

Enroller Portal Plan-Based Enroller

User Guide



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Overview

The Enroller Portal Plan-Based Enroller User Guide outlines all features and functions available to Plan-Based Entity Enrollers in the Enroller Portal. This document details the functions of an Enroller user, how to complete the Enroller Portal profile, background clearance, and training requirements.

New Enroller User

This section provides instructions for new enroller users. As an Enroller, please complete the Counselor application process.

The Authorized Contact (AC) or Primary Contact (PC) listed on the entity roster must create the Enroller user account by completing the steps below.

Note. The PC typically creates the account for the Enroller(s).

Add Counselor Information (Authorized or Primary Contact Steps)

The Authorized or Primary Contact is responsible for initiating the process to add a new Enroller on behalf of the Entity. The screenshot listed below will assist the AC or PC on how to initiate a Counselor application in the Enroller Portal. Once the information is completed, the AC or PC will submit the information on behalf of the Enroller.

1. Log in to the Enroller Portal. Select Log In.

Log in or Create an	Account to Get Covered	
Username	Forgot username?	
Password	Forgot password?	
	٩	
Graa	Log In	

2. From the Entity Home Page. Select **My Team** tab and click on the **Add Counselor** option to continue to the Add Counselor page.



Home	Entity 🗸	My Team 🗸	My Profile	Resources 🗸
		Team List		
		Pending Staff A	• •	Icome to your Ent
		Add Counselor		ur Book of Business, assist
Entity Boo	k of Busines	s Consumers b	oy Metal Tier I	Plan

3. The *Add Counselor Information* page displays. Add Counselor details for the newly added Enroller. Select **Next** to continue.

Welcome to Covered California Become a Covered California Centified Coursestor and hep Californians enroll into quality heathcare coveraged			
Add Counselor Information			
Counselor Type: Plan Based Enroller			
Note: If you are a Primary Contact or Authorized Contact adding yourself as a Counselor, upon submission of this form, you w address for both roles, but will be prompted to create a different Username, Password, and PIN.	ill receive instructions to begin the certification process. When creating your Counselor login, you may use the same email		
* Counselor First Name	*Email 🔘		
_			
* Counselor Lass Name	* Confirm Email		
	* Preferred Method of Communication		
Legal Dusiness Name	Preferred Method of Communication -None- *		
Kalser Foundation Health Plan	•		
•Phone 0	Enroller CDI License Status		
	route r		
Alternate Phone			
*Date of Birth	CDI Expiration Date		
	8		
* State ID Type	* Select Primary Enroller Location		
-None-	-None-		
* Driver's License or ID Number	Show Primary Enroller Location Address in Find Local Help		
	Select Other Sites Served (CtrI+Click or Command+Click on Mac, to select multiple)		
	National Direct Sales Center (Location Address : 8403 South Park Circle, Orlando, FL, 32819)		
Personal Malling Address Personal Malling Address Same as Prinsey Location Malling Address Address Line 1			
Address Line 2 0			
*Gty O			
*State			
GA	Ψ		
*ZIP Code 0			
*Spoken Languages (Ctrl+Click or Command+Click on Mac, to select multiple)	*Written Languages (Ctrl+Click or Command+Click on Mac, to select multiple)		
English	English		
Spanish	Spanish		
African	African		
Ambaric	Ambaric		
Arabic 🗸	Arabic 😴		
	Next		

Important: Covered California will verify the status of the Enroller's agent license with the California Department of Insurance (CDI) to ensure it is Active and in good standing as outlined under Insurance Code Section 1626 to transact in Accident and Health or Sickness insurance. If the Enroller does not have an Active agent license, the enroller must complete the Criminal Record Disclosure (located in the Enroller Portal) and Live Scan fingerprinting process.



4. Review the Counselor Application to ensure accuracy. Select Save and Next to continue.

		Welcome to	Covered Califorr	nia
	Become a Covered	California Certified Counselor	and help Californians enroll into	o quality healthcare coverage!
Review Counselor App	lication Form			
To review your application be	fore moving forward, click Rev	iew Counselor Application.		
If you are ready to move for	ard to add the Counselor's put	blic photo or any other documen	ation, please click Save and Next	
				Review Counselor Application Save and Next

5. The *Public Photo and Documentation Upload* page will display. No action is required for Plan-Based Enrollers as badge photos are not a requirement for this program. Select **Next.**

	Welcome to Covered California! Welcome to Covered California Become a Covered California Certified Counselor and help Californians enroll into quality heathcare coverage!	
Public Photo and Documentation Upload		
Counselors are only required to upload their Enroller Photo.		
Primary Contact or Authorized Contacts must upload the folio 1. Proof of Business Satus 2. Proof of Business Lability Insurance 3. Proof of Works's Comparation Insurance 4. Proof of Wild Burness Lennes 5. Conflict of Interest Prevention Plan If you are not prepared to provide all required documents at th	lowing before the Entity can be approved: this time, you may upload your required documentation at any time after initial submission.	
Accepted Formats: JPG, JPEG, .GIF, .PNG, .BMP, .PDF, Maxim	imum File Size: 5 MB per file	
* Document Category		
Enroller Photo		
	Lupicad files Or drop files	

6. The *Counselor Application Submission Confirmation* page will display. Select the **Finish** to complete the submission. The application status will now be *Pending Review* with Covered California.

