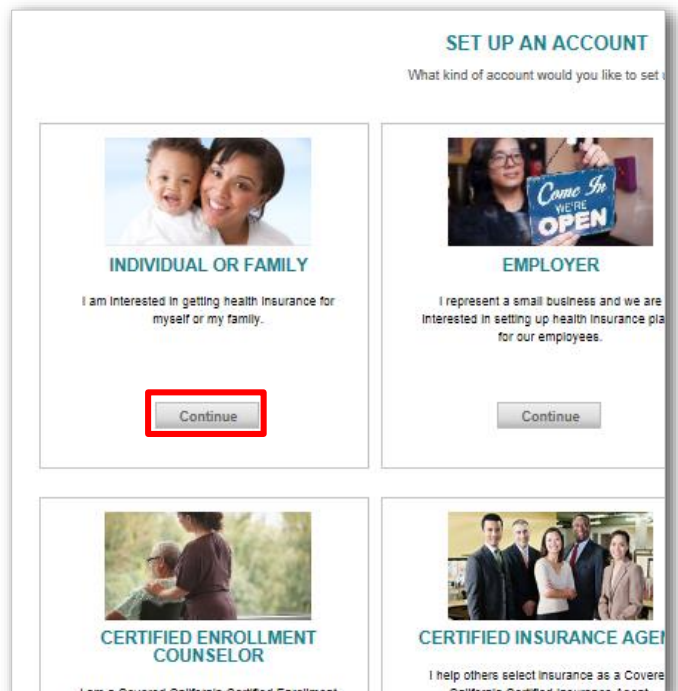
Before creating an application for health care coverage, the consumer must first create an account. The consumer can also create an account after someone they designate has created an application for them. In this case the consumer can link their new account to the previously created application. The consumer follows the steps below to create an account.

1. Go to the Covered California homepage at www.CoveredCA.com
2. Click on **Apply Now** to navigate to the *Set Up an Account* page, which offers a choice of several roles for account creation
3. Find the role for **Individual or Family** and click the **Continue** button in that box.



Account Creation Process

During account creation, the left-side navigation panel shows five steps to create an account. After completing each section, a check mark replaces the step number. Fields that require information are marked with red asterisks.



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4. The first step is to agree to the Terms and Conditions and Privacy Practices established for the CoveredCA.com website. On the *Use of this Website* page, the consumer must indicate this agreement before proceeding with account creation. The consumer can read through the text for Terms and Conditions and Privacy Practices, then click the checkbox to indicate agreement, and then click **Continue**.

The screenshot shows the 'SET UP AN ACCOUNT' sidebar with '1. Use of This Website' selected. The main content area is titled 'USE OF THIS WEBSITE' and contains a welcome message and links to 'View the Terms and Conditions of Use' and 'View the Notice of Privacy Practices'. A red box highlights a checkbox with the text: 'Check this box to show you understand and agree to the Terms and Conditions and Notice of Privacy Practices.' A yellow 'Continue' button is also highlighted with a red box.

5. In the second section, the consumer enters **User Information** (information about the account holder), including **First Name, Last Name, Date of Birth, and Social Security Number**.

The screenshot shows the 'SET UP AN ACCOUNT' sidebar with '2. User Information' selected. The main content area is titled 'USER INFORMATION' and contains a list of required fields: 'First Name', 'Last Name', 'Date of Birth' (with a calendar icon), 'Social Security number' (with a question mark icon), and 'Preferred method of communication' (a dropdown menu). A question with radio buttons asks: '*Do you have an existing case that you would like to link to this new account?' with 'Yes' and 'No' options.

6. Covered California sends notifications to a personal secure mailbox that is part of the account; in the **Preferred method of communication** field, the consumer indicates how they want to be notified that a message is waiting (note that Covered California is required by law to send some information by mail).

7. If someone has already started an application on the consumer's behalf (e.g., a Covered California Service Center Representative, Certified Enrollment Counselor, or Certified Insurance Agent), the consumer was given an Access Code to link that application to the account being created. Clicking the **Yes** radio button for this question causes another field to display in which that Access Code is entered.

