Quick Reference Guide

How to Establish and Activate a Delegate in CURES, with Questions and Answers

October 14, 2022
Preliminary Steps

Prior to activating a Delegate Association in CURES, a user must complete two steps.

**Step 1:** Determine if the prospective Delegate meets the eligibility criteria.* If the prospective Delegate satisfies the eligibility criteria, the user will move to Step 2.

**Step 2:** Execute a Delegate Agreement* with any eligible Delegate(s) to whom that user wishes to delegate authority to access data in CURES on that user’s behalf. (DOJ has posted Delegate Agreement samples that can be accessed at [https://oag.ca.gov/cures](https://oag.ca.gov/cures)).

Once these steps are complete, the user may proceed to activate a Delegate Association in CURES with such Delegates.

*Detailed information concerning Delegate eligibility and Delegate Agreement requirements are described in DOJ’s October 14, 2022, bulletin entitled, “New Features and Requirements for Expanded Delegate Access.”*
Activating a Delegate Association

After login, the user will land on their CURES dashboard.

Select “My Profile”

Select “Manage Delegates”
Activating a Delegate Association

The user is brought to the Manage Delegates page.

Select “Add Delegate”
Activating a Delegate Association

The user will complete the “Add Delegate Agreement” page

- Delegate Agreement Verification
- Delegate Agreement Information
  - Delegate Last Name
  - Delegate First Name
  - Delegate Email Address
  - Term of Agreement
    (Effective Date and Expiration Date)
- Certification of Delegate Association

Select “Submit”
Activating a Delegate Association

The user will see the confirmation message that a Delegate Association Request was sent.

The Delegate will immediately receive a system-generated email notification that an Authorizing User added them as a Delegate.
Activating a Delegate Association

The Delegate will receive an email notification that the Authorizing User added them as their Delegate.

If the Delegate already has a CURES account, they must do the following:
- Login to CURES.
- Enter the unique verification code that was included in the original email notification
  (The unique verification code expires 14 calendar days after the date it was issued).

If the Delegate does not yet have a CURES account, they must do the following:
- Create a CURES account using the registration link included in the original email notification
  (The registration link will expire 14 calendar days after the date it was issued).

If the Delegate or Authorizing User has any questions, they can contact the CURES Help Desk at cures@doj.ca.gov or (916)210-3187
Questions & Answers

**Question:** Am I required to establish Delegates?

**Answer:** No, you are not required to establish Delegates. However, if you want to use Delegates then you will be required to establish Delegate associations using the instructions given in this guide.

**Question:** How is this new Delegate role different from the prior Delegate role?

**Answer:** The prior Delegate role only permitted Delegates to initiate Patient Activity Reports on behalf of their Authorizing Users; the Delegates could not directly access those reports. The new Delegate role permits Delegates to directly access Patient Activity Reports in CURES. Pursuant to sections 824.5 and 824.6 of the regulations, Delegates may obtain a Patient Activity Report for a search period not to exceed 24 months from the date of the search. The text of the regulations can be viewed here (URL: https://oag.ca.gov/system/files/media/CURES%20-%20Text%20of%20Adopted%20Regulations.pdf)
Questions & Answers

**Question:** Who is eligible to serve as a Delegate?

**Answer:** Eligibility criteria for Delegates is provided in section 824.1(a) of the regulations. An individual must meet this eligibly criteria to serve as a Delegate in CURES. The text of the regulations can be viewed here (URL: https://oag.ca.gov/system/files/media/CURES%20-%20Text%20of%20Adopted%20Regulations.pdf).

**Question:** Will the Department of Justice (DOJ) advise me on whether my staff members are eligible to serve as Delegates?

**Answer:** No, the DOJ will provide the eligibility criteria, but it is the responsibility of the Authorizing Users, independently or in conjunction with their administrative or legal staff, to determine which staff members are eligible to become Delegates pursuant to eligibility criteria provided in section 824.1 of the regulations. The text of the regulations can be viewed here (URL: https://oag.ca.gov/system/files/media/CURES%20-%20Text%20of%20Adopted%20Regulations.pdf).
Questions & Answers

**Question:** What must be included in the Delegate Agreement between an Authorizing User and the Delegate(s)?

**Answer:** The Delegate Agreement must include, at a minimum, all of the requirements set forth in section 824.2(a) of the regulations. The text of the regulations can be viewed here (URL: https://oag.ca.gov/system/files/media/CURES%20-%20Text%20of%20Adopted%20Regulations.pdf). These requirements are also listed in the “New Features and Requirements for Expanded Delegate Access” bulletin, under the section titled “Delegate Agreement.”

**Question:** Will the Department of Justice (DOJ) provide an example of a Delegate Agreement?

**Answer:** The DOJ has provided two Delegate Agreement samples, which are posted on the CURES website at https://oag.ca.gov/cures. The first sample Delegate Agreement demonstrates an agreement between one Authorizing User and one Delegate. The second sample Delegate Agreement demonstrates an agreement between one Authorizing User and multiple Delegates.
Questions & Answers

**Question:** Are Authorizing Users permitted to have multiple Delegates? And are Delegates permitted to have multiple Authorizing Users?

**Answer:** Yes, Authorizing Users are permitted to have multiple Delegates, and Delegates are permitted to have multiple Authorizing Users. The system will allow for Authorizing Users to have up to 50 Delegates, and for Delegates to have up to 50 Authorizing Users.

**Question:** Are Authorizing Users permitted to have a single Delegate Agreement with multiple Delegates?

**Answer:** Yes, an Authorizing User may enter into a single Delegate Agreement with multiple Delegates. This is specified in section 824.2(a)(2) of the regulations, which provides: “the Delegate Agreement must only be between one Authorizing User and one Delegate, or between one Authorizing User and multiple Delegates.” The text of the regulations can be viewed here (URL: https://oag.ca.gov/system/files/media/CURES%20-%20Text%20of%20Adopted%20Regulations.pdf).