



Enroller Portal Plan-Based Entity

User Guide



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Overview

The Enroller Portal Plan-Based Entity User Guide outlines all features and functions available to Plan-Based Entity Business Contacts in the Enroller Portal. This document details the functions of an Entity user, account registration process, entity application process, managing Counselors, managing files, and required documentation.

Account Creation Process (Authorized or Primary Contact Steps)

This section provides instructions for users to create a new Entity account.

The Authorized Contact (AC) or Primary Contact (PC) listed on the entity roster is responsible for creating the Enroller user account. Once the account is created, an email from the Enroller Portal will be sent to the Enroller:

Username Forgot username? Password Forgot password? Cog In Create an Account
Log In
Create an Account

- 1. To access the Enroller Portal, you must navigate to the <u>Log In or Create an Account to Get</u> <u>Covered</u> page
- 2. Select the Start Here to Submit Your Application link



Welcome to Covered California Become a Covered California Certified Insurance Agent or Counselor and help Californians enroll into quality healthcare coverage!				
Covered California Certified Enrollers				
Covered California Certified Enrollers include Certified Insurance Agencies and Certified Enrollment Entities with Agents and Enrollment Counselors who help consumers learn about, navigate, and apply for qualified health plans, qualified dental plans, and financial assistance offered by Covered California. Select from the appropriate application option below to get started.				
To access important resources for Certified Enrollers, visit Certified Enroller Resource Page.				
Create and Submit Agency Application	Create and Submit Entity Application			

3. Select Create and Submit Entity Application

Note: The Entity will need to designate an AC or PC, and the first eligible Counselor to complete the certification process. Please designate a Counselor who can complete the process within the 90-day turnaround.

Welcome to Covered California Become a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!			
Entity Information			
• Entity Type 0			
None	;		
* Entity Name	*Organization Type 🚺		
	None +		
*Legal Business Name	*State Tax ID		
Website Address	•FEIN ()		
* Phone 🚺	*Email 🚺		
Alternate Phone	*Confirm Email		
	* Preferred Method of Communication		
	None +		
	* Counties Served (Ctrl+Click or Command+Click on Mac, to select multiple)		
	Alameda *		
	Alpine		
	Amador		
	Butte		
	Calaveras		
Population Served			
 Languages (Ctrl+Click or Command+Click on Mac, to select multiple) 	* Ethnicities (Ctrl+Click or Command+Click on Mac, to select multiple)		
English	African		
Spanish	African American		
African	American Indian		
Amharic	Armenian		
Arabic	Cambodian		
* Industries (Ctrl+Click or Command+Click on Mac, to select multiple)	Does the Entity serve the disabled?		
Agriculture	None t		
Automotive			
Construction			
Consumer Goods and Services			
Energy			

- 4. Fill out all the required fields and click **Next**.
 - Once the application has been submitted, two (2) emails will be sent with the login link and access code.

Important: The access code is valid for 24 hours only and for one-time use.



Dear
Thank you for submitting your application.
To edit your application, you will need the following three items:
1. Access Code (separate email titled, "Access your Entity Application").
2. Legal Business Name
3. Federal Employer Identification Number (FEIN)
Once you have retrieved your access code, click on the below link to edit your application. Please note, this Access Code expires after 24 hours and can only be used once per editing session. You may request a new access code via the link below, as needed.
If you are a Counselor or Approved Admin Staff, you are also required to update your application by adding information about your Criminal Record, which you can add by clicking the link below.
Click Here to Edit Your Entity Application.
Note: Please keep this email to edit your application until your application is certified or approved.
Questions? Visit coveredca.com/resources/ or contact CEC/PBE Helpline at (855) 324-3147 or email CommunityPartnerCertSupport@covered.ca.gov.
Sincerely,
Covered California
Dear
Thank you for submitting your application.
Your Access Code to edit your Entity Application is amr69sSy25
Note: This Access Code expires after 24 hours and can only be used once per editing session. You may request a new access code via the link mentioned below, as needed.
To edit your application, you will need the link, which is sent in separate email titled "Edit Your Entity Application".
Questions? Visit coveredca.com/resources/ or contact CEC/PBE Helpline at (855) 324-3147 or email CommunityPartnerCertSupport@covered.ca.gov.
Sincerely,
Covered California

Note: A third email will be sent with training login information for the <u>Learning Management</u> <u>System (LMS)</u>. Primary Contacts only are required to complete the training. This is approximately a 30-minute training and does not have an exam requirement. Once enrolled, the Primary Contact will receive an email with further instructions on accessing the new LMS Training account.

5. Upon receipt of both emails, click the *Click Here to Edit Your Entity Application* link. Select the **Yes, I have an Access Code** option and **I'm not a robot checkbox.**



Welcome to Covered California! Welcome to Covered California Become a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!	
Enter Access Code to Edit Your Entity Application	
De you have an Access Code to edit your Entity application? Ves. I have an Access Code No. my Access Code has been used or has expired, and I want to generate a new Access Code Im not a robot Im not a robot Image - Temme	
Nex	ĸt

- 6. Next, enter the Access Code, the Entity FEIN, and PC's Email Address.
- 7. The *Public Photo and Documentation Upload* page displays. No action is required for Plan-Based Enrollers as badge photos are not a requirement for this program. Select **Next**.

Welcome to Covered California! Welcome to Covered California Become a Covered California Certified Counseior and help Californians enroll into quality healthcare coverage!			
Public Photo and Documentation Upload Counselors are only required to upload their Enroller Photo.			
Primary Contact or Authorized Contacts must upload the following before the Entity can be approved: 1. Proof of Bueniess Status 2. Proof of Worken's Companisation Insurance 3. Proof of Worken's Companisation Insurance 4. Proof of Yakid Butthess License 5. Conflict Interess Teverance Main			
If you are not prepared to provide all required documents at this time, you may upload your required documentation at any	time after initial submission.		
Accepted Formats: JPG, JPEG, GIF, JNG, BMP, JOF, Maximum File Size: 5 MB per file			
* Document Category			
None			
Proof of General Liability Insurance UvelSan Envisite Proto Othar Proof of Business Satus (Tax Identification Number on Institution Letterhead) Proof of Visit Business Sciences Confict of Inserest Prevention Plan V9 Entity Agreement Nore			

8. A confirmation page will indicate that the application was submitted successfully. Click **Finish.**

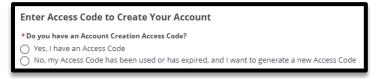


Account Creation Steps

The Account