Welcome to Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!	
Counselor Application Submission Confirmation	
You have successfully submitted the Counselor Application for Rocky Baboae .	
The application is being reviewed. Rody Balboa will receive two emails with an access code and UR, at michelle.owens@calheers.ca.gov.	
The emails will contain information on how to view and edit their personal details.	
	Finish



Plan-Based Enroller Application Steps

The PBE Enroller will receive two emails from Covered California with the following subject lines: *Edit Your Plan Based Enroller Application* email and *Access Your Plan Based Enroller Application*.

1. The *Edit Your Plan Based Enroller Application* email will include a link to **Edit** the enrollment application and allow the Enroller to update and/or edit the application details entered by the AC or PC.

Dear
Thank you for submitting your application.
To edit your application, you will need the following three items:
1. Access Code (separate email titled, "Access Your Plan Based Enroller Application").
2. Last Name
3. California Driver's License Number or State ID
Once you have retrieved your Access Code, click on the below link to edit your application. Please note, this Access Code expires after 24 hours and can only be used once per editing session. You may request a new Access Code via the link below, as needed.
If you are a Counselor or Approved Admin Staff, you are also required to update your application by adding information about your Criminal Record, which you can add by clicking the link below.
Click Here to Edit Your Plan Based Enroller Application.
Note: Please keep this email to edit your application until your application is certified or approved.
Questions? Visit coveredca.com/resources/ or contact CEC/PBE Helpline at (855) 324-3147 or email CommunityPartnerCertSupport@covered.ca.gov.
Sincerely,
Covered California

2. The Access Your Plan Based Enroller Application email includes an access code which is needed to gain access to Edit Your Plan Based Enroller Application.

Important: The Access Code is valid for 24 hours only and for one-time use.

Dear
Thank you for submitting your application.
Your Access Code to edit your Plan Based Enroller Application is L5ZTQQz3XF
Note: This Access Code expires after 24 hours and can only be used once per editing session. You may request a new Access Code via the link mentioned below, as needed.
To edit your application, you will need the link, which is sent in separate email titled "Edit Your Plan Based Enroller Application".
Questions? Visit coveredca.com/resources/ or contact CEC/PBE Helpline at (855) 324-3147 or email CommunityPartnerCertSupport@covered.ca.gov.
Sincerely,
Covered California

Note: Enrollers can request a new access code by following the instructions at the bottom of the *Access Your Plan Based Enroller Application* email or you can send an email to <u>PBECert@covered.ca.gov.</u>



- 3. Select the Yes, I have an Access Code option and fill out the Access Code, Last Name, and CA State ID Number fields.
- 4. To proceed to the next page, select the l'm not a robot checkbox.
- 5. Select **Next** to continue.

Welcome to Covered California! Welcome to Covered California Become a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!
Enter Access Code to Edit Your Counselor Application
Do you have an Access Code to edit your Counselor application? Ves. I have an Access Code No. my Access Code has been used or has expired, and I want to generate a new Access Code Access Code
*Last Name
*CA State ID Number
I'm not a robot
Next

6. The *Counselor Information* page will display. The Enroller will need to verify the information and/or edit any fields, before selecting **Next** to continue.

Counselor Type : Certified Application Counselor	
ounselor First Name	Email
Journselor Last Name	Preferred Method of Communication
egal Business Name	CDI License Expiration Date
hone	Primary Enroller Location
liternate Phone	Other Sites Served
late of Birth	
8	J
A State ID Type	
CA Drivers License Number	
A State ID Number	
Personal Mailing Address	
Personal Mailing Address same as Primary Location Mail	ling Address
Spoken Languages (Ctrl+Click or Command+Click on Mac,	* Written Languages (Ctrl+Click or Command+Click on Mac,
to select multiple)	to select multiple)
English	English
Spanish	Spanish
African	African
Amharic	Amharic
Arabic .	Arabic



Note: If any of the greyed-out information needs to be updated, send an email to <u>PBECert@covered.ca.gov to request the change.</u>

7. The *Review Counselor Application Form* page will display. Click **Save and Next** button to continue to the *Public Photo and Documentation Upload* page.

Review Counselor Application Form	
To review your application before moving forward, please click Review Counselor Application .	- 1
Click Save and Next to continue your application on the next pages, where you will be asked to: 1. Upload your Enroller Photo 2. Complete your Criminal Record Disclosure form 3. Complete screening questions (Plan Based Enrollers only)	
Review Counselor Application Save and N	lext

8. No action is required on the *Public Photo and Documentation Upload* page because Plan-Based Enrollers are not required to maintain a badge photo. Click **Next**.

Welcome to Covered California! Welcome to Covered California Become a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!		
Public Photo and Documentation Upload		
Accepted Formats: JPG, JPEG, .GIF, .PNG, .BMP, .PDF. Maximum File Size: 5 MB per file		
* Document Category		
None	\$	
You must select the document type for each file uploaded. If you have no files to upload, please select "None."		ļ
	Next	

9. The Enroller is required to read the *Entity Qualifying Attestations* and acknowledge the organization applying qualifies to participate in the Program as an Entity and that all submitted information is accurate. The Enroller will place a check mark in the box. Select **Submit** to continue.



