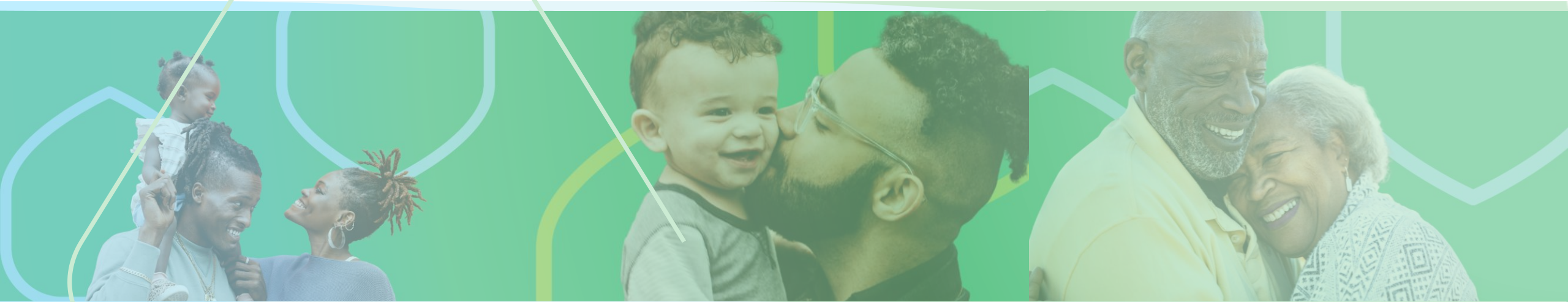


# GEORGIA ACCESS



**September Office Hours for CDOs**  
**September 26, 2024**

# TABLE OF CONTENTS

#	Section	Slide(s)
1	Georgia Access Overview	4-6
2	CAC Program Requirements	7-10
3	Best Practices for Assisting Consumers	11-15
4	Outreach Toolkit Overview	16-18
5	Georgia Access Entity Portal	19-20
6	Timeline and Resources	21-23
7	Q&A	24
8	Appendix	25-28

# GEORGIA ACCESS ASSISTER PROGRAM TEAM



**Dr. Tangelia Clary-Marshall**  
Engagement Director



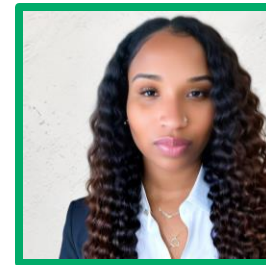
**Kenya Taylor**  
Assistant Engagement Director



**Alexandra Frasqueri**  
Assister Program Manager



**Richetta Milton-Jacks**  
Assister Program Analyst



**Larissa Williamson**  
Assister Program Analyst

# GEORGIA ACCESS OVERVIEW

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# GEORGIA ACCESS OVERVIEW

Georgia is making significant strides in improving access to affordable, quality insurance across the state for consumers.

The Office of Commissioner of Insurance and Safety Fire (OCI) launched the Georgia Access Division in 2023.

Georgia Access is the State's program for eligible Georgians to shop for and enroll in health insurance.

**Georgia Access will go live on November 1, 2024 as a State-based Exchange (SBE) for Open Enrollment (OE) 2025.**



## GEORGIA ACCESS GOALS

- 1** Increase the number of insured Georgians.
- 2** Improve the shopping and enrollment experience for consumers.
- 3** Strengthen competition, innovation, and private sector investment in Georgia's market.

# GEORGIA ACCESS ENROLLMENT OPTIONS

Georgia will be the first SBE in the country that will provide a state-run consumer portal and private entity shopping and enrollment options.

## Consumer Enrollment Options



Certified agents



Web brokers



Insurance companies



Georgia Access  
consumer portal



Contact Center

*CACs are NOT permitted to enroll consumers in a healthcare plan*

# CAC PROGRAM REQUIREMENTS

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# OVERVIEW OF CAC REQUIREMENTS

CACs are required to be licensed and certified to assist consumers on Georgia Access for Plan Year (PY) 2025. CACs are not required to complete pre-licensure training or pay the \$55 fee for PY 2025.





