TABLE OF CONTENTS

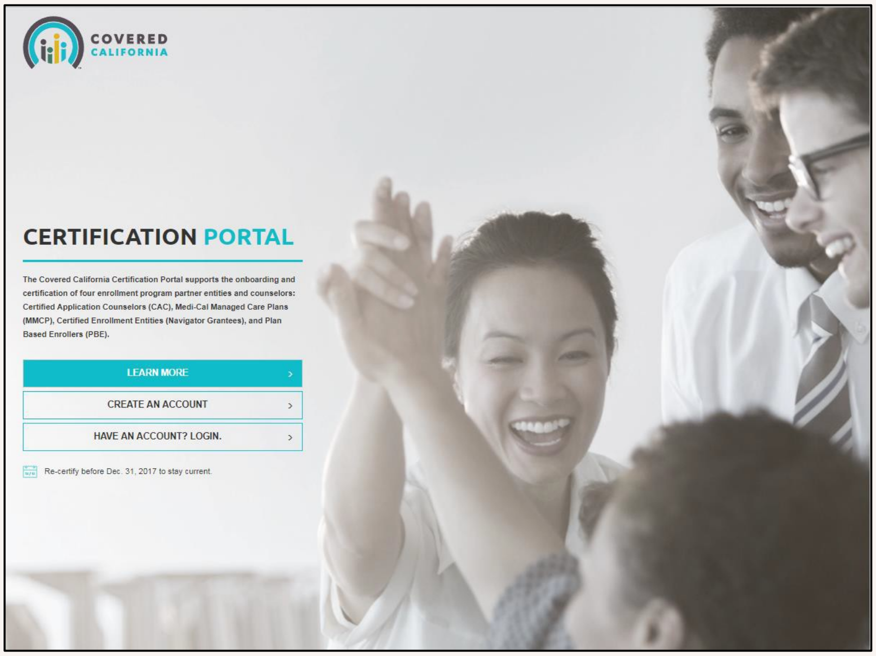
IMPORTANT NOTE:

1. Entities that were Active in the old IPAS system ARE NOT REQUIRED to create an account or complete a NEW application in the Certification Portal.
2. After you have successfully logged in to the Certification Portal, please skip to the "My Entity" section on Page 18 to begin managing your account.

Table Contents

CERTIFICATION PORTAL ENTITY USER OVERVIEW

This document outlines all features and functions available to Entity Business Contacts in the Certification Portal. It details the functions that you as an Entity User have including the account registration process, entity application process, managing counselors, and managing files & required documentation.



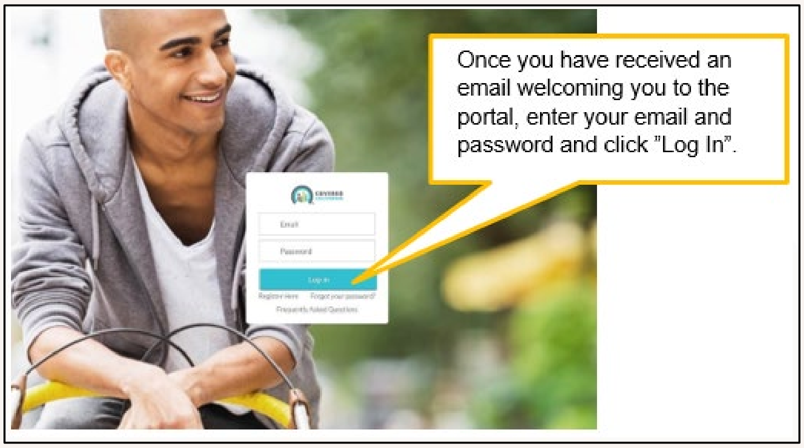
ACCOUNT CREATION PROCESS

IMPORTANT NOTE:

3. Entities that were Active in the old IPAS system ARE NOT REQUIRED to create an account or complete a NEW application in the Certification Portal.
4. If you were an Active entity in the old IPAS system, you will receive an email from the Certification Portal with a username and instructions to login. To access the Certification Portal, you must navigate to the “Have An Account? Login.” button shown below:
5. After you have successfully logged in to the Certification Portal, please skip to the "My Entity" section on Page 22 to begin managing your account.

LOGIN PAGE

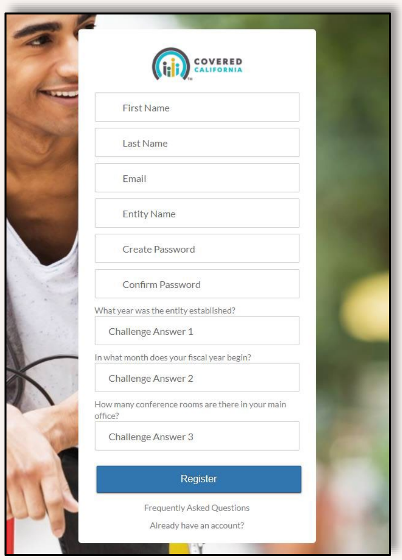
The Certification Portal login page can be found at https://coveredca.force.com/Certification/s/login/



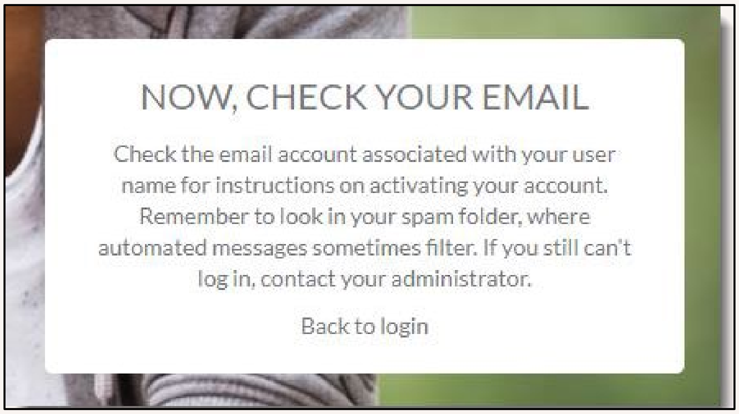
ENTITY REGISTRATION

To register as a new Entity applicant, follow the steps below.

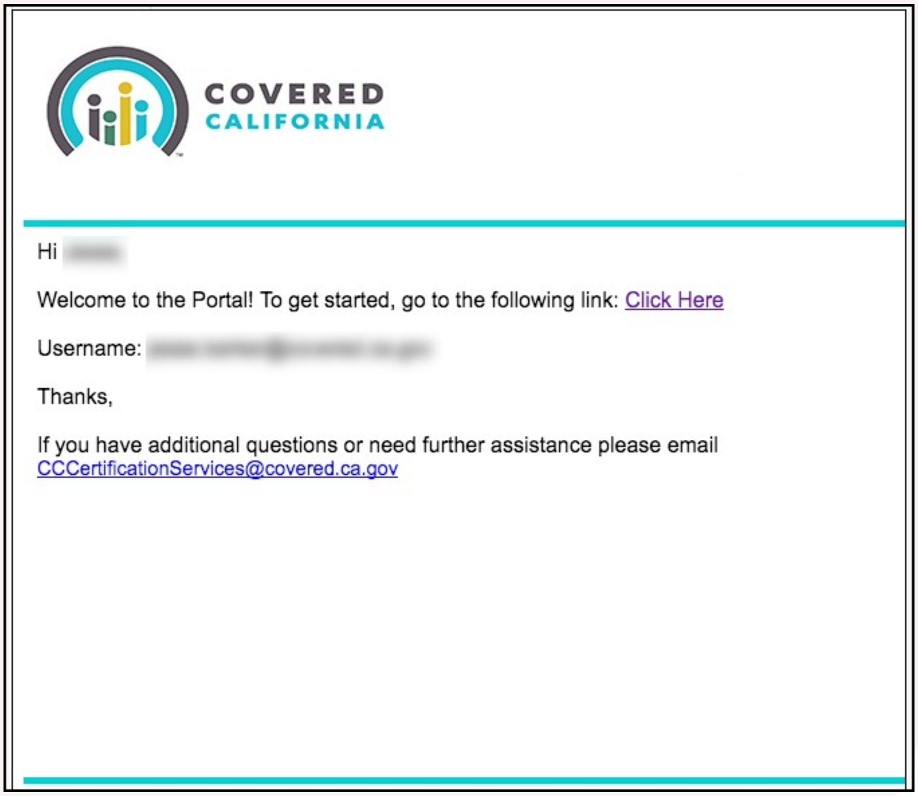
A. All new Entity applicants must populate all fields displayed on the CREATE AN ACCOUNT page and then click "Register". The email address populated in the Email field will also be the username for your new account. Password requirements are as follows:
    a. Minimum of 10 characters
    b. Must mix alpha and numeric characters



B. After clicking the "Register" button you will see the following message on your screen. An email notification will be sent with a link to activate the new user account.



C. The System sends an email to the address provided for verification purposes. *Sample of email below. You must click on the link provided in the email.*

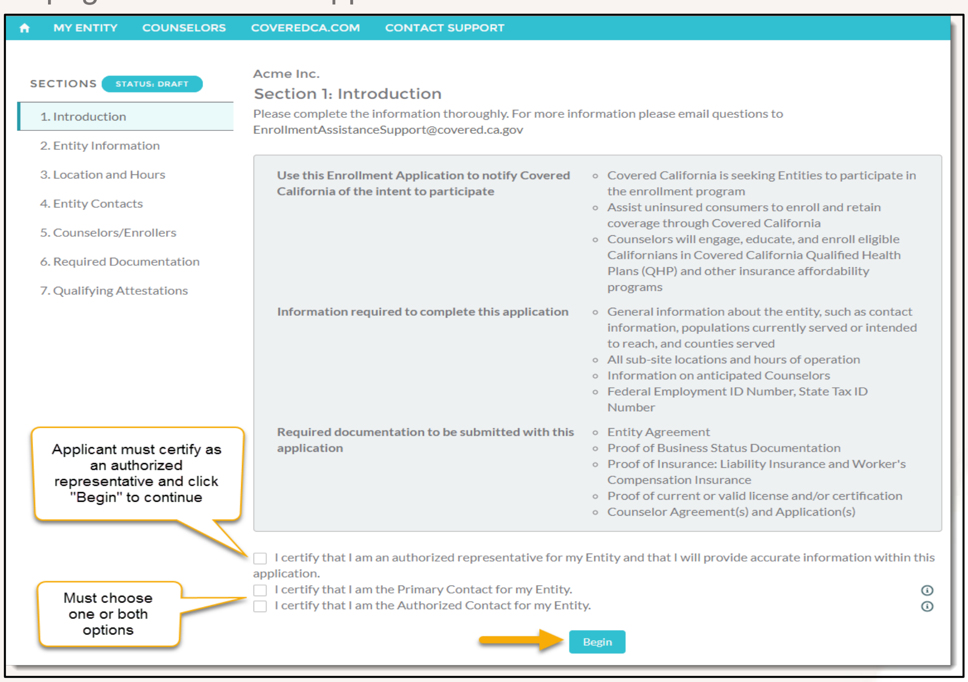


2. Once you click the link in the email message, you will be directed back to the Login Page. Enter the Email and Password that was entered in the registration process. Click "Log in" once your Email and Password are entered.

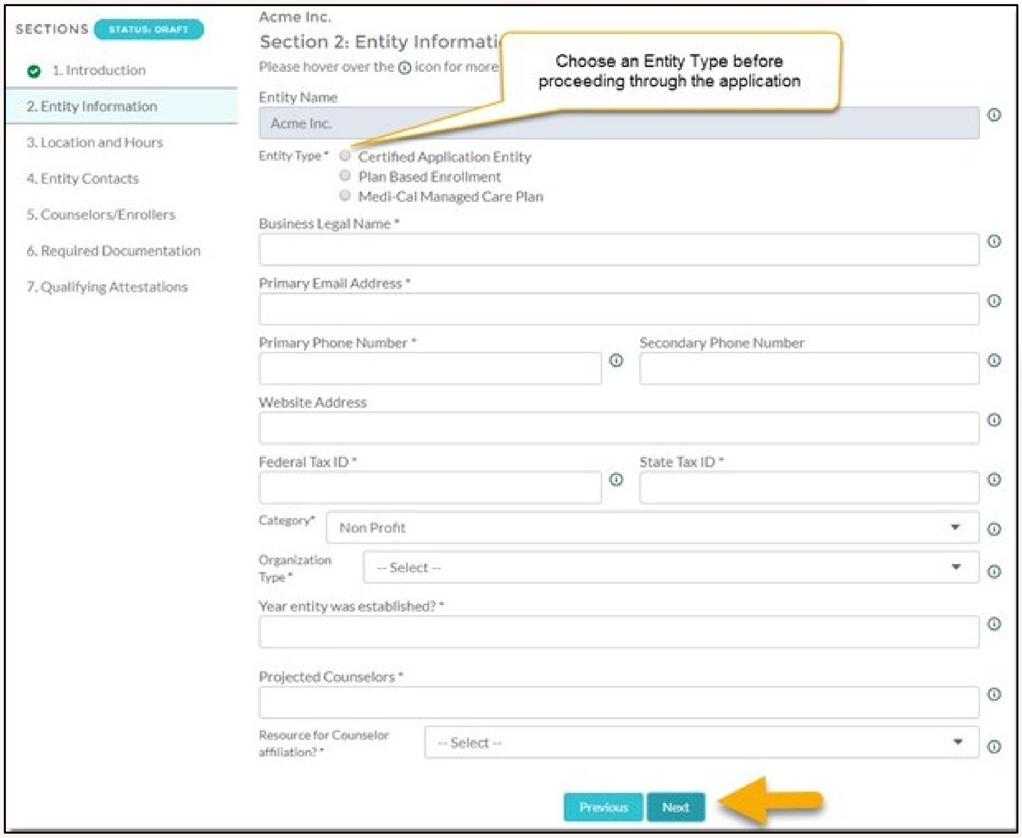
ENTITY APPLICATION

The steps below indicate the process of completing your Entity Application and submitting it for review by Covered California's Certification Services Section.

1. **INTRODUCTION:** Upon initial login, you will be directed to the Entity Application. Review the information on the page then appropriately click the checkboxes at the bottom of the page to offer certification of the statements. Click "Begin" to advance to the next page and start the application.

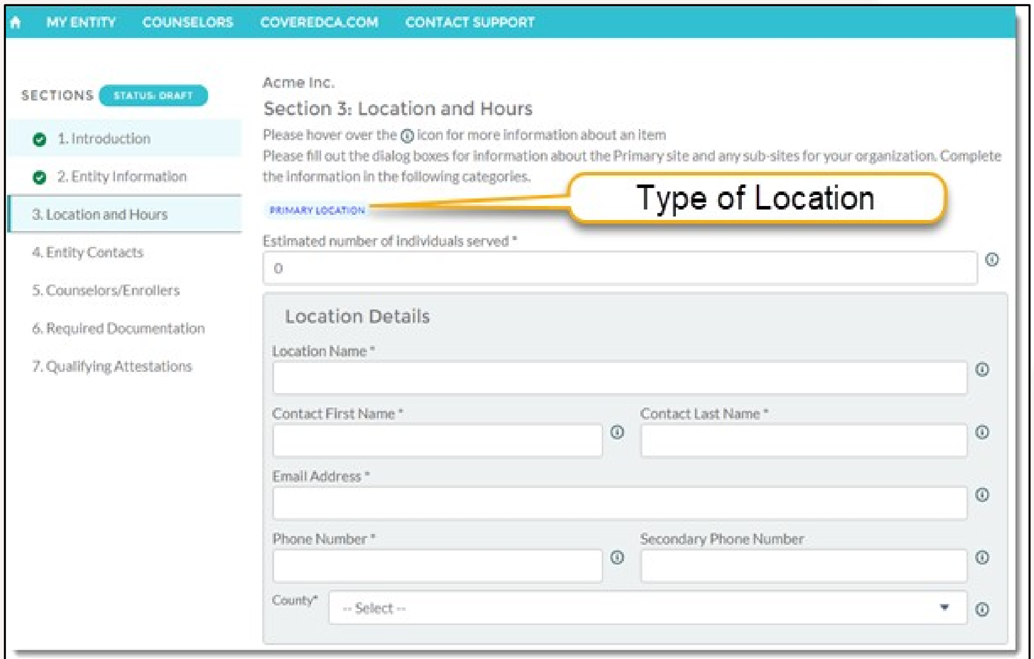


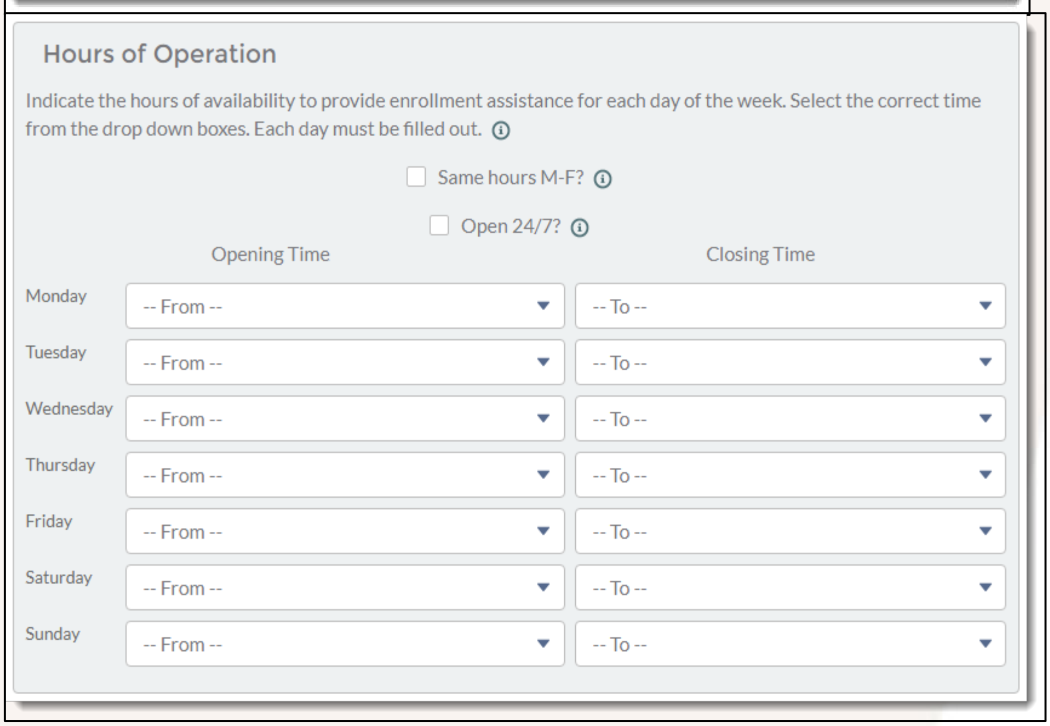
2. **ENTITY INFORMATION:** Please choose an **Entity Type** and then complete all required information in the section. Click "Next" to advance to the next section of the application.



