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## CERTIFICATION PORTAL COUNSELOR USER OVERVIEW

This document outlines all features and functions available to Entity Counselors in the Certification Portal. It details the functions that you, as a Counselor User, have including profile completion, background clearance, and training.

NEW COUNSELOR USER

The Primary or Authorized Contact listed on the entity roster will create your Counselor user account. You will receive an email from the Certification Portal that looks like the following:

Email Subject: **Welcome to the Certification Portal**

Email Body:
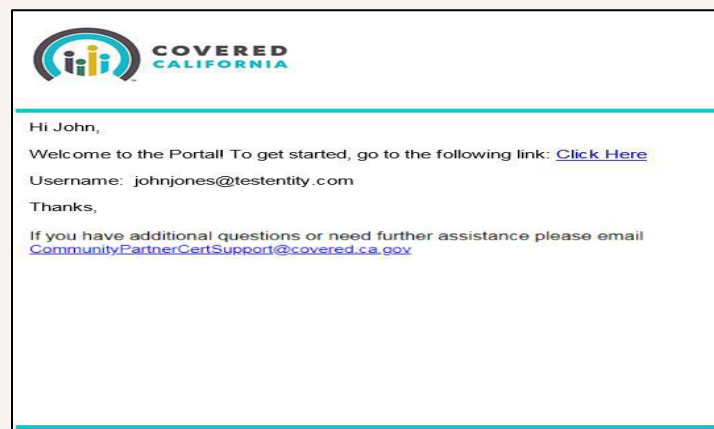
When you click on the hyperlink provided in the email it will take you to a login screen. There you will be prompted to set a password for your new account. When the Change Password button is pressed, you will be logged into the system.
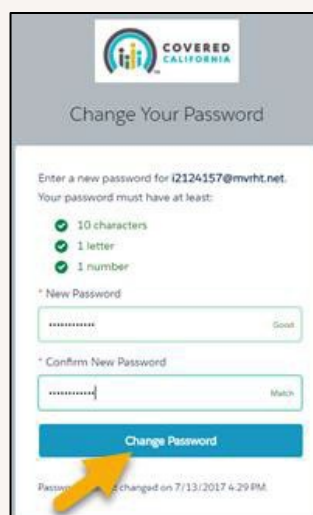
COUNSELOR HOMEPAGE

