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### IMPORTANT NOTE:

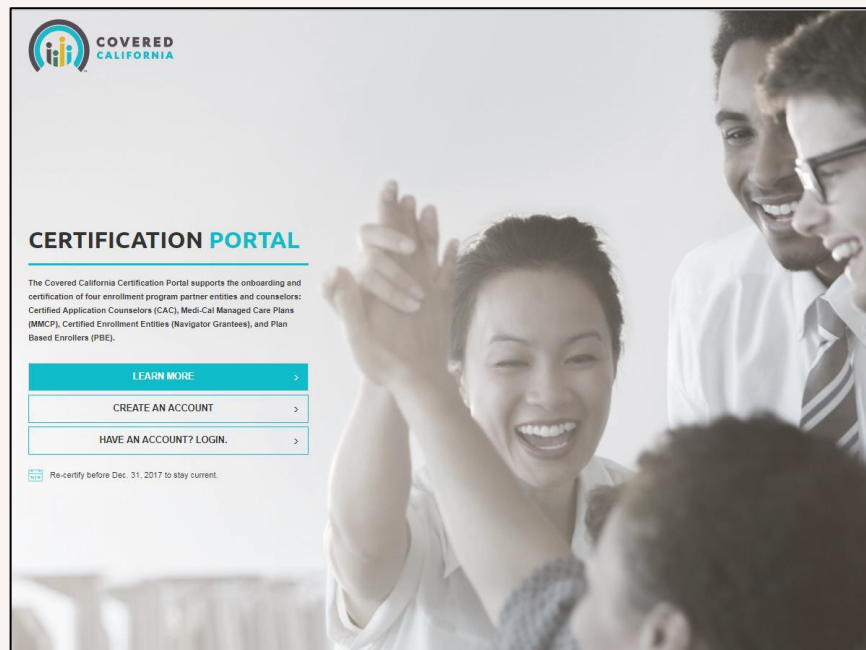
1. Entities that were Active in the old IPAS system ARE NOT REQUIRED to create an account or complete a NEW application in the Certification Portal.
2. After you have successfully logged in to the Certification Portal, please skip to the "My Entity" section on Page 18 to begin managing your account.

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## **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.



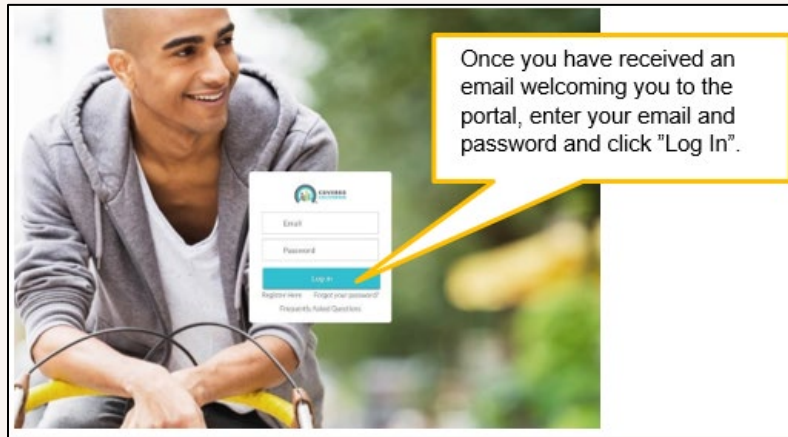
## **ACCOUNT CREATION PROCESS**

### **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

A man with a shaved head, wearing a grey hoodie over a white t-shirt, is smiling and looking at a smartphone. The phone screen shows the Covered California registration page. The form includes fields for First Name, Last Name, Email, Entity Name, Create Password, Confirm Password, and three challenge questions. At the bottom, there is a blue 'Register' button and links for 'Frequently Asked Questions' and 'Already have an account?'.

COVERED CALIFORNIA

First Name

Last Name

Email

Entity Name

Create Password

Confirm Password

What year was the entity established?

Challenge Answer 1

In what month does your fiscal year begin?

Challenge Answer 2

How many conference rooms are there in your main office?

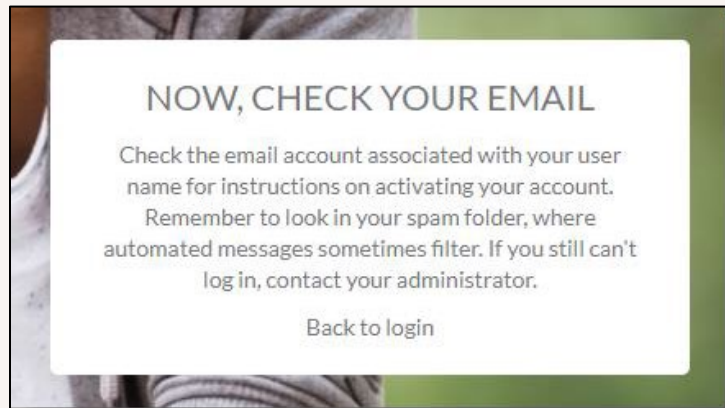
Challenge Answer 3

Register

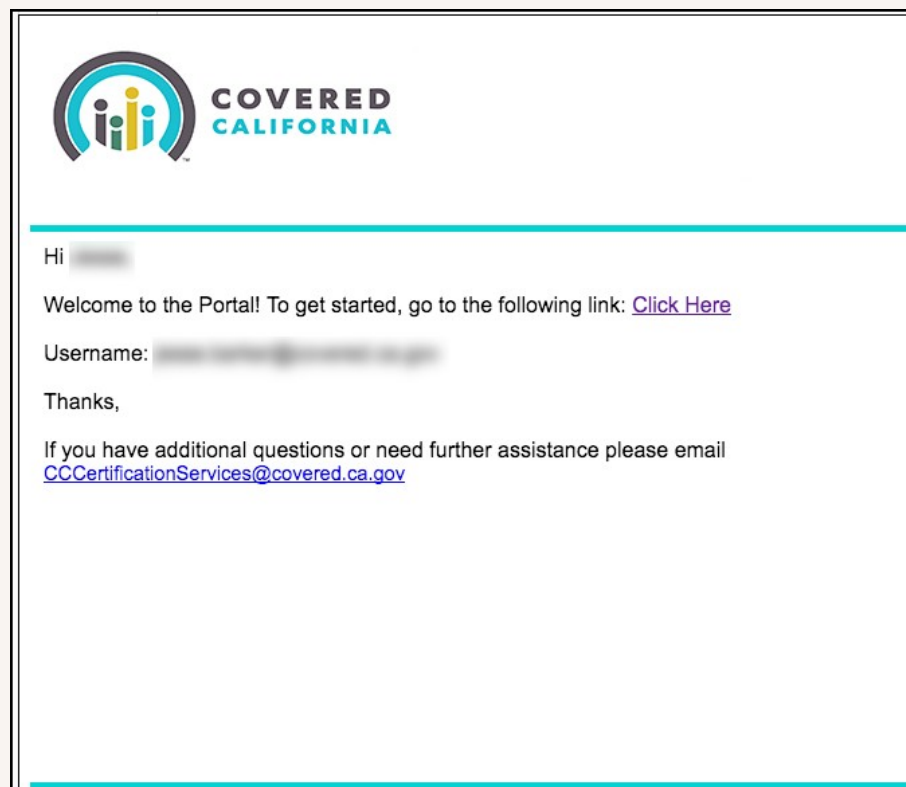
Frequently Asked Questions

Already have an account?

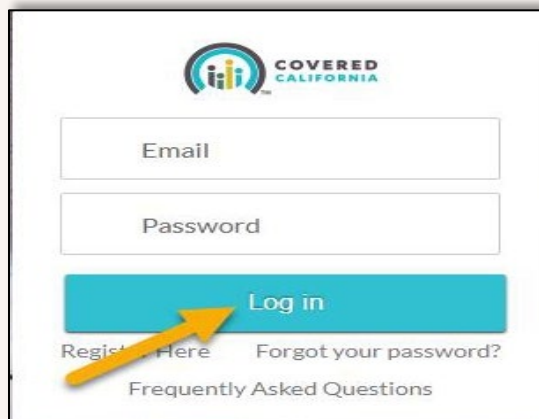
- B. After clicking the “Register” button you will see the following message on your screen. An email notification will be sent with a link to activate the new user account.



- 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.*



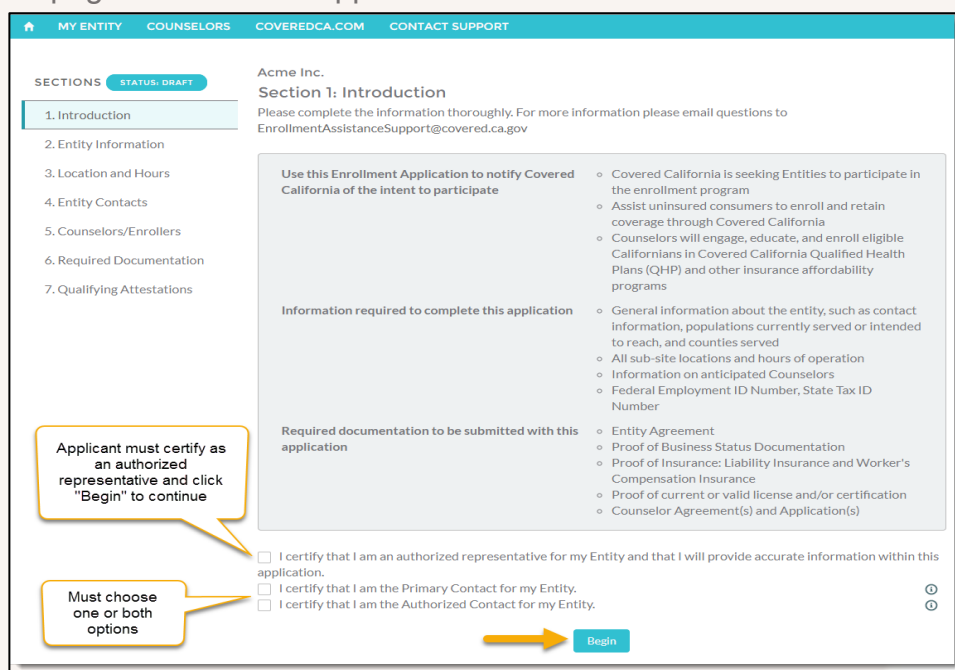
2. Once you click the link in the email message, you will be directed back to the Login Page. Enter the Email and Password that was entered in the registration process. Click “Log in” once your Email and Password are entered.



## 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.

Acme Inc.