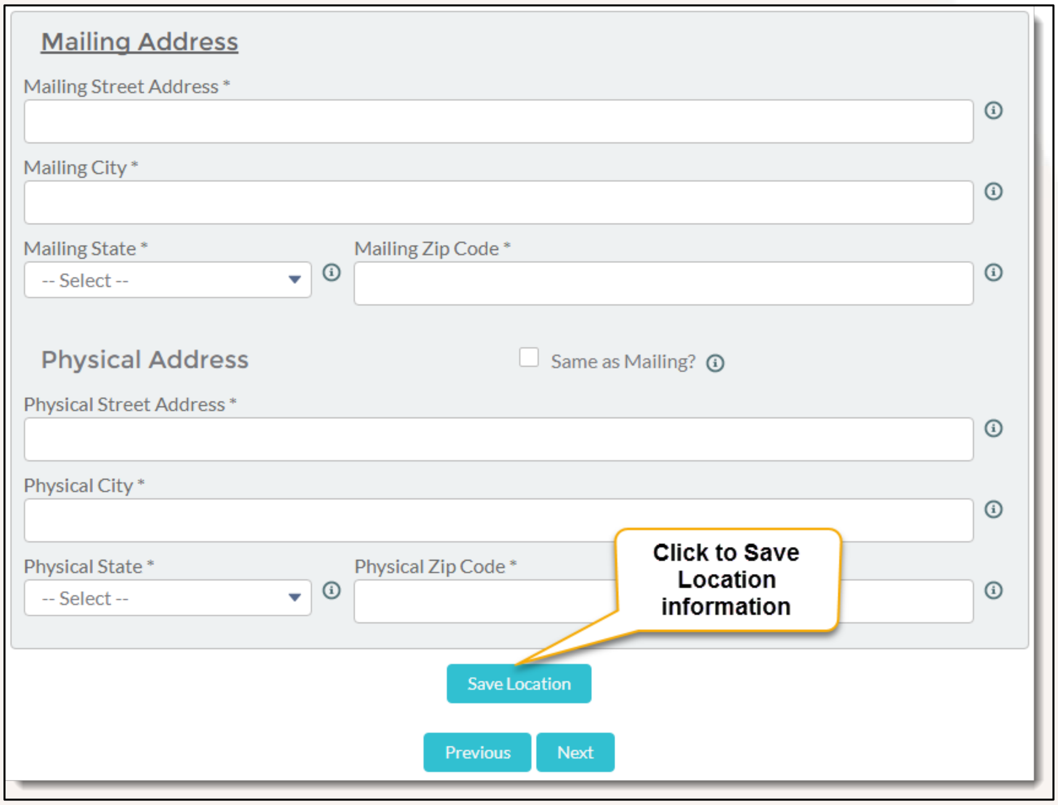
Note: The Entity Application will be saved after each step when "Next" is clicked. Your progress will be saved in case you need to leave and finish later. If you decide to leave the application early, you will be taken back to where you left off next time you log into the system.

3. **LOCATION AND HOURS:** Next you must setup the Primary Location and any Sub-Site Locations that represent the Entity. The Primary Location is required and will be the first location record added.

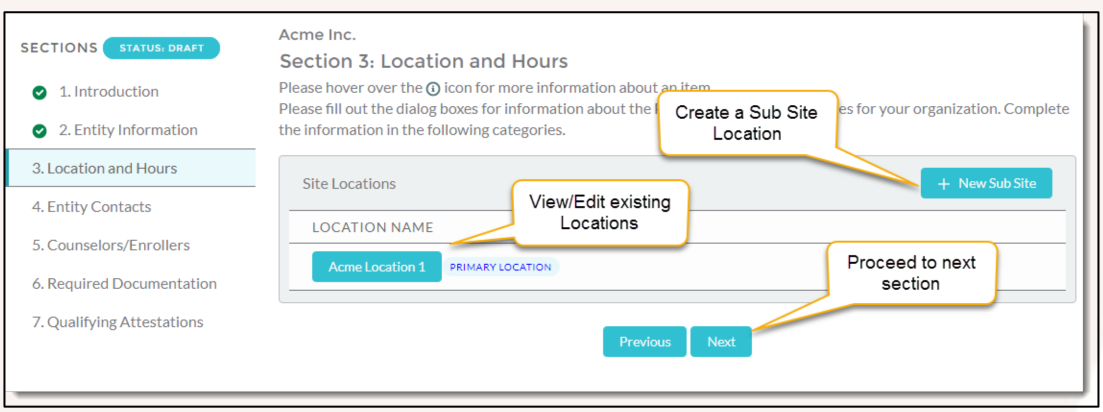




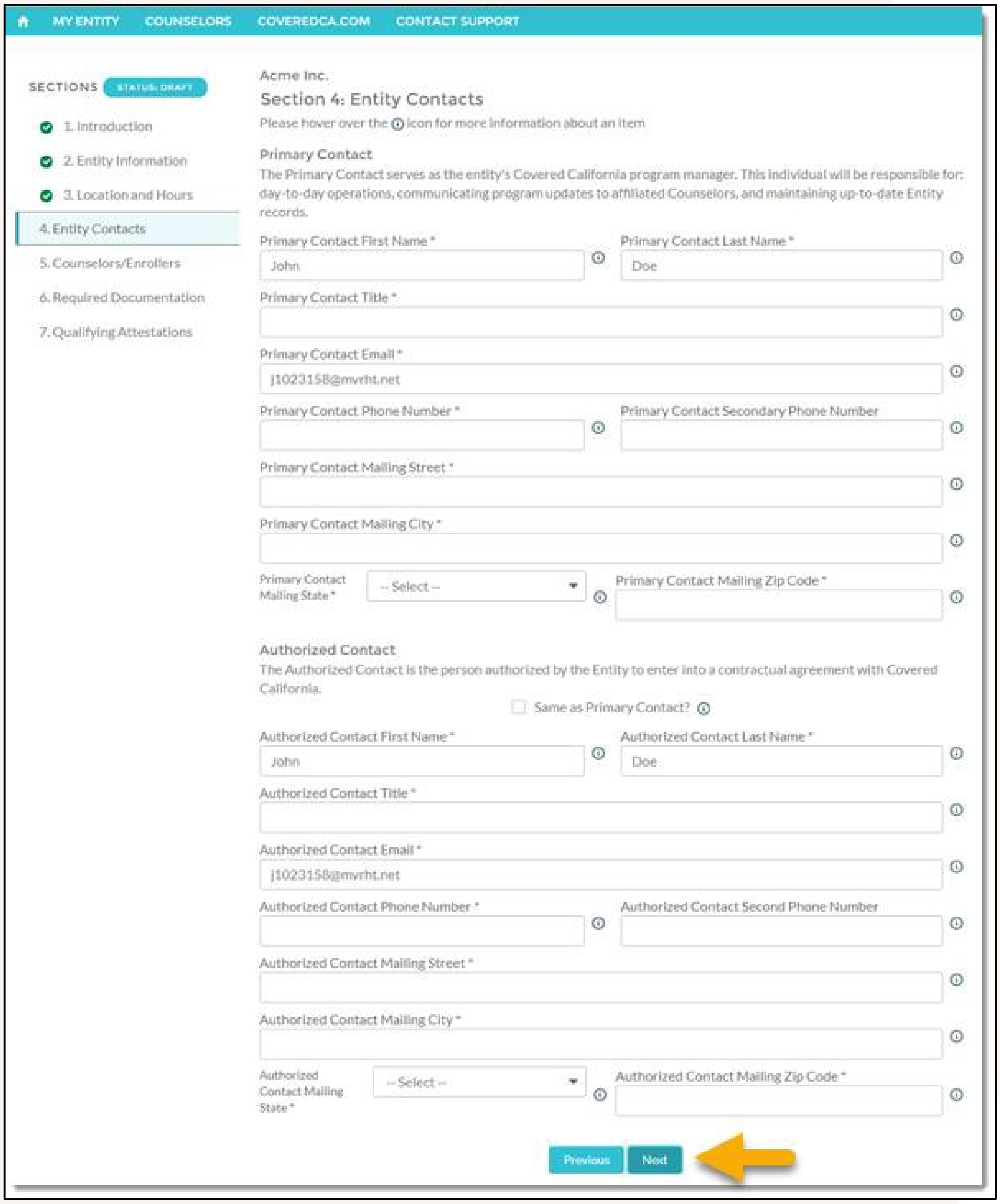
You must save the address information by clicking "Save Location" before clicking on "Next".



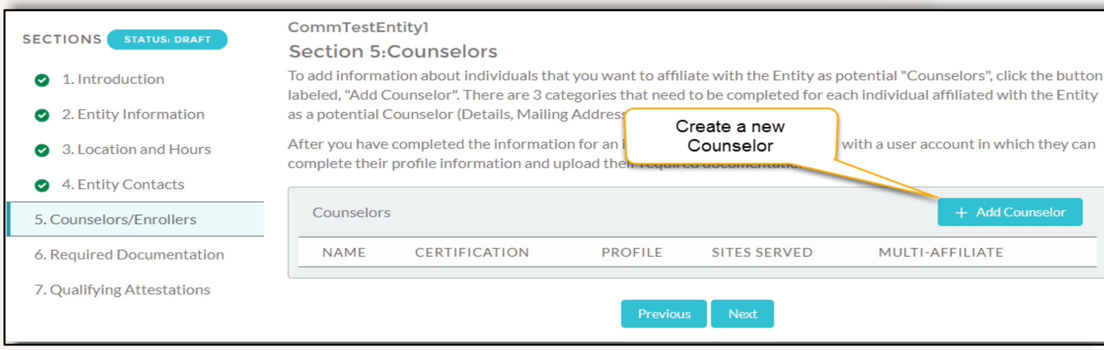
Once a location is saved, a list of all the Entity's locations you have created will be displayed with options to add additional Sub Sites or proceed to the next section of the application.



4. **ENTITY CONTACTS:** Next, you must fill out all the information in this section to identify the entity's lead contact persons. Some fields may be pre-populated with your information depending on what was selected in the Introduction section 1 (page 8).

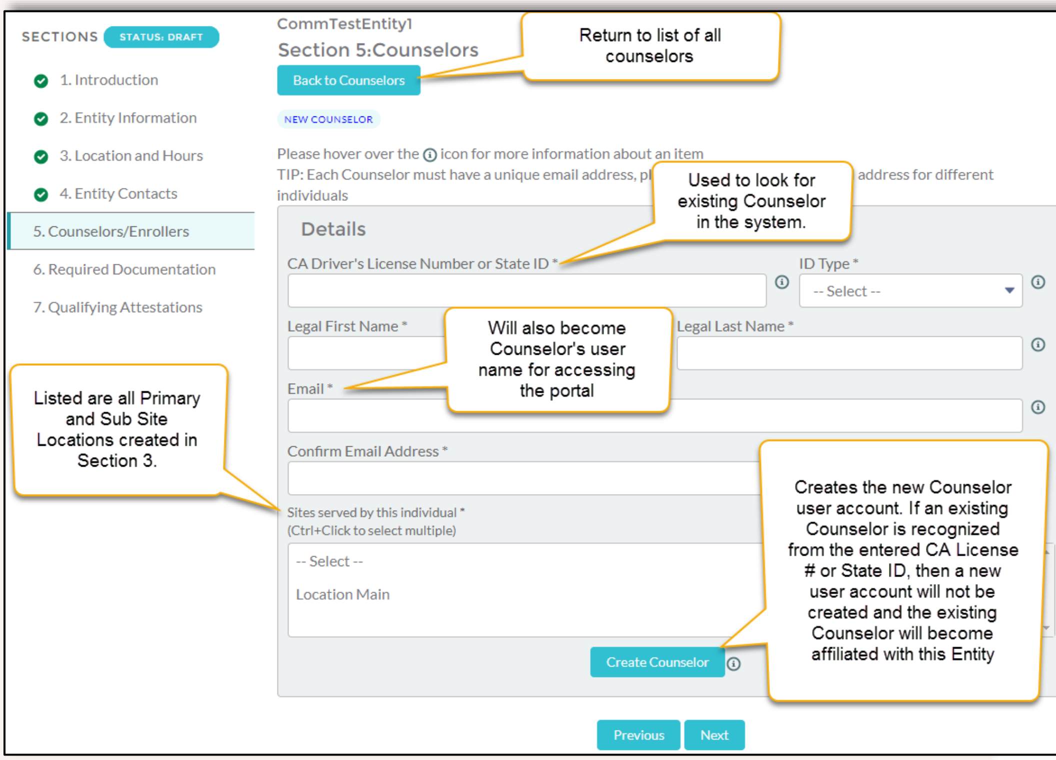


COUNSELORS/ENROLLERS: The System will take you to Section 5 to add Counselors. click on the "Add Counselor" button. New Entities must add at least one counselor with their application.



After clicking the "Add Counselor" button you will advance to following screen. Fill out the required information. The new Counselor must be assigned as a resource to one or more of the Locations that you created in Section 3. After the information has been correctly entered, click on the "Create Counselor" button to create and associate the Counselor with your Entity.

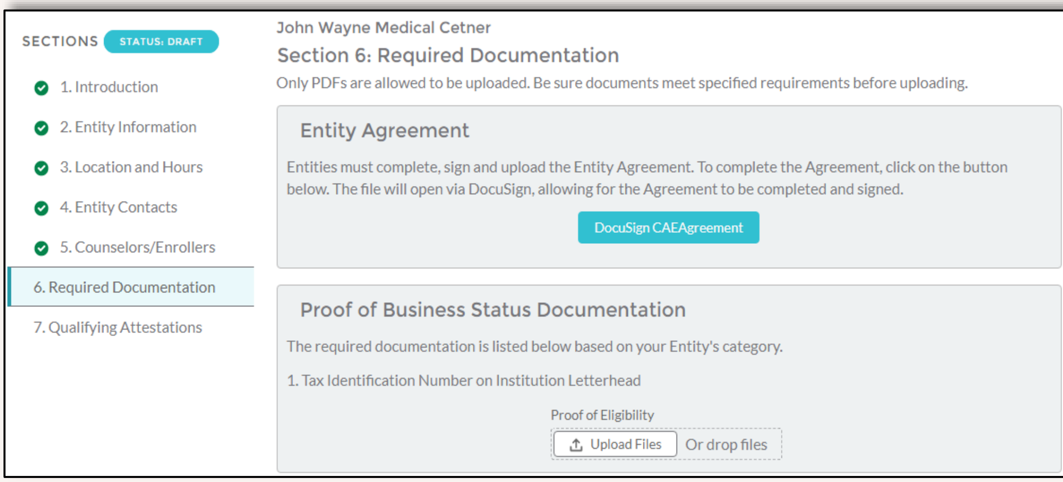
Note: A Counselor can be assigned up to two sites.



After creating the counselor, select “Back to Counselors” to view a refreshed list of all the counselors (with the option to create more), or proceed to the next section of the application by clicking “Next”.

5. **REQUIRED DOCUMENTATION:** Once the Counselors have been entered and clicked “Next” the System will navigate to Section 6: “Required Documentation.” Each item in this section must be completed or uploaded as part of the application. The content in each section may vary depending on the entity type that was selected in Section 2.