Welcome to Covered California Become a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!			
	Entity Qualifying Attestations		
	screening attestations pertaining to the Entity applying for the program. qualifying attestations below, please agree to the acknowledgement statement at the bottom of this page and click Next .		
Attestation 1	l certify the organization applying is not a health insurance insurer or stop loss issuer, a subsidiary of a helath insurance issuer or a stop loss issuer, or an association that includes members of, or lobbies on behalf of, the insurance industry.		
Attestation 2	I certify the organization applying is not receiving any consideration directly or indirectly from a health insurance insurer or stop loss issuer for enrolling individuals and employees into qualified or non-qualified health coverage.		
Attestation 3	I certify the organization applying does not employ any individuals who receive any consideration for enrolling qualified individuals and employees into a qualified or non- qualified health coverage.		
Attestation 4	l certify the organization applying and all of its employees will comply with the conflict of interest standards located at the California Code of Regulations Title 10, Chapter 12, Section 6866.		
Attestation 5	I certify that the entity will serve families of mixed immigration status and individuals with disabilies.		
Sy clicking submit, acknowledgement is made that the organization applying qualifies to participate in the Program as an Entity and that all submitted information is true, correct and accurate.			
	Previous		

Note: To agree with the attestation statements, select the *By Clicking submit,* acknowledgement is made that the organization applying qualifies to participate in the Program as an Entity and that all submitted information is true, correct, and accurate checkbox.

Background Clearance Steps

The Background Clearance process is comprised of 2 parts: **Criminal Record Disclosure and Live Scan** are completed only when an Enroller *does not have* an Active Insurance Agent License with the Department of Insurance.

Note: If the Enroller has an Active Insurance Agent License with the Department of Insurance the background clearance step is **NOT** required.

 The Criminal Record Disclosure Form page displays. The Enroller must complete the Criminal Record Disclosure Form by providing their social security number and completing Section B of the Criminal History Disclosure selecting the appropriate dropdown answer for the six criminal history disclosures questions. Select Next to continue.



Welcome to Covered California! Become a Covered California Control of Californians erroll into quality healthcare coverage!			
Criminal Record Disclosure Form			
A. Personal information			
Counselor Name Social Security Number •			
Instructions and Background Clearance Requirements			
0 In order to become a Certified Enrollment Counselor (CEC), the law requires that you complete a background check (Government Code s Regulators, Title 19 CCB 1657), Covered California (CC) submits your fingerprints to the Department of Justice (DO) to to beind 6658, The CO) oriental history preor is compared to spor Coliman I depart Coliciours (CD) to beind y discrepancies, inconsistence, on any information you provide in and with the CD to make a determination of your elipbility to provide consumer assistance. Failure to o process and candidates will be required to resubmit prior to completing the certification background clearance.	I history report, iCalifornia Code of Regulations, Tide 10 CCR 8 remissions, CC will evaluate the oriminal history report, including amplicite the CRD in its entirety may delay the certification		
revealed in cases of legal action. The CRD is available for your review, but copies are not provided to you.			
NPCRENT. Cc will be notified by the DCI there is any new information or activity on your record, including all subsequent arrests an Code 1110-5 (c). Cc will make a we determination of your eligibility to provide consumer assistance based goon any updates to your they have been released on ball or personal recognizance, criminal convictions, and administrative actions taken by any other agency will be the second second and the second se	ecord. CECs shall report to CC any subsequent arrests for which		
A conviction is any plea of guilty or noio contendere (no contest) or a verdict of guilty for any crime. Criminal convictions from another 9 convictions in California. You do not need to list any conviction that has been set aside, dismissed, or sealed, or those which are exempts			
You MUST disclose convictions and administrative actions even if: • It happened a long time ago: • It was only a mindomeanor; • You ddin't have to go to court /pour attorney went for you; bin ddid not a b 1 of nonlinearistic and the resonance more and not non-binistic.			
 You did not go to jail or prison or the servence was only a fine or probation; You received a certificate of rehabilitation. 			
The fellowing Cenvictions do NOT need to be listed on your CRD: Any conviction set alide, judicially doinsised, or ordered scaled pursuant to law, including, but not limited to, Sections 1203.4, 1203.46, 1203.46, 1203.47, 1203.4			
B) By our need more space or would like to provide additional clarifying comments, including any evidence of rehabilitation, please attach a and date with your information jafter saving this records. While additional information is optional, providing details migriding any report allow us to individually assess your record and is strongly recommended. CC will consider any of the following written evidence of rehabilitation.	table offenses on your record, and evidence of rehabilitation,		
A letter in your own words epidence and o an egy resemble of the same or a similar by our refubilitation or any miliparing factors; - A letter in your own words epidence and on any other same or a similar by our refubilitation or any miliparing factors; - Letter that you received a parton for any criminal convictors but you before may sill be on your received apairst you due to the criminal conviction rest owners. - Proof you have complicit with any items of participant, resistuction or any other samcions lawfully imposed against you due to the criminal conviction referenced in this application; - Proof you have complicit with any items of participant, resistuction or any other samcions lawfully imposed against you due to the criminal conviction referenced in this application; - Proof you have proformed the same or similar type of work, after the criminal conviction(s) referenced in your application; - Proof you have no other history of discipline for the same or a similar type of conduct referenced in your application; - Proof you have no other history of discipline for the same or a similar type of conduct referenced in your application; - Proof you have no other history of discipline for the same or a similar type of conduct referenced in your application; - Proof you have no other history of discipline for the same or a similar type of conduct referenced in your application; - Proof you have no other history of discipline for the same or a similar type of conduct referenced in your application; - Proof you have no other history of discipline for the same or a similar type of conduct referenced in your application; - Proof you have no other history of discipline for the same or a similar type of conduct referenced in your application; - Proof participation in education, training, treatment or redubilitation program; - References Forme engityees, participation offenses, participation for the participatin offense, participation fores, participation f			
 Evidence that any pending charges did not result in a criminal consistion; and/or Any additional information relevant to demonstrating rehabilitation or other mitigating factors. 			
B. Criminal History Disclosure			
Please answer all criminal history questions			
Question 1: Other than those excluded up above, have you ever been convicted of a misdemeanor?	Question 1 Response -None-		
Question 2: Other than those excluded up above, have you ever been convicted of a felony?	* Question 2 Response -None-		
Question 3: Do you currently have orieniant charges pending against you?	* Question 3 Response None-		
Question 4: Are you currently out on ball or on your own recognizance for any current arrest?	* Question 4 Religionse Nane-		
Question 5: Are you currently under any formal or informal supervision, such as probation or parole, for a conviction of any state or federal violation?	* Question 5 Response -None-		
Question 6: Have you ever had an Administrative Action against you from another State Agency?	* Question 6 Response None- *		
If you answered YES to any of the above questions, give details indicating the date and location of each orime or administrative action and, if desired, the nature and circumstances of the offerse. If you need additional space or have more offenses or administrative actions to declare, you must use additional sheets and upload them to this record after saving. Once you are ready to submit the discosure, click the Submit for Approval button.			
	Previous		