This close-up shows the question: '*Do you have an existing case that you would like to link to this new account?' with a question mark icon. The 'Yes' radio button is selected and highlighted with a red box. Below the question is a text input field labeled 'Enter your Access Code'.

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8. Click **Continue** to proceed to the *Contact Information* page, where the consumer's physical address, email, and phone number are entered.

9. Before moving on, we validate the address entered against the United States Postal Service. A popup dialog appears showing any close or exact matches with the address. The user may select an address presented from the USPS comparison or choose to keep the previous entry. Click **Ok** when finished.

The screenshot shows the 'CONTACT INFORMATION' page with a progress bar on the left indicating steps: 1. Use of This Website, 2. User Information, 3. Contact Information (highlighted), 4. Username/Password, and 5. Account Summary. The main form includes fields for Street Address 1, Street Address 2, City, State (CA), Zip Code, Email (john.doe@me.com), and Phone Number (XXX-XXX-XXXX). A 'Continue' button is highlighted with a red box. A popup dialog titled 'Confirm Your Mailing Address' is overlaid, showing the address entered and a list of possible addresses from USPS. The 'Ok' button in the popup is also highlighted with a red box.

10. The consumer must create their own **Username** and **Password** in the next screen. Note that any person advising or supporting the consumer is not allowed to know the consumer's password, PIN or the answers to the consumer's security questions that will be provided later in the process.

a. Username must contain eight or more characters including at least one letter and one number.

b. Password rules:

- Cannot be the same as or similar to the username
- 8-16 characters
- At least one upper-case alpha character
- At least one lower-case alpha character
- At least one number
- At least one special character
- Password must start with a letter
- Cannot contain a common dictionary word or name

c. Type the chosen username into the **Username** field

d. Create a password that fits the above password criteria and type it in the **Password** field

The screenshot shows the 'USERNAME & PASSWORD' page with a progress bar on the left indicating steps: 1. Use of This Website, 2. User Information, 3. Contact Information, 4. Username/Password (highlighted), and 5. Account Summary. The main form includes fields for Username (JohnDoe123), Password (masked with dots), Re-enter Password (masked with dots), Electronic Signature PIN (masked with dots), and Re-enter PIN (masked with dots). A 'Continue' button is highlighted with a red box.

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- e. **Reenter Password** to confirm
11. The consumer must also create a 4-digit **Electronic Signature Personal Identification Number**. This **PIN** is used to sign documents electronically.
 - a. Type the 4-digit PIN into the **Electronic Signature PIN** field
 - b. Reenter in the **Reenter PIN** field to confirm
 - c. Click **Continue**
 12. View the **Account Summary** page. When finished entering information for the account and check marks appear next to the first four steps in the left navigation panel, give the information one last review. The screen shows three sections – User Information, Contact Information, and Username & Password.
 - a. Click the **Edit** button next to any section to update its information
 - b. Otherwise, click **Continue** to save the information and create the account
 - c. A popup displays indicating that the account was successfully created. Click the **Log In** button to go to the *Log In* page and get started.

SET UP AN ACCOUNT

- ✓ Use of This Website
- ✓ User Information
- ✓ Contact Information
- ✓ Username/Password
- 6.Account Summary**

ACCOUNT SUMMARY

User Information

Name : John Does Edit

Birthdate : 01/01/1970

Social Security number : ****-**-6789

Preferred Method of Communication : Email

Contact Information

Street Address 1 : 123 Main St Edit

Street Address 2 :

City : Sacramento

State : CA

Zip Code : 95816

Email : johndoes@me.com

Phone number :

Username & Password

Username : johndoesnt Edit

Password : *****

Electronic Signature PIN : ****

Back Continue

CREATE ACCOUNT CONFIRMATION

Congratulations. You have successfully created a Covered California account.
You can now securely log in to your Account. Click the "Log In" button below.

Log In