   NOTE: Documents that are missing or filled out incorrectly will delay the approval process. Continue below for a detailed look at each section.



a. **ENTITY AGREEMENT: Upon request, the CA CSS Team (CommunityPartnerCertSupport@covered.ca.gov) will send a valid copy to the Entity directly.**

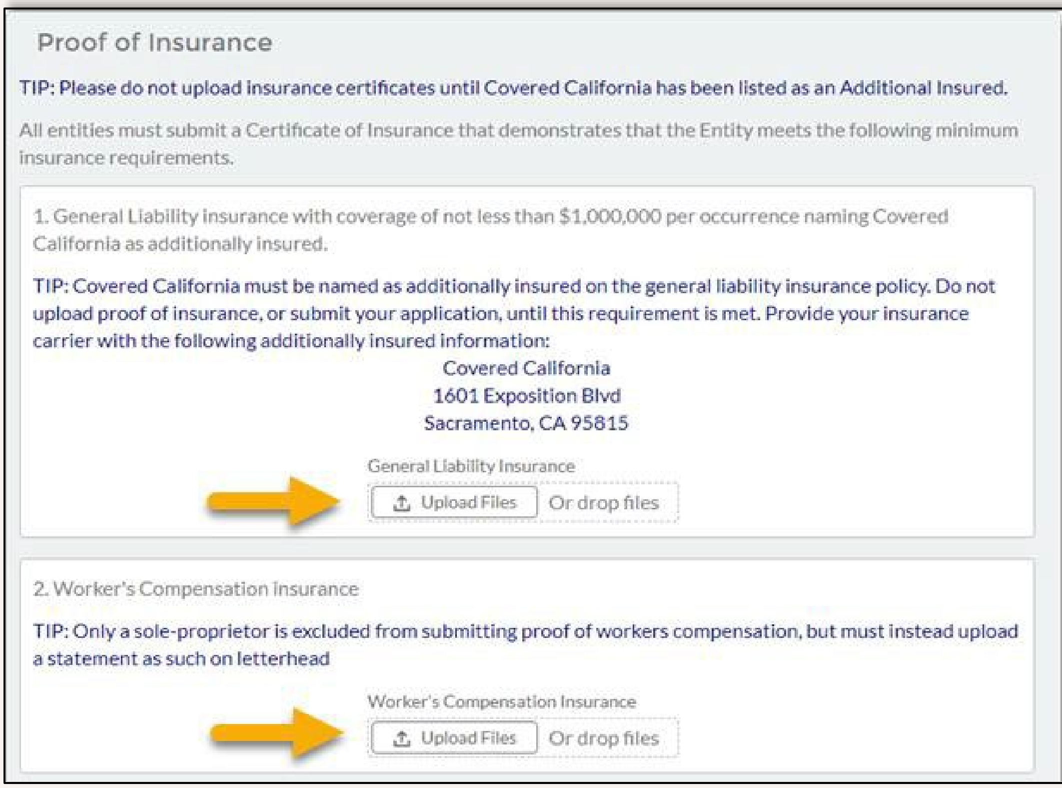
   Note: When completing the document, ensure it is filled out by the Authorized Contact

   Once all the information has been properly filled out and the document is signed, send the Entity Agreement back to the CSS Team to further be processed and reviewed.

   NOTE: If there is nothing to disclose, enter “Nothing to disclose” in those fields.

b. **PROOF OF ELIGIBILITY:** Click on the “Upload Files” button and browse to the appropriate PDF document which is on your computer. You also have the option to drop the file into the dotted area for it to be uploaded.

c. **PROOF OF INSURANCE:** Upload Files for both General Liability Insurance and Worker’s Compensation Insurance documents.



TIP: Only a **sole proprietor** is excluded from submitting proof of workers compensation. To validate, the sole proprietor(s) must prepare a statement on their business letterhead noting that because their entity is providing service as a sole proprietor, they are excluded from having Workers Compensation coverage.

d. **PROOF OF LICENSE:** Click on “Upload Files” to select your Proof of Business License documentation.

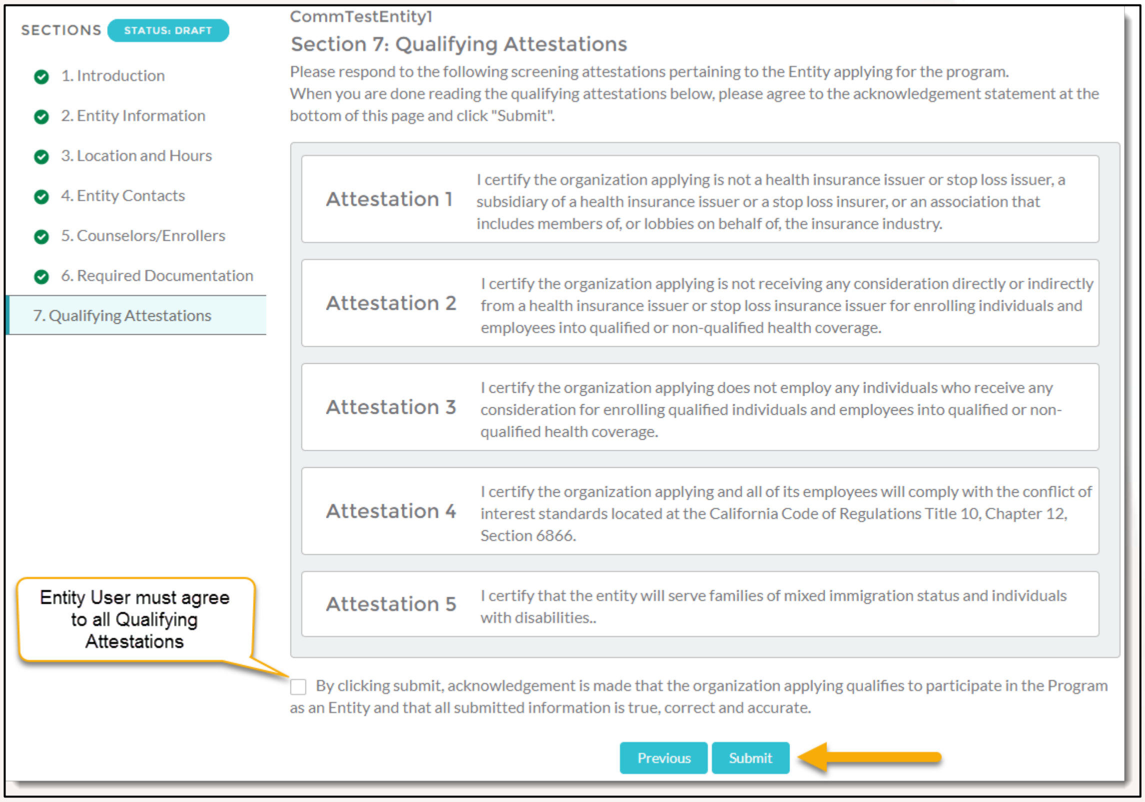
NOTE: If you are a school, municipality, or other government agency without a normal business license, submit a signed letter stating this on the official letter head of your organization. If you are a nonprofit organization, submit proof of your 501(c)(3) status.

e. **CONFLICT OF INTEREST PREVENTION PLAN:** A template for a Covered California Conflict of Interest Prevention Plan is provided through the Conflict of Interest Prevention Plan blue button. If you have your own conflict of interest prevention plan, please **click** on “Upload Files” to upload your own Conflict of Interest Prevention Plan.

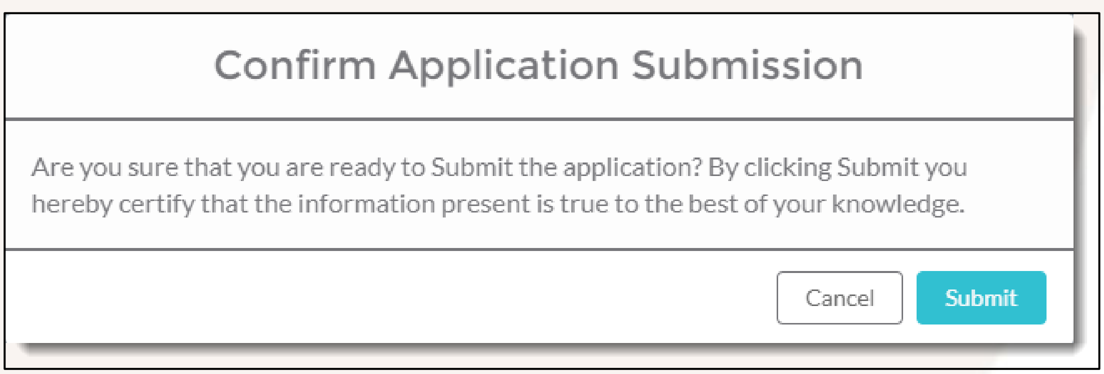
After all the required documentation has been uploaded, click on the “Next” button to advance to the next section.

Note: The maximum file size for an uploaded document is **4 MB** (Megabytes). Please optimize any scanned documents to fit within the upload limit. All required documents must be uploaded to proceed to the next section. A green checkbox indicator will display next to each section when a document is uploaded successfully.

6. **QUALIFYING ATTESTATIONS:** Read each Qualifying Attestation. Click in the check box to acknowledge your agreement with the attestations and click on "Submit" to initiate application submission.

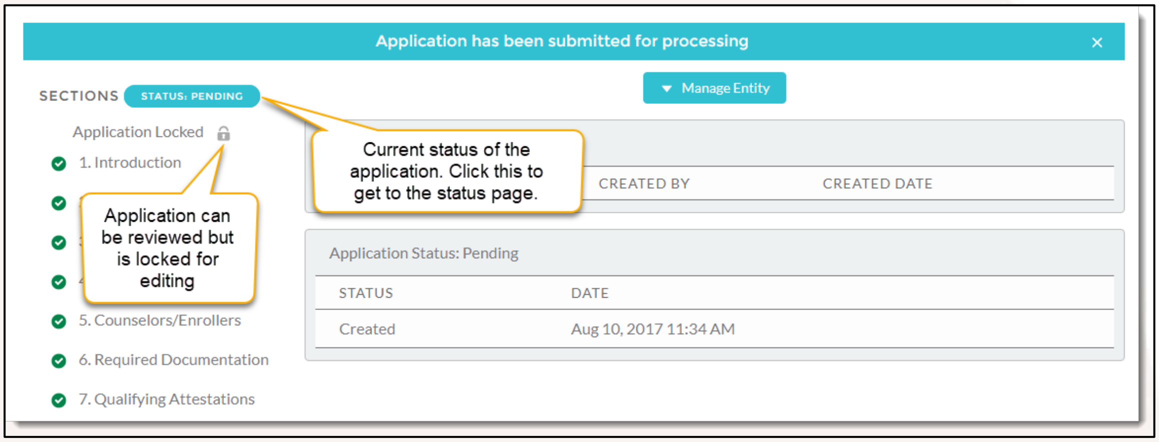


The following confirmation message will appear after clicking the "Submit" button. Click the "Submit" button again. The Entity Application will be submitted to the Certification Services Section for processing.



ENTITY APPLICATION STATUS APPROVAL PROCESS

When the Entity Application is submitted, the user will be directed to the application status page where the application status history and any notes added by the review team will be displayed.

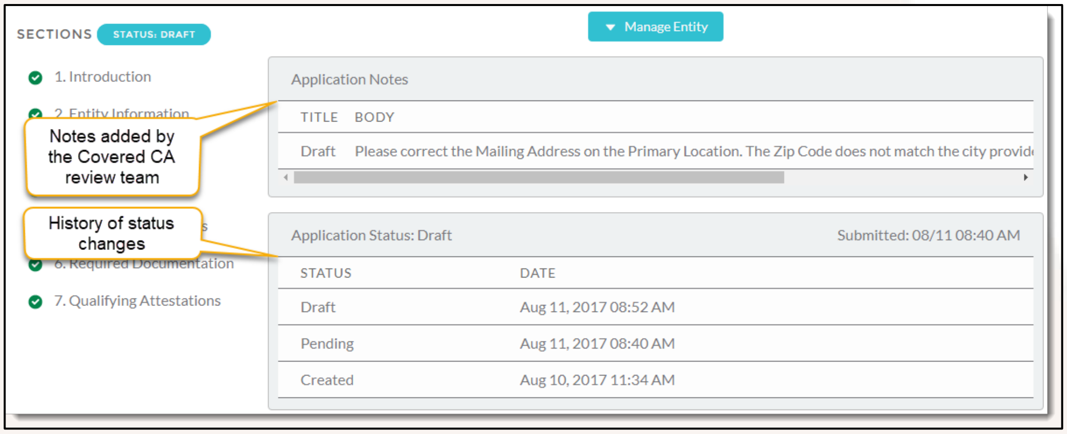


- The application status is “Pending”, and the application is locked from editing. The application will remain in “Pending” status until it is reviewed and updated by the Certification Services Section (CSS).
- The Entity User will receive an email confirming the submission of the Entity Application and will inform the user when the application will be reviewed.

Once an Entity Application has been submitted for processing, the application is reviewed by Covered California’s Certification Services Section. Covered California will review the application and all required documentation. The review team will update the Entity Application Status to one of the following values:

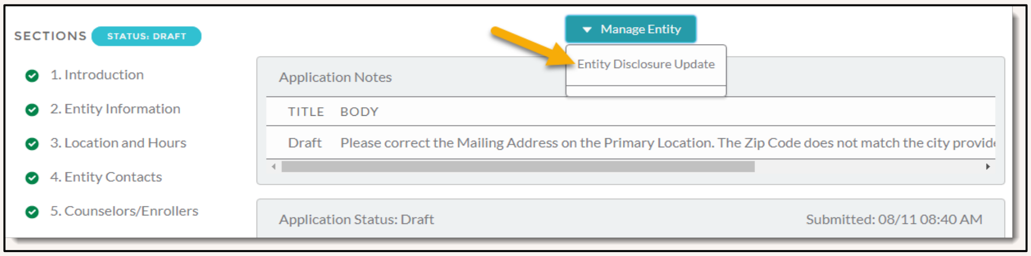
a. **Draft** – The Entity Application requires additional edits and is returned to the Entity User. The review team will provide details on what needs to be corrected.
b. **Pending** – The Entity Application is awaiting a determination from Covered California’s review team.
c. **Approved** – The Entity Application has been approved.
d. **Not Approved** – The Entity Application has been reviewed and NOT approved.
e. **In CC Review** – The Application has been initially reviewed, but further review is necessary.
f. **Withdrawn** – The Application has been withdrawn by request of the Entity.

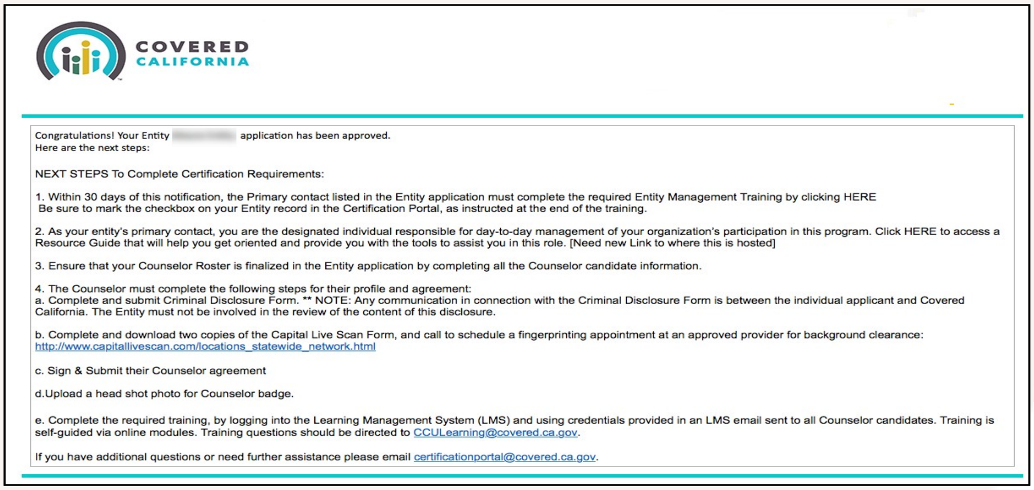
You will see when the review team updates the status of the application by viewing the application status page.



You also can add additional disclosures to your Entity Agreement. This is useful if you have additional items to disclose after you have signed and submitted your application and the application is still under review.

Once Entity Application is marked as **"Approved"**, you will receive an email outlining the next steps in the Entity Certification process (see next page). Next time you log into the Certification Portal with an approved application, you will be directed to the My Entity page instead of the application.





Congratulations! Your Entity application has been approved.
Here are the next steps:

NEXT STEPS To Complete Certification Requirements:

1. Within 30 days of this notification, the Primary contact listed in the Entity application must complete the required Entity Management Training by clicking HERE
Be sure to mark the checkbox on your Entity record in the Certification Portal, as instructed at the end of the training.

2. As your entity's primary contact, you are the designated individual responsible for day-to-day management of your organization's participation in this program. Click HERE to access a Resource Guide that will help you get oriented and provide you with the tools to assist you in this role. [Need new Link to where this is hosted]

3. Ensure that your Counselor Roster is finalized in the Entity application by completing all the Counselor candidate information.