2. The Criminal Records Disclosure – Certification Signature page will display. The Enroller must enter their full name and select **Yes** or **No** from the Agree to Electronic Signature dropdown. Review the information listed on the page. Select the **Next** button.

Welcome to Covered California! Welcome to Covered California Become a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!		
Criminal Record Disclosure - Certification Signing C.Certification - Read Carefuly Below Signing Read Carefuly I decline under penalty of perjury under the laws of the State of California that I have read and understand the information contained in this affidave and I decline under penalty of perjury under the laws of the State of California that I have read and understand the information contained in this affidave and	ny responses and accompanying attachments are true and correct. I understand that falsification, withholding of information or failure to answer all	
questions completely and accurately on the CRD may prevent me from being certified as a counselor by CC and/or result in decertification. *Full Name		
Gui Name	*Agree to electronic signature	
Excitance Apreement Each party agrees that the electronic signatures (whether digital or encrypted) of the parties included in this Agreement are intended to authenticate this w Beccomic Signature means any electronic sound, symbol, or process astached to or logically associated with a record and deacated and advected by a party to time. By determinable signing that Agreement, Centref Earth Terroliteric Counsels are sets to comply with the adolicable terms, conditions, and centralisations	riting and to have the same force and effect as manual signatures.	
Privacy Statement Privacy Statement Privacy Statement Privacy Act (PL 93-577) and the Information Practices Act of 1977 (Civil Code section 1798 et seq), notice is given for the request o volumary, Faller to provide the SSD may delay the processing of this form and the criminal record check.		
Covered California will create a file concerning your criminal background check that will contain certain documents, including information that you provide	You have the right to access certain records containing your personal information maintained by the Department (Civil Code section 1798 et seq.).	
NOTE: IMPORTANT INFORMATION: Under the California Public Records Act, Covered California may have to provide copies of some of the records in your fi of a Certified Enrollment Entity that has a CEC with a criminal record exemption.	le to members of the public who ask for them, including newspaper and television reporters. Covered California must also tell people who ask the name	
Questions? If you have any questions regarding Certification Status or need further assistance, please email CommunityPartnerCertSupport@covered.ca.gov.		
If you have any questions about this form or background status, please email BackgroundChecks@covered.ca.gov. IMPORTANT NOTICES		
APPLICANT FINGERPRINT NOTICE AND RECORDS CORRECTION		
Your fingerprints will be used to check the oriminal history records of the DOJ and FBI. You have the opportunity to complete or challenge the accuracy of t record are set forth in Title 28, CFR, 16.34. To request a change, correction, or update to a DOJ record, you must request a record review with DOJ in accord		
PRIVACY STATEMENT		
Pursuant to the Federal Privacy Act (PL 59-579) and the Information Practices Act of 1977 (Civil Code section 1798 et seq.) notice is given for the request of the Social Security Number (SSN) on this form. The California Department of Justice uses a person's SSN as an identifying number. The requested SSN is voluratery for Justice SSN may delay the processing of this form and the criminal record check. Covered California will create a file concerning your criminal background check that will contain certain documents, including information that you provide. You have the right to access certain records containing your personal information maintines by the Department (Civil Code section 1798 et seq.).		
PUBLIC RECORDS ACT		
Under the California Public Records Act, Covered California may have to provide copies of some of the records in your file to members of the public who as	k for them, including newspaper and television reporters.	
	Previour	

3. The Enroller must read the *Screening Questions for Plan-Based Enroller* and select **Yes** or **No** to acknowledge program qualifying questions. Select **Next** to continue.

	vered California! Counselor and help Californians enroll into quality healthcare coverage!
Screening Questions for Plan-Based Enroller Please respond to the following Screening Questions.	
I hereby certify that:	
1. I shall comply with the PBE Program requirements of Chapter 12, Article 9 and Section 6500(f) of Article	le 5.
2. I am a natural person of not less than 18 years of age.	
3. The statements made in this application are true, correct and complete to the best of my knowledge	and/or belief.
4. I will adhere to any applicable State or Federal Laws and regulation.	
* Certified Plan-Based Enroller Signature	
None	\$
* Certified Plan-Based Enroller Name	* Date
	Previous



4. The Enroller will receive confirmation the application was successfully updated. Select the **Finish** button to submit the application.