Once logged into the system you will be presented with the homepage welcome screen. Here you will find high-level information regarding your certification status as well other important information related to fulfilling your duties as a certified counselor.
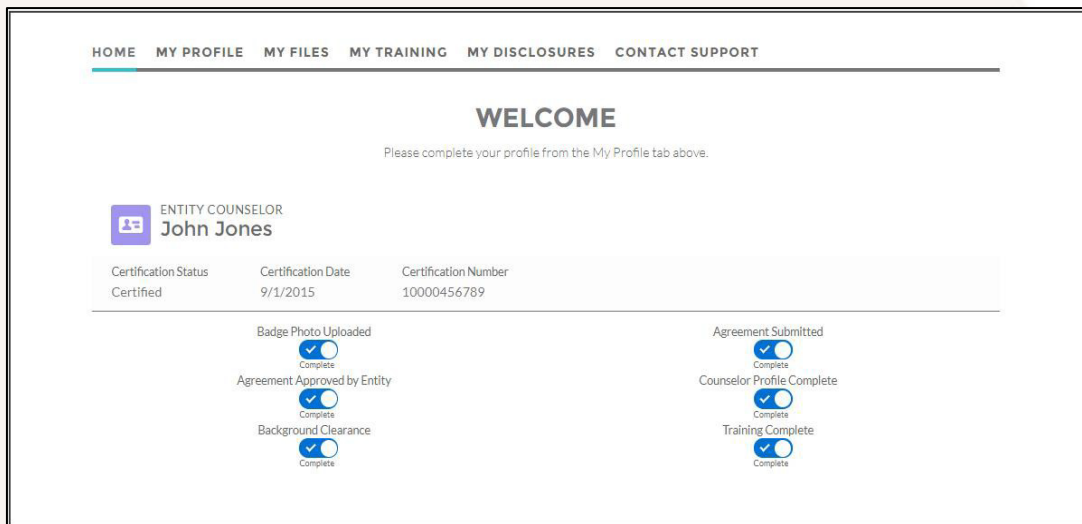
NOTE: New counselors will have no blue check marks on their page. Required items will begin to be checked off as the certification process steps are completed.
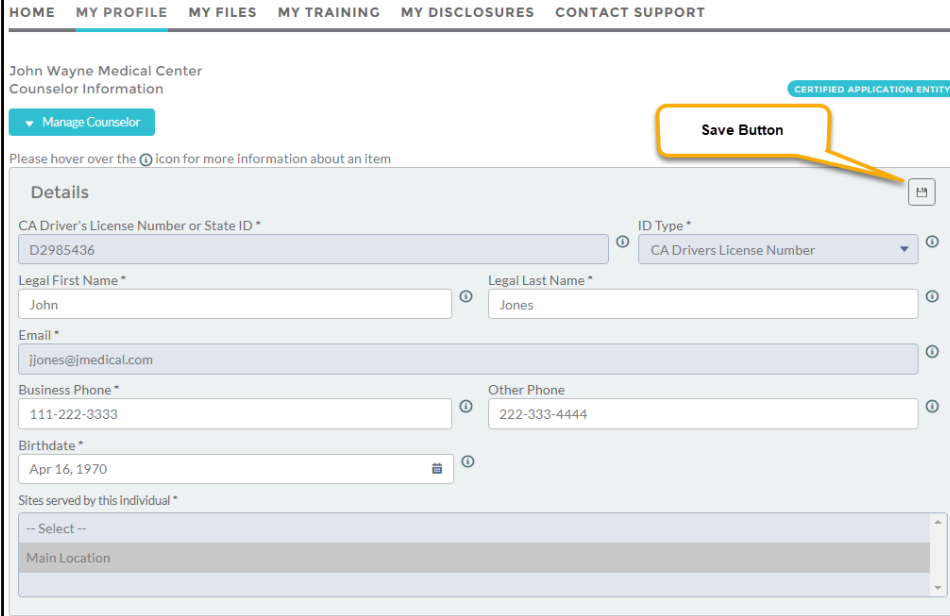
COUNSELOR MY PROFILE

Navigate to the "**My Profile**" tab to complete the information necessary for the counselor certification process.
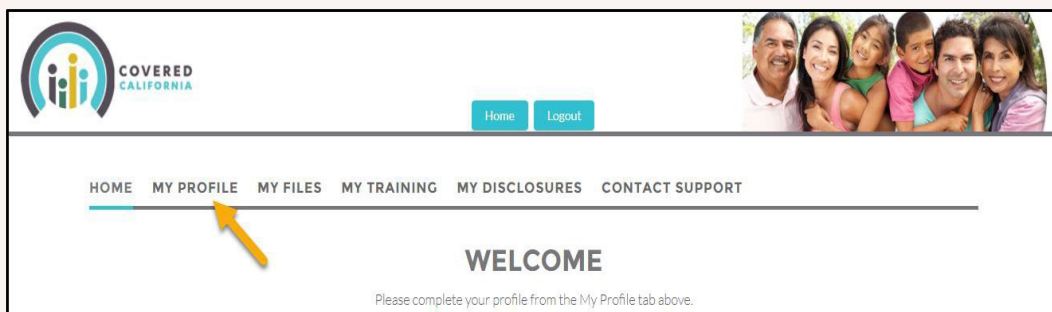
IMPORTANT: Active and Certified counselors ARE NOT REQUIRED to complete a NEW application in the Certification Portal. Please skip to page 20 to view an example of the email sent to access the Certification portal and training.