4. The Counselor must complete the following steps for their profile and agreement:
a. Complete and submit Criminal Disclosure Form. ** NOTE: Any communication in connection with the Criminal Disclosure Form is between the individual applicant and Covered California. The Entity must not be involved in the review of the content of this disclosure.

b. Complete and download two copies of the Capital Live Scan Form, and call to schedule a fingerprinting appointment at an approved provider for background clearance:
http://www.capitallivescan.com/locations_statewide_network.html

c. Sign & Submit their Counselor agreement

d.Upload a head shot photo for Counselor badge.

e. Complete the required training, by logging into the Learning Management System (LMS) and using credentials provided in an LMS email sent to all Counselor candidates. Training is self-guided via online modules. Training questions should be directed to CCULearning@covered.ca.gov.

If you have additional questions or need further assistance please email certificationportal@covered.ca.gov.

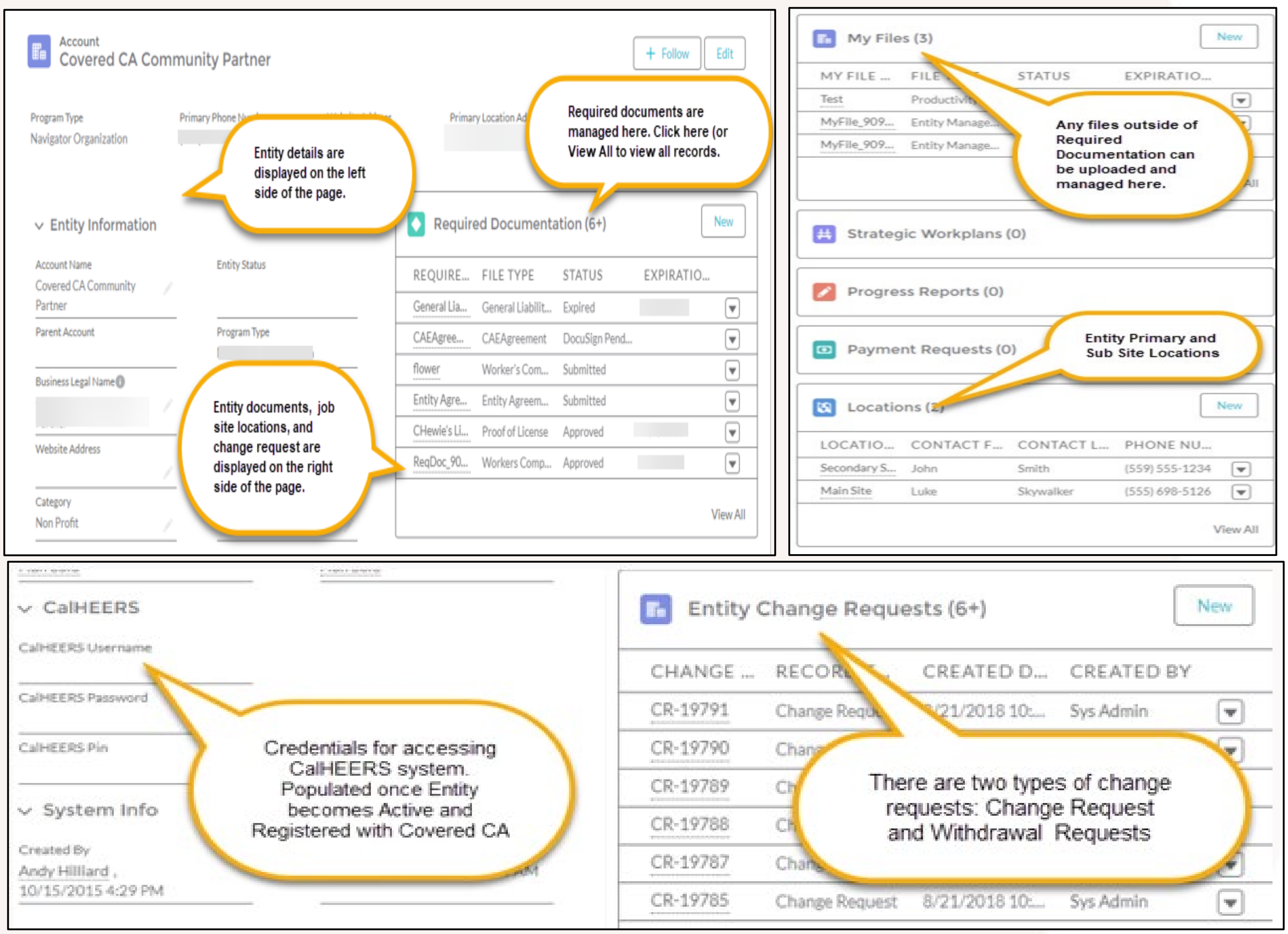
Sample Application Approval Email

MY ENTITY

The “My Entity” page provides a snapshot view of your Entity account information and all items related to your Entity. The related items include:

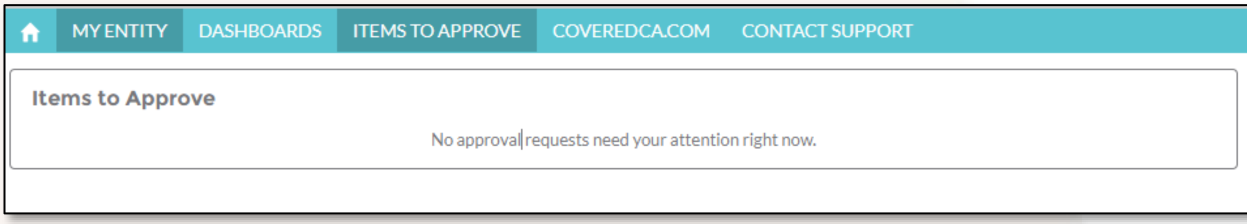
- Required Documentation: Documents such as, Business License, General Liability and Workers Compensation are submitted here.
- My Files: Any files that are not Required Documents are located here.
- Entity Applications: The application that was filled out and submitted for review.
- Locations: The address information for the Entity and the subsites are found here.
- Entity Change Requests: Any information changed or updated will be logged here.

Each of the different sections is described below:



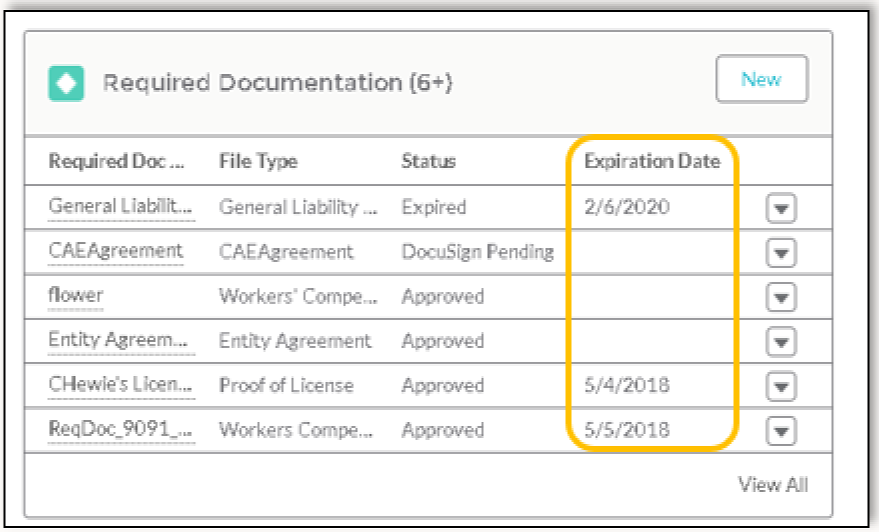
NEW – ENTITY ACCOUNT "MY APPROVALS"

Primary Contacts or Authorized Contacts are required to approve or reject pending requests located under the "Items to Approve" tab.



REQUIRED DOCUMENTS & MY FILES

Required Documents and My Files records are used to manage all files associated with your Entity. Required Documents will have been automatically created through the Entity Application process and typically will not need to be created from the My Entity page once an application has been approved. However, some Required Documents will expire over time and will need to be updated.



Required Documentation (6+)

New

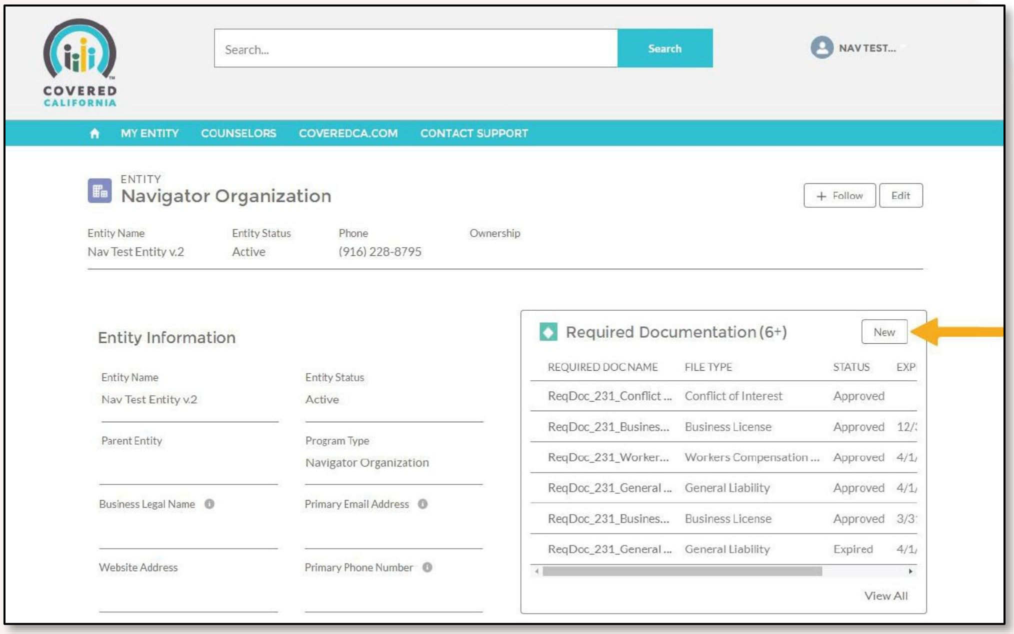
Required Doc ...	File Type	Status	Expiration Date
General Liabilit...	General Liability ...	Expired	2/6/2020
CAEAgreement	CAEAgreement	DocuSign Pending	
flower	Workers' Compe...	Approved	
Entity Agreem...	Entity Agreement	Approved	
CHewie's Licen...	Proof of License	Approved	5/4/2018
ReqDoc_9091_...	Workers Compe...	Approved	5/5/2018

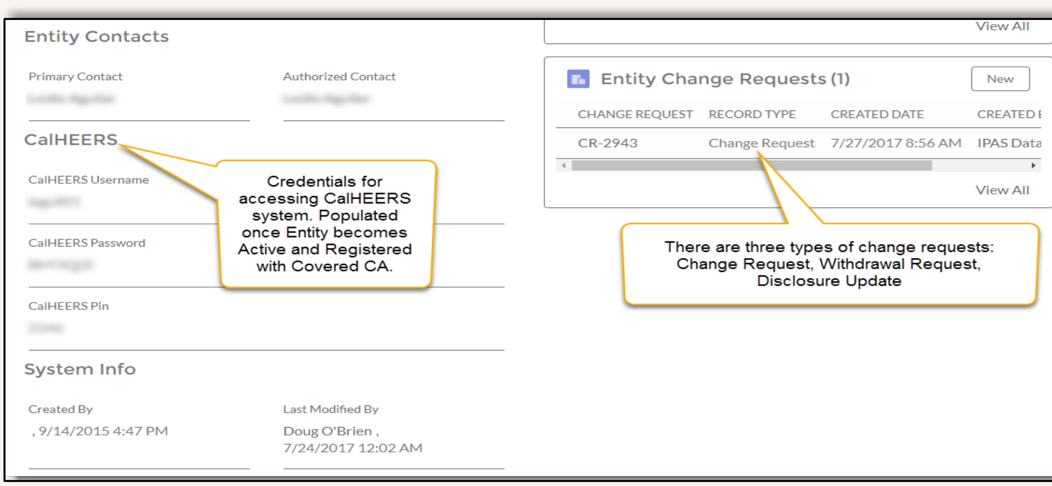
View All

Example of Expired Required Documents.

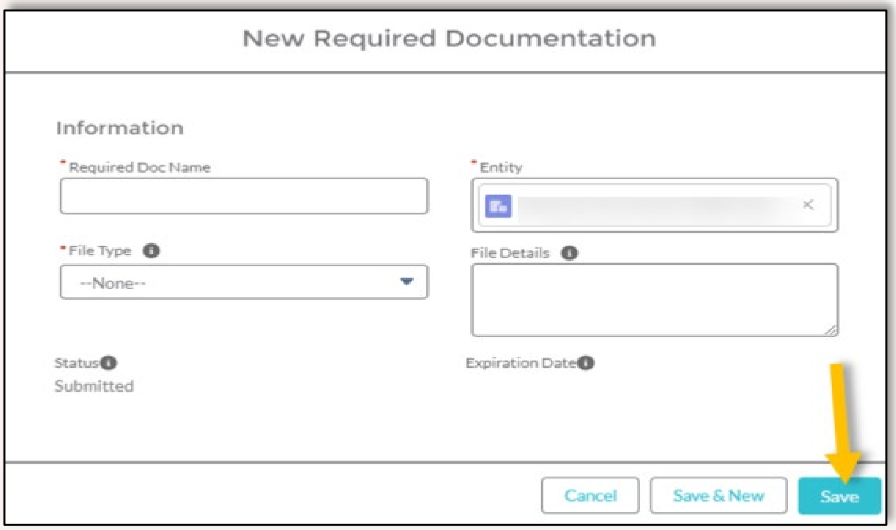
UPDATING EXPIRED REQUIRED DOCUMENTS:

Expired Required Documents can be updated through the following procedure:
Click on the “New” button next to Required Documents

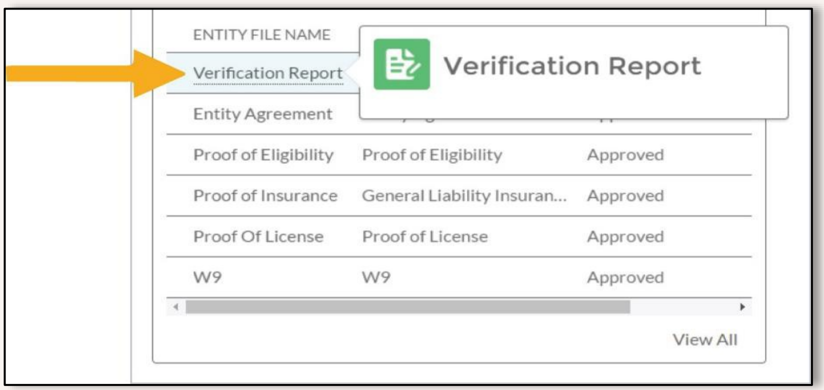




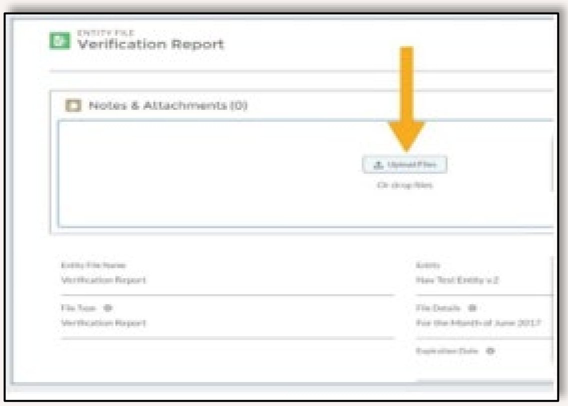
1. Complete required fields and click on the "Save" button



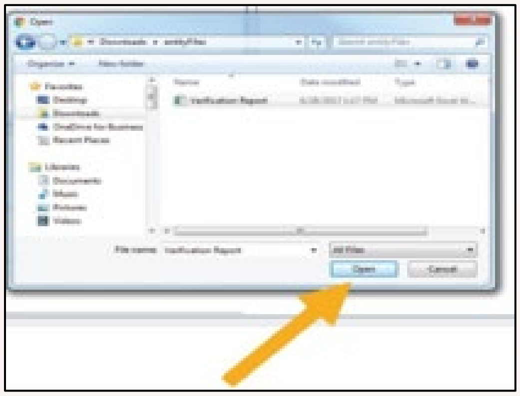
2. Click the name of the file you just created



3. Click the "Upload Files" button



4. Select the file you want to upload:

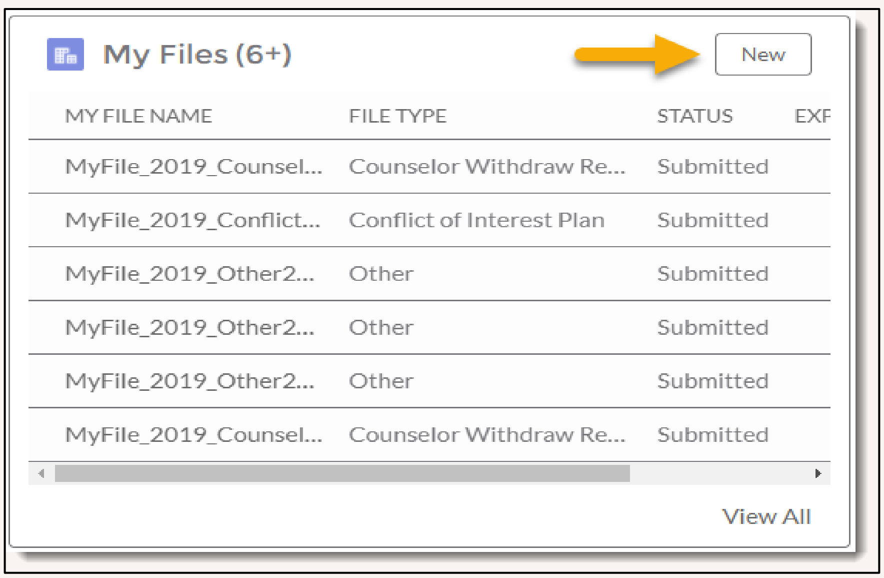


NOTE: The system will display the Required Document Entry has now been completed.