Welcome to Covered California! Welcome to Covered California Become a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!
Counselor Application Successfully Updated
Hello
You have successfully updated your Counselor application. Your application is being reviewed. You will receive additional communications from Covered California about your required next steps to the email provided:
For more information, visit <u>www.coveredca.com/resources</u> .
Finish

5. If applicable, the Enroller will receive a Live Scan form via DocuSign to complete the background clearance process. If you sign the DocuSign form, you do not need to upload the document as it will automatically be uploaded to the Certification application. If you print the form and sign it, you must upload the signed document to the Enroller Portal.

The Live Scan will have three additional Privacy Notices documents that you must read.

- Print two (2) copies of the pre-populated Live Scan forms to take with you to the Live Scan facility (Capital Live Scan) as they will need to keep the forms.
- Contact the Live Scan facility to schedule a fingerprinting appointment. For a list of locations, download or access the service locations using the following link: https://www.applicantservices.com/CA-Social-Distancing/Live_Scan_Locations



Covered California R Plan-Based Enroller Applicant Fo		ican 👔
Plan-based Enroller Applicant Po		COVERED
This form is only intended for the u Please complete the document and	se of the individual listed below. Altering Lensure the information is valid and up-to	g or sharing this document is prohibited. o-date (Print in CAPITAL LETTERS)
ORI (Code assigned by DOJ):	Authorized Applic	ant Type: Assister Cert 1043 GC
Contract Code (For use at Biometrics locations Only): N/A		ertification/Permit OR working Title:
Applicant Information		
Name:		Suffix:
Alias:		
Gender: Male Female		Eve Color:
Date of Birth:		Hair Color:
Social Security Number:		Height:
California Driver's License:	23 	Weight:
Home Address		
Street Address:		City:
State:		Zip:
		[wab:
OCA		
	Mandalore	
Nar	me of the Ceritified Enrollment	t Entity
Live Scan Agency Name	Live Scan Id (LSID)	Date
Name of Operator	ATI Number	OATI (Resubmission Only)
Attestation Acknowledgement	11111000001	OTTY (Addational Only)
	ev have received these Privacy	Notices prior to being Live Scanned or
	l cards, acknowledged by signat	
		tement, and Applicant's Privacy Rights.
<u>+</u>		
Applicant Signature		Date
	Regarding the Live Scan process, locations or a	
		appointments call: 877-288-5519 PM) or entail is coveredra@canitallisescan.com
	Monday through Saturday, 9:00 AM to 5:00 P	
QUESTIONS?	Monday through Satarday, 9:00 AM to 5:00 P You may also visit the Web page at http://capi Regarding Covered California Enrollment Assi	stallivescan.com/covered-ca istance Program email:
QUESTIONS?	Monday through Satarday, 950 AM to 5:00 P You may also visit the Web page at http://eap	stalltvescan.com/covered-ca istance Program email: ca.gov

Note: For the purposes of this program, the Covered CA Live Scan form is the only acceptable form. Any other Live Scan form is unacceptable.

If there are issues or you have questions about the background check process, reach out to backgroundchecks@covered.ca.gov for assistance.

Enroller Certification Training Steps

Covered California will enroll you in the <u>Learning Management Training (LMS) Courses</u> once the Enroller eligibility requirements are reviewed. The Enroller will receive an email with their login ID (your email address) and temporary password from LMS.

Use this weblink <u>https://learning.coveredca.com/#/login</u> to access and complete the online Certification Training courses.





Training Reminders:

- The Enroller will receive an email with a link to create a password to login to the Learning Management System (LMS).
- Your username will be the same as the email address on the file listed on the Enroller application.
- Enroller(s) **must** complete all courses within 90 days of the date they were enrolled into the Certification Training courses.
- The Enroller must pass the Certification Training exam with a score of 80% or greater.
- The Exam is an open book, and the Enroller is encouraged to use the study guides provided in LMS.
- The Enroll will have 3 attempts to pass the exam. If the Enroller fails, the exam three times they must contact the AC or PC to further request Covered California re-enrolls the Enroller in the LMS training course and exam.

Account Creation Steps

The Account Creation step is the FINAL part of the Certification process.

- 1. Once the Enroller is certified by Covered California, they will receive two emails from Covered California:
 - The Enroller will receive an email titled *Access Code for Your New Counselor Account* with an Access Code and further instructions awaiting the arrival of the second email. The Access Code is **ONLY** valid for 24 hours and a one-time use.
 - The Enroller will receive an email titled Your Certified Enrollment Counselor Application is Approved with instructions and a link to create the account credentials. Click on <u>Click</u>



<u>Here to Create Your Counselor Account using Your Access Code</u>. The Counselor will be directed to the <u>Enter Access Code to Create Your Account</u> landing page.