Section 2: Entity Information

Please hover over the ⓘ icon for more

Entity Name  
Acme Inc. ⓘ

Entity Type \*  
☐ Certified Application Entity  
☐ Plan Based Enrollment  
☐ Medi-Cal Managed Care Plan

Business Legal Name \* ⓘ

Primary Email Address \* ⓘ

Primary Phone Number \* ⓘ Secondary Phone Number ⓘ

Website Address ⓘ

Federal Tax ID \* ⓘ State Tax ID \* ⓘ

Category\* Non Profit ⓘ

Organization Type \* -- Select -- ⓘ

Year entity was established? \* ⓘ

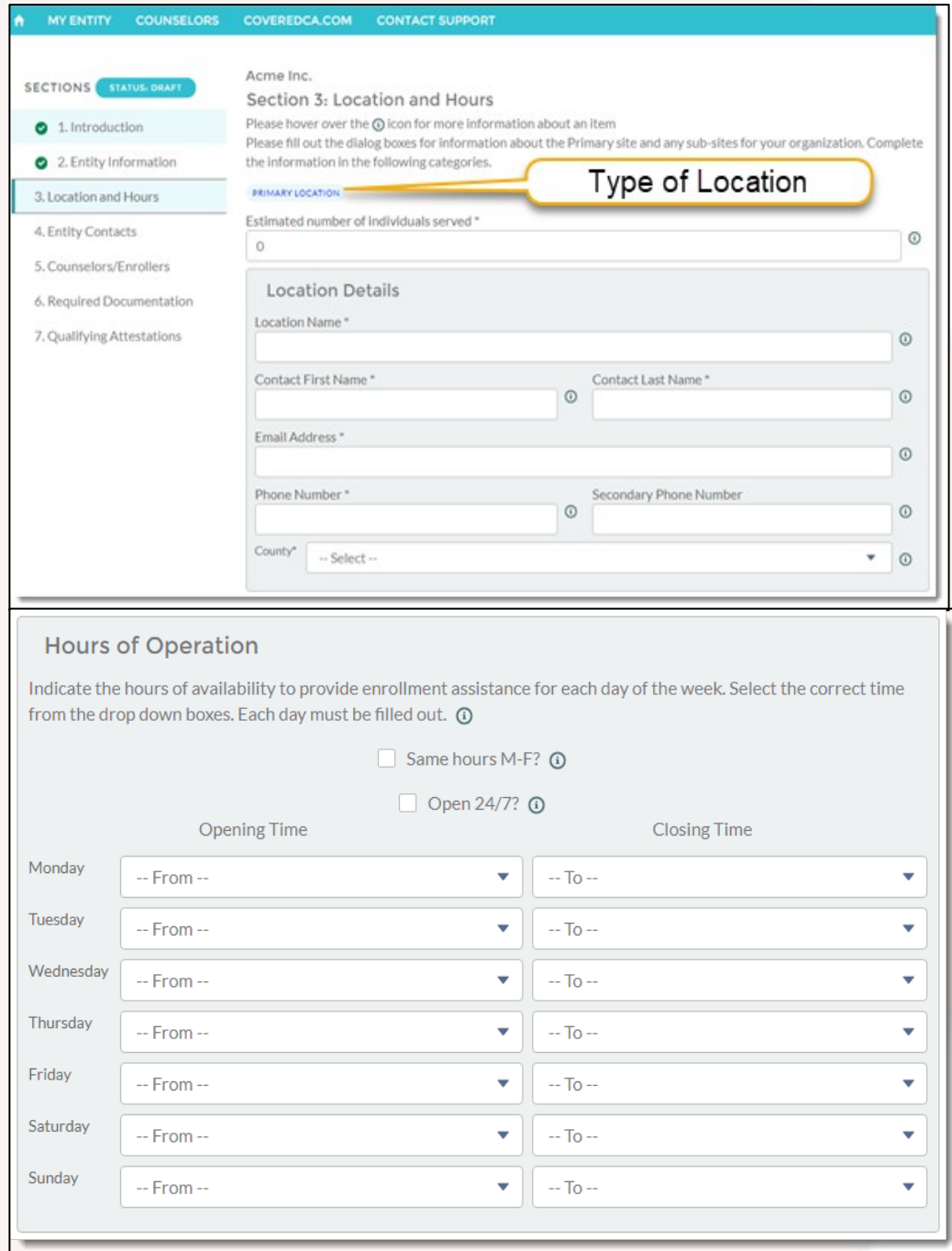
Projected Counselors \* ⓘ

Resource for Counselor affiliation? \* -- Select -- ⓘ

Previous Next

**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.



The screenshot displays the 'Section 3: Location and Hours' form for 'Acme Inc.'. The left sidebar shows a list of sections: 1. Introduction, 2. Entity Information, 3. Location and Hours (selected), 4. Entity Contacts, 5. Counselors/Enrollers, 6. Required Documentation, and 7. Qualifying Attestations. The main content area is titled 'Section 3: Location and Hours' and includes instructions: 'Please hover over the ⓘ icon for more information about an item' and 'Please fill out the dialog boxes for information about the Primary site and any sub-sites for your organization. Complete the information in the following categories.' Below this, there is a 'PRIMARY LOCATION' tab. A yellow callout box labeled 'Type of Location' points to the 'PRIMARY LOCATION' tab. The form includes a field for 'Estimated number of individuals served \*' with a value of '0'. Below this is a 'Location Details' section with fields for 'Location Name \*', 'Contact First Name \*', 'Contact Last Name \*', 'Email Address \*', 'Phone Number \*', 'Secondary Phone Number', and 'County \*' (a dropdown menu with '-- Select --'). Below the 'Location Details' section is the 'Hours of Operation' section. It includes instructions: 'Indicate the hours of availability to provide enrollment assistance for each day of the week. Select the correct time from the drop down boxes. Each day must be filled out. ⓘ'. There are two checkboxes: 'Same hours M-F? ⓘ' and 'Open 24/7? ⓘ'. Below these are two columns of dropdown menus: 'Opening Time' and 'Closing Time'. The rows are labeled with days of the week: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. Each row has an 'Opening Time' dropdown (with '-- From --' selected) and a 'Closing Time' dropdown (with '-- To --' selected).

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.

SECTIONS

STATUS: DRAFT

✓ 1. Introduction

✓ 2. Entity Information

3. Location and Hours

4. Entity Contacts

5. Counselors/Enrollers

6. Required Documentation

7. Qualifying Attestations

Acme Inc.

Section 3: Location and Hours

Please hover over the ⓘ icon for more information about an item.

Please fill out the dialog boxes for information about the item. The information in the following categories.

Site Locations

LOCATION NAME

Acme Location 1PRIMARY LOCATION

+ New Sub Site

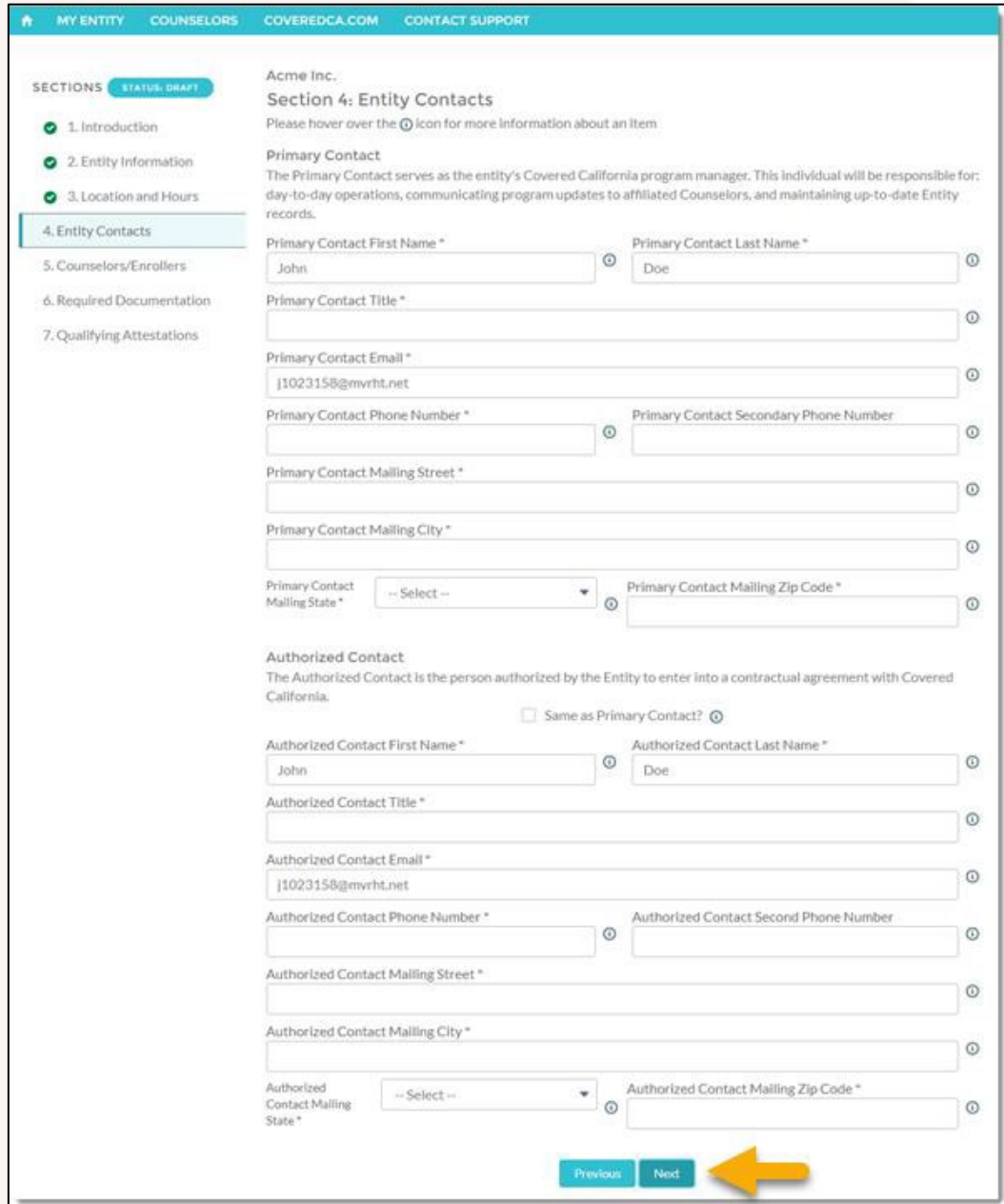
View/Edit existing Locations

Proceed to next section

Previous

Next

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).



**Acme Inc.**

**Section 4: Entity Contacts**

Please hover over the ⓘ icon for more information about an item

**Primary Contact**

The Primary Contact serves as the entity's Covered California program manager. This individual will be responsible for: day-to-day operations, communicating program updates to affiliated Counselors, and maintaining up-to-date Entity records.

Primary Contact First Name \* John ⓘ

Primary Contact Last Name \* Doe ⓘ

Primary Contact Title \* ⓘ

Primary Contact Email \* j1023158@mvrrht.net ⓘ

Primary Contact Phone Number \* ⓘ

Primary Contact Secondary Phone Number ⓘ

Primary Contact Mailing Street \* ⓘ

Primary Contact Mailing City \* ⓘ

Primary Contact Mailing State \* -- Select -- ⓘ

Primary Contact Mailing Zip Code \* ⓘ

**Authorized Contact**

The Authorized Contact is the person authorized by the Entity to enter into a contractual agreement with Covered California.

