

Certified Application Counselor Program Designated Organization Agreement

This Cor	nnect for	Health Assis	tance Netwo	rk Agre	ement (Agr	eem	ent), ente	red in	to betwe	en the Colo	orado
Health	Benefit	Exchange	("COHBE")	doing	business	as	Connect	for	Health	Colorado	and
				(Partner),	is p	art of Co	OHBE'	s Certif	ied Applic	ation
Counsel	lor Progra	ım. That pro	gram design	ates org	anizations	to su	ipervise C	ertifie	d Applica	ation Couns	elors
as part	of COHBE	's efforts to	serve Colora	dans by	providing	appl	ication ass	istand	e.		

1. <u>Designation and Authority</u>. Subject to the terms of this Agreement, COHBE hereby designates and authorizes Partner to assist customers with applications for insurance affordability programs and insurance offered on or through COHBE's insurance marketplace. The scope of this Agreement is limited to the designation of Partner by COHBE, and does not create an agency or any other legal relationship between the parties.

2. Partner Representations.

- A. <u>Compliance with COHBE Policies and Applicable Laws</u>. Partner shall comply with all COHBE policies and procedures now in effect, or hereafter adopted, all instructions as may from time to time be given to Partner by COHBE, and all applicable federal and state laws and regulations including, but not limited to, as applicable, the Affordable Care Act (ACA), the Health Insurance Portability and Accountability Act (HIPAA), the Colorado Insurance Code, and the regulations promulgated thereunder.
- B. No Prior or Ongoing Disciplinary Action. Neither the Partner, nor any of its officers, directors, employees nor any other person substantially involved in the contracting or fundraising activities of the Partner is currently on the "List of Excluded Individuals/Entities" (LEIE) maintained by the Office of Inspector General of the United States Department of Health and Human Services. Partner further represents that it is not currently the subject of any disciplinary proceeding or other action by any federal or state governmental authority. Partner agrees that it has a continuing obligation to notify COHBE in writing within seven (7) business days if it becomes subject to such disciplinary action.

- C. <u>Services at No Charge</u>. Partner shall provide application assistance without charging customers or making assistance conditional on any other relationship, purchase, or direct or indirect consideration.
- 3. <u>Liability and Indemnification</u>: Partner will be liable for the conduct of the Certified Application Counselors under their supervision, whether employed or volunteer, including (but not limited to) compliance with the roles and responsibilities set out in the Connect for Health Colorado Certified Application Counselor Program Announcement and this Connect for Health Colorado Certified Application Counselor Program Agreement, and processes and procedures developed by COHBE. Partner will be required to indemnify and hold COHBE harmless for any legal claims or damages resulting from the actions of their Certified Application Counselors.
 - A. <u>Indemnification</u>. Partner agrees to indemnify, defend and hold COHBE harmless for any and all legal claims or damages resulting from Partner's breach of any representations or requirements or from Partner's negligent acts or omissions under this Agreement.
- 4. <u>Advertising and Marketing.</u> Partner acknowledges and agrees to comply with any COHBE advertising, marketing, and branding requirements, as determined by COHBE and communicated to Partner from time to time. Partner may advertise or refer to itself as a "Connect for Health Colorado Designated Organization," but shall not represent itself as an agent or other representative of, or otherwise licensed or approved by COHBE. COHBE reserves the right to terminate a Partner under Section 10.B of this Agreement for acts of misrepresentation or false and misleading advertising, as solely determined by COHBE.
- 5. <u>Failure to perform and corrective action</u>. If COHBE becomes aware that Partner has failed or is failing to meet its representations or requirements under this Agreement, COHBE will provide notice of the identified failure to the Partner. COHBE may, but is not required, to provide the Partner with an opportunity to establish a corrective action plan approved by COHBE including a period to cure the failure that exceeds the 30 day period established in section 10 of this agreement.
- 6. <u>Duty to Customer</u>. Partner agrees to provide full and impartial information to customers seeking their services in connection with application assistance for insurance affordability programs and qualified health and dental plans offered through COHBE.

- 7. <u>Non-Discrimination</u>. The Partner may not discriminate against any employee, applicant for employment, or customer because of race, color, religion, sex, national origin, sexual orientation, or any other characteristic forbidden as a basis for discrimination by applicable laws.
- 8. <u>Title VI and ADA Compliance</u>. The Partner, its agents and employees shall seek to provide information in a culturally and linguistically appropriate manner in compliance with Title VI of the Civil Rights Act of 1964 and shall ensure accessibility and usability for individuals with disabilities in accordance with the Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act.