2. Once on the landing page, the Enroller should select **Yes**, **I have an Access Code**.



3. The Enroller will enter the Access Code, Entity's Federal Tax ID (not social security), and email address listed on the application. Click the **I'm not a robot** checkbox. Select **Next** to continue.

Enter Access Code to Create Your Account		
Do you have an Account Creation Access Code? Yes, I have an Access Code No, my Access Code has been used or has expired, and I want to generate a new Access Code Access Code		
* Federal Tax ID (FEIN/SSN) 🚯		
*Email		
* Required entry.		
l'm not a robot reCAPTCHA Privacy - Terms		

4. Usernames must have at least **8** characters and may contain numbers, letters, hyphens, and periods. Cannot be more than 50 characters. May have numbers, hyphens, and periods.

Important: Once the Username has been created, it cannot be changed.

Password criteria:

- Passwords must have at least **15** characters (no more than 50).
- Passwords must contain **1** of the following:
 - Uppercase letter
 - Lowercase letter
 - o Number
 - Special character
- Passwords must not contain dictionary words, names, or common keyboard patterns.
- When re-entering the password, it must match.



New Password

Your password must:

- Not contain dictionary words, names, or common keyboard patterns (example: Qwerty1!)
- Have at least 15 characters
- Have no more than 50 characters
- Must have at least 1 UPPERCASE letter
- Must have at least 1 lowercase letter
- Must have at least 1 number
- Must have at least 1 special character such as `~!@#\$% ^&*()_+-=[]\{} |;':",./<>?
- Must not be one of your previous 24 passwords

salesforce		
Change Your Password		
Enter a new password for		
include at least:		
0 15 characters		
 1 uppercase letter 		
1 lowercase letter		
🔘 1 number		
1 special character (1)		
* New Password		
* Confirm New Password		
Security Question What is your mother's maiden name?		
* Answer		
Change Password		
Password was last changed on 11/6/2023 3:15 PM.		
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6. The Enroller must select a four-digit PIN Number

Note: Save this information for future use – Covered California will not have access to the PIN Number.

7. The system will now ask for the Enroller to select 3 Security Questions from a group of options and to provide answers to each.

(iii) iii	VERED Ifornia		\$
	Choose Your Security Questions Security questions help us verify your identity and keep your information safe.		
	Choose and answer 3 questions. Security Question 1	(+ Add)	
	Security Question 2	(+ Add	
	Security Question 3	(+ Add)	
	Cancel	Nex	

- 8. During your account set up, the enroller is prompted to complete additional account verification steps to prevent fraud.
 - Confirm your email address.
 - Cell phone number
- 9. Input the Enroller email address and cell phone number to activate the password reset. This functionality does not require reaching out to Covered California for additional assistance.



COVERE	\$ ®	
	Register Your Email	
	We will send a One Time Passcode to your email address to register your account. Once your email address is confirmed, it can be used to verify your identity if you forget your username, password or need to view your tax forms.	
	The email address connected to your account is below. If this is not the best email address, update it now.	
	Enter your email address	
	Enter your email address	
	Please enter a valid email address. For example, abc@kyz.com.	
	Re-enter your email address	
	Re-enter your email address	
	Please enter a valid email address. For example, abclhys.com	
	Send One Time Passcode	
	Cancel	
COVE		
COVE CALIFO		
COVE CALIFO		
COVE	RED	x
COVE CALIFO	RED Register Your Cell Phone We will send a One Time Passcode to your cell phone number to register your account. Once your number is confirmed, it can be used to verify your identity if you forget your password, username or need to view your ta	x
COVE CALIFO	RED Register Your Cell Phone We will send a One Time Passcode to your cell phone number to register your account. Once your number is confirmed, it can be used to verify your identity if you forget your password, username or need to view your tar forms.	x
COVE	RED Register Your Cell Phone We will send a One Time Passcode to your cell phone number to register your account. Once your number is confirmed, it can be used to verify your identity if you forget your password, username or need to view your tay forms. Enter your cell phone number	x
COVE	RED Register Your Cell Phone We will send a One Time Passcode to your cell phone number to register your account. Once your number is confirmed, it can be used to verify your identity if you forget your password, username or need to view your tay forms. Enter your cell phone number	x
COVE CALIFO	Register Your Cell Phone We will send a One Time Passcode to your cell phone number to register your account. Once your number is confirmed, it can be used to verify your identity if you forget your password, username or need to view your tar forms. Enter your cell phone number Standard text message rate applies. Presse enter a valid 10-digit phone number.	x
CALLES	RED Register Your Cell Phone We will send a One Time Passcode to your cell phone number to register your account. Once your number is confirmed, it can be used to verify your identity if you forget your password, username or need to view your tar forms. Enter your cell phone number <i>standard text message rate applies</i> . Please enter a valid 10-digit	x
	Register Your Cell Phone We will send a One Time Passcode to your cell phone number to register your account. Once your number is confirmed, it can be used to verify your identity if you forget your password, username or need to view your tar forms. Enter your cell phone number Standard text message rate applies. Presse enter a valid 10-digit phone number.	x

- 10. For each step, the system will send the Enroller a passcode to validate the email address and/or cell phone number. Input the passcode to set up the password recovery option.
- 11. Once the Account Creation is complete the Enroller can log in to <u>Enroller Portal</u> with their username and password to access their Certified account.