# 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 October 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.*

# **BEST PRACTICES FOR ASSISTING CONSUMERS**

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# BEST PRACTICES FOR CONSUMER ASSISTANCE

Many consumers have limited knowledge of benefits and coverage options, which makes it crucial that CACs utilize best practices when assisting consumers.

## ASK THE RIGHT QUESTIONS

- Conducting a needs assessment can provide a clearer picture of a consumer's situation and needs. Asking questions will help you narrow down a solution to address the consumer's situation. Most consumers are either **seeking information** or **seeking coverage**.

## IDENTIFY VULNERABLE OR UNDERSERVED POPULATIONS

- Identify if the consumer belongs to vulnerable or underserved populations to understand how to best serve the consumer.

## GET CREATIVE

- Look for workarounds. When trying to help a consumer you may not be able to verify their identity.
- Asking the right questions will allow you to effectively provide assistance.
- Be patient. Some consumers may not know how to use technology even if they have internet access.
- Try a variety of solutions to help provide consumers with the support they need.

It is important to help consumers understand the connection between health coverage, medical treatment, and being healthy.



# STRATEGIES FOR EFFECTIVE COMMUNICATION

Effective communication is key to earning consumers' trust. Effective communication strategies include:



**Adapt to Cultural and Linguistic Differences.** Cultural and linguistic differences require you to identify and understand a consumer's cultural beliefs, behaviors and needs.



**Assess Literacy Level.** A consumer's literacy level (their ability to read and write) plays a significant role in how they understand their health coverage options. You must work with this understanding to bring the consumer to a place where they are willing to enroll.



**Identify a Consumer's Health Literacy Level.** Health literacy is the ability to access and understand basic information about health coverage to make decisions on coverage. Communicate with a consumer at their health literacy level to effectively share plan information.



**Accommodate Physical and Intellectual Disabilities:** Consumers with physical or intellectual disabilities may need help to gain access to coverage information. These consumers may need to be matched to special services.

# OUTREACH EVENT BEST PRACTICES

CDOs are required to conduct one (1) outreach event per month. Understanding the goals of outreach events and best practices to meet those goals will help CDOs reach consumers in their communities.

## OUTREACH EVENT GOALS

**Provide Free In-Person Assistance**

**Promote Education**

**Build Trust**

**Align with Strategic Opportunities**

## OUTREACH EVENT BEST PRACTICES



### Promote Outreach Events

- Promote through effective communication channels (social media, radio, email, flyers).

### Host Different Types of Outreach Events

- Face-to-face Outreach (e.g., distributing brochures/fliers, presentations)
  - High-traffic Activities
- Media (Social media campaigns, radio, local newspapers etc.)
- Local Partnerships



### Understand the Community

- What are the community's needs?
- What enrollment challenges does the community face?
- What are the community's trusted sources of information and support?
- What resources are already available?

# OUTREACH RULES

CACs must adhere to the following rules when conducting outreach to consumers.



Gifts and promotional items must be only of nominal value. CACs are **prohibited from providing gifts of any value** to a consumer as an incentive for enrollment.



CACs **may not conduct outreach and education activities by going door-to-door** or through other unsolicited means of direct contact to consumers.



CACs are **prohibited from calling consumers using an automatic telephone dialing system** or an artificial or prerecorded voice (frequently referred to as robocalls) unless the consumer has an existing relationship with the individual or organization.

# OUTREACH TOOLKIT OVERVIEW

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# GEORGIA ACCESS OUTREACH TOOLKIT OVERVIEW

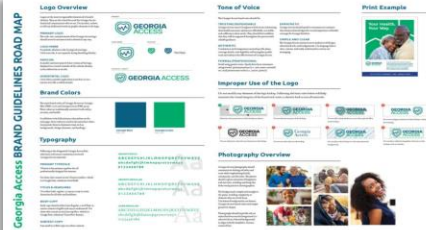
The Georgia Access Outreach Toolkit is a comprehensive guide for CDOs to raise awareness and market Georgia Access in the communities they serve.

