

# GEORGIA ACCESS



**CDO Onboarding Meeting**  
*August 26<sup>th</sup>, 2024*

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# CAC PROGRAM OVERVIEW

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# ROLE OF THE CDO

CDOs are expected to engage in the following activities in support of Georgia Access.



Oversee and support affiliated CAC employees and/or volunteers.



Maintain open lines of communication with Georgia Access staff.



Provide information to consumers on how to shop and apply for coverage through Georgia Access.



Conduct outreach and education events to support consumers in applying on Georgia Access.



Provide assistance to underserved and uninsured populations across the State.

# ROLE OF A CAC: REQUIRED ACTIVITIES

CACs assist consumers in applying for health insurance coverage and financial assistance on Georgia Access.



## *CACs perform the following activities:*

- Provide unbiased support for consumers by remaining free of prohibited conflicts of interest.
- Educate consumers on basic healthcare concepts, coverage options, and available financial assistance on Georgia Access.
- Support consumers with applying on Georgia Access.
- Support consumers in understanding their eligibility results and next steps.
- Provide consumers with language interpretation support, when available.
- Provide consumers with accessibility support, when available.
- Refer consumers to the Georgia Access Contact Center, as appropriate.
- Help consumers find certified agents, as appropriate.
- Provide information on how to apply for Medicaid and PeachCare for Kids®, as appropriate.

# ROLE OF A CAC: PROHIBITED ACTIVITIES

CACs are prohibited from performing activities that constitute providing health insurance advice or compromise their ability to remain objective in providing consumer support.



## *CACs are prohibited from:*

- Recommend specific health insurance plans for consumers.
- Enroll a consumer into a health insurance plan.
- Provide gifts to a consumer to incentivize enrollment.
- Impose fees for providing consumer support and assistance.
- Request or receive compensation from insurance companies, agents for consumer referrals, and consumers or third parties for assistance.
- Act as an intermediary between an employer and health insurance company.
- Call consumers to offer assistance without the consumer initiating first contact.
- Use an automatic telephone dialing system or an artificial or prerecorded voice.
- Solicit any consumer for an application or enrollment assistance by going door-to-door or through unsolicited means of direct contact.
- Provide gifts of any value to an applicant or potential enrollee as an inducement for enrollment.

# CAC PROGRAM REQUIREMENTS

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# CDO RESPONSIBILITIES

CDOs retain the primary responsibility for planning, directing, and executing the proposed project as outlined in the CDO application.



## Oversee CACs

- **Monitor CACs & Confirm Compliance:** Confirm that affiliated CACs adhere to license and certification requirements. Confirm that CACs follow all Georgia Access CDO Agreement requirements.
- **Report Incidents:** Report any privacy and security incidents or negative behavior/fraud by a CAC to Georgia Access.
- **Provide Updated Lists of Affiliated CACs:** Provide a preliminary list of affiliated individual CACs during onboarding. After OE, CDOs are required to send updated lists whenever a CAC joins or leaves the organization.




## Program Management

- **Conduct Outreach Activities:** Participate in a minimum of one outreach event per month, including targeting uninsured individuals or underserved or vulnerable populations.
- **Collect Metrics & Submit Reports:** Reporting requirements are outlined in the next slide.
- **Protect Consumer Privacy & Security:** Maintain the privacy and security plan submitted as part of the CDO Application to maintain the privacy and security of all consumer data.



# CDO REPORTING REQUIREMENTS

CDOs are required to submit participation and application assistance data to Georgia Access on a recurring basis for program evaluation. Reporting requirements are listed below.

Report Type	Content	Deadline
<div></div> <div><b>Quarterly</b> <b>Programmatic Metrics</b></div>	<ul style="list-style-type: none"><li>Information on outreach and education events conducted, including event descriptions, data on attendees, partners involved, and lessons learned.</li><li>Information regarding the performance of affiliated CACs and the type of consumer assistance provided.</li><li>Data regarding the number of consumers who have received application assistance by county.</li></ul>	<p>Data should be tracked beginning November 1, 2024 and reports are due:</p> <ul style="list-style-type: none"><li>December 15, 2024*</li><li>March 15, 2025*</li><li>June 15, 2025*</li><li>September 15, 2025*</li></ul>

*\*If the report deadline falls on a weekend, the report is due the last weekday prior to the deadline.*

# **CAC REQUIREMENTS**

# INDIVIDUAL CAC REQUIREMENTS

CACs are required to complete the following licensure and certification requirements to become a certified CAC for PY 2025.