Enroller User Home Page

After an Enroller completes their Account Creation process, they will have access to the Enroller Portal to assist and manage consumer they assist with enrollment. The following section provides Enrollers with a navigation overview of the Enroller Portal dashboard tabs frequently used.

Enroller Home Page tab:

When the Enroller logs in to the system, they will land on the *Welcome to your Entity Home Page*. The Enroller can access high-level information regarding their certification status, starting an application, delegation tool, reports, quick links, and more.

	Home Entity \checkmark My Profile My Delegations \checkmark Resources \checkmark			
	Welcome to your Entity Home Page! Manage your Book of Business, assist your consumers, and more.			
Home	Enroller Portal Notifications Notifications Archive Book of Business Consumers by Metal Tier Plan	Quick Links		
	Welcome!			
	Explore additional choices by navigating through the tabs on the right or My Reports from the menu	Secure Mailbox		
		Delegation Tool		
		Start Application		
		Enroller Toolkits		
		My Reports		

Enroller Portal Notifications tab:

- The **Enroller Portal Notifications** tab displays the Enroller's active notifications sent by the Distribution Services Communications Team. The most recent notification is displayed at the top of the list.
- Clicking a link from the *Notification* column displays a popup with the notification details.

	Home	Entity 🗸	My Profile My Deleg	ations 🗸	Resources 🗸		
				M	elcome to voi	ır Entity Home Page!	
					-	ss, assist your consumers, and more.	
Home	Enroller Portal Notifications	Notifications	s Archive Book of Busin	ess Consu	mers by Metal Tier Plan		
ß	Enroller Portal Notification	ons					
Notif	fication Id	Notificat	tion	Received Dat	Ð	Archive Date	_
						Previous Page 1 of 0 Next	_



Notification Id	Notification	Received Date	Archive Date
1-000055	Nov 6th Training (*^&%*^\$&%	2023-11-06	2023-11-07
1-000055	Nov 6th Training (*^&%*^\$&%	2023-11-06	2023-11-07
1-000055	Nov 6th Training (*^&%*^\$&%	2023-11-06	2023-11-07
1-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
1-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
1-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
1-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
N-000054	demo test	2023-11-06	2023-11-07
4-000053	Notification For Testing	2023-11-06	2023-11-07
I-000052	All Entity Users Open Survey	2023-11-06	2023-11-08

Notification Archive tab:

- The Notifications Archive tab displays a list of the Enroller's archived notifications sent by the Distribution Services Communications Team. The most recent notification is displayed at the top of the list.
- Clicking a link from the *Notifications* column displays a popup with the notification details.

Notification Id	Notification	Received Date	Archive Date
N-000031	Thursday testing	2023-11-02	2023-11-03
N-000011	Notifica	2023-10-30	2023-10-31
N-000010	training demo 1	2023-10-30	2023-10-31
N-000000	Home Page Notification	2023-10-24	2023-10-26

Entity Book of Business tab:

- The Entity Book of Business tab displays the Book of Business by Enroller Contact report, allowing Enrollers to view Consumers in the Entity's book of business, apply filters to and edit the book of business, and save or export the book of business. Export options include Formatted or Details Only views.
- Clicking a Consumer's name from the Contact: *First Name* or Contact: *Last Name* columns display an individual household account or Consumer contact information.

Enroller Portal Notification Notification Archive	Entity Book of Business	Consumers by Metal Tier Plan
Report: Contact Application and Enrollees Book of Business by Enroller Contact		Add Chart T Edit

Note: For Enrollers, a **My Book of Business** tab displays instead, automatically filtered to Consumers with active delegations along with Consumer, application, eligibility, and enrollment details.

Consumers by Metal Tier Plan tab:

The **Consumers by Metal Tier Plan** tab displays the *Enrollment by Metal Tier Plan Type* report, allowing Staff to view the number of Consumers delegated to them for each metal tier plan Level. A *Consumers by Metal Tier* bar graph is also available.

Home	Enroller Portal Notifications	Notifications Archive	Book of Business	Consumers by Metal Tier Plan	
	Report: Enrollees Report Type Enrollments by Metal Tier Pl	lan			Q. C. Edit 💌
Total Re O	cords				

Entity Quick Links

Quick Links display on user role similar to the Agency Home page, the *Welcome to your Entity Home Page!* displays a section. Links display based on user role. The *Quick Links* section may contain the following links:

- Secure Mailbox Navigates the user to the Secure Mailbox to view messages
- **Delegation Tool** Navigates the user to the *Consumer Delegation* page to delegate a CEC to the case
 - Displays only for Counselors
- Start Application Navigates the user to the Consumer Home page to begin a new application on behalf of a Consumer
 - Displays only for Counselors
- Enroller Toolkits Navigates the user to the Enrollment Partner Toolkit page
 - Displays for PC, AC and Counselors
- **My Reports** Navigates the user to the *Reports* page to view, generate, extract and file available reports. The following reports display: *Recent, Created by Me, Private Reports, All Reports. Recent* is the default view.