CONTENTS	1 Talking Points	2 Style Guide Roadmap	3 Template Digital Content	4 Print Collateral	5 Social Media Handles
DETAILS	Reference language to support discussions about Georgia Access with communities assisters serve.	Georgia Access brand guidelines to create a consistent identity across all communication channels. The Style Guide Roadmap includes logos, spacing, color palette, font, tone of voice, and photography guidance.	Sample messaging and images for use across social media platforms such as Facebook, X (formerly Twitter), and Instagram.	Posters, postcards, and other collateral to distribute to communities assister serve.	Follow, connect, and engage with Georgia Access through the following accounts. Also consider sharing our posts and tagging our accounts in your communications.

## Talking Points

Feel free to reference this language as you discuss the Georgia Access program with communities.

- TALKING POINTS**
  - Georgia Access is the state's program for all residents to find quality, affordable health insurance.
  - The website is [www.GeorgiaAccess.gov](https://www.GeorgiaAccess.gov).
  - Information:** Georgia Access is a free, confidential, one-on-one service that helps people understand their options for health insurance through the state's official marketplace, **HealthCare for All Georgia**.
  - Eligibility:** Georgia Access is available to all Georgia residents who are eligible for health insurance through the state's official marketplace, **HealthCare for All Georgia**.
  - Regardless of where you live, you can get help from Georgia Access.
  - The website is available to consumers in both English and Spanish.
  - Consumers will be able to find the same information in both languages.
- With Georgia Access, consumers have many options for finding an affordable health insurance plan. Georgia Access is a free, confidential, one-on-one service that helps people understand their options for health insurance through the state's official marketplace, **HealthCare for All Georgia**.
- There are many ways you can get help from Georgia Access. You can call the toll-free number, visit the website, or go to a community assistance center. The website is available in both English and Spanish.
- Georgia Access is available to all Georgia residents who are eligible for health insurance through the state's official marketplace, **HealthCare for All Georgia**.
- Consumers will be able to find the same information in both languages.



## Template Digital Content

The Toolkit contains sample messaging and images for use across social media platforms such as Facebook, X (formerly Twitter), and Instagram. See the next slide and supporting materials for additional content.

- GUIDANCE ON HOW TO POST**
  - Please connect with and tag @GeorgiaAccess and our social media handles ([www.GeorgiaAccess.gov](https://www.GeorgiaAccess.gov)) in your posts.
  - Please share your preferred language (i.e., show that your community members communicate with most comfortably) when posting social media.
  - If your organization serves a Spanish-speaking population, please publish the post in both English and Spanish so that those audiences can receive the message. Spanish language materials are included in the toolkit.



## Print Collateral

How to distribute collateral. Distribute collateral in your organization's offices and at outreach events, depending on existing communication and outreach tactics.

- EXAMPLES**
  - Posters to use on your community bulletin board.
  - Make posters available in locations frequented by community members.
  - If your organization serves a Spanish-speaking population, please make collateral available in Spanish so that those audiences can receive the message. Spanish language materials are included in the toolkit.
  - Share appropriate collateral with business partners, community organizations, or you can fit.



## Toolkit Materials: Social Media Handles

Follow, connect, and engage with us through the following accounts. Also consider sharing our posts and tagging our accounts in your communications. Reach out to [Agents@GeorgiaAccess.ga.gov](mailto:Agents@GeorgiaAccess.ga.gov) with questions.

- [www.GeorgiaAccess.gov](https://www.GeorgiaAccess.gov)
- [www.GeorgiaAccess.gov](https://www.GeorgiaAccess.gov)
- [www.GeorgiaAccess.gov](https://www.GeorgiaAccess.gov)
- [www.GeorgiaAccess.gov](https://www.GeorgiaAccess.gov)
- [www.GeorgiaAccess.gov](https://www.GeorgiaAccess.gov)
- [www.GeorgiaAccess.gov](https://www.GeorgiaAccess.gov)

# OUTREACH TOOLKIT COLLATERAL

The Georgia Access Outreach Toolkit will include additional collateral, including print and digital resources, that assisters can use to promote Georgia Access among target populations. Toolkit collateral will be distributed in late September.

- 🎯 **Print and digital collateral will be distributed in late September.** The Outreach Toolkit contains brand guidelines and examples of collateral.
- 🎯 **Resources will be available in English and Spanish** and contain key information about Georgia Access.
- 🎯 **Digital materials can be published on your organization's website** and social media. Digital content includes social media content, email copy, and slides for presentations.
- 🎯 **Print materials can be shared at in-person outreach events.** Material includes posters, flyers and postcards.
- 🎯 **Connect to target populations** Use the appropriate resources that connect to your organization's strategy to reach targeted populations and meet key goals.



*Sample Facebook post*

# GEORGIA ACCESS ENTITY PORTAL

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# ENTITY PORTAL OVERVIEW

The Georgia Access entity portal is a new state-run portal that CDOs can use to manage individual, affiliated CACs and that CACs can use to support consumers with the application process.

## CDOs



### Activate Entity Portal Profile

CDO leads will receive an email with instructions for how to access the entity portal and to activate an entity portal profile on October 15.



### Manage CACs

CDOs can use the entity portal to manage, suspend, and monitor their affiliated CACs.



### Update Organization Information

CDOs can update their hours of operation and business address on the entity portal for consumers.

## Individual CACs



### Activate Entity Portal Profile

Individual CACs can activate their entity portal after their CDO lead registers them as an affiliated CAC on the entity portal.



### Assist and Manage Consumers

CACs can use the entity portal to manage a list of consumers who they are assisting and help consumers fill out an application.

Our team will provide a **live demo** of the entity portal during the monthly meeting on **Thursday, October 10.**

# **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
	Sept	Oct	Nov	Dec	Jan
Certification Training					
Georgia Access certification training is available – Training is Live!					
Deadline to complete certification training			11/1		
Office Hours					
Office Hour Sessions for CDOs	9/26	10/31	11/28	12/26	1/30
Report Submission Requirements					
Quarterly report due**				12/15	
Assist Consumers					
Contact Center is live		10/1			
Assister portal launches		10/15			
CACs begin helping consumers			11/1		

\*\*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



**Georgia Access Website** | [georgiaaccess.gov/for-partners/certified-application-counselors/](https://georgiaaccess.gov/for-partners/certified-application-counselors/)

Information on the Georgia Access CAC Program



**OCI Website** | [oci.georgia.gov/agents-agency-licensing/navigators-and-georgia-access-specialists-cacs](https://oci.georgia.gov/agents-agency-licensing/navigators-and-georgia-access-specialists-cacs)

Information on State of Georgia licensure requirements and the application process.



**Sircon** | [sircon.com/landingPages/states/georgia/content.jsp](https://sircon.com/landingPages/states/georgia/content.jsp)

Apply for a license, check the status of a license or application, and update contact information.



**Georgia Access Certification** | [certification.georgiaaccess.gov](https://certification.georgiaaccess.gov)

Access the Georgia Access certification training and final assessment.



**CDO Inbox** | [CDOs@GeorgiaAccess.ga.gov](mailto:CDOs@GeorgiaAccess.ga.gov)



**Georgia Access Contact Center** | 1-888-312-4237

The Contact Center will go live on starting October 1, 2024.



# Q&A

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# APPENDIX

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# 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.



## Changes in Georgia Access Specialist licensure requirements

- CACs are no longer required to complete the pre-licensing training and assessment or pay the \$55 licensing fee.

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.*