1

## Establish Relationship With CDO

- Individuals are hired or become volunteers with the CDO.

2

## Complete Georgia Access Certification

- Individuals complete the online Georgia Access certification training ([certification.georgiaaccess.gov](https://certification.georgiaaccess.gov)) and pass the final assessment.

3

## Submit a New Application or Renewal for a Georgia Access Specialist License

- Individuals submit their or renewal application for a Georgia Access Specialist license through Sircon and are required to provide: citizenship affidavit, proof of affiliation with a CDO, and proof of passing the certification assessment.

4

## Support Consumers on Georgia Access

- Individuals are notified their Georgia Access Specialist license is approved.
- CACs start supporting consumers on Georgia Access.

# GEORGIA ACCESS CERTIFICATION REQUIREMENTS

CACs who would like to support Georgia consumers for PY 2025 are required to complete Georgia Access certification.

**CACs must complete the Georgia Access certification training and pass the accompanying assessment:** \_\_\_\_\_

- 1 Access the certification training**  
The course and assessment will be available on the Georgia Access Learning Management System (LMS). Access the LMS at [certification.georgiaaccess.gov](https://certification.georgiaaccess.gov)
- 2 Complete certification training**  
The course includes the CAC role, Georgia Access policies and procedures, and privacy and security. The State recommends setting aside 3 hours to complete the certification training course.
- 3 Pass the final assessment**  
A minimum score of 80% is required to pass the final assessment; a maximum of three attempts will be permitted.
- 4 Submit the Certification Agreement**  
As part of the final assessment, CACs attest that they will adhere to all requirements and policies in the Georgia Access Certification Agreement.
- 5 Obtain Georgia Access certification certificate**  
CACs who pass the final assessment are provided a printable, downloadable PDF certificate.

# GEORGIA ACCESS SPECIALIST LICENSE REQUIREMENTS

CACs are required to obtain and maintain a Georgia Access Specialist license to assist consumers on Georgia Access.

## Complete the steps below to apply for a Georgia Access Specialist license



Visit <https://oci.georgia.gov/agents-agency-licensing/> to review the requirements for Georgia Access Specialist license.



Log in to Sircon, <https://www.sircon.com/landingPages/states/georgia/content.jsp> to apply\*.



Upload the Georgia Access Certificate verifying completion of certification.



Upload the completed and signed Licensure Affiliation Form. The form must be signed by the affiliated CDO to confirm affiliation.



Upload the completed and notarized Citizenship Affidavit and legible copy of applicants ID.

**Note: CACs are not required to complete pre-licensure training or pay the \$55 fee for PY 2025.**

*\*CACs that received a license for PY 2024 submit a renewal application and are still required complete Georgia Access certification training.*

# **TIMELINE AND RESOURCES**

# KEY PROGRAM ACTIVITIES, MILESTONES, AND DEADLINES

The following outlines the key activities and dates for CDOs and CACs participating in Georgia Access.

	2024				2025	
	Aug	Sept	Oct	Nov	Dec	Jan
Training and Certification						
Georgia Access certification training is available – Training is Live!						
Deadline to complete training (11/1)				11/1		
Assist Consumers						
CDO performance period begins, begin helping consumers				11/1		
Report Submission Requirements						
Quarterly report due**					12/15	

*\*\*If the report deadline falls on a weekend, the report is due the last weekday prior to the deadline*

*\*\* Continues quarterly through September 2025*

# RESOURCES

## CACs can access the following resources for additional information and support:

- Visit the [Georgia Access website](#) for information regarding the Georgia Access CAC program.
- Visit <https://oci.georgia.gov/agents-agency-licensing/navigators-and-georgia-access-specialists-cacs> for information on Georgia Licensure requirements and the application process.
- Visit <https://www.sircon.com/landingPages/states/georgia/content.jsp> to apply for a license, check the status of a license or application, and update contact information.
- Visit [certification.georgiaaccess.gov](https://certification.georgiaaccess.gov) to access the Georgia Access certification training and final assessment.
- Email questions to [CDOs@GeorgiaAccess.ga.gov](mailto:CDOs@GeorgiaAccess.ga.gov)



# Q&A

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