9. Confidentiality of Information/Privacy and Security.

- A. <u>Confidentiality</u>. Partner may use confidential client and COHBE information to carry out its requirements under this Agreement or as required by applicable law. Partner agrees to comply with applicable law including the ACA, HIPAA, Colorado State law and regulations promulgated thereunder regarding the confidentiality of personal health information.
- B. <u>COHBE Privacy and Security Standards</u>. The Partner shall comply with COHBE's privacy and security standards as set forth and incorporated by reference in Attachment 3 of the Agreement.

10. <u>Term and Termination</u>.

- A. <u>Term</u>. This Agreement is effective upon its execution by the parties and shall be in effect for not longer than twelve (12) months with the possibility of renewal for a subsequent term upon COHBE and the Partner's continuing satisfaction of the terms of designation.
- B. <u>Termination</u>. Either party may terminate this Agreement upon 30 days written advance written notice. COHBE may terminate this Agreement for Partner's failure to meet any requirement of the Agreement or should it at any time determine that such termination is in COHBE's best interest, provided that such termination shall be in writing and be provided to Partner at least thirty (30) days in advance of the effective date of termination.
- 11. <u>Project Administration</u>: The Partner will directly administer the project as set forth in the application submitted in response to the Connect for Health Colorado Certified Application Counselor Program Announcement.
 - A. Designation: The Partner must meet designation requirements as defined by COHBE.

B. <u>Conduct, Roles and Responsibilities</u>

- i. Partner agrees to ensure that the employees and volunteers under its supervision pursuant to this Agreement will adhere to requirements as set forth at 45 CFR § 155.225 and the role as defined in the Connect for Health Colorado Certified Application Counselor Program Announcement.
- ii. Partner will ensure that employees and volunteers under its supervision pursuant to this Agreement will not represent or conduct themselves in such a way that violates State of Colorado law governing the licensing and appointment of insurance producers, C.R.S. 10-2-401 et. seq.
- C. <u>CAC Certification</u>: Partner must ensure all Certified Application Counselors under its supervision meet the requirements for certification as defined by COHBE and listed below, and obtain certification prior to assisting customers. A Certified Application Counselor certification plan shall be presented to COHBE prior to execution of this agreement and shall require at a minimum:
 - i. Partner agrees to ensure that all staff it intends to certify as Certified Application Counselors have undergone and passed a criminal background check which shows they are free of conviction for financial crimes, crimes against children or vulnerable adults, and violent offenses.
 - ii. Partner agrees to ensure all staff it intends to certify as Certified Application Counselors meet the initial training requirements on marketplace overview, privacy and security, qualified health and dental plans, insurance affordability programs, including passage at 80% or better prior to certification. Partner agrees to meet additional training requirements as a condition of continued certification under the Agreement as designated by COHBE from time to time. COHBE will provide schedules and details of its training programs to Partner in advance.
 - iii. Partner agrees and understands that only licensed and certified agents/brokers can advise and provide detailed insurance counsel to the consumer.
 - iv. Monitoring that includes a plan to regularly assess adherence to privacy and security practices, role, accuracy of guidance given to customers, and training standards.

- iv. Duties and Standards of Certification must be in compliance with 45 CFR § 155.225 (c) and (d).
- 12. <u>Audit and Reporting Requirements</u>: The Partner agrees to submit an annual report on or before the date due, with information including but not limited to characteristics of populations served and numbers served per the instructions provided by COHBE. Partner will bear all costs associated with copying and submitting requested reports.
 - A. The Partner agrees to participate in an evaluation of COHBE's program, including assisting with any data collection and information gathering, such as participation in surveys, site visits, meetings, and interviews with evaluators.
 - B. The Partner agrees to participate in any audits required by COHBE or its federal partners, including but not limited to the U.S. Department of Health and Human Services.
- 13. <u>Failure to perform and corrective action</u>: If it is apparent that the Partner is failing to meet its obligations under this Agreement, COHBE will provide notice of the identified failure to the Partner, an opportunity to establish a corrective action plan approved by Connect for Health Colorado, and at least thirty (30) days to cure. Failure to cure will result in suspension or cancellation of the partnership and associated certification.