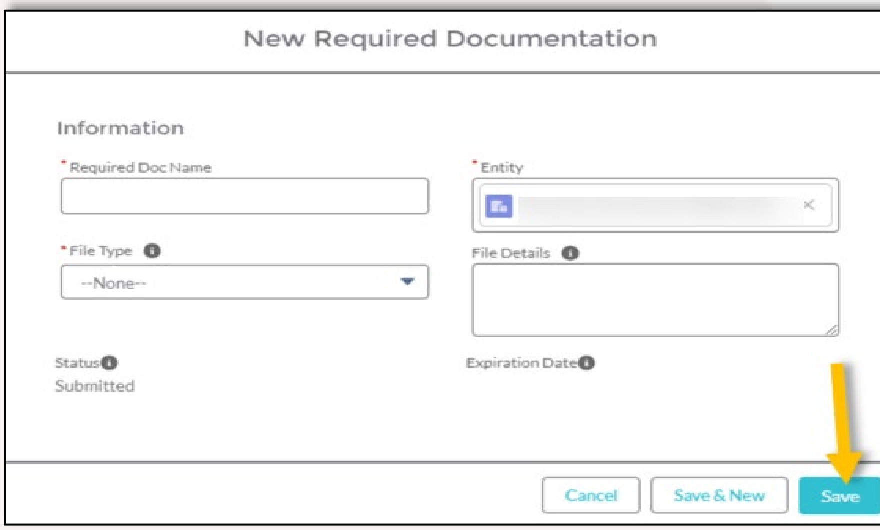
CREATING MY FILES:

My Files records are like Required Documents, but they will be used to manage any files that were not required as part of the initial application process.

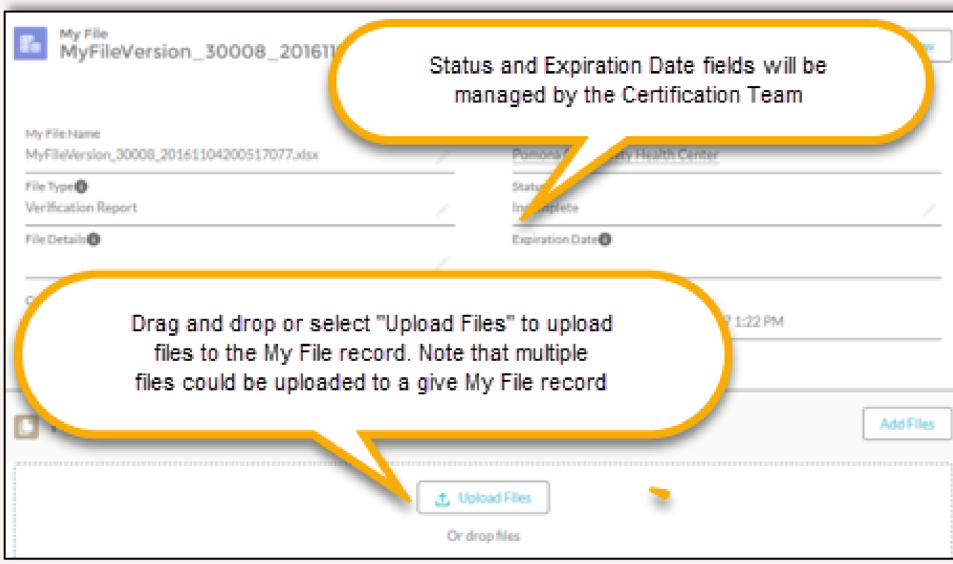
A. My Files are for documents that are not considered Required Documents and a place to manage these files. To upload a new My File, first click the **"New"** button on the My Files related list.



B. The following popup will appear. Enter the appropriate information and then click **"Save"** to create the file detail record.

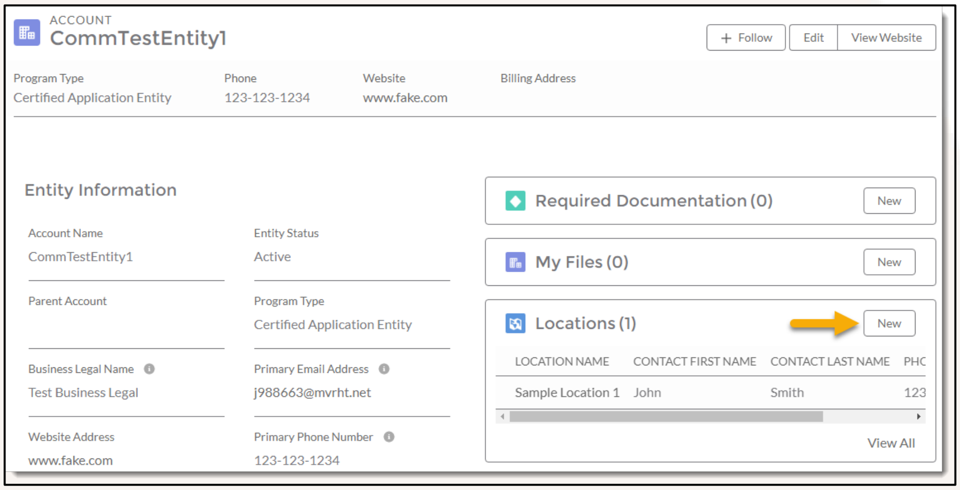


C. The record that's created houses details about the file(s) related to it. Now that the record has been created, one or many files can be uploaded to it.

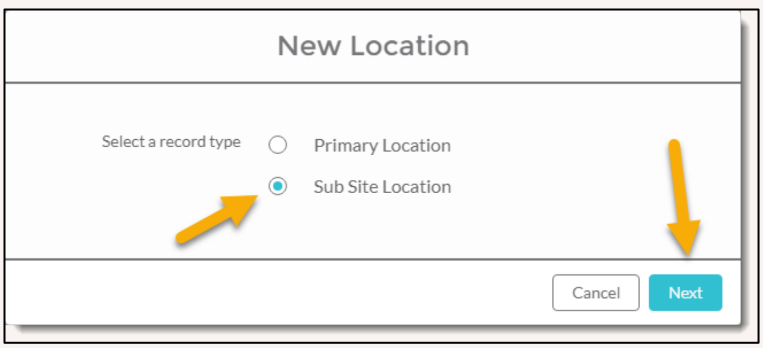


MANAGE LOCATIONS

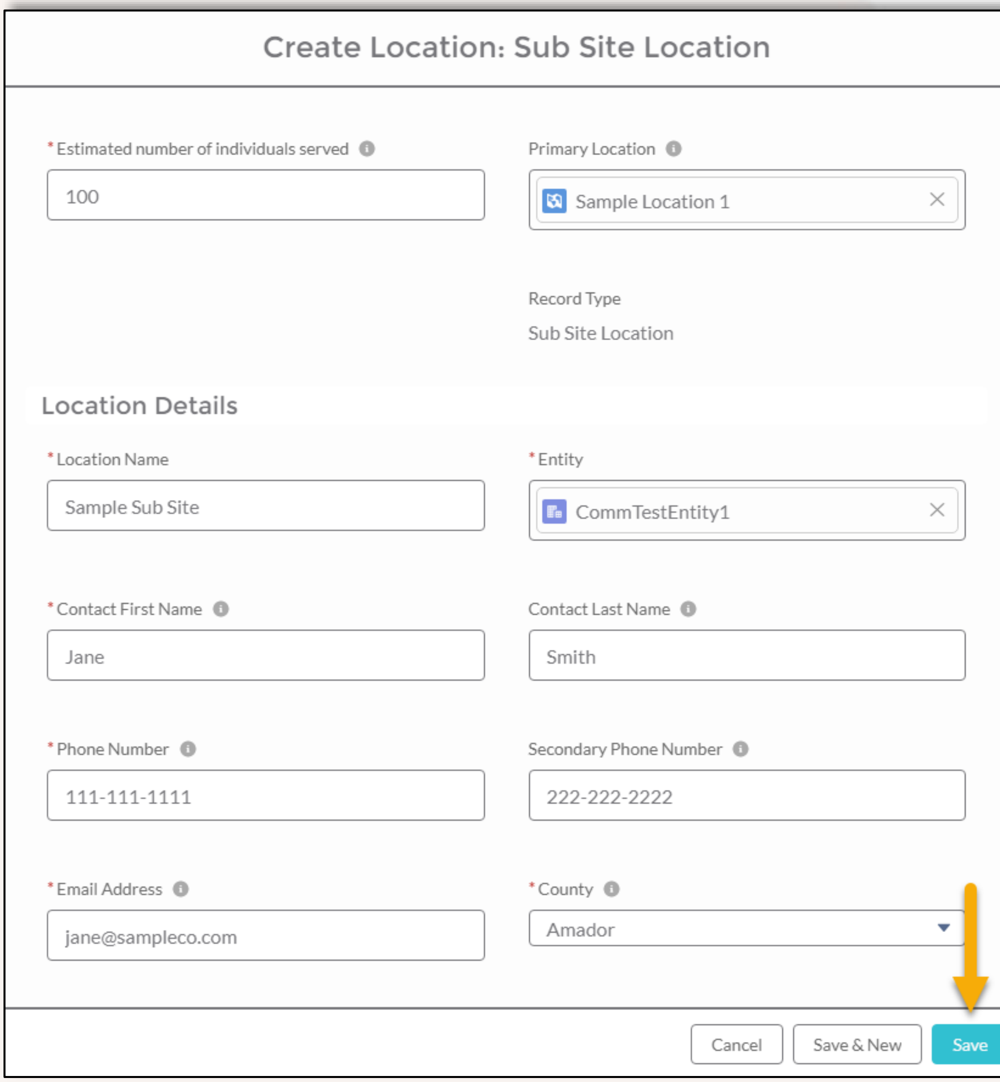
CREATING A LOCATION: The “Locations” related list, click on the **“New”** button.



A. Select Primary or Sub Site Location for the Record Type. There should only be one Primary Location.



B. Once all the information is completed click on the "Save" button to complete the process.



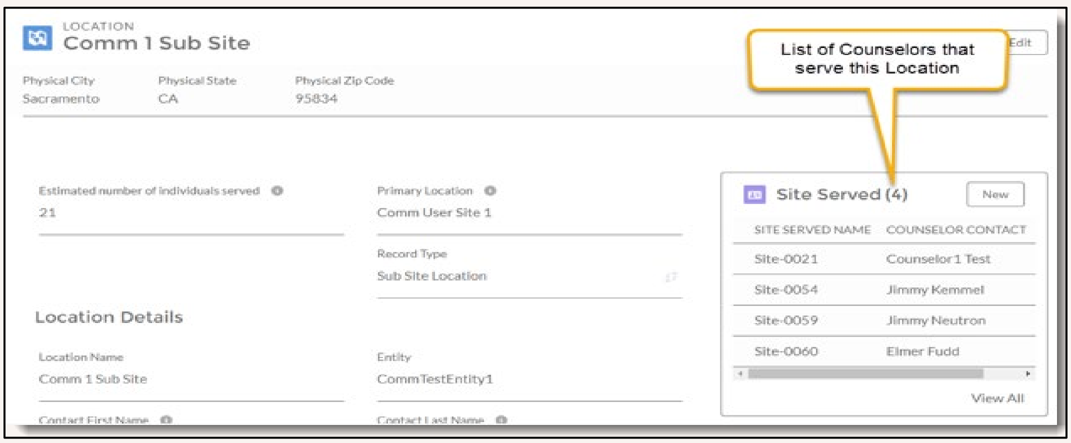
NOTE: Changes to an existing site in the Certification Portal will initiate a Change Request for CalHEERS so the systems remain in sync. Refer to the Entity Change Requests section on Page 33 for a full list of Entity Change Requests and approvals required for the change to take effect.

ADDING SITES SERVED TO COUNSELORS

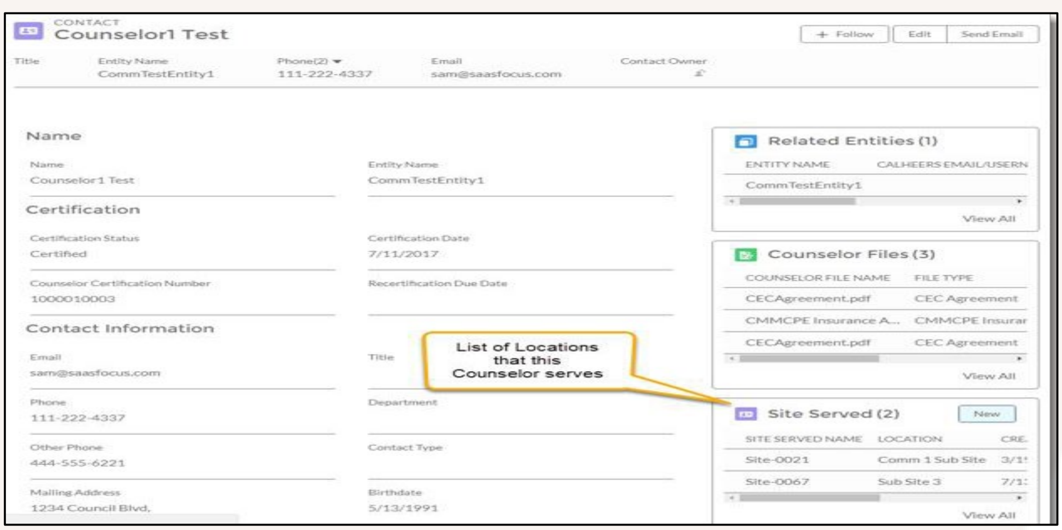
Site Served record represents the Location of the Entity, the Counselor Contact records, and the Site Served Records are linked. If a Counselor changes the location, they serve the information must be updated in the Certification Portal.

VIEWING SITES SERVED:

Each Location can be associated with a set of Counselors that are responsible for serving the site. These associations are managed through the Sites Served related list. The Sites Served related list is displayed on both the Location and the Counselor Contact record pages.



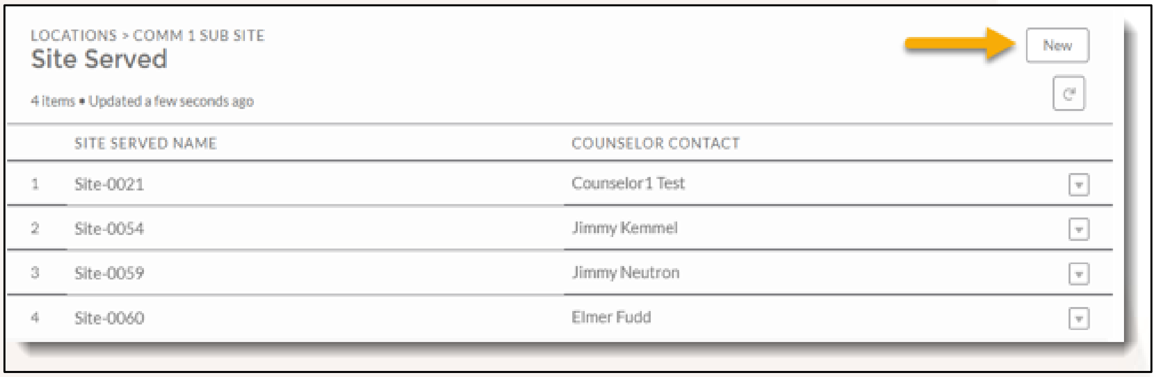
Location view of Sites Served



Counselor view of Sites Served

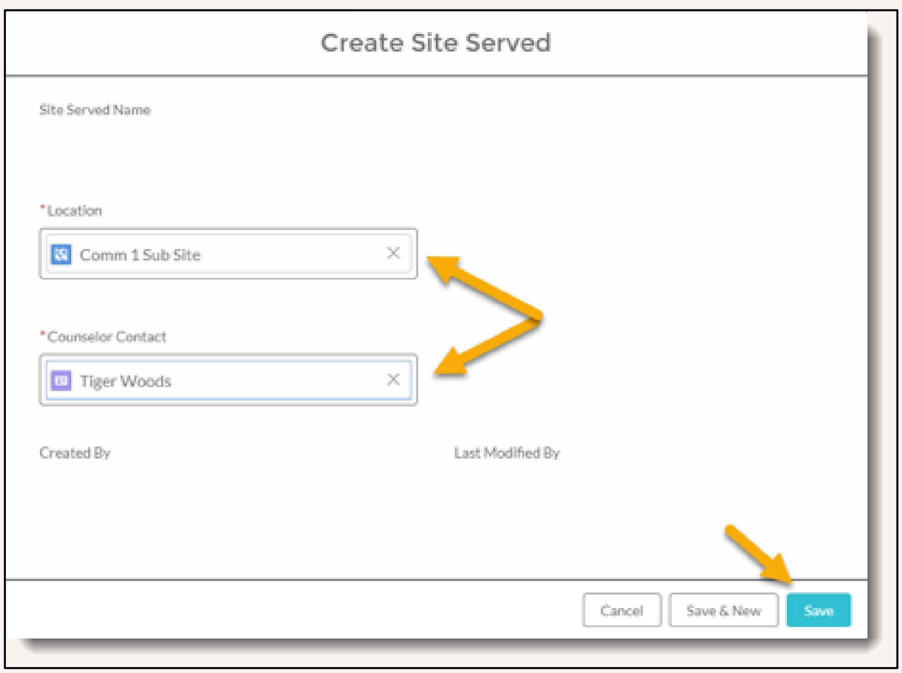
CREATING LOCATION SITES SERVED:

Select the “New” button from the Site Served related list.