☐ Same as Primary Contact? ⓘ

Authorized Contact First Name \* John ⓘ

Authorized Contact Last Name \* Doe ⓘ

Authorized Contact Title \* ⓘ

Authorized Contact Email \* j1023158@mvrrht.net ⓘ

Authorized Contact Phone Number \* ⓘ


Authorized Contact Second Phone Number ⓘ

Authorized Contact Mailing Street \* ⓘ

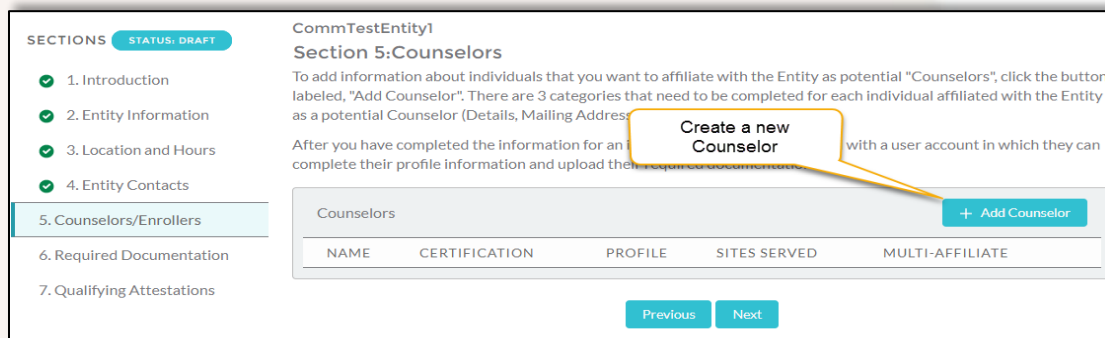
Authorized Contact Mailing City \* ⓘ

Authorized Contact Mailing State \* -- Select -- ⓘ

Authorized Contact Mailing Zip Code \* ⓘ

**Previous** **Next** 

**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.



**SECTIONS** STATUS: DRAFT

- 1. Introduction
- 2. Entity Information
- 3. Location and Hours
- 4. Entity Contacts
- 5. Counselors/Enrollers**
- 6. Required Documentation
- 7. Qualifying Attestations

**CommTestEntity1**  
**Section 5: Counselors**

To add information about individuals that you want to affiliate with the Entity as potential "Counselors", click the button labeled, "Add Counselor". There are 3 categories that need to be completed for each individual affiliated with the Entity as a potential Counselor (Details, Mailing Address, and Required Documentation).

After you have completed the information for an individual, click the "Create Counselor" button to create a user account in which they can complete their profile information and upload their required documentation.

**Create a new Counselor**

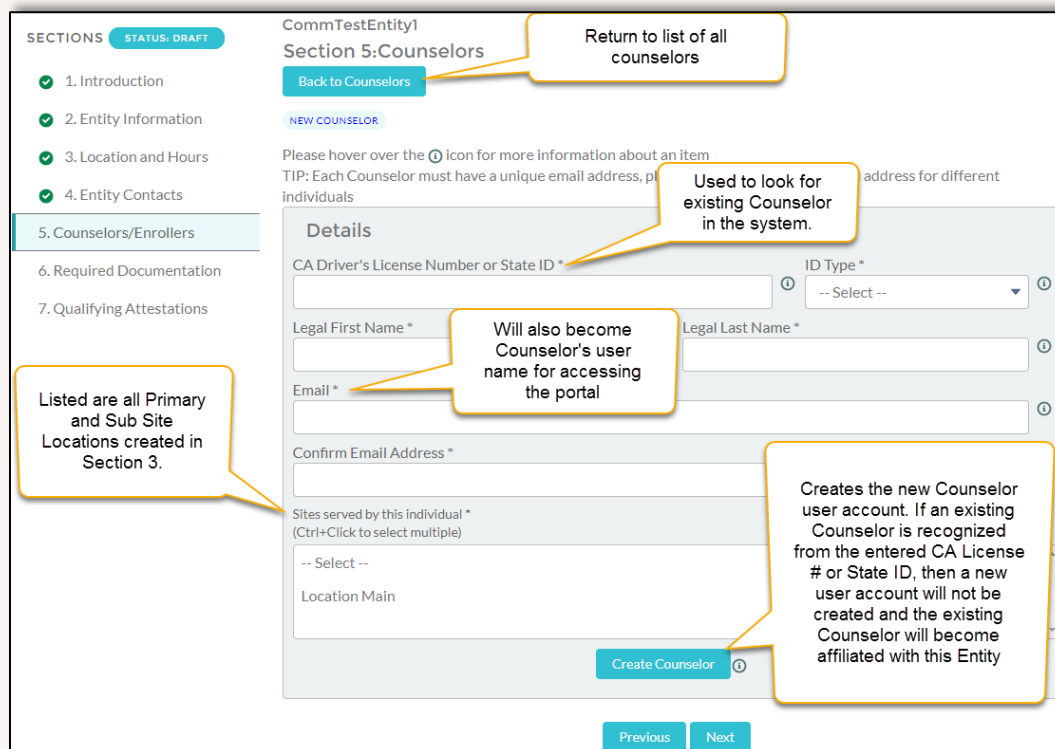
**Counselors** [+ Add Counselor](#)

NAME	CERTIFICATION	PROFILE	SITES SERVED	MULTI-AFFILIATE

[Previous](#) [Next](#)

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.



**SECTIONS** STATUS: DRAFT

- 1. Introduction
- 2. Entity Information
- 3. Location and Hours
- 4. Entity Contacts
- 5. Counselors/Enrollers**
- 6. Required Documentation
- 7. Qualifying Attestations

**CommTestEntity1**  
**Section 5: Counselors**

[Back to Counselors](#)

[NEW COUNSELOR](#)

Please hover over the ⓘ icon for more information about an item

TIP: Each Counselor must have a unique email address, please use a different email address for different individuals

**Details**

CA Driver's License Number or State ID \*  ⓘ ID Type \*  ⓘ

Legal First Name \*  ⓘ Will also become Counselor's user name for accessing the portal

Legal Last Name \*  ⓘ

Email \*  ⓘ Used to look for existing Counselor in the system.

Confirm Email Address \*

Sites served by this individual \* (Ctrl+Click to select multiple)

-- Select --

Location Main

[Create Counselor](#) ⓘ Creates the new Counselor user account. If an existing Counselor is recognized from the entered CA License # or State ID, then a new user account will not be created and the existing Counselor will become affiliated with this Entity

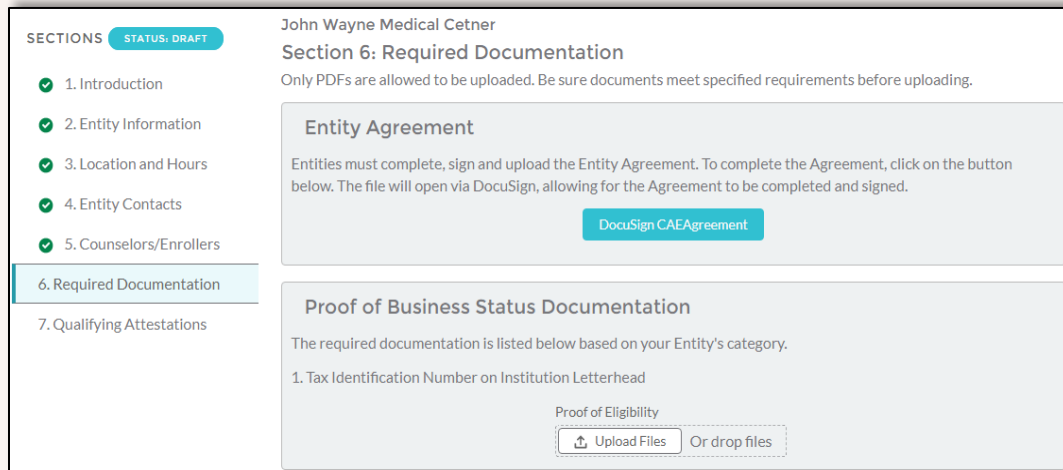
[Previous](#) [Next](#)

Listed are all Primary and Sub Site Locations created in Section 3.

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.



**SECTIONS** STATUS: DRAFT

- 1. Introduction
- 2. Entity Information
- 3. Location and Hours
- 4. Entity Contacts
- 5. Counselors/Enrollers
- 6. Required Documentation**
- 7. Qualifying Attestations

John Wayne Medical Cetner  
**Section 6: Required Documentation**  
 Only PDFs are allowed to be uploaded. Be sure documents meet specified requirements before uploading.

**Entity Agreement**  
 Entities must complete, sign and upload the Entity Agreement. To complete the Agreement, click on the button below. The file will open via DocuSign, allowing for the Agreement to be completed and signed.

[DocuSign CAEAgreement](#)

**Proof of Business Status Documentation**  
 The required documentation is listed below based on your Entity's category.

1. Tax Identification Number on Institution Letterhead

Proof of Eligibility

[Upload Files](#) Or drop files

- a. **ENTITY AGREEMENT:** Upon request, the CA CSS Team ([CommunityPartnerCertSupport@covered.ca.gov](mailto: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.

**Proof of Business Status Documentation**

The required documentation is listed below based on your Entity's category.

1. Tax Identification Number on Institution Letterhead

Proof of Eligibility

  Or drop files

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

**Proof of Insurance**

**TIP: Please do not upload insurance certificates until Covered California has been listed as an Additional Insured.**


All entities must submit a Certificate of Insurance that demonstrates that the Entity meets the following minimum insurance requirements.

1. General Liability insurance with coverage of not less than \$1,000,000 per occurrence naming Covered California as additionally insured.

**TIP: Covered California must be named as additionally insured on the general liability insurance policy. Do not upload proof of insurance, or submit your application, until this requirement is met. Provide your insurance carrier with the following additionally insured information:**

Covered California  
1601 Exposition Blvd  
Sacramento, CA 95815


General Liability Insurance

  Or drop files

2. Worker's Compensation Insurance

**TIP: Only a sole-proprietor is excluded from submitting proof of workers compensation, but must instead upload a statement as such on letterhead**

Worker's Compensation Insurance

  Or drop files

**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.



**Proof of current or valid license**

Entities must provide documentation of the business license and other relevant certification of the Entity, including any federal or state designations.

Proof of License

  Or drop files

- 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.



**Conflict of Interest Prevention Plan**

Entities must provide a Conflict of Interest Prevention Plan. This Conflict of Interest Prevention Plan, when uploaded, will be submitted to legal team for Review and either approved or returned to submitter for updates.

Conflict of Interest Prevention Plan

Or drop files

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.

SECTIONS

STATUS: DRAFT

1. Introduction

2. Entity Information

3. Location and Hours

4. Entity Contacts

5. Counselors/Enrollers

6. Required Documentation

7. Qualifying Attestations

CommTestEntity1

**Section 7: Qualifying Attestations**

Please respond to the following screening attestations pertaining to the Entity applying for the program. When you are done reading the qualifying attestations below, please agree to the acknowledgement statement at the bottom of this page and click "Submit".

Attestation 1

I certify the organization applying is not a health insurance issuer or stop loss issuer, a subsidiary of a health insurance issuer or a stop loss insurer, 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 issuer or stop loss insurance 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 qualified or non-qualified health coverage.

Attestation 4

I 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 disabilities.

☐ 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.

Previous

Submit

Entity User must agree to all Qualifying Attestations

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.

Confirm Application Submission

Are you sure that you are ready to Submit the application? By clicking Submit you hereby certify that the information present is true to the best of your knowledge.

Cancel

Submit

## 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 screenshot shows a web interface for an Entity Application. At the top, a teal banner reads "Application has been submitted for processing" with a close button. Below this, the status is "STATUS: PENDING" with a "Manage Entity" button. A sidebar on the left lists sections: "1. Introduction", "5. Counselors/Enrollers", "6. Required Documentation", and "7. Qualifying Attestations". The "1. Introduction" section is highlighted with a callout: "Application can be reviewed but is locked for editing". The main content area shows "Application Status: Pending" and a table with columns "STATUS" and "DATE". The table contains one row: "Created" with the date "Aug 10, 2017 11:34 AM".

- 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:

- 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.
- Pending** – The Entity Application is awaiting a determination from Covered California’s review team.
- Approved** – The Entity Application has been approved.
- Not Approved** – The Entity Application has been reviewed and NOT approved.
- In CC Review** – The Application has been initially reviewed, but further review is necessary.
- 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.

**SECTIONS** STATUS: DRAFT ▼ Manage Entity

- 1. Introduction
- 2. Entity Information *Notes added by the Covered CA review team*
- 3. Location and Hours
- 4. Entity Contacts
- 5. Counselors/Enrollers
- 6. Required Documentation *History of status changes*
- 7. Qualifying Attestations

**Application Notes**

TITLE	BODY
Draft	Please correct the Mailing Address on the Primary Location. The Zip Code does not match the city provided.

**Application Status: Draft** Submitted: 08/11 08:40 AM

STATUS	DATE
Draft	Aug 11, 2017 08:52 AM
Pending	Aug 11, 2017 08:40 AM
Created	Aug 10, 2017 11:34 AM

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.

**SECTIONS** STATUS: DRAFT ▼ Manage Entity

- 1. Introduction
- 2. Entity Information
- 3. Location and Hours
- 4. Entity Contacts
- 5. Counselors/Enrollers

**Application Notes**

TITLE	BODY
Draft	Please correct the Mailing Address on the Primary Location. The Zip Code does not match the city provided.

**Application Status: Draft** Submitted: 08/11 08:40 AM

Entity Disclosure Update

**COVERED CALIFORNIA**

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

**NEXT STEPS To Complete Certification Requirements:**

- 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.
- 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]
- Ensure that your Counselor Roster is finalized in the Entity application by completing all the Counselor candidate information.
- The Counselor must complete the following steps for their profile and agreement:
  - 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.
  - 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.capitalivescan.com/locations\\_statewide\\_network.html](http://www.capitalivescan.com/locations_statewide_network.html)
  - Sign & Submit their Counselor agreement
  - Upload a head shot photo for Counselor badge.
- 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](mailto:CCUlearning@covered.ca.gov).

If you have additional questions or need further assistance please email [certificationportal@covered.ca.gov](mailto: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:

The screenshot shows the 'My Entity' page with several sections and callouts:

- Entity Information (Left Side):** A callout states, "Entity details are displayed on the left side of the page." This section includes fields for Account Name, Parent Account, Business Legal Name, Website Address, Category, and Non Profit.
- Required Documentation (6+):** A callout states, "Required documents are managed here. Click here (or View All) to view all records." This section displays a table of required documents.
- My Files (3):** A callout states, "Any files outside of Required Documentation can be uploaded and managed here." This section displays a table of files.
- Locations (2):** A callout states, "Entity Primary and Sub Site Locations." This section displays a table of locations.
- Entity Change Requests (6+):** A callout states, "There are two types of change requests: Change Request and Withdrawal Requests." This section displays a table of change requests.
- CalHEERS Credentials:** A callout states, "Credentials for accessing CalHEERS system. Populated once Entity becomes Active and Registered with Covered CA." This section includes fields for CalHEERS Username, Password, and Pin.

REQUIRE...	FILE TYPE	STATUS	EXPIRATIO...
General Lia...	General Liabil...	Expired	
CAEAgree...	CAEAgreement	DocuSign Pend...	
flower	Worker's Com...	Submitted	
Entity Agre...	Entity Agreem...	Submitted	
Chewie's LL...	Proof of License	Approved	
ReqDoc_90...	Workers Comp...	Approved	

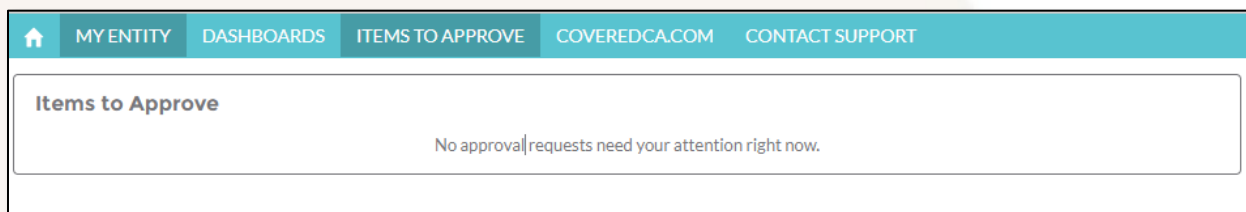
MY FILE ...	FILE ...	STATUS	EXPIRATIO...
Test	Productivity...		
MyFile_909...	Entity Manage...		
MyFile_909...	Entity Manage...		

LOCATIO...	CONTACT F...	CONTACT L...	PHONE NU...
Secondary S...	John	Smith	(559) 555-1234
Main Site	Luke	Skywalker	(555) 698-5126

CHANGE ...	RECORD...	CREATED D...	CREATED BY
CR-19791	Change Requ...	8/21/2018 10:...	Sys Admin
CR-19790	Change		
CR-19789	Ch		
CR-19788	Ch		
CR-19787	Chang		
CR-19785	Change Request	8/21/2018 10:...	Sys Admin

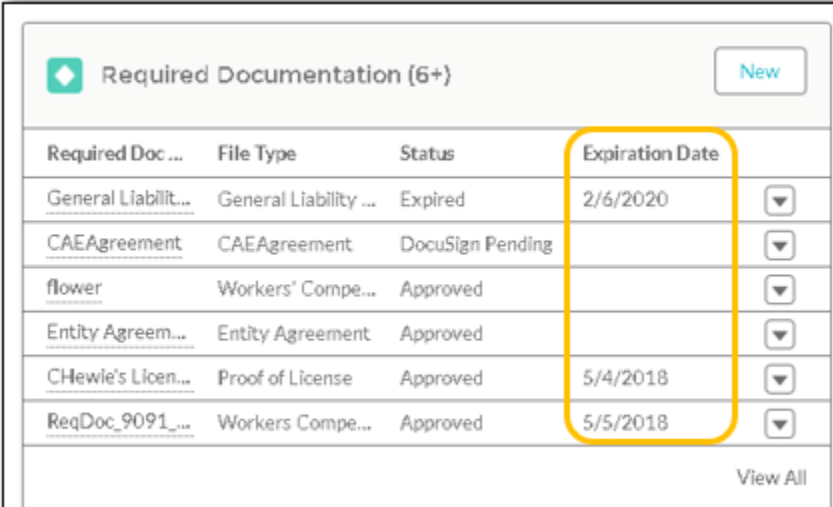
## NEW – ENTITY ACCOUNT “MY APPROVALS”

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.



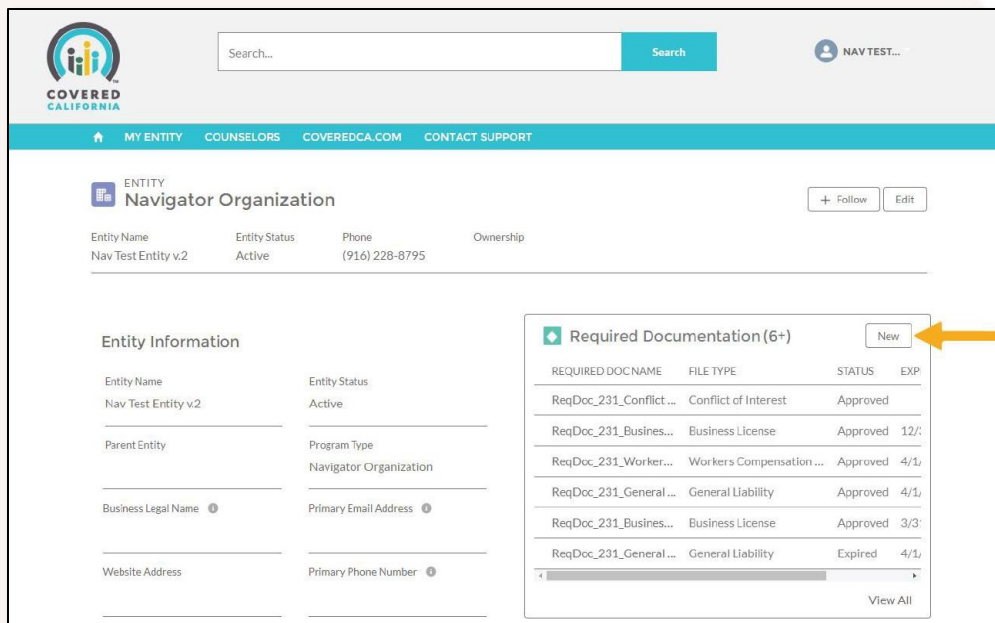
Required Doc ...	File Type	Status	Expiration Date	
General Liabilit...	General Liability ...	Expired	2/6/2020	▼
CAEAgreement	CAEAgreement	DocuSign Pending		▼
flower	Workers' Compe...	Approved		▼
Entity Agreem...	Entity Agreement	Approved		▼
CHewie's Lioen...	Proof of License	Approved	5/4/2018	▼
ReqDoc_9091_...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



Entity Name: Nav Test Entity v2  
 Entity Status: Active  
 Phone: (916) 228-8795

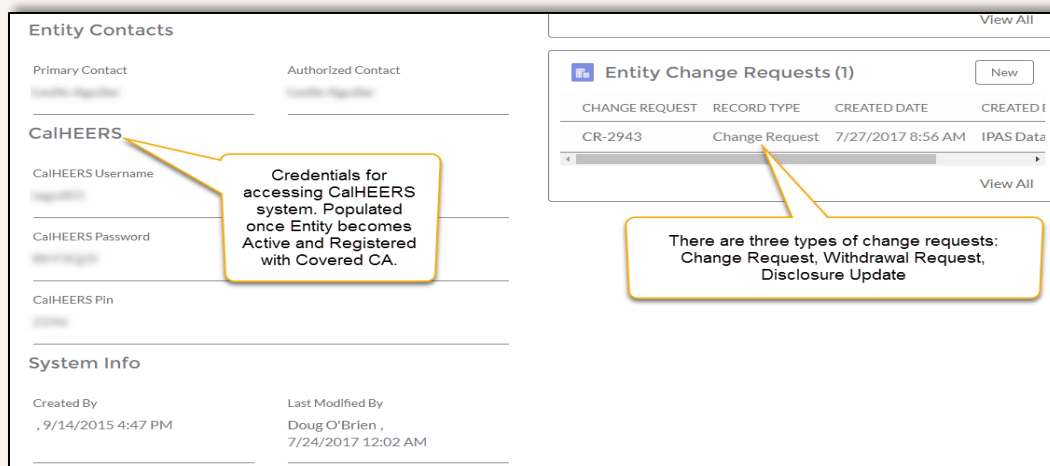
**Entity Information**

Entity Name: Nav Test Entity v2  
 Entity Status: Active  
 Parent Entity: Navigator Organization  
 Program Type: Navigator Organization  
 Business Legal Name: [Redacted]  
 Primary Email Address: [Redacted]  
 Website Address: [Redacted]  
 Primary Phone Number: [Redacted]

**Required Documentation (6+)** New

REQUIRED DOC NAME	FILE TYPE	STATUS	EXP
ReqDoc_231_Conflict...	Conflict of Interest	Approved	
ReqDoc_231_Busines...	Business License	Approved	12/1
ReqDoc_231_Worker...	Workers Compensation ...	Approved	4/1
ReqDoc_231_General ...	General Liability	Approved	4/1
ReqDoc_231_Busines...	Business License	Approved	3/3
ReqDoc_231_General ...	General Liability	Expired	4/1

[View All](#)



**Entity Contacts**

Primary Contact: [Redacted]  
 Authorized Contact: [Redacted]

**CalHEERS**

CalHEERS Username: [Redacted]  
 CalHEERS Password: [Redacted]  
 CalHEERS Pin: [Redacted]

**System Info**

Created By: [Redacted]  
 Last Modified By: Doug O'Brien  
 , 9/14/2015 4:47 PM  
 7/24/2017 12:02 AM

**Entity Change Requests (1)** New

CHANGE REQUEST	RECORD TYPE	CREATED DATE	CREATED I
CR-2943	Change Request	7/27/2017 8:56 AM	IPAS Data

[View All](#)

Credentials for accessing CalHEERS system. Populated once Entity becomes Active and Registered with Covered CA.

There are three types of change requests: Change Request, Withdrawal Request, Disclosure Update

1. Complete required fields and click on the “Save” button

**New Required Documentation**

**Information**

\* Required Doc Name

\* Entity

\* File Type

Status

**File Details**

File Details

Expiration Date

[Cancel](#) [Save & New](#) [Save](#)

2. Click the name of the file you just created

ENTITY FILE NAME	Verification Report	Entity Agreement
Proof of Eligibility	Proof of Eligibility	Approved
Proof of Insurance	General Liability Insuran...	Approved
Proof Of License	Proof of License	Approved
W9	W9	Approved

[View All](#)

3. Click the “Upload Files” button

**ENTITY FILE**  
**Verification Report**

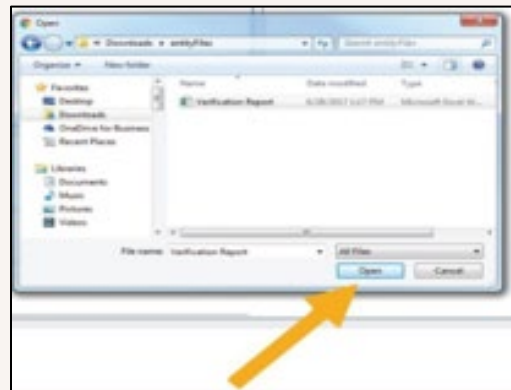
**Notes & Attachments (0)**

[Upload Files](#)

*Or drag files*

Entity File Name	File Type	File Details	Expiration Date
Verification Report			

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 MyFiles related list.


**My Files (6+)**
New

MY FILE NAME	FILE TYPE	STATUS	EXF
MyFile_2019_Counsel...	Counselor Withdraw Re...	Submitted	
MyFile_2019_Conflict...	Conflict of Interest Plan	Submitted	
MyFile_2019_Other2...	Other	Submitted	
MyFile_2019_Other2...	Other	Submitted	
MyFile_2019_Other2...	Other	Submitted	
MyFile_2019_Counsel...	Counselor Withdraw Re...	Submitted	

View All

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

New Required Documentation

Information

\* Required Doc Name

\* File Type 1  
--None--

Status 1  
Submitted

\* Entity

File Details 1

Expiration Date 1

Cancel Save & New Save

- 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.

My File  
MyFileVersion\_30008\_20161104200517077.xlsx

My File Name  
MyFileVersion\_30008\_20161104200517077.xlsx

File Type 1  
Verification Report

File Details 1

Status 1  
Incomplete

Expiration Date 1

7:12:22 PM

Add Files

Upload Files

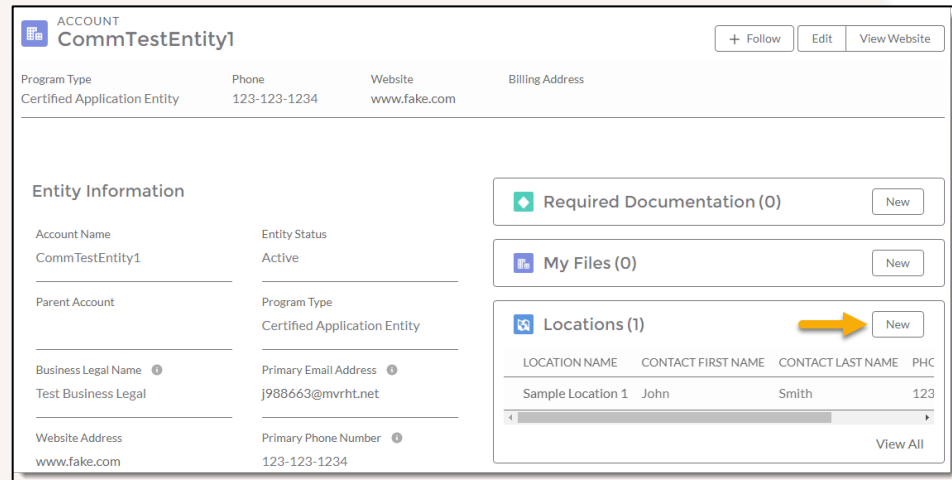
Or drop files

Status and Expiration Date fields will be managed by the Certification Team

Drag and drop or select "Upload Files" to upload files to the My File record. Note that multiple files could be uploaded to a give My File record

## MANAGE LOCATIONS

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



ACCOUNT  
CommTestEntity1

+ Follow Edit View Website

Program Type: Certified Application Entity  
Phone: 123-123-1234  
Website: www.fake.com  
Billing Address:

**Entity Information**

Account Name: CommTestEntity1  
Entity Status: Active  
Parent Account:  
Program Type: Certified Application Entity  
Business Legal Name: Test Business Legal  
Primary Email Address: j988663@mvrht.net  
Website Address: www.fake.com  
Primary Phone Number: 123-123-1234

**Required Documentation (0)** New

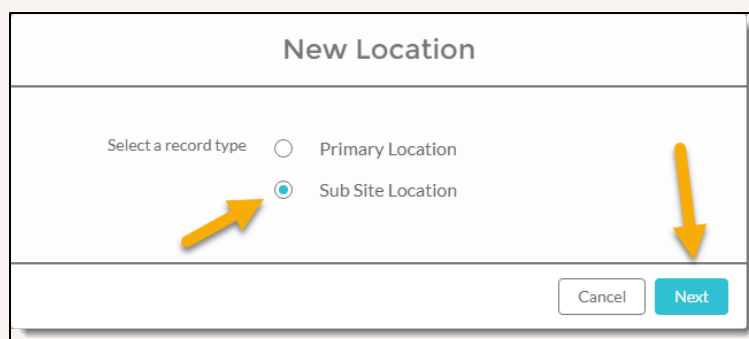
**My Files (0)** New

**Locations (1)** New

LOCATION NAME	CONTACT FIRST NAME	CONTACT LAST NAME	PHC
Sample Location 1	John	Smith	123

View All

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



**New Location**

Select a record type

☐ Primary Location

☒ Sub Site Location

Cancel Next

- B. Once all the information is completed click on the “Save” button to complete the process.

## Create Location: Sub Site Location

\* Estimated number of individuals served ⓘ

Primary Location ⓘ  

Sample Location 1

×

Record Type  
Sub Site Location

### Location Details

\* Location Name

\* Entity  

CommTestEntity1

×

\* Contact First Name ⓘ

Contact Last Name ⓘ

\* Phone Number ⓘ

Secondary Phone Number ⓘ

\* Email Address ⓘ

\* County ⓘ  

Amador

▼

Cancel

Save & New

Save

**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**  
**Comm 1 Sub Site**

Physical City: Sacramento    Physical State: CA    Physical Zip Code: 95834

Estimated number of individuals served: 21

Primary Location: Comm User Site 1

Record Type: Sub Site Location

**Location Details**

Location Name: Comm 1 Sub Site    Entity: CommTestEntity1

Contact First Name:    Contact Last Name:

**Site Served (4)**

SITE SERVED NAME	COUNSELOR CONTACT
Site-0021	Counselor1 Test
Site-0054	Jimmy Kemmel
Site-0059	Jimmy Neutron
Site-0060	Elmer Fudd

View All

Location view of Sites Served

**CONTACT**  
**Counselor1 Test**

Title:    Entity Name: CommTestEntity1    Phone(2): 111-222-4337    Email: sam@saasfocus.com    Contact Owner:

**Name**

Name: Counselor1 Test    Entity Name: CommTestEntity1

**Certification**

Certification Status: Certified    Certification Date: 7/11/2017

Counselor Certification Number: 1000010003    Recertification Due Date:

**Contact Information**

Email: sam@saasfocus.com    Title:

Phone: 111-222-4337    Department:

Other Phone: 444-555-6221    Contact Type:

Mailing Address: 1234 Council Blvd.    Birthdate: 5/13/1991

**Related Entities (1)**

ENTITY NAME	CALHEERS EMAIL/USERN
CommTestEntity1	

View All

**Counselor Files (3)**

COUNSELOR FILE NAME	FILE TYPE
CECAgreement.pdf	CEC Agreement
CMMCPE Insurance A...	CMMCPE Insuranc
CECAgreementLpdf	CEC Agreement

View All

**Site Served (2)**

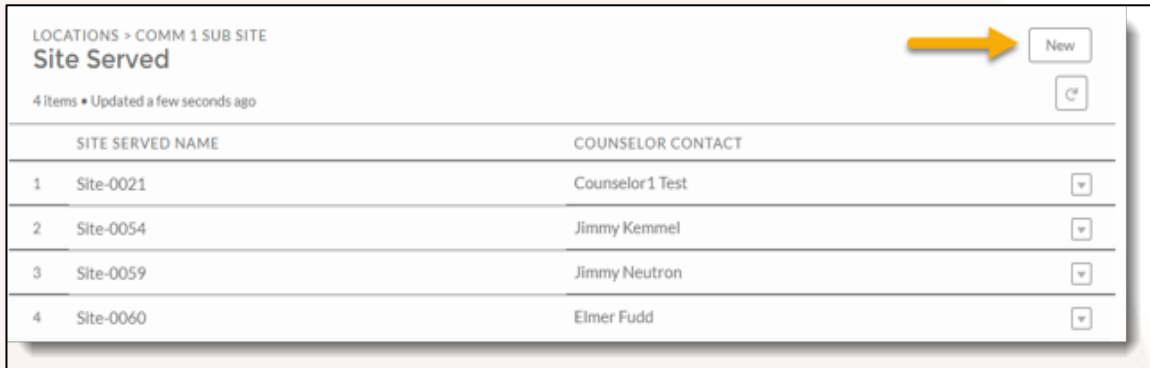
SITE SERVED NAME	LOCATION	CRE
Site-0021	Comm 1 Sub Site	3/11
Site-0067	Sub Site 3	7/11

View All

Counselor view of Sites Served

## CREATING LOCATION SITES SERVED:

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

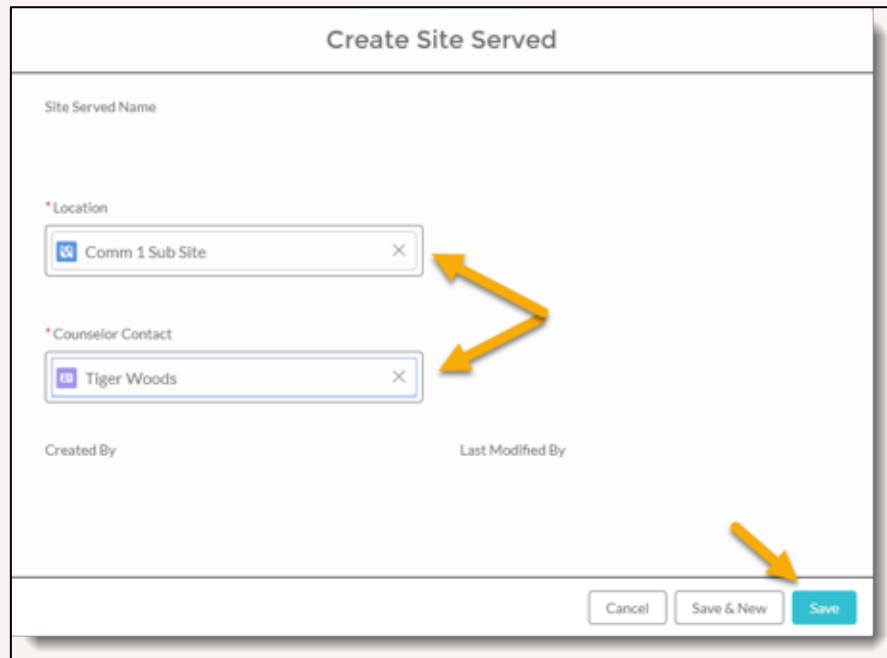


LOCATIONS > COMM 1 SUB SITE  
**Site Served**  
 4 items • Updated a few seconds ago

	SITE SERVED NAME	COUNSELOR CONTACT	
1	Site-0021	Counselor1 Test	▼
2	Site-0054	Jimmy Kemmel	▼
3	Site-0059	Jimmy Neutron	▼
4	Site-0060	Elmer Fudd	▼

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).



**Create Site Served**

Site Served Name

\* Location  
 Comm 1 Sub Site

\* Counselor Contact  
 Tiger Woods

Created By Last Modified By

Cancel Save & New Save

Saving Site Served

## ENTITY CHANGE REQUESTS

### 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".

The screenshot displays the 'My Entity' page. At the top right, there are two buttons: '+ Follow' and 'Edit'. An orange arrow points to the 'Edit' button. The page is divided into several sections:

- Account Information:** Includes fields for Program Type (Certified Application Entity), Primary Phone Number, Website Address, and Primary Location Address.
- Entity Information:** A section with a dropdown arrow, containing fields for Account Name, Entity Status (Pending), Parent Account, Program Type (Certified Application Entity), Business Legal Name, Primary Email Address, Website Address, and Primary Phone Number.
- Required Documentation (6+):** A table listing documentation requirements with columns for Required Document, File Type, Status, and Expiration Date. A 'New' button is located next to the table header.

Required ...	File Type	Status	Expiration D...
Issued Cert...	Workers' Co...	Approved	10/15/2021
CAE Agree...	Entity Agree...	Approved	6/23/2023
Issued Cert...	General Liab...	Approved	6/26/2021
ATCAA gov...	Proof of Lice...	Approved	1/11/2022
Issued Cert...	Workers' Co...	Approved	10/15/2021
ATCAA gov...	Proof of Lice...	Archived	

View All

**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
<b>1.0 Entity Information</b>	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
<b>1.2 Special Populations Served</b>	All	N	Y
<b>1.3 Counties Served</b>	All	N	Y
<b>1.4 Resource Directory</b>	All	N	Y
<b>2.0 Location and Hours</b>	All	N	Y
<b>2.1 Hours of Operation</b>	All	N	Y
<b>2.2 Site Mailing Address</b>	All	N	Y
<b>2.3 Site Physical Address</b>	All	N	Y
<b>2.4 Spoken Languages</b>	All	N	Y
<b>2.5 Estimate # Individuals</b>	All	N	Y
<b>2.6 % OF Individuals Served</b>	All	N	Y
<b>2.7 Employment Industries</b>	All	N	Y
<b>3.0 Counselor Assignment</b>	All	Y	Y
<b>4.0 Entity Contact Info</b>	All	Y	Y

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

ACCOUNT

CommTestEntity1

[+ Follow](#)
[Edit](#)
[View Website](#)

Program Type

Certified Application Entity

Phone

123-123-1234

Website

www.fake.com

Billing Address

Entity Information

Account Name

CommTestEntity1

Entity Status

Active

Parent Account

Program Type

Certified Application Entity

Business Legal Name

Test Business Legal

Website Address

www.newsite.com

Category

Government

Federal Tax ID

12-3456789

Organization Type

Labor Unions

Change Request records are created whenever a set of tracked changed are captured.

There are three types of Entity Chang Requests: Change Request, Withdrawal Request, Disclosure Update

Required Documentation (0)

New

My Files (0)

New

Locations (1)

New

LOCATION NAME	CONTACT FIRST NAME	CONTACT LAST NAME	PHC
Sample Location 1	John	Smith	123

View All

Entity Change Requests (2)

New

CHANGE REQUEST	RECORD TYPE	CREATED DATE	CREATED
CR-2944	Change Request	7/28/2017 11:22 AM	Comm U
CR-2943	Change Request	7/28/2017 10:32 AM	IPAS Dat

View All

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

ENTITY CHANGE REQUEST

CR-2944

[Clone](#)
[Submit for Approval](#)

Change Request

CR-2944

Entity

CommTestEntity1

Number of Changes

4

Record Type

Change Request

Status

Submitted

Created By

Comm User1, 7/28/2017 11:22 AM

7/28/2017 11:22 AM

List will display all changes that were captured, showing the old and new values.

Entity Changes (4)

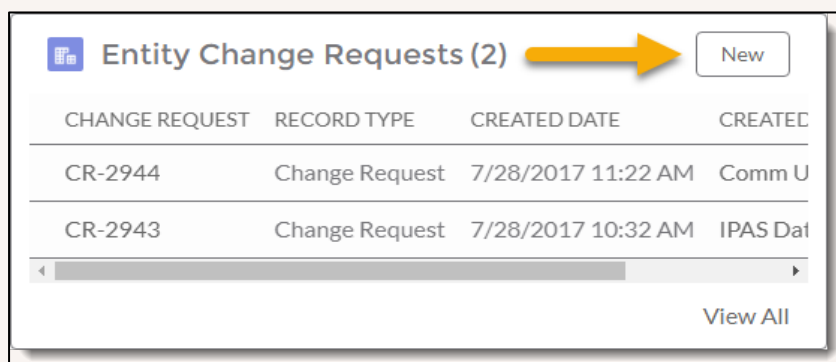
FIELD TYPE	FIELD NAME	OLD VALUE	NEW VALUE
Account	Does the entity serve the disabled?		No
Account	Primary Phone Number	123-123-1234	123-123-7890
Account	Website Address	www.fake.com	www.newsite.com
Account	Year entity was established?		2000

View All

## 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.

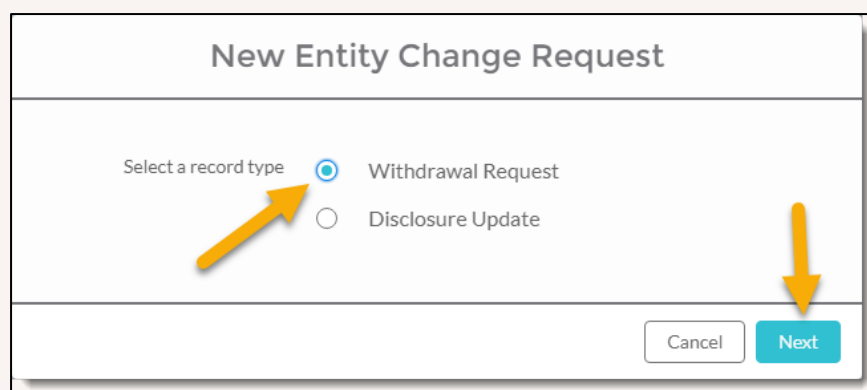


The screenshot shows a web interface titled "Entity Change Requests (2)". An orange arrow points to a "New" button in the top right corner. Below the title is a table with the following columns: CHANGE REQUEST, RECORD TYPE, CREATED DATE, and CREATED. The table contains two rows of data:

CHANGE REQUEST	RECORD TYPE	CREATED DATE	CREATED
CR-2944	Change Request	7/28/2017 11:22 AM	Comm U
CR-2943	Change Request	7/28/2017 10:32 AM	IPAS Dal

Below the table is a "View All" link.

B. Choose Withdrawal Request for the Record Type.



The screenshot shows a form titled "New Entity Change Request". It has a section labeled "Select a record type" with two radio button options: "Withdrawal Request" (which is selected) and "Disclosure Update". An orange arrow points to the "Withdrawal Request" radio button. At the bottom right of the form are two buttons: "Cancel" and "Next". Another orange arrow points to the "Next" button.

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

**New Entity Change Request: Withdrawal Request**

Please list the full name of the counselor(s) to be withdrawn.

\* Entity

Counselor

Status  
Draft

Make sure to state the reason for the counselor(s) withdrawal.

\* Reason for Withdrawal

Information  
Change Request

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.

**ENTITY CHANGE REQUEST**  
**CR-2945**

Change Request  
CR-2945

Status  
Submitted

Reason for Withdrawal ⓘ  
Sample reason for withdrawing from the program...

Entity  
CommTestEntity1

Record Type  
Withdrawal Request

Created By  
Comm User1, 7/28/2017 11:51 AM

Modified By  
Comm User1, 7/28/2017 11:51 AM

**Approval History (2)**

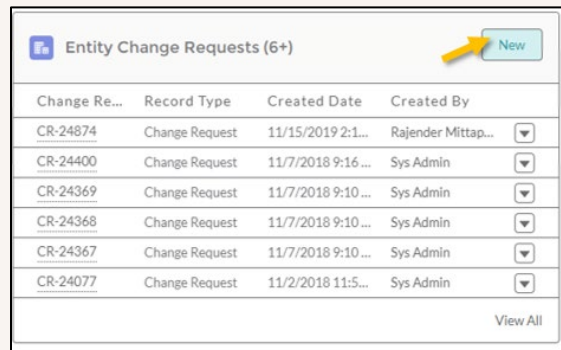
STEP NAME	STATUS	COMMENTS	DATE	
Certification Services Section	Pending		7/28/2017 11:51 AM	
Approval Request Submitted	Submitted	Withdrawal Request submitted by com...	7/28/2017 11:51 AM	

Withdrawal request will automatically be submitted for approval to the Covered CA review team.

## COUNSELOR WITHDRAWAL:

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

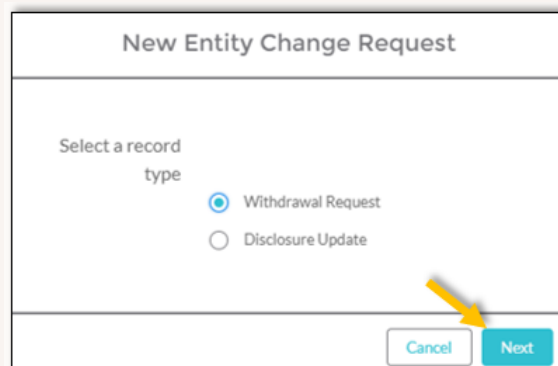
A. Click on the “New” button on the Entity Change Request related list.



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.



**New Entity Change Request**

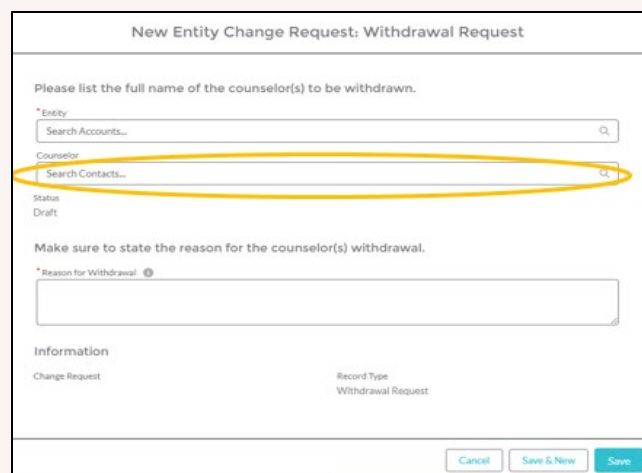
Select a record type

☒ Withdrawal Request

☐ Disclosure Update

Cancel Next

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



**New Entity Change Request: Withdrawal Request**

Please list the full name of the counselor(s) to be withdrawn.

\* Entity

Search Accounts...

Counselor

Search Contacts...

Status

Draft

Make sure to state the reason for the counselor(s) withdrawal.

\* Reason for Withdrawal

Information

Change Request

Record Type

Withdrawal Request

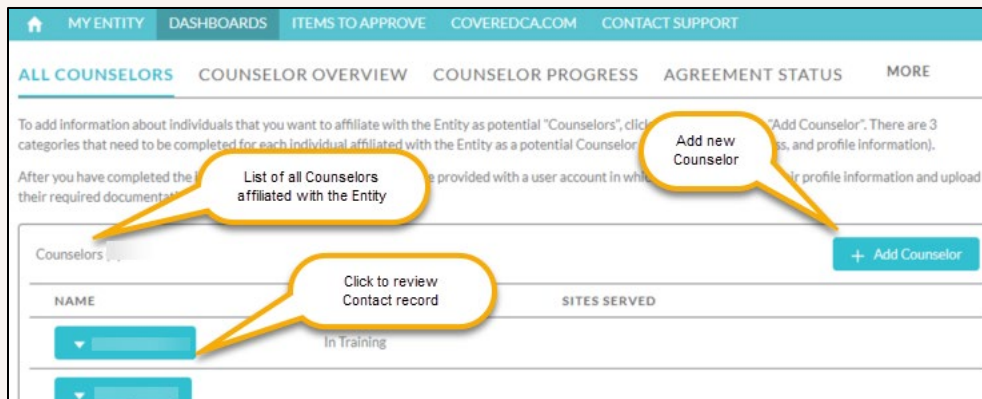
Cancel Save & New Save

## 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

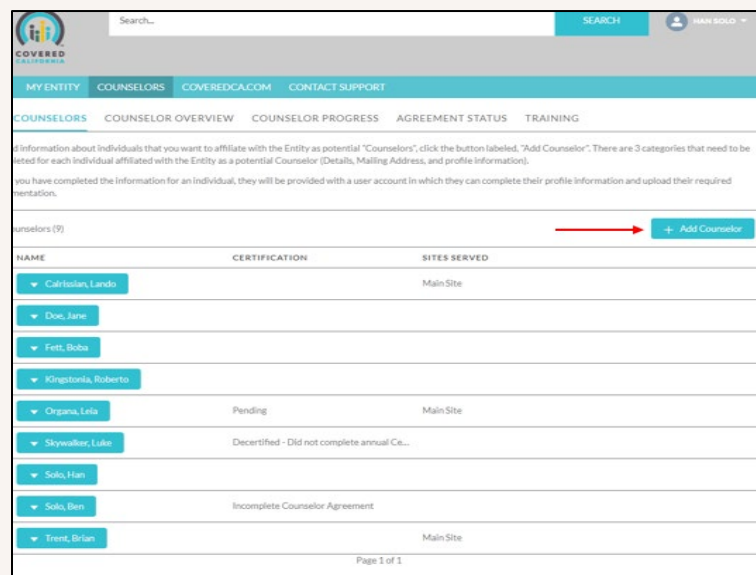
The All Counselors tab provides a list of all Counselors that are affiliated with the Entity and provides a resource for adding new Counselor users.



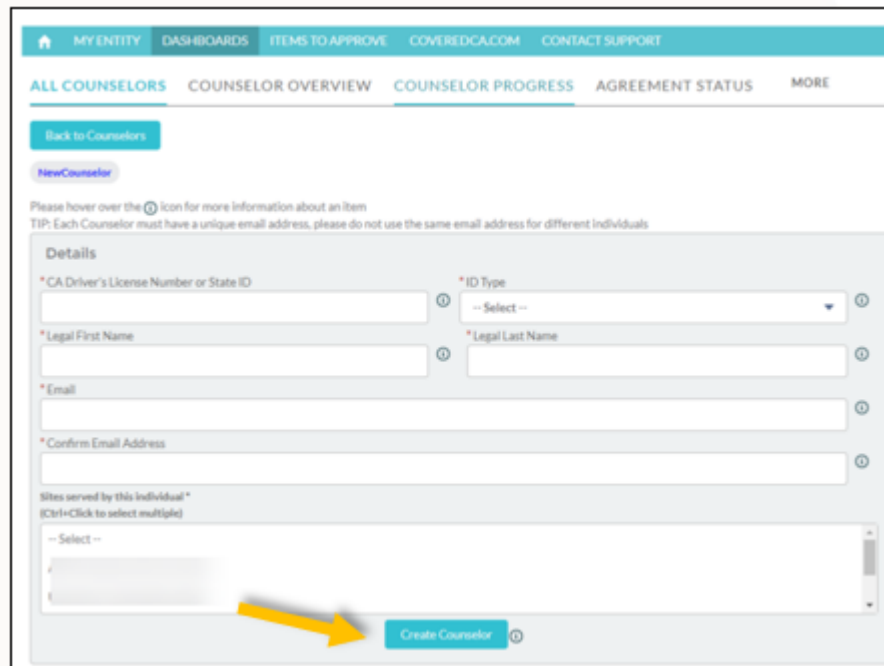
**NOTE:** There is no way to delete inactive counselors from this list at this time.

### 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.



MY ENTITY DASHBOARDS ITEMS TO APPROVE COVEREDCA.COM CONTACT SUPPORT

ALL COUNSELORS COUNSELOR OVERVIEW COUNSELOR PROGRESS AGREEMENT STATUS MORE

Back to Counselors

New Counselor

Please hover over the ⓘ icon for more information about an item  
TIP: Each Counselor must have a unique email address, please do not use the same email address for different individuals

**Details**

\* CA Driver's License Number or State ID ⓘ

\* ID Type ⓘ -- Select -- ⓘ

\* Legal First Name ⓘ

\* Legal Last Name ⓘ

\* Email ⓘ

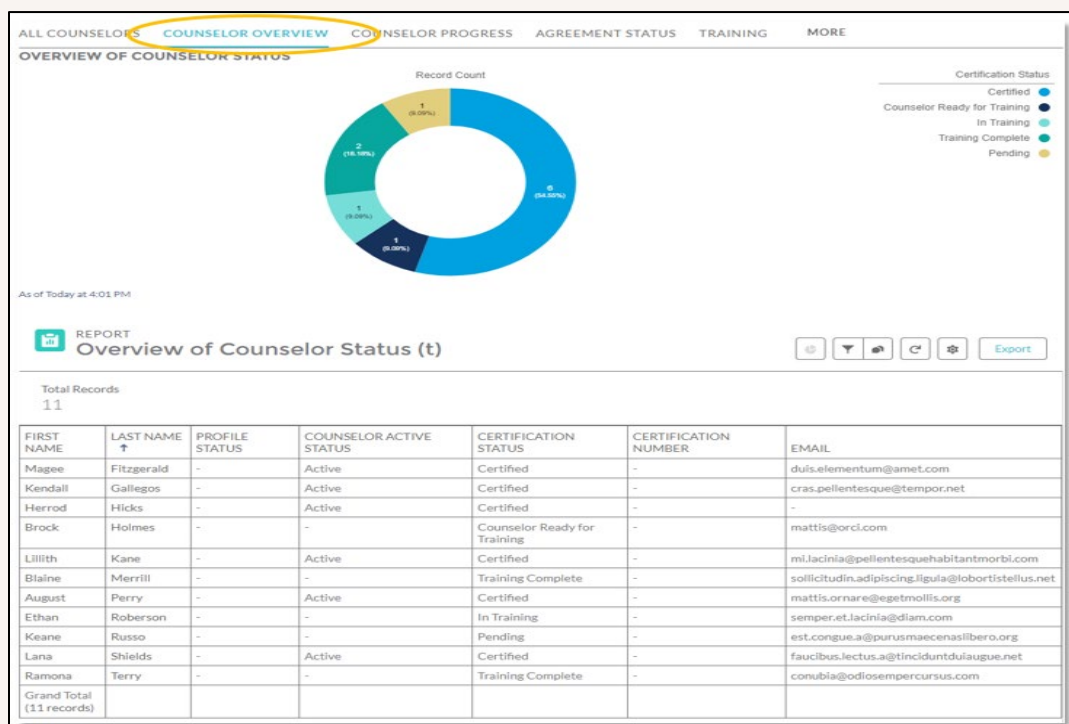
\* Confirm Email Address ⓘ

Sites served by this individual \*  
(Ctrl+Click to select multiple)

-- Select -- ⓘ

Create Counselor ⓘ

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



## 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							
<div>REPORT</div> <div>Counselor Agreement Status</div> <div> </div>							
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)							

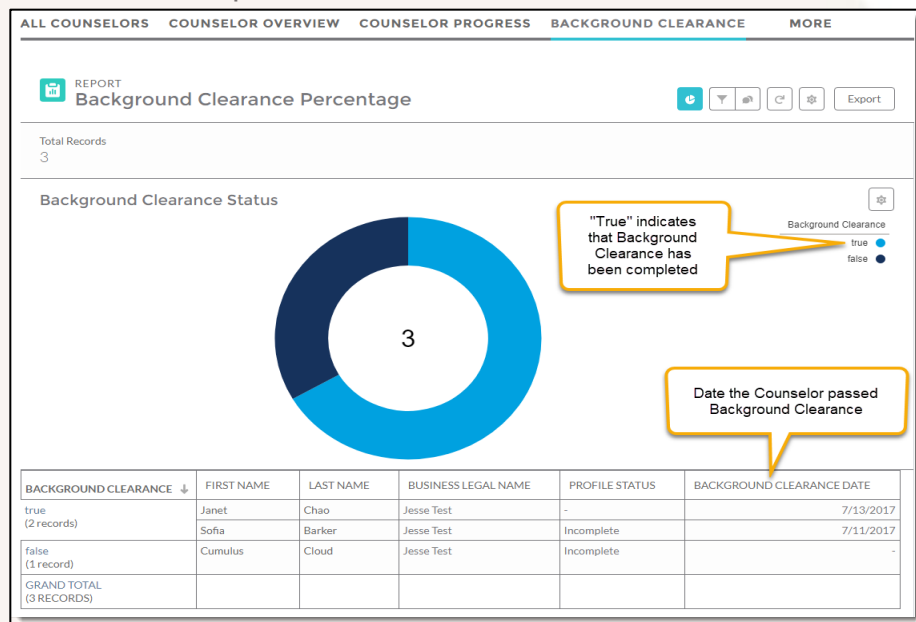
## TRAINING

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

ALL COUNSELORS COUNSELOR OVERVIEW COUNSELOR PROGRESS AGREEMENT STATUS TRAINING MORE						
COUNSELOR TRAINING						
<div> <div>                         Status                          Complete                            In Progress  </div> </div> <div>As of Today at 8:26 AM</div>						
<div>REPORT</div> <div>Counselor Training (t)</div> <div> </div>						
Total Records 3						
FIRST NAME	LAST NAME ↑	LMS COURSE	PROGRESS	DATE STARTED	DATE COMPLETED	STATUS
		Test_CEC/Navigator Certification Curriculum 2015-2016	0%	5/16/2017 2:30 PM	5/16/2017 2:30 PM	Complete
		Test_CEC/Navigator Certification Curriculum 2015-2016	0%	5/16/2017 2:30 PM	5/16/2017 2:30 PM	Complete
		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.




## 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.

ALL COUNSELORS COUNSELOR OVERVIEW COUNSELOR PROGRESS AGREEMENT STATUS **NAME BADGE** MORE

REPORT  
Counselor Name Badge Status (t)

Total Records  
1

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

ALL COUNSELORS

COUNSELOR OVERVIEW

COUNSELOR PROGRESS

DELEGATION CODE

MORE

Report: Contacts with Related Accounts

Counselor Delegation Code

Add Chart

Export

Total Records

5

	Full Name ↑	Activation Date
1		2/24/2021 1:20 PM
2		
3		2
4		-
5		-

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

CONTACT

Ariana Martinez

Account Name	Title	Phone	Email	Certification Status
		(714) 999-1000	amartinez@calheers.org	Decertified - NLI form sent to DOJ

DETAILS
RELATED

Related Accounts (1)

ACCOUNT NAME	DELEGATION CODE	CALHEERS ASSISTER NUMBER
	3wqfth	

View All

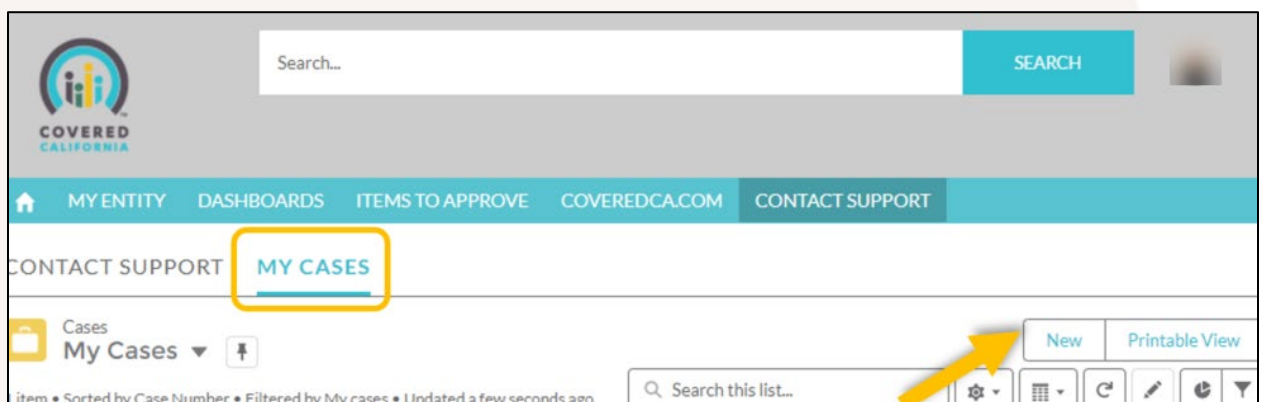
CalHEERS Delegation Code listed for each affiliated Entity

## 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](mailto: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.



Search...

SEARCH

COVERED CALIFORNIA

MY ENTITY DASHBOARDS ITEMS TO APPROVE COVEREDCA.COM CONTACT SUPPORT

CONTACT SUPPORT MY CASES

Cases My Cases

New Printable View

Search this list...

Once completed with full details, select “Save”.



New Case: Enroller Support

Case Owner  
John Doe

Account Name

Contact Name

\* Status  
Open

Subject  
testing 2 submitted from Portal

Priority  
Medium

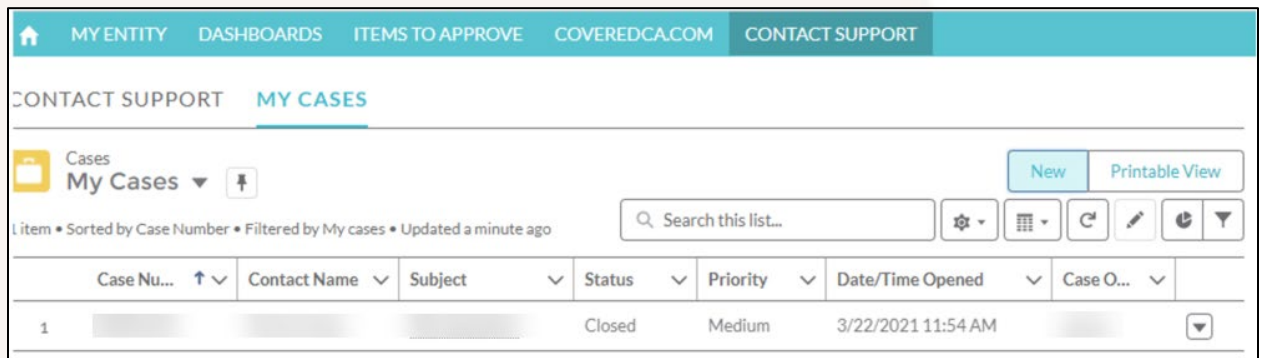
Description  
test submit by counselor

Case Origin  
Certification Portal

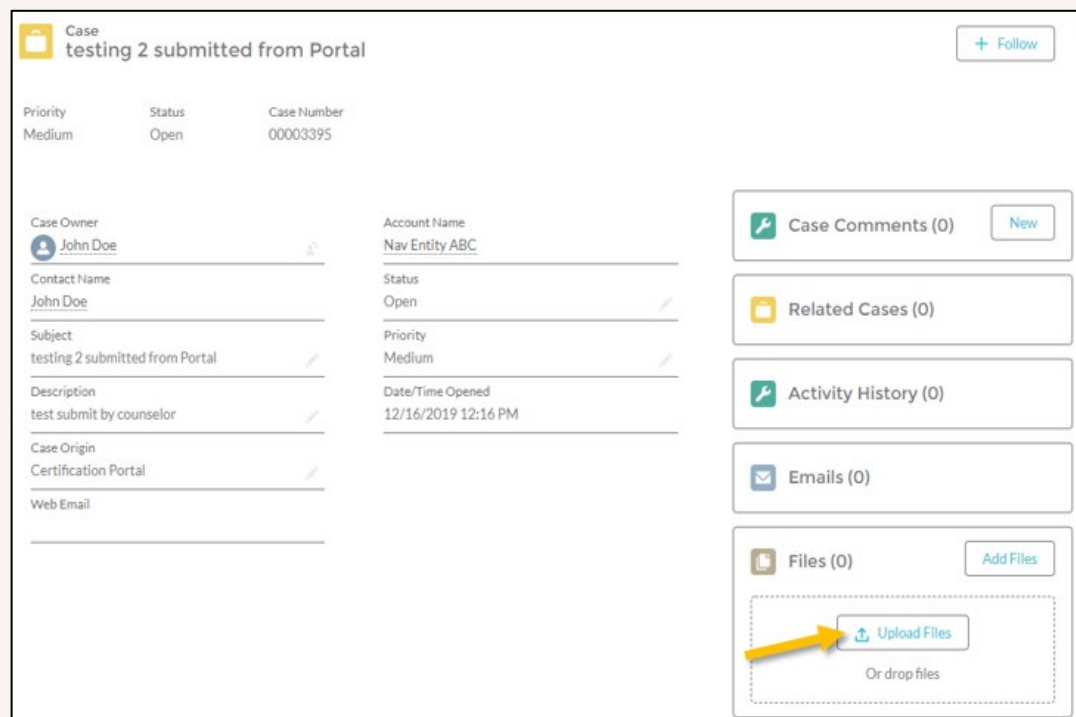
Web Email

Cancel Save & New 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).