14. Conflict of Interest

- A. Partner affirms that Partner and all of its employees agree to act at all times in the best interest of the applicants assisted, as required under 45 CFR 155.225(c)(4).
- B. Partner and its employees will make full disclosure in writing to COHBE of any conflicts of interests and make disclosure of conflicts of interest to all customers prior to the provision of application assistance.

15. General Requirements:

A. The Partner is aware of and will comply with the obligations as set out in the following: the Connect for Health Colorado Certified Application Counselor Program Announcement, as amended from time to time by COHBE and incorporated as Attachment 3; the Partner's application, including any subsequently submitted revisions, incorporated as Attachment 2; and the terms of this Agreement.

B. <u>Venue and Jurisdiction</u>. The laws of Colorado shall govern the interpretation and enforcement

of this Agreement. Any claim, action, suit or proceeding relating to this Agreement shall be

brought in the applicable State or Federal courts for the City and County of Denver, Colorado.

C. <u>Nonassignment.</u> The Partner may not sell, transfer, or otherwise assign its designation or

any of its obligations under this Agreement, or its rights, title, or interest in this Agreement,

without the prior written consent of COHBE. This Agreement shall bind any respective successors

and assigns of the parties.

D. <u>Amendments.</u> No amendment to this Agreement is binding unless it is in writing and

signed by both parties.

E. The following items are incorporated by reference and made a part of this Agreement.

Attachment 1: Partner's Application submitted in response to the Connect for Health

Colorado Certified Application Counselor Program Announcement, including any

subsequently submitted revisions to same.

Attachment 2: Privacy and Security Standards

Attachment 3: Certified Application Counselor Program Announcement and Designated

Organization Application Guidelines

16. Acceptance of Terms and Conditions: This document shall be signed by an individual legally

authorized to execute contracts on behalf of the Partner, signifying agreement to comply with all the

terms and conditions specified above.

The above terms and conditions of the Agreement are hereby accepted and agreed to as of the date

specified:

For: Colorado Health Benefit Exchange (COHBE)

By:

Date:

For:	[Partner]			
Ву:				
Date	<u>:</u> :			

Attachment 1

Partner's Application

Attachment 2

Privacy and Security Standards

Partner shall:

- (a) Not use or disclose COHBE information other than as permitted or required by the Agreement or as required by law;
- (b) Use appropriate safeguards, and comply with or exceed COHBE supplied policies and guidance with respect to COHBE information, to prevent use or disclosure of information other than as provided for by the Agreement;
- (c) Report to COHBE any use or disclosure of COHBE information not provided for by the Agreement of which it becomes aware, including breaches of unsecured COHBE information, and any security incident of which it becomes aware;
- (d) Ensure that all of Partner's subcontractors that create, receive, maintain, or transmit COHBE information on behalf of the Partner agree to the same restrictions, conditions, and requirements that apply to the Partner with respect to such information;
- (e) Maintain and make available the information regarding accounting of disclosures; and
- (f) Make its internal practices, books, and records available to COHBE for purposes of determining compliance with the COHBE Polices and Guidance.

1.0 Purpose of Announcement

Connect for Health Colorado has established a Certified Application Counselor Program to designate organizations throughout the state that will provide application assistance to consumers seeking health coverage and financial assistance paying for health coverage through the marketplace. The Certified Application Counselor Program is an unfunded initiative that will establish designated organizations as Connect for Health Colorado partners to support our efforts to provide access to health coverage to Coloradans. It is designed for providers and other organizations that perform application assistance for health coverage or financial assistance, or otherwise provide support with health coverage enrollments.

As part of the Certified Application Counselor Program, Connect for Health Colorado will designate organizations that agree to certify staff or volunteers to perform the duties of Certified Application Counselors. These Designated Organizations must: 1) Submit a Designated Organization application for approval by Connect for Health Colorado, 2) Sign and submit the Certified Application Counselor Program Designated Organization Agreement with Connect for Health Colorado, and 3) Successfully complete mandatory training.

Deadline: Applications will be accepted on a rolling basis throughout the year.

All applications shall be submitted using the form provided. The <u>signed form and signed agreement</u> shall be uploaded via email <u>together</u> to: <u>upload.CAC 201.iori5037hw@u.box.com</u>. The applicant will receive a confirmation email as soon as Connect for Health Colorado has verified the documents were received. Confirmation of receipt does not constitute approval of the application. Upon review, applicants will be notified in writing of their approval and provided instructions for registering for training.

Questions: Questions will be accepted to CACProgram@connectforhealthco.com. Please put CAC Program in the subject line of the email.