Sites Served related list (View All mode)

Populate the Location field with the name of the site location and populate the Counselor Contact field with the name of the counselor that will serve the site. One of the two fields will automatically be populated depending on which related list was selected from (i.e. Counselor vs. Location). Click “Save” (or Save & New to create another).

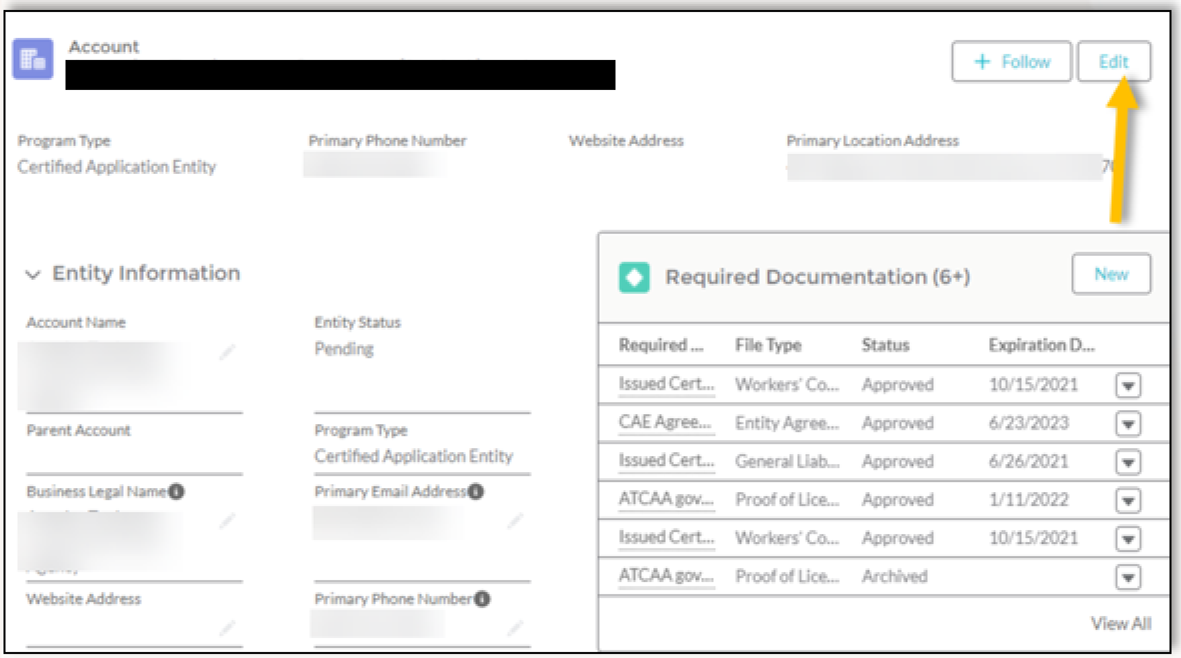


Saving Site Served

ENTITY CHANGE RQUESTS

CHANGE REQUESTS:

Most changes to your entity's information can be made by simply editing the information. To do so, click the "Edit" button in the upper right side of the "My Entity" page. If you need to edit an existing site, click the down arrow button next to that site, and click "Edit".

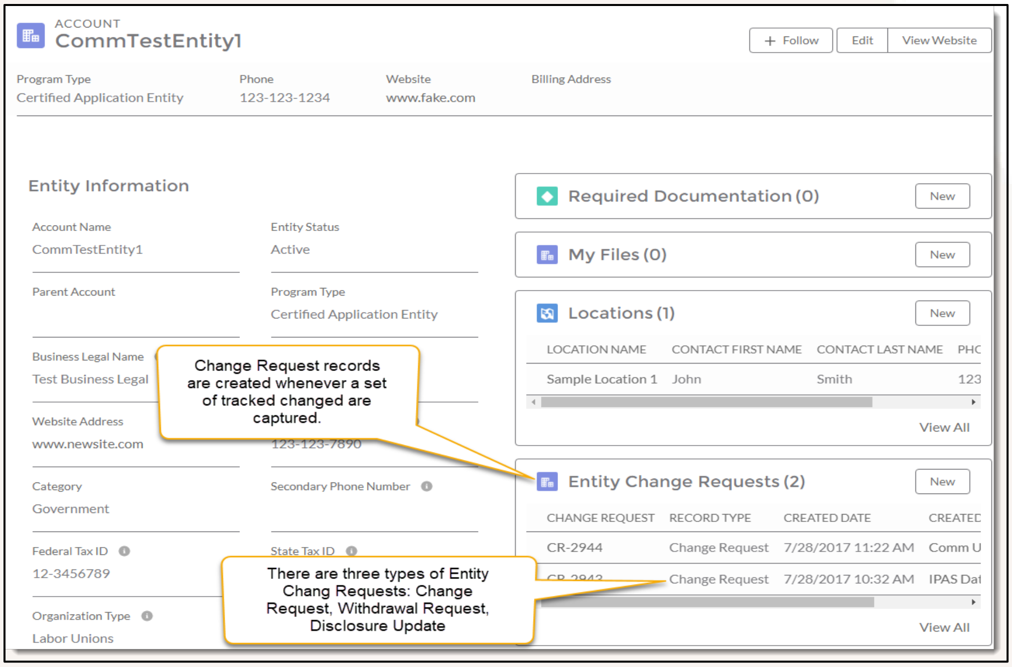


NOTE: Active Entities Change Request records will automatically be created when information is modified on your Entity or any records related to the Entity (e.g. Contacts, Locations, Sites Served etc.).

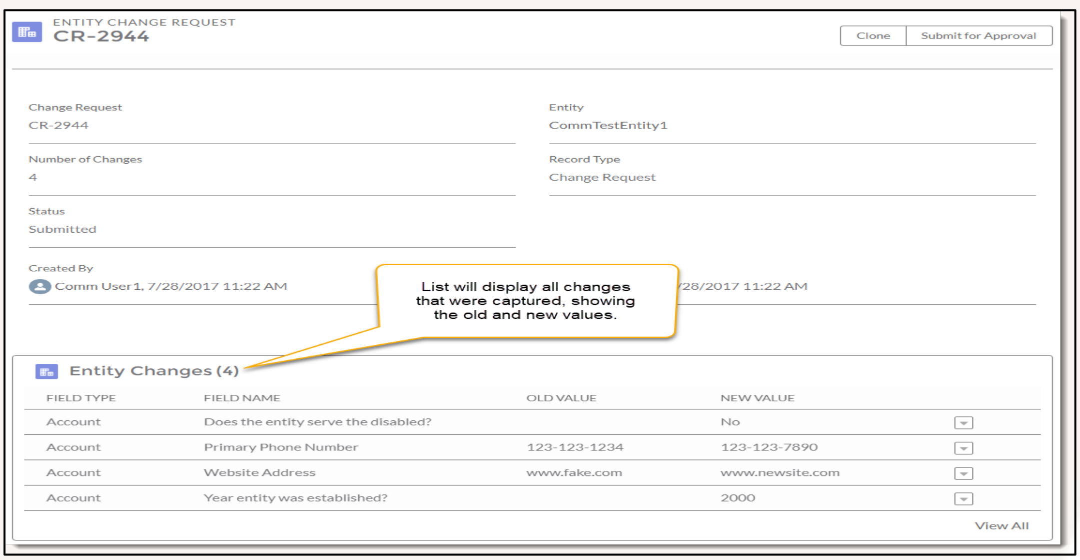
Certain changes are tracked by Covered CA and are synced with CalHEERS. There are some changes that require approval by Covered CA before they can be applied. You can make changes to the Entity within the Certification Portal. The table below denotes which changes are tracked and updated in CalHEERS and which changes require approval from Covered CA.

Section	Field	Approval Required	CalHEERS Update
1.0 Entity Information	Entity Name	Y	Y
	Business Legal Name	Y	Y
	Main Email Address	N	Y
	Website Address	N	Y
	Primary Phone	N	Y
	Secondary Phone	N	Y
	FEID	Y	Y
	State Tax ID	Y	Y
	Category Change	Y	Y
1.2 Special Populations Served	All	N	Y
1.3 Counties Served	All	N	Y
1.4 Resource Directory	All	N	Y
2.0 Location and Hours	All	N	Y
2.1 Hours of Operation	All	N	Y
2.2 Site Mailing Address	All	N	Y
2.3 Site Physical Address	All	N	Y
2.4 Spoken Languages	All	N	Y
2.5 Estimate # Individuals	All	N	Y
2.6 % OF Individuals Served	All	N	Y
2.7 Employment Industries	All	N	Y
3.0 Counselor Assignment	All	Y	Y
4.0 Entity Contact Info	All	Y	Y

Entity Change Requests are found on the right column of the 'My Entity' page.



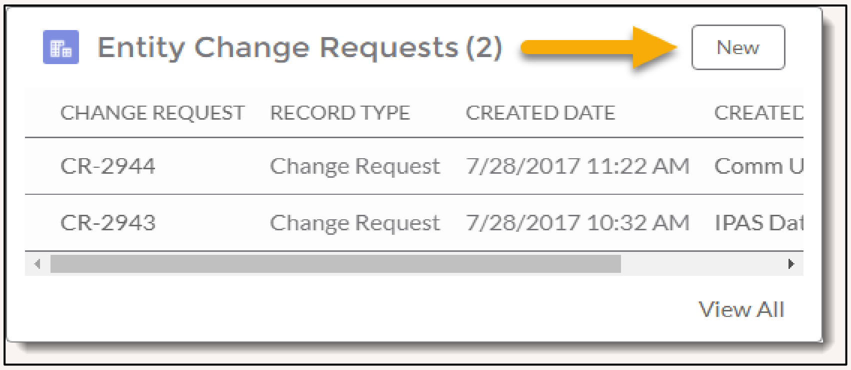
Select a Change Request record in the list to view all the changes associated with it.



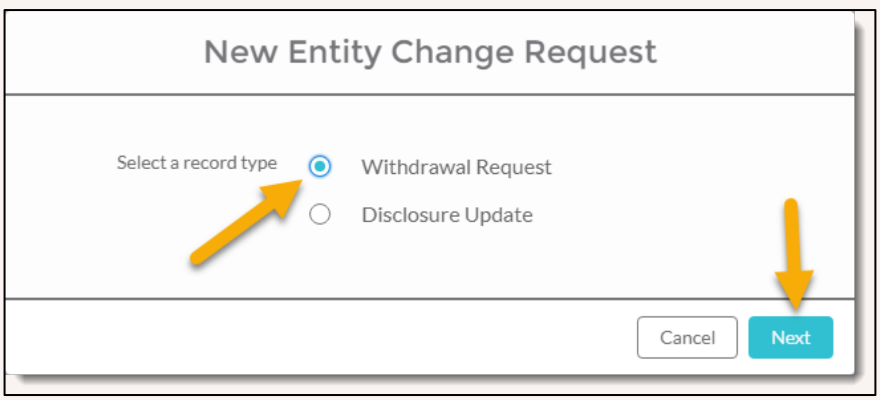
WITHDRAWAL REQUESTS:

If an Entity would like to withdraw from the program, they can do so by submitting a request through the “Entity Change Request”. To submit a Withdrawal Request, follow the steps below.

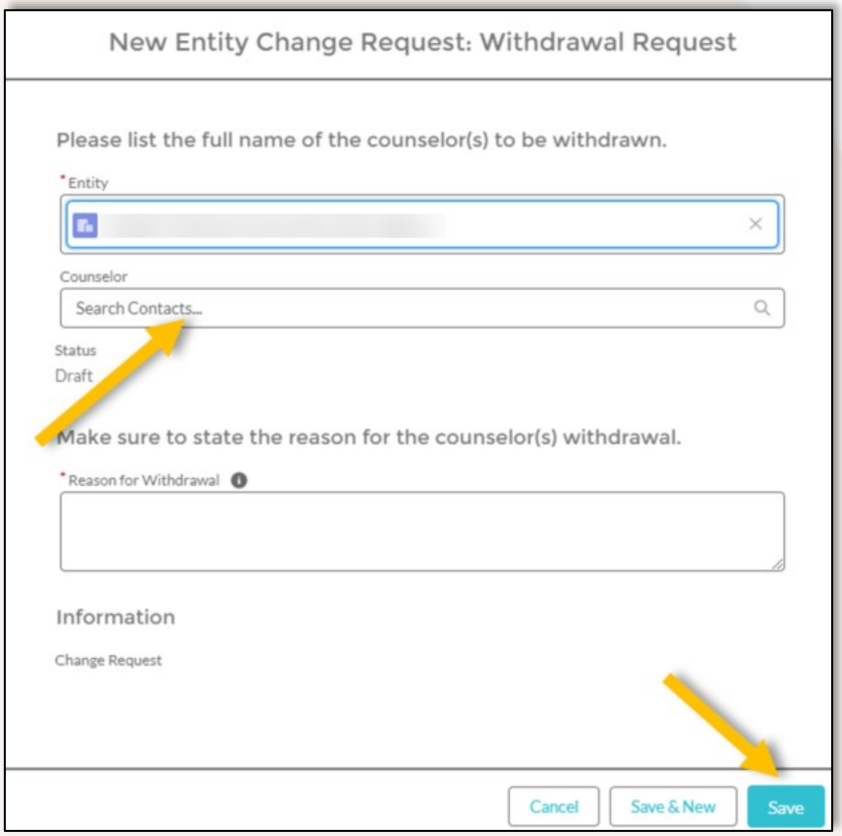
A. Click on the “New” button on the Entity Change Request related list.



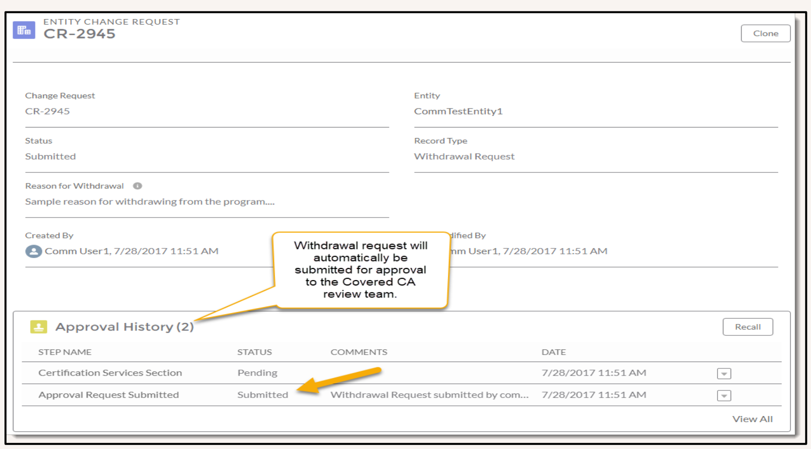
B. Choose Withdrawal Request for the Record Type.



C. In the 'Reason for Withdrawal' box, indicate the reason and click Save.



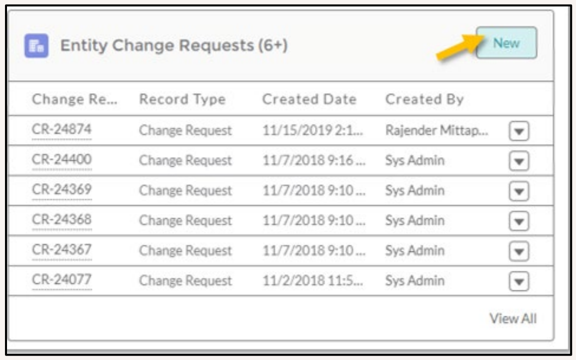
D. Once the record is saved it will be submitted for approval to the Certification Services Section. Your Entity will be withdrawn from the program upon approval of the request.