	Q Search			▲ (2) -	
Home	Entity 🗸 My Profile My Delegations 🗸	Resources 🗸			
		-	ntity Home Page! sist your consumers, and		
Enroller Portal Notification	Notification Archive Book of Business Consume	rs by Metal Tier Plan		Quick Links	
🗊 Enroller Portal N	lotifications			Secure Malibox	
Notification Id	Notification	Received Date	Archive Date	Delegation Tool	
N-000055	Nov 6th Training (*^&%*^\$&%	2023-11-06	2023-11-07	Start Application	
N-000055	Nov 6th Training (*^&%*^\$&%	2023-11-06	2023-11-07	Enroller Toolkits	-
N-000055	Nov 6th Training (*^&%*^\$&%	2023-11-06	2023-11-07	Enroller Toolkits	_
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07	My Reports	
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07		_
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07		
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07		
N-000054	demo test	2023-11-06	2023-11-07		
N-000053	Notification For Testing	2023-11-06	2023-11-07		
N-000052	All Entity Users Open Survey	2023-11-06	2023-11-08		
		P	revious Page 1 of 2 Next		

Home Page Navigation

The Entity landing pages are similar and display the following functionality at the top of the page:

- Search Field Allows staff to search for Contacts, Leads, and Accounts
- Notifications Bell Icon Displays a red number when a pending notification is present

<u></u>	Q Search	▲ 9 -
Home	Entity V My Profile My Delegations V Resources V	
	Welcome to your Entity Home Page!	

- Notifications may display the following:
 - Alert for Delegation Request Delegation has been assigned
 - **Contract DocuSign Envelope Failed** Contract DocuSign failed
 - Delegation Transfer Status Indicates the status of a delegation transfer
 - Live Scan DocuSign Envelope Failed The Live Scan DocuSign failed



- **Profile icon** If you hover-over the icon, it will display a dropdown description with the following options:
 - Home Navigates the users to the Welcome to your Entity Home Page!
 - **My User Profile** Navigates the user to the My Security Profile Page
 - Logout Logs the user out of the system

Q Searth.		•
Home Entity v My Profile	My Delegations 🗸 Resources 🗸	Home
	Welcome to your Entity Home Page!	My User Profile
Book of Business Consumers by Metal Tier Plan	Manage your Book of Business, assist your consumers, and more.	Quick Links

- Entity tab dropdown Displays for all Entity staff with the following link:
 - **My Entity** Navigates user to Entity account page with navigator contact information, Entity contacts, population served, and certification/approval status

Home Entity 🗸	My Profile My Delegations 🗸 Resources 🗸	
My Entity	Welcome to your Entity Home Page! Manage your Book of Business, assist your consumers, and more.	
Book of Business Consumers by Metal Tier Plan		Quick Links
Report: Contact Application and Enrollees My Book of Business	Q. 28 Add Court Y (27 Edit Y	Secure Mailbox
		Delessies Teel

• My Profile tab – Navigates the user to the *Contact* page to view their profile.



- My Delegations tab
 - Active Delegations Navigates user to all active delegations
 - Pending Delegations Navigates the user to all pending delegations
 - My Delegation History Navigates the user to the Entity Delegation History page

Home Entity 🗸 My Profile	My Delegations V Resources V	
	My Active Delegations	
	My Pending Delegations Come to your Entity Home Page! Book of Business, assist your consumers, and more.	
	My Delegation History	
Book of Business Consumers by Metal Tier Plan		Quick Lin
Report: Contact Application and Enrollees My Book of Business	Q. 🚯 Add Chart 🔻 🧭 Edit 💌	Secure Mailb
Total Records 111		Delegation T
Sectore and the sector of the	Last Name V Customer DOB V SSN Last 4 V Residence Address Line 1 V Residence Address Line 2 V	Contraction of the second seco

- **Resources** tab dropdown Displays for all Entity staff with the following links:
 - Enroller Toolkits Navigates the user to the *Enrollment Partner Toolkits and Resources* page of the Covered California website
 - **My Reports** Navigates the user to *Entity Reports*

Home Entity ~ My F	Profile My Delegations V Resources V	
	V _{My Reports} /our Entity Home Page!	
	Manage your consumers, and more.	
Book of Business Consumers by Metal Tier Plan		Quick Links
Book of Business Consumers by Metai Tier Plan Report: Contact Application and Enrollees My Book of Business	Q. 4 Add Churt Y (7 Edit Y	Quick Links Secure Mailbox

Forgot Password or Password Reset

Note: This can only be completed if an email or phone number were provided at the beginning of account username set up. If that information was not provided, email a request to <u>CommunityPartnerCertSupport@covered.ca.gov.</u>

1. On the login page, select Forgot Password



Log in or Crea	ate an Account to Get	Covered
Username		orgot username?
Password	F	orgot password?
	Create an Account	

- 2. An email will be sent to the registered email with a link to reset the password
- 3. The password must be 15 characters long, with 1 uppercase letter, 1 lowercase letter, 1 number, and 1 special character.

salesforce	
Change Your Password	
Enter a new password for	
include at least:	
15 characters	
1 uppercase letter 1 lowercase letter	
1 number	
1 special character 1	
* New Password	
* Confirm New Password	
Security Question	
What is your mother's maiden name?	
* Answer	
Password was last changed on 11/6/2023 3:15 PM.	
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Need Assistance

This concludes the Enroller Portal Plan-Based Enroller User Guide training steps. If you have any questions or need assistance regarding the Enroller Portal or the process, please send the Certification Services Section Team at <u>PBECert@covered.ca.gov</u>.