2.0 Background and Connect for Health Colorado Assistance Network Description

2.1 Connect for Health Colorado Background

Connect for Health Colorado is a public, non-profit entity established by Senate Bill 11-200, a state law passed by the Colorado General Assembly in May 2011. Connect for Health Colorado is governed by a Board of Directors with additional direction from a panel of state legislators called the Legislative Health Benefit Exchange Implementation Review Committee. Connect for

Health Colorado's mission is to increase access, affordability, and choice for individuals and small employers purchasing health insurance in Colorado.

Connect for Health Colorado's new health insurance marketplace opened on October 1, 2013 and allows individuals, families and small employers to shop for and buy health insurance based on quality and price. Customers using the Connect for Health Colorado website can find information about health coverage options and the qualified health plans sold through the marketplace, and information about tax credits and cost sharing subsidies that will help reduce the cost of purchasing a qualified health plan. Connect for Health Colorado is the sole access point for eligible Coloradans to apply for and receive tax credits to reduce the cost of premiums and subsidies to reduce cost sharing. Customers can apply and shop through Connect for Health Colorado's website and can also access assistance by phone and in person through a customer support network that includes a call center, Health Coverage Guides and licensed and certified agents/brokers. More information is available at www.connectforhealthco.com.

2.1.1 Target Populations

Connect for Health Colorado is open to:

- Individuals and families who currently purchase insurance on their own in the individual insurance market, including self-employed individuals;
- Uninsured individuals and families; and
- Small businesses (with 2-50 employees). <u>Note:</u> Certified Application Counselors are not expected to directly support small businesses. Certified Application Counselors will receive training to recognize small business marketplace questions and refer to the customer service center.

3.0 Connect for Health Colorado Certified Application Counselor Program

Connect for Health Colorado established the Certified Application Counselor program to provide additional access points for Coloradans seeking assistance with the application for health coverage and financial assistance paying for coverage. The Certified Application Counselor program is being implemented in compliance with 45 CFR § 155.225 and all Designated Organizations are expected to maintain compliance with 45 CFR § 155.225 as well. Certified Application Counselors provide assistance to individuals applying for health coverage and financial assistance paying for health coverage, and provide information and assistance to customers regarding the process of shopping for, selecting and enrolling in QHPs, Medicaid and CHP+.

Connect for Health Colorado Support for Designated Organizations and Certified Application Counselors

Connect for Health Colorado will be responsible for the following functions related to the Certified Application Counselor program.

• Application Process: Managing the Designated Organization application process.

- Training: Training will include modules on:
 - Connect for Health Colorado overview and introduction;
 - Eligibility;
 - Qualified health plan (QHP) options;
 - Insurance affordability programs;
 - o Benefits;
 - Connect for Health Colorado privacy and security standards;
 - o Other applicable rules and regulations including conflict of interest; and
 - o How to make referrals to other members of the Customer Support Network.

All annual and refresher training will be conducted on-line. Designated Organizations will be responsible for loading their staff into the online learning management system and assuring course completion. There will also be optional in-person training offered for those who wish to attend.

- **Ongoing Monitoring**: To include but not be limited to:
 - Review of annual submission of application from each Designated Organization;
 - Review of annual report to be provided by Designated Organizations;
 - Review of quality of information and interaction with consumers
 - Audit of Training quality and accuracy delivered via a Designated Organization's in-house Trainer
 - Audits and/or investigations in the event of complaints;
 - Review of Policies and Procedures if newly developed and/or if audits and or investigations require said review; and
 - Any activities as might be required due to breeches in security or instances of compromise of privacy.
- **De-Certification**: If necessary, Connect for Health Colorado will withdraw designation from a Designated Organization for non-compliance with the terms and conditions of the Designated Organization Agreement with Connect for Health Colorado.

To support Designated Organizations and Certified Application Counselors in helping Connect for Health Colorado customers learn about the range of options, complete applications, and facilitate enrollment, Connect for Health Colorado will provide the following services:

Website capable of providing general education about health insurance terms, eligibility
for premium tax credits and cost sharing subsidies, and comparison of available
qualified health plans. The website will be a secure place for customers to apply for
premium tax credits and cost sharing subsidies, and to access an eligibility
determination for Medicaid and CHP+. The system will also collect and submit
enrollment applications to QHPs.