COUNSELOR WITHDRAWAL:

Entities can withdraw a counselor on their behalf by doing the following steps:

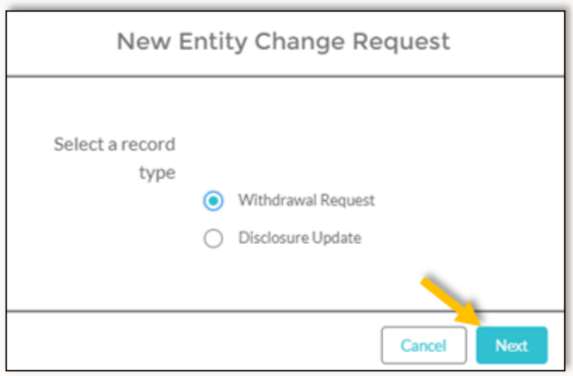
A. Click on the "New" button on the Entity Change Request related list.


Entity Change Requests (6+)   New

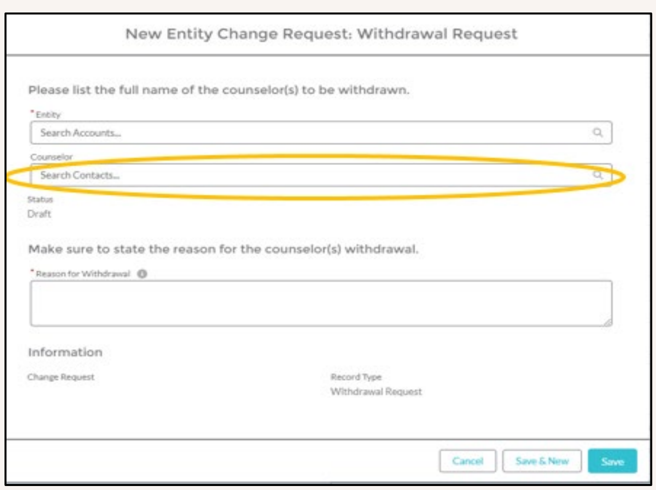
Change Re...	Record Type	Created Date	Created By
CR-24874	Change Request	11/15/2019 2:1...	Rajender Mittap...
CR-24400	Change Request	11/7/2018 9:16 ...	Sys Admin
CR-24369	Change Request	11/7/2018 9:10 ...	Sys Admin
CR-24368	Change Request	11/7/2018 9:10 ...	Sys Admin
CR-24367	Change Request	11/7/2018 9:10 ...	Sys Admin
CR-24077	Change Request	11/2/2018 11:5...	Sys Admin

View All

B. Choose Withdrawal Request for the Record Type.



C. In the 'Reason for Withdrawal' box, indicate the reason and click Save.

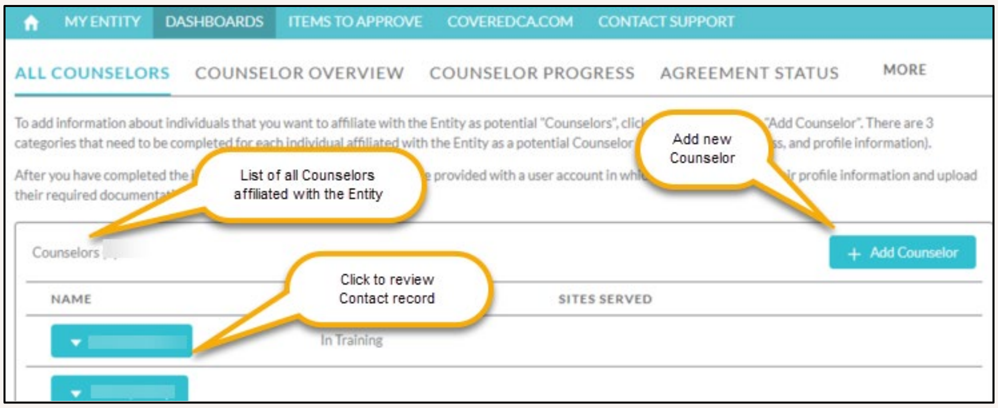


COUNSELOR MANAGEMENT

The Counselors tab in the top navigation bar is where all your entity Counselors will be managed. The tab contains a series of sub tabs that are each described below.

ALL COUNSELORS

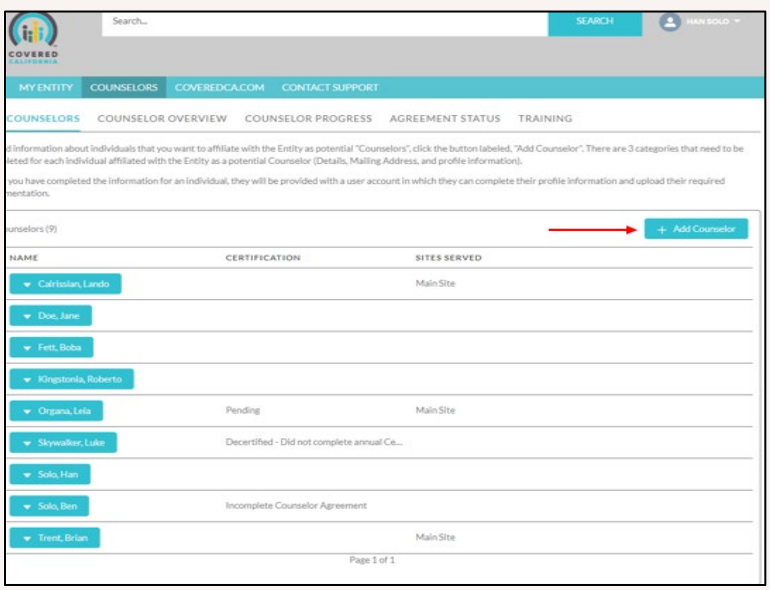
The All Counselors tab provides a list of all Counselors that are affiliated with the Entity and provides a resource for adding new Counselor users.



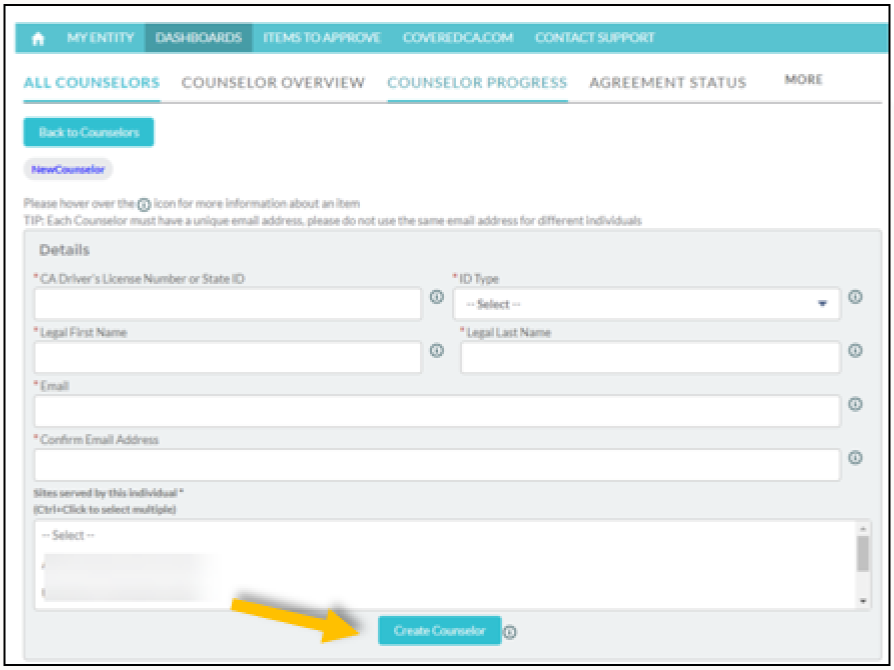
NOTE: There is no way to delete inactive counselors from this list at this time.

ADDING A NEW COUNSELOR

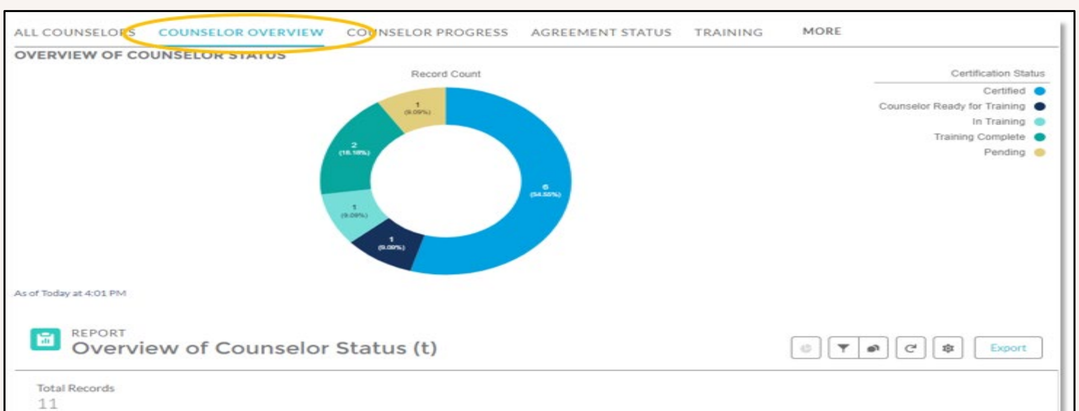
This tab displays all currently rostered counselors. In order to add a new counselor, select the **Add Counselor** sub tab.



Once on this page, fill out all information with an asterisk next to it. When done, select the Create Counselor button to complete the initial onboarding process.



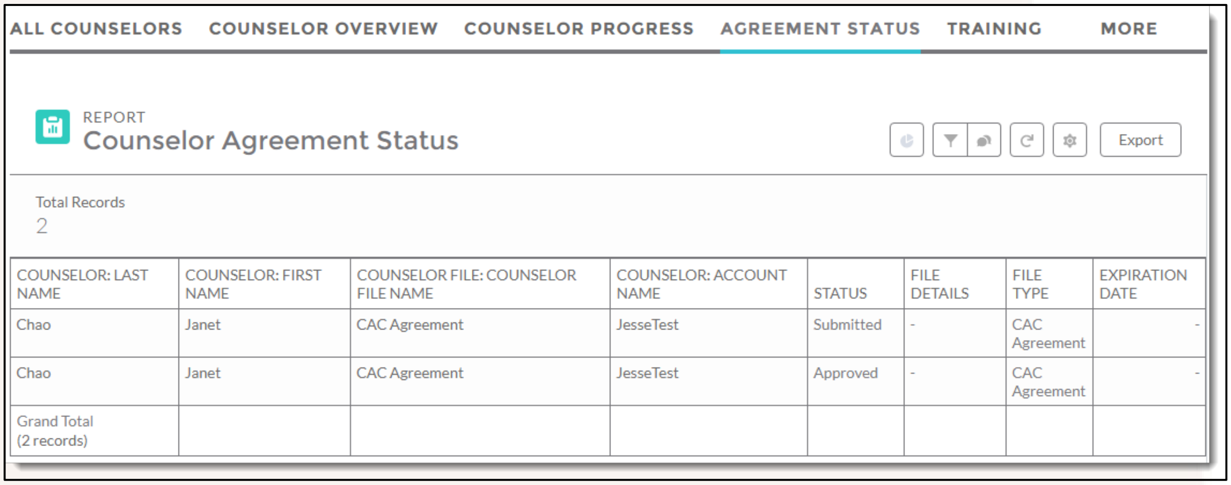
The **Counselor Overview** tab displays a report showing the certification overview of all the counselors.



FIRST NAME	LAST NAME	PROFILE STATUS	COUNSELOR ACTIVE STATUS	CERTIFICATION STATUS	CERTIFICATION NUMBER	EMAIL
Magee	Fitzgerald	-	Active	Certified	-	duis.elementum@amet.com
Kendall	Gallegos	-	Active	Certified	-	cras.pellentesque@tempor.net
Herrod	Hicks	-	Active	Certified	-	-
Brock	Holmes	-	-	Counselor Ready for Training	-	mattis@orci.com
Lillith	Kane	-	Active	Certified	-	mi.lacinia@pellentesquehabitantmorbi.com
Blaine	Merrill	-	-	Training Complete	-	sollicitudin.adipiscing.ligula@lobortistellus.net
August	Perry	-	Active	Certified	-	mattis.ornare@egetmollis.org
Ethan	Roberson	-	-	In Training	-	semper.et.lacinia@diam.com
Keane	Russo	-	-	Pending	-	est.congue.a@purusmaecenaslibero.org
Lana	Shields	-	Active	Certified	-	faucibus.lectus.a@tinciduntduiaugue.net
Ramona	Terry	-	-	Training Complete	-	conubia@odiosempercursus.com
Grand Total (11 records)						

AGREEMENT STATUS

This tab displays the status of all **Counselor Agreements** that have been submitted for approval. “Counselor Name”, “Counselor File”, and “Account Name” can all be clicked to take you to the related page.


ALL COUNSELORS | COUNSELOR OVERVIEW | COUNSELOR PROGRESS | AGREEMENT STATUS | TRAINING | MORE

REPORT
Counselor Agreement Status

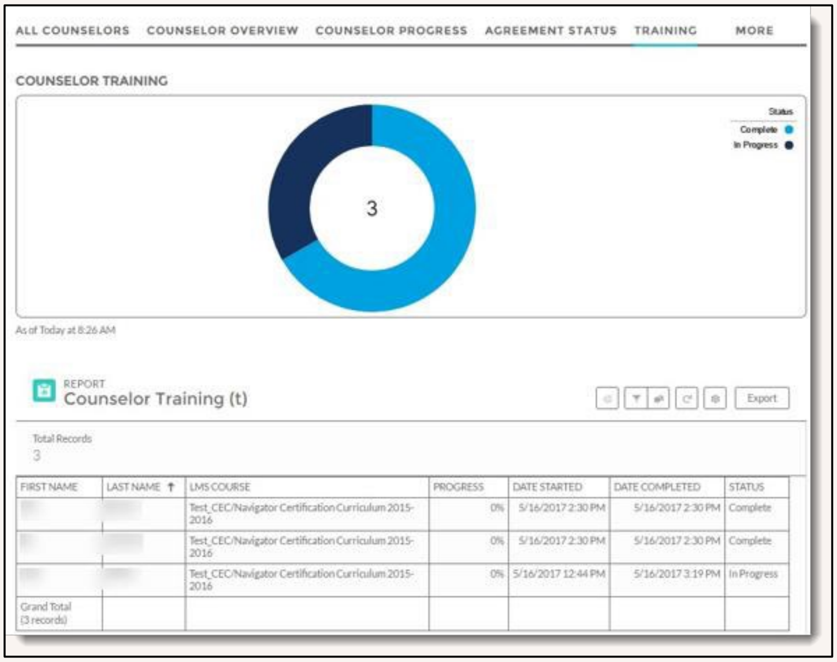
Export

Total Records
2

COUNSELOR: LAST NAME	COUNSELOR: FIRST NAME	COUNSELOR FILE: COUNSELOR FILE NAME	COUNSELOR: ACCOUNT NAME	STATUS	FILE DETAILS	FILE TYPE	EXPIRATION DATE
Chao	Janet	CAC Agreement	JesseTest	Submitted	-	CAC Agreement	-
Chao	Janet	CAC Agreement	JesseTest	Approved	-	CAC Agreement	-
Grand Total (2 records)							

TRAINING

The **Training** tab displays a list of all Counselors enrolled into certification training and the status of the curriculum completed.



REPORT
Counselor Training (t)

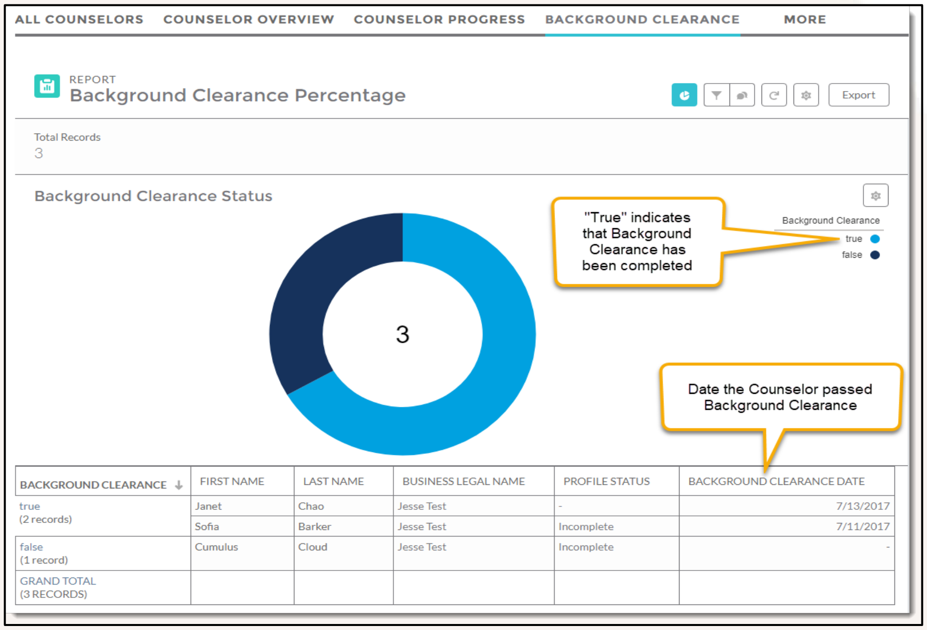
Export

Total Records
3

FIRST NAME	LAST NAME	LMS COURSE	PROGRESS	DATE STARTED	DATE COMPLETED	STATUS
[illegible]	[illegible]	Test_CEC/Navigator Certification Curriculum 2015-2016	0%	5/16/2017 2:30 PM	5/16/2017 2:30 PM	Complete
[illegible]	[illegible]	Test_CEC/Navigator Certification Curriculum 2015-2016	0%	5/16/2017 2:30 PM	5/16/2017 2:30 PM	Complete
[illegible]	[illegible]	Test_CEC/Navigator Certification Curriculum 2015-2016	0%	5/16/2017 12:44 PM	5/16/2017 3:19 PM	In Progress
Grand Total (3 records)						

BACKGROUND CLEARANCE

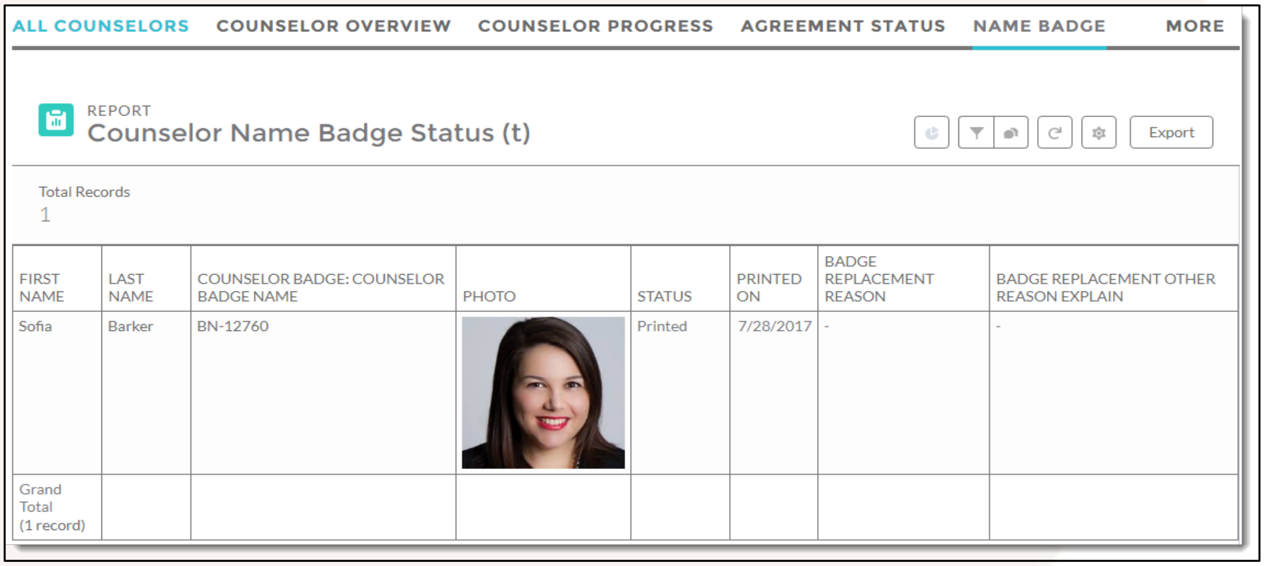
The **Background Clearance** tab displays all the Counselors that have completed the Background Clearance process.



BACKGROUND CLEARANCE	FIRST NAME	LAST NAME	BUSINESS LEGAL NAME	PROFILE STATUS	BACKGROUND CLEARANCE DATE
true (2 records)	Janet	Chao	Jesse Test	-	7/13/2017
	Sofia	Barker	Jesse Test	Incomplete	7/11/2017
false (1 record)	Cumulus	Cloud	Jesse Test	Incomplete	-
GRAND TOTAL (3 RECORDS)					

NAME BADGE

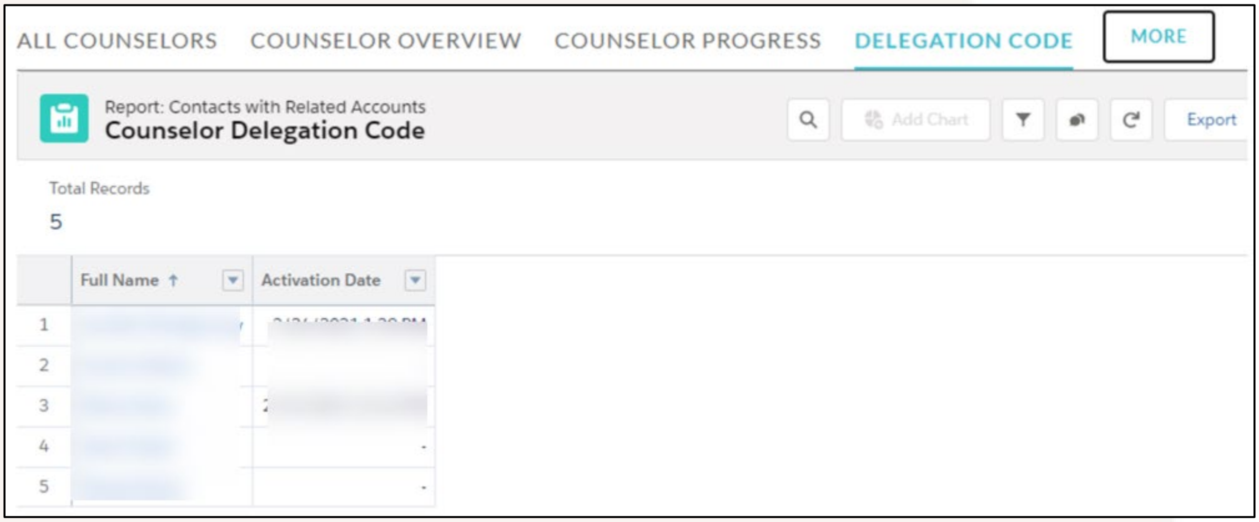
The **Name Badge** tab will display Counselor Badges that have been processed and completed. This report will display for new badge requests and Badge Replacement requests. “Counselor Name” and “Counselor Badge Name” can be clicked to take you to the related page.



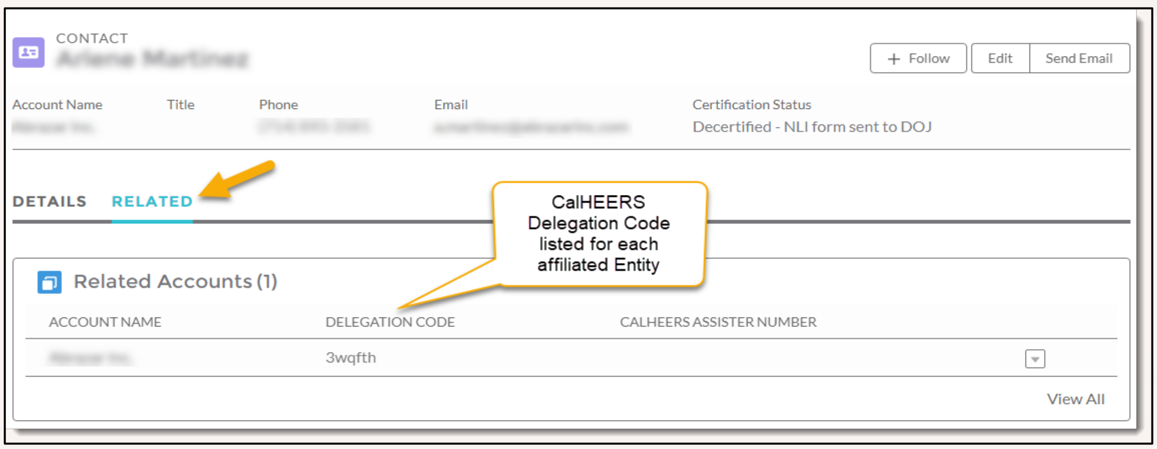
FIRST NAME	LAST NAME	COUNSELOR BADGE: COUNSELOR BADGE NAME	PHOTO	STATUS	PRINTED ON	BADGE REPLACEMENT REASON	BADGE REPLACEMENT OTHER REASON EXPLAIN
Sofia	Barker	BN-12760		Printed	7/28/2017	-	-
Grand Total (1 record)							

DELEGATION CODE

Clicking the counselor's name on the Counselor Delegation Code report will take you to that counselor's Contact Record, where you can find their Delegation Code under the "Related" tab



The **Delegation Code** can be found in the counselor's Contact record.

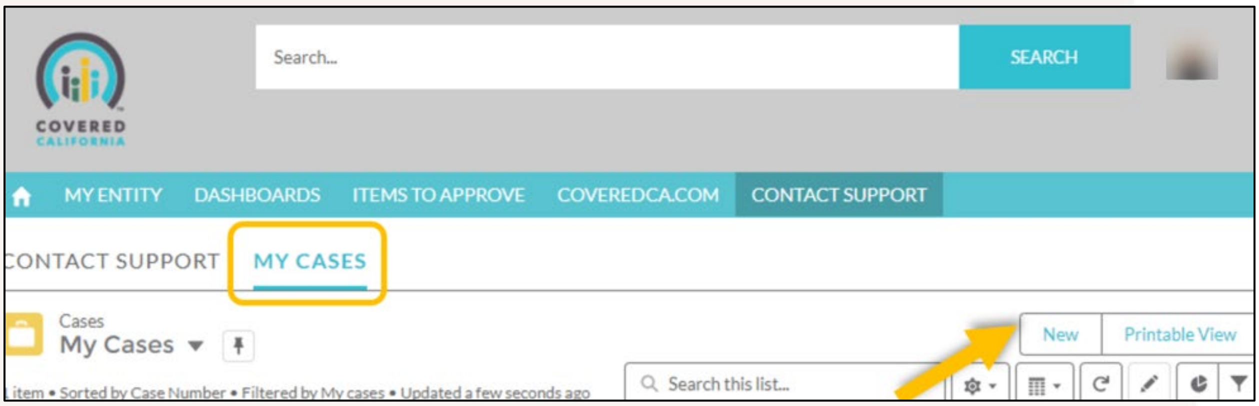


COVEREDCA.COM

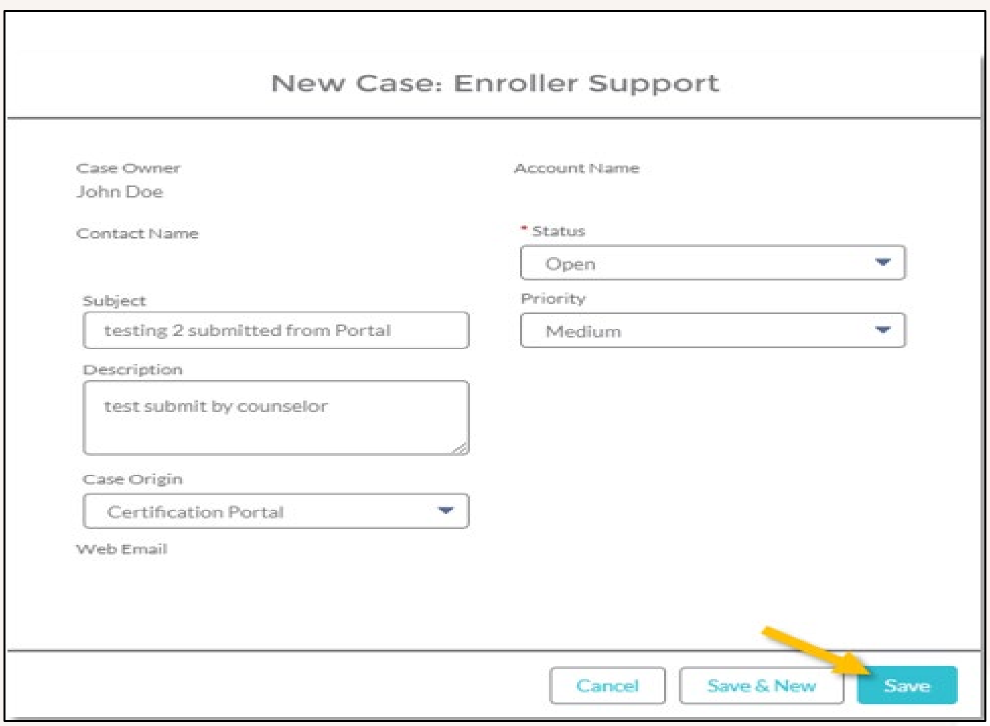
Once the Entity Application is approved, at least one counselor for the entity has been "Certified", and all 'required documents' from the entity have been reviewed and approved, the entity will then receive credentials to gain access to CoveredCA.com.

CONTACT SUPPORT

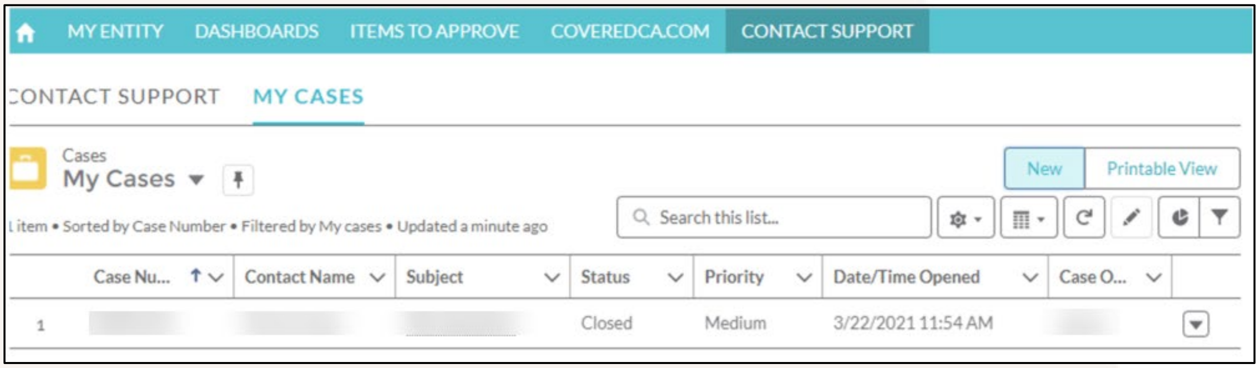
If you need assistance regarding the certification process and/or certification portal, email CommunityPartnerCertSupport@covered.ca.gov or select the **Contact Support** tab and select the **My Cases** sub tab. Select the **New** Tab to create a Case to be reviewed and answered by CSS within 48 hours. Ensure to provide full details of your question or issue in the required fields of the support boxes.



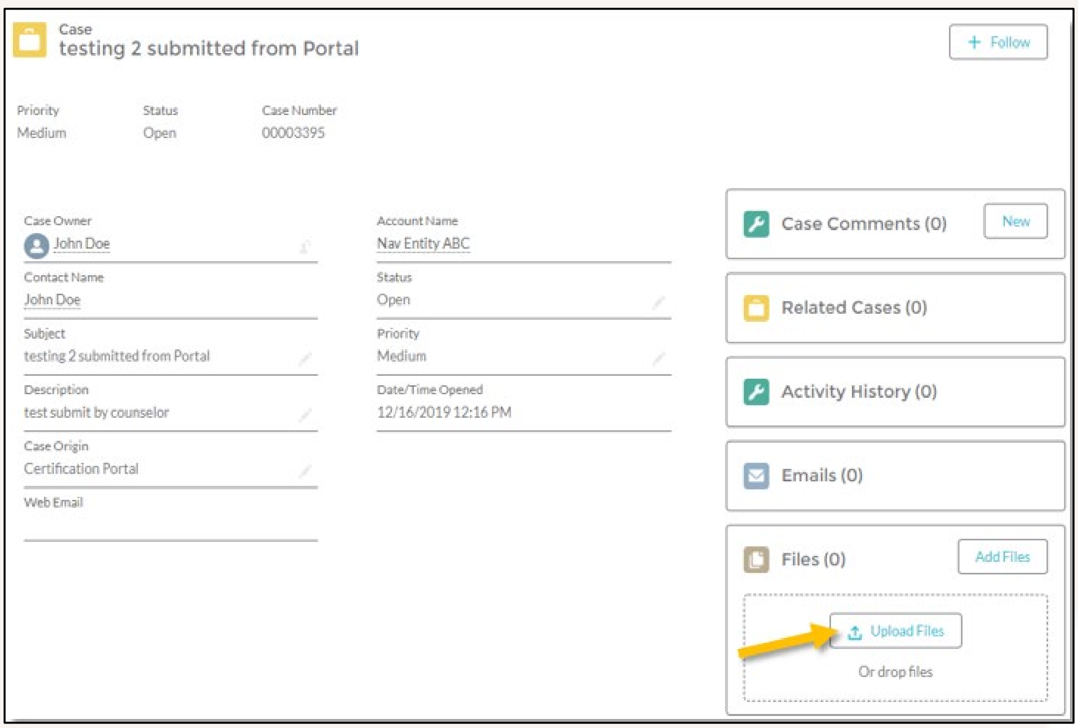
Once completed with full details, select "Save".



Existing support cases that have been submitted can be reviewed in the **My Cases** sub tab.



To add an attachment, select the **Upload Files** button and add your document to your Case.



This concludes the Certification Portal Entity User Overview Manual training steps. If you have any questions or need assistance regarding the Certification Portal or the process, please send the Certification Services Section Team at [CommunityPartnerCertSupport@covered.ca.gov.](mailto:CommunityPartnerCertSupport@covered.ca.gov)