NEW Counselors looking to become certified for the first time:

1. The first step is to populate all required fields in the Details section (Note: the fields in grey are pre-populated by the Primary / Authorized Contact person. Once completed, click on the 'save' icon button located on the top right corner of the section panel, or by clicking the 'Save Details' button at the bottom of the page.

Note: Make sure to fill out all required fields, which are marked with a red asterisk, before submitting. Any missing fields will result in a delay in the certification process.

2. Next, fill in the **Personal Mailing Address** fields.
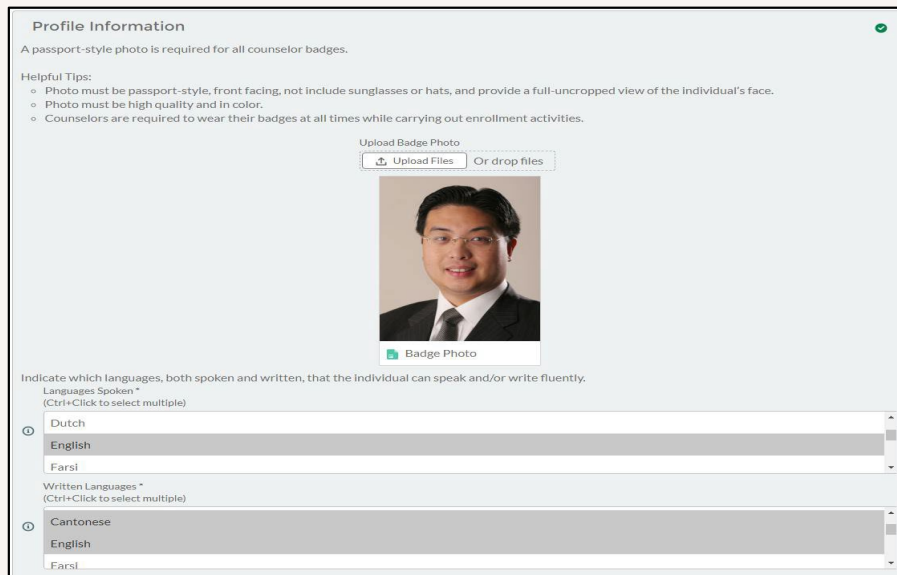
3. The next step is to complete the Profile Information section. You must upload your badge photo and select your written and spoken language(s).

BADGE PHOTO

Follow these guidelines below when uploading your badge photo and select your written and spoken languages(s):

- Photo must be a passport-style, front facing photograph, which does not include sunglasses or hats, and provides a full-uncropped view of the individual's face.
- Photo must be high quality and in color.

Note: Counselors are always required to wear their badges while carrying out enrollment activities.

The Required Documentation section includes the Counselor Agreement, Criminal Record Disclosure, and the Live Scan Forms. These documents must be reviewed and submitted prior to becoming a certified counselor.

In the upcoming pages we will provide a walkthrough for how to upload and submit the documents. If these documents are not completed within 30 days your profile will not be reviewed.

COUNSELOR AGREEMENT

If your entity requires a Counselor Agreement, click on the Certified Application Counselor Agreement as shown below.

1. Click on the "CAC Agreement" button to access the Counselor Agreement and submit the document for review.

2. Ensure that you review and read the full agreement before electronically signing and filling out the disclosure statements. When you are ready to sign the agreement, populate the required fields at the bottom of the document. Once saved you will be directed back to your profile.

If you have nothing to disclose, you must type "**I have nothing to disclose**" in the appropriate disclosure fields and "Save". Entering N/A or None will cause us to reject the agreement.

Note: If you are submitting a new Agreement after the initial one, make sure to click the "Submit for Approval" button in the upper right corner of the page that comes up after saving the new Agreement.
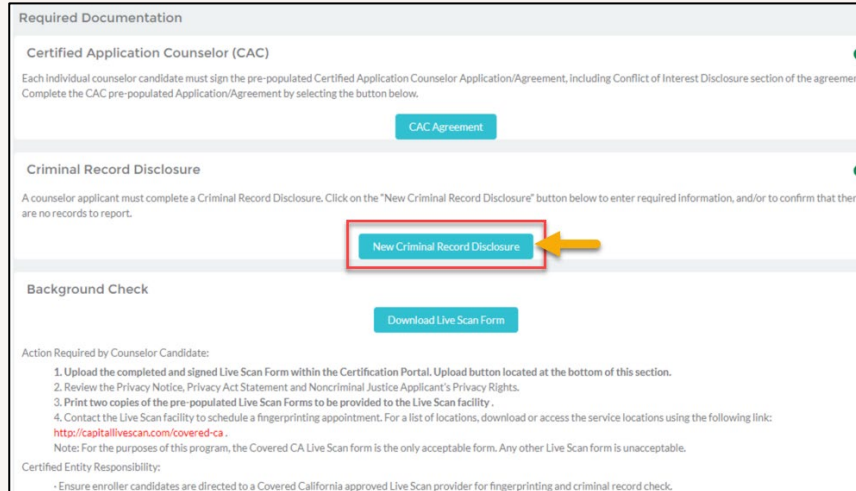
BACKGROUND CLEARANCE

The Counselor background clearance process consists of two documents that are located on the Counselor profile in the Certification Portal.

These items must be submitted to Covered California to be reviewed and approved as part of the Counselor certification process. A Candidate cannot qualify to become certified until they submit the Background Clearance documents.

CRIMINAL DISCLOSURE

1. Click on the "New Criminal Disclosure" button. See screenshot below.

2. When you click on the "New Criminal Disclosure" a pop-up will appear with the blank electronic document. The required fields in the form must be filled out and submitted to Covered California for review.

Create Criminal Record Discl[osure]

Answer all criminal history questions

B. Criminal History Disclosure

Question 1

Other than those excluded up above, have you ever been convicted of a misdemeanor?

*Question 1 Response

--None--

Question 2

Other than those excluded up above, have you ever been convicted of a felony?

*Question 2 Response

--None--

Question 3

Do you currently have criminal charges pending against you?

*Question 3 Response

--None--

Question 4

Are you currently out on bail or on your own recognizance for any current arrest?

*Question 4 Response

--None--

Question 5

Are you currently under any formal or informal supervision, such as probation or parole, for a conviction of any state or federal violation?

*Question 5 Response

--None--

Question 6

Have you ever had an Administrative Action against you from another State Agency?

*Question 6 Response

--None--

Create Criminal Record Disclosure: New Disclosure

C. Certification – Read Carefully Before Signing

Read Carefully

I declare under penalty of perjury under the laws of the State of California that I have read and understand the information contained in this affidavit and my responses and accompanying attachments are true and correct. I understand that falsification, withholding of information or failure to answer all questions completely and accurately on the CRD may prevent me from being certified as a counselor by CC and/or result in decertification.

*Full Name

Agree to electronic signature

☐

Populate to sign

Electronic Agreement

Each party agrees that the electronic signatures (whether digital or encrypted) of the parties included in this Agreement are intended to authenticate this writing and to have the same force and effect as manual signatures.

Electronic Signature means any electronic sound, symbol, or process attached to or logically associated with a record and executed and adopted by a party with the intent to sign such record pursuant to the California Uniform Electronic Transactions Act (Cal. Civ. Code § 1633.1 et seq.) as amended from time to time. By electronically signing this Agreement, Certified Enrollment Counselor agrees to comply with the applicable terms, conditions, and certifications set forth therein.

Privacy Statement

Pursuant to the Federal Privacy Act (P.L. 93-579) and the Information Practices Act of 1977 (Civil Code section 1798 et seq.), notice is given for the request of the Social Security Number (SSN) on this form. The California Department of Justice uses a person's SSN as an identifying number. The requested SSN is voluntary. Failure to provide the SSN may delay the processing of this form and the criminal record check.

Cancel   Save

Create Criminal Reco...

Provide details on each offense

III)

If you answered YES to any of the above questions, give details indicating the date and location of each crime or administrative action and, if desired, the nature and circumstances of the offense. If you need additional space or have more offenses or administrative actions to declare, you must use additional sheets and upload them to this record after saving. Once you are ready to submit the disclosure, click the Submit for Approval button.

FIRST OFFENSE, PENDING CHARGE, OR ADMINISTRATIVE ACTION

Offense Question 1

What was the first offense, pending charge or administrative action?:

Offense Question 1 Response

When did it occur?:

Tell us what happened (optional):

Where did it occur? City:

Where did it occur? State:

3. Once saved, you will be taken to the **Criminal Record Disclosure** record to complete the process and submit to Covered California for review.

Note: To attach additional information to support your disclosure, click on the 'Add Files' button as illustrated below and upload as required).

CRIMINAL RECORD DISCLOSURE
CRD-0024

Submit for Approval

If there is anything additional to support the disclosure these can be uploaded by clicking "Add Files" and upload.

Counselor Name	Status	Created By
Sofia Barker	Draft	Sofia Barker, 8/7/2017 8:50 AM

Criminal Record Disclosure
CRD-0024

Status
Draft

A) Personal Information

Employer Name
JesseTest

Social Security Number
518067749

Counselor Name
Sofia Barker

CA Driver's License Number or State ID
CA4657939

Your Address

Date of Birth
8/17/1978

City

Approval History (0)
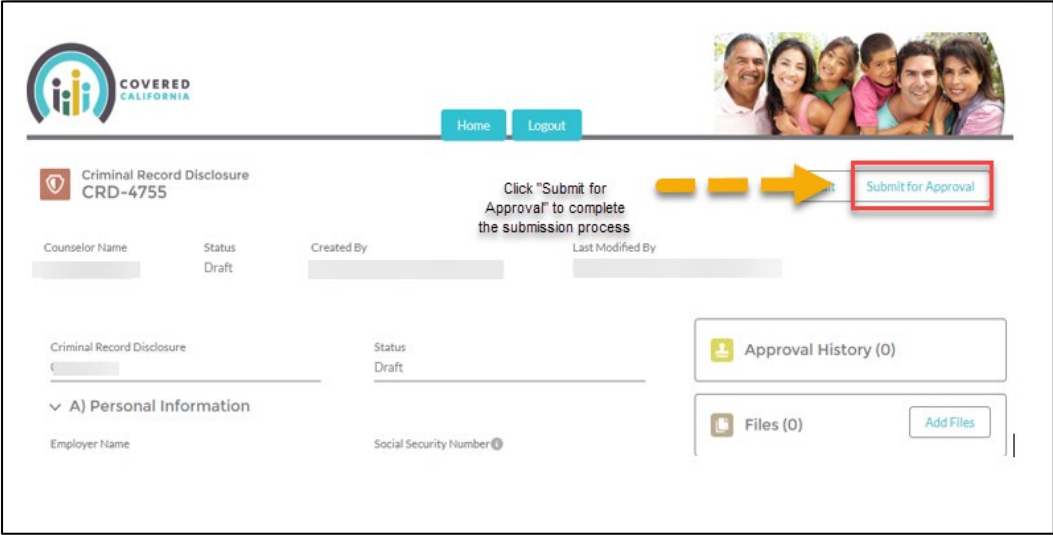
Files (0)   Add Files

Upload Files
Or drop files

4. Click on "Submit for Approval" to send your Criminal Record Disclosure form toCovered California for review. You will be notified once your Live Scan is delivered to Covered California and Criminal Record Disclosure is reviewed.

BACKGROUND CHECK

The second step to the Background Check is completing the Live Scan form and taking the documents to an authorized location to be submitted and fingerprinted.

1. Each Counselor applicant must download the Live Scan form, print (2) two copies and take the forms to an authorized Capitol Live Scan location (https://www.capitallivescan.com/state-wide).

2. Contact the Live Scan facility to schedule a fingerprinting appointment. For a list of locations, download or access the service locations using the following link: https://www.capitallivescan.com/state-wide.

3. Download and print the two (2) copies of the pre-populated form. The screenshot below shows what the Live Scan form looks like.

4. Review the Privacy Notices and sign the Live Scan form under the "Attestation Acknowledgment" to attest receipt of the three notices.

Example of the Privacy Notices (3)

5. Upload the completed and signed Live Scan form in the Certification Portal (upload button is located at the bottom of the "Background Check" section). Your signature on the Live Scan forms is an attestation that you have received the privacy notices.

Note: When all documents have been completed and submitted in the Required Documentation sections a green check mark will appear on the upper right-hand corner. Ensure you "Save Details".

CERTIFICATION TRAINING

Computer-based Certification Training is provided by Covered California and will be taken through the Learning Management System (LMS).

You will be enrolled in the Certification Training modules, once your profile is completed and the agreement is approved.

Note: You will have 30 days to complete the training and 3 attempts to pass the exam with a score of 80% or better. Take your time and answer each question to the best of your ability. A study guide is available in LMS under resources to help you with the exam.

Once enrolled, you will receive an automated email that will provide you with a link to LMS to create an LMS account and access the Certification Training.
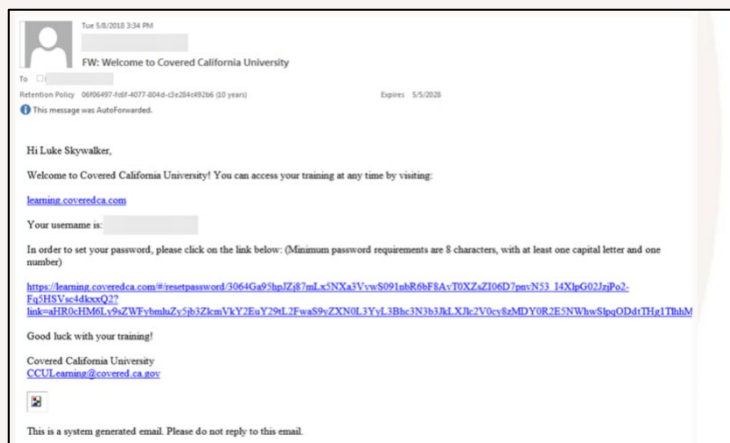
When you complete the Certification Training courses, you will receive another automated email to confirm completion.
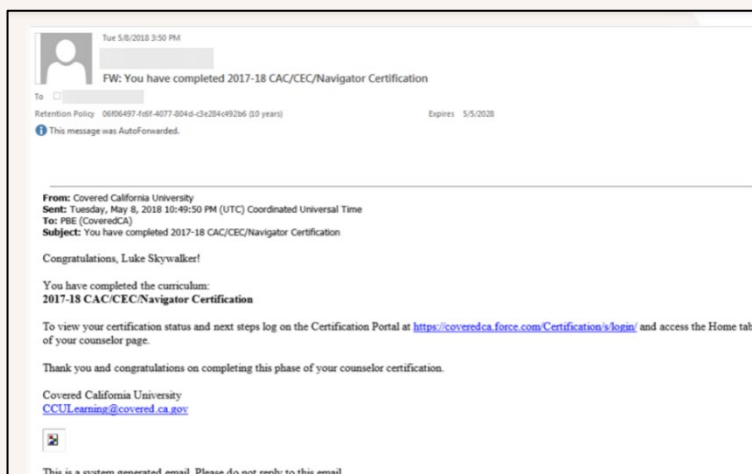
IMPORTANT CERTIFICATION NOTIFICATIONS

Requirements to Finalize your Certification

Once your Criminal Record Disclosure and Background Check are approved, the training is complete, and you pass the exam Covered California will change your status to "Certified".

CalHEERS Account Creation

An automated email will be sent to you with a link and instructions on how to make your CalHEERS account. A Covered California Analyst will call you to step you through the process of creating your CalHEERS account.

Badge/ e-Badges

As a result of COVID-19, Covered California is temporarily emailing Certified Counselors an e-badge with 7 days of being Certified. Once you receive your e-badge you can begin to assist consumers for your Entity.

The e-badge allows counselors the ability to work successfully with consumers while awaiting a physical badge.

A physical badge will be sent to you within 30 Business Days to the physical address listed in your Certification Portal Profile. For additional questions or inquiries, you can send an email to CommunityPartnerCertSupport@covered.ca.gov.

ADDITIONAL COUNSELOR ACTIONS

Manage Counselor-Additional Counselor Actions

The top of the My Profile page has a drop-down menu labeled "Manage Counselor" for performing additional actions as a Counselor. See the screenshot below for available options.
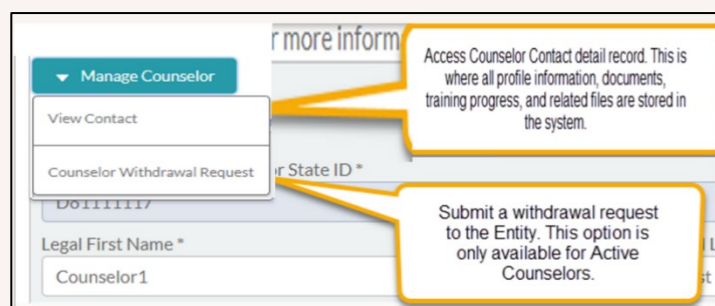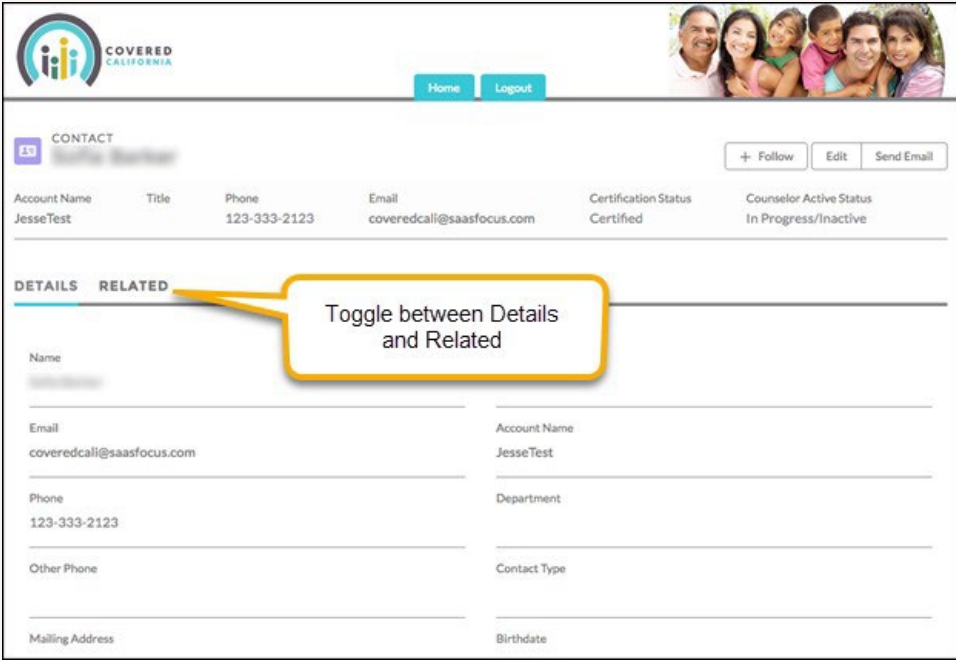
VIEW CONTACT SECTION

"View Contact" allows you to view your own contact record and related Information. Select "**View** Contact" from the drop-down menu under "Manage Counselor".

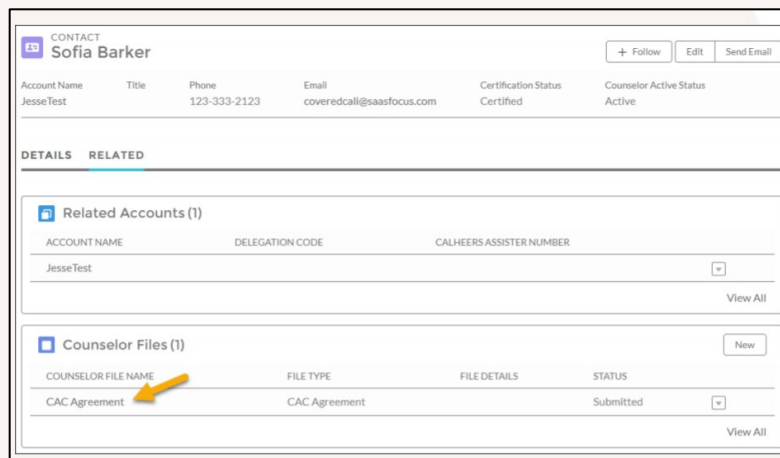Clicking on the button "View Contact" as shown in the screen below.
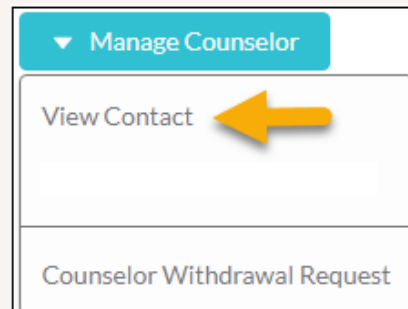
The "Details" tab shows your information and allows you to edit information by clicking the "Edit" button in the upper right-hand corner of the page.

The "Related" tab will show you any documents or files that are related to you, including all entity affiliations and sites served.
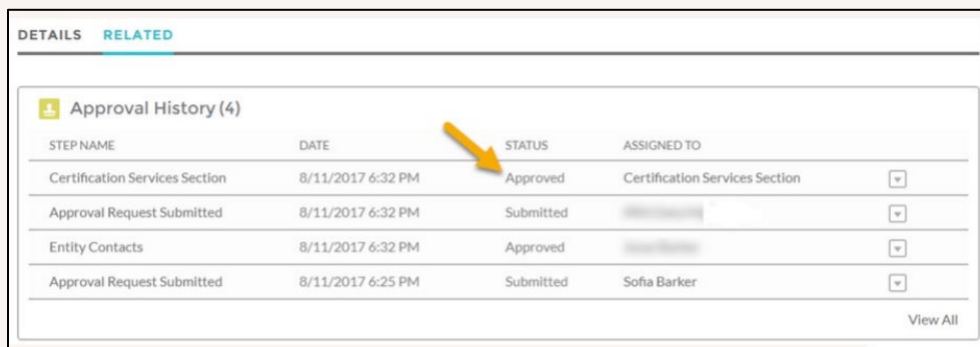
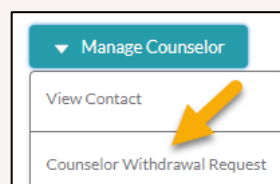The counselor Agreement Status can be found in the "Counselor Files" related list on your Contact record.

After Entity Contact approval, it will be submitted to Covered California for review. If approved by the Certification Services Section, the Counselor Agreement is the then complete.

COUNSELOR WITHDRAWAL REQUEST

1. You can submit a withdrawal request to your Entity if you would like to withdraw from the program. Click on the "Counselor Withdrawal Request" link from "Manage Counselor" the drop-down menu. This function can only be done if you are an active Counselor with and active Entity.

2. Provided your reason for wanting to withdraw from the program in the "Reason for Withdrawal" field. Click on the "Save" button to be directed to the Withdrawal Request Record.

3. The system will take you to the Withdrawal Request record which will automatically be submitted to the Entity Contacts for approval.

4. When both the Entity Contacts and the Covered California have approved of your withdrawal request your status will be updated to "Withdrawn-Entity request" within the system.