- Training Materials and job aids online.
- Customer Service Center to provide support by phone to customers and Certified
 Application Counselors. The Customer Service Center will also support Spanish language
 interpretation services for customers and interpretation of other languages by request.
- Outreach and Education Materials available online for printing.
- **Tools and services** that support the blind and visually-impaired, non-English speaking customers, and TTY/TDD for the hearing impaired.

3.1 Designated Organization and Certified Application Counselor Expectations and Requirements

3.1.1 Requirements for Designated Organizations

The Designated Organizations shall:

- Currently help with financial assistance, application assistance, or enrollment into financial or health programs
- Have existing policies and procedures in force that protect the privacy of personal information and personal health information;
- Have existing policies and procedure in place for staff and volunteer background checks;
- Have existing non-discrimination and inclusion policies;
- Have existing policies and procedures for providing ADA-accessible locations and services and for providing reasonable accommodations;
- Have existing policies and procedures for assessing and evaluating customer service programs for quality and escalating customer complaints for resolution.
- Agree to provide Connect for Health Colorado Application Counselor training for staff or volunteers who will act as Application Counselors.
- Agree and understand that only licensed and certified agents/brokers can advise and provide detailed insurance counsel to the consumer.
- 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.
- 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, any conflicts of interest
- Agree to act in the best interests of customers.
- Agree to refer customers with unmet language interpretation or translation needs to the Connect for Health Colorado customer support 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 requirements.
- Agree to adhere to Connect for Health Colorado's branding and marketing standards.

The Designated Organizations shall submit any of these policies and procedures to Connect for Health Colorado upon request.

Upon application approval, Connect for Health Colorado expects Designated Organizations to identify staff and volunteers who will be trained and certified; review policies and procedures to ensure compliance with Connect for Health Colorado guidelines and federal regulations.

CAC Certification

Designated Organizations are responsible for certifying their Certified Application Counselor staff. As part of the application, the Designated Organization applicant is responsible for submitting a Certification Plan that outlines how Certified Application Counselors will be certified, monitored, evaluated and de-certified, if necessary. The Certification Plan must include the following components:

- The Certification Plan shall include a requirement that a Certified Application Counselor completes Connect for Health Colorado's CAC Training and receives a score of 80 percent or higher on each training module.
- The Certification Plan shall outline its customer escalation and complaint resolution process.
- The Certification Plan shall articulate how the Certified Application Counselors will be monitored, evaluated and re-trained (if necessary) to ensure they are complying with all privacy practices, roles and training standards. This monitoring shall be designed to ensure Certified Application Counselors:
 - Do not charge for assistance;
 - Inform customers of their role and do so prior to providing assistance;
 Obtain authorization from customers acknowledging the release of personal information for application purposes and obtain this authorization prior to providing assistance;
 - Disclose to customers, prior to providing assistance, any conflicts of interest;
 - Act in the best interests of customers; and
 - Do not provide advice and assistance on plan selection.

- Do refer customers with unmet language interpretation or translation needs to Connect for Health Colorado customer service network.
- Do provide Application Counseling services that acknowledge insurance affordability programs and qualified health plan options for which a customer is eligible.
- The plan shall detail the annual re-certification process, which shall include refresher training provided by Connect for Health Colorado.
- The plan shall detail the process for de-certifying Certified Application Counselors. At a minimum, the plan shall allow for de-certification for failure to complete training and for cause (e.g., due to complaints or multiple infractions of policies and protocols).

The Designated Organizations shall provide reports annually to Connect for Health Colorado. The specific reporting requirements and formats will be provided to the point of contact but will include, at a minimum, the number of Certified Application Counselors, the number of customers assisted, the number of customers enrolled, a report of complaints received, and information about any de-certifications that had occurred over the prior year.

The next open enrollment for coverage through Connect for Colorado begins on November 1, 2015 and will continue through January 31, 2016. Subsequent annual enrollment periods will occur each fall. These will be the periods of highest activity, although Certified Application Counselors should also expect to provide enrollment assistance throughout the year as lifechange events bring new people to the Marketplace.

Conflict of Interest

Designated Organizations and Certified Application Counselors must disclose to Connect for Health Colorado and customers any relationships the Designated Organization or Certified Application Counselor has with QHPs or insurance affordability programs, or other potential conflicts of interest. Designated Organizations must disclose these relationships to Connect for Health Colorado and shall require that any Certified Application Counselors disclose the same information to them.

