



COVERED CALIFORNIA

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



JOB AID: CREATE AN INDIVIDUAL ACCOUNT

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.

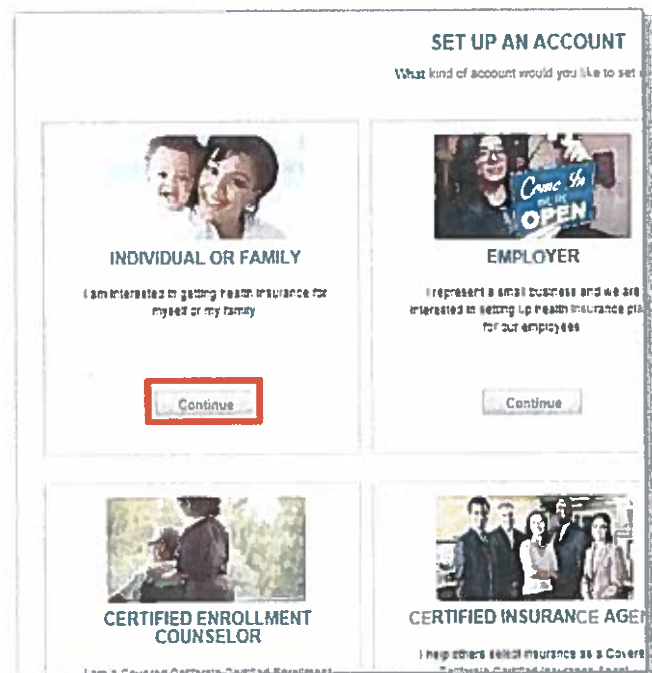
Before creating an application for health care coverage, the consumer must first create an account. The consumer can also create an account after someone they designate has created an application for them. In this case the consumer can link their new account to the previously created application. The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

SET UP AN ACCOUNT

USE OF THIS WEBSITE

Welcome to the Covered California portal. If you use this website, you agree to the Terms and Conditions of Use and our Notice of Privacy Practices. If you disagree with any part of these documents, please do not use our website.

[View the Terms and Conditions of Use](#)

[View the Notice of Privacy Practices](#)

Check this box to show you understand and agree to the Terms and Conditions and Notice of Privacy Practices.

Continue

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**.

SET UP AN ACCOUNT

USER INFORMATION

* Indicates a required field.

Use of This Website

2. User Information

3. Contact Information

4. Username/Password

5. Account Summary

*First Name

*Last Name

*Date of Birth

Social Security number

*Preferred method of communication

*Do you have an existing case that you would like to link to this new account? Yes No

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.

*Do you have an existing case that you would like to link to this new account? Yes No

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.

SET UP AN ACCOUNT

CONTACT INFORMATION

* Indicates a required field.

✓ Use of This Website

✓ User Information

3. Contact Information

4. Username/Password

5. Account Summary

Street Address 1:

Street Address 2:

City:

State: CA

Zip Code:

* Email: john.doe@me.com

Phone Number: XXX-XXX-XXXX

Continue

Confirm Your Mailing Address

The address you've entered is different from those on the Postal Service's database.

The address you entered

• 123 Main St
Sacramento, CA
95816

Possible Address 1

• 123 Main St
Sacramento, CA
95816

Ok

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

SET UP AN ACCOUNT

USERNAME & PASSWORD

* Indicates a required field.

✓ Use of This Website

✓ User Information

✓ Contact Information

4. Username/Password

5. Account Summary

Your Username must have 8 or more characters

*Username: JohnDoe123

Your password must be at least 8 characters long and use only letters and numbers. It must use at least one number and one letter. Passwords are case sensitive.

*Password: *****

*Re-enter Password: *****

Please create a four-digit Electronic Signature Personal Identification Number (PIN). You will need this number to sign your application.

*Electronic Signature PIN: ****

*Re-enter PIN: ****

Back

Continue

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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

ACCOUNT SUMMARY

✓ Use of This Website

✓ User Information

✓ Contact Information

✓ Username/Password

Account Summary

User Information

Name: John Doe Edit

Birthdate: 01-01-1970

Social Security Number: ****-**-6719

Preferred Method of Contactation: E-mail

Contact Information

Street Address 1: 123 Main St. Edit

Street Address 2:

City: Sacramento

State: CA

Zip Code: 95216

Email: johndoe@me.com

Phone Number:

Username & Password

Username: johndoe123 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