



Certified Application Counselor (CAC) Program Designated Organization Criteria

Connect for Health Colorado will designate organizations to certify their staff or volunteers to perform the duties of Certified Application Counselors. Designated organizations must submit an application for approval to Connect for Health Colorado and sign an agreement with Connect for Health Colorado. The criteria for consideration and designation are:

- Complete and sign application with basic identifying information and meet the following qualifications:
 - Currently helping with financial assistance, application assistance, or enrollment into financial or health programs
 - Have existing policies and procedures in place to protect the privacy of customer information
 - Have existing policies and procedures in place for staff and volunteer background checks
 - Have a non-discrimination and inclusion policy and agree to provide services to customers in an inclusive way that does not discriminate on the basis of factors such as race, color, religion, sex, national origin, or sexual orientation.
 - ADA accessible locations and services and provide reasonable accommodation
 - Have policies and procedures in place for assessing and evaluating customer service programs for quality and escalating customer complaints for resolution
 - Have at least \$1,000,000 per occurrence and \$2,000,000 aggregate in General Liability coverage, \$250,000 in Employee Crime/Dishonesty coverage and \$1 million in Privacy coverage.
- Agree to provide Connect for Health Colorado Application Counselor training for staff or volunteers who will act as Application Counselors
- Agree to provide a plan to certify, monitor, evaluate, re-certify, and de-certify Application Counselors
 - Certification plan must include passing Connect for Health Application Counselor training with 80% or better
 - Monitoring must include plan to regularly assess adherence to privacy practices, role, accuracy of guidance given to customers, and training standards
 - Duties and Standards of Certification must be in compliance with 45 CFR § 155.225 (c) and (d). A copy of 45 CFR § 155.225 is provided as Appendix A of the Certified Application Counselor RFA.



- Agree to provide application assistance without charging customers or making assistance conditional on any other relationship, purchase, or direct or indirect consideration
- Agree to adhere to Connect for Health Colorado Privacy and Security Standards, and submit to audit of such
- Agree to inform customers, prior to providing assistance, of the role of Certified Application Counselor
- Agree to disclose to customers, prior to providing assistance, conflicts of interest
- Agree to act in the best interests of customers
- Agree to refer customers with unmet language interpretation or translation needs to Connect for Health Colorado customer service network
- Agree to provide Application Counseling services that acknowledge insurance affordability programs and qualified health plan options for which a customer is eligible
- Agree to Connect for Health Colorado reporting and auditing on request
- Agree to adherence to Connect for Health Colorado's branding and marketing standards

TERMS AND CONDITIONS OF DESIGNATED ORGANIZATIONS

Once an organization has been designated by Connect for Health Colorado, the organization shall agree to the terms and conditions that include but are not limited to:

- Meeting the criteria as stated above
- Communicating changes to contact and organizational information
- Annually, completing a Designated Organization application
- Reporting breeches in security or instances of compromise of privacy to Connect for Health Colorado. This may result in the end of organization's designation
- Notifying Connect for Health Colorado about any suspicion of fraud, identity theft, waste or abuse.
- Misuse of Connect for Health Colorado's brand and marketing standards may result in the end of the organization's designation
- Concerns about a Designated Organization's ability to provide services in alignment with agreement may result in the end of the organization's designation
- Certification and Designation status are not assignable to successor entities in the event of a merger, joint venture, acquisition, partnership