Privacy and Security Requirements

Connect for Health Colorado has developed Privacy and Security Standards in compliance with state and federal regulations to protect the data that Connect for Health Colorado receives, processes, stores, and handles on behalf of applicants, carriers, small-business owners, and others. Unauthorized disclosure of information can compromise Connect for Health Colorado business operations, violate individual privacy rights, and possibly constitute a criminal act. The

Designated Organization shall agree to adhere to Connect for Health Colorado Privacy and Security Standards.

Liability

Designated Organizations will be liable for the conduct of the Certified Application Counselors under their supervision, including (but not limited to) compliance with the roles and responsibilities set out in this Application and the Agreement. Designated Organizations will be required to hold Connect for Health Colorado harmless for any legal claims or damages resulting from Certified Application Counselors actions.

3.1.2 Certified Application Counselors: Roles, Responsibilities and Duties

The Designated Organizations will be responsible for ensuring the duties performed by the Certified Application Counselors will align with federal requirements (45 CFR § 155.225 (c)) which require them to:

- 1. Provide information to individuals and employees about the full range of QHP options and insurance affordability programs for which they are eligible;
- 2. Assist individuals and employees to apply for coverage in a QHP through Colorado's Connect for Health Colorado and for insurance affordability programs; and
- 3. Help to facilitate enrollment of eligible individuals in QHPs and insurance affordability programs. Note: facilitating enrollment will include providing basic instruction to customers about the QHPs available in Connect for Health Colorado, the plan shopping experience and decision tools, providing information about next steps, and plan selection assistance, if needed.

The role of the Certified Application Counselors will be to act in the best interest of the customer and provide Connect for Health Colorado customers with fair and impartial information and services that help educate them about:

- Connect for Health Colorado;
- The available programs, including insurance affordability programs such as Medicaid, CHP+, and subsidized coverage;
- Eligibility for QHP premium tax credits and cost-sharing reductions;
- How a customer can complete an application;
- The plan selection process and what they can expect; and
- Where to go for additional assistance with plan selection or unmet need.

Certified Application Counselors can help individuals complete an application, describe the plan selection and enrollment process and clarify distinctions among QHPs; however, Certified Application Counselors *should not provide advice or input on an individual's plan selection*.

4.0 Who May Apply

Individual organizations, associations, or government agencies may apply. Connect for Health Colorado encourages applications from organizations such as community health centers (including Federally Qualified Health Centers and Rural Health Centers); hospitals; health care providers (including Indian Health Services, Indian tribes and Urban Indian organizations that provide health care; Ryan White HIV/AIDS providers; behavioral health or mental health providers); agencies that have experience providing social services to the community such as Supplemental Nutrition Assistance Program (SNAP) outreach or energy assistance which are either non-federal government entities or organized under section 501(c) of the Internal Revenue Code; and other local governmental agencies that have similar processes and protections in places such as health departments and libraries.

5.0 Application Preparation and Approval Process

5.1 Application Preparation

A completed application packet includes <u>both</u> the completed and signed application and agreement using the Connect for Health Colorado CAC Program Designated Organization Application and Certified Application Counselor Program Agreement that can be found on the Connect for Health Colorado website under the "About Us" menu by selecting "Application Counselors". Applicants shall upload via email their application, agreement and all attachments to <u>upload.CAC 201.iori5037hw@u.box.com</u>. A confirmation email will be sent to verify receipt as soon as Connect for Health Colorado has verified the documents were received. Connect for Health Colorado will communicate with the primary contact identified on the application.

<u>Deadline for applications:</u> Complete applications <u>and</u> signed Certified Application Counselor Program Designated Organization Agreements will be accepted on a rolling basis throughout the year.

<u>Questions and Requests for Clarification:</u> Applicants may send e-mail questions and requests for clarifications to: <u>CACProgram@connectforhealthco.com</u> with "CAC Program" in the subject line. Phone inquiries will not be accepted. Applicants and interested parties should check the website regularly for updates.

Application Withdrawal: Applications may be withdrawn by Applicants at any time.

<u>Connect for Health Colorado Questions, Requests for Clarification or Modifications:</u> During the application review, Connect for Health Colorado may contact Applicants for clarification of information provided on their application.

<u>Confidentiality:</u> Connect for Health Colorado will not make the contents of applications available to the public, however will comply with the Colorado Open Requests Act as necessary.

5.2 Approval Criteria

The Designated Organizations shall be evaluated on the criteria as set forth in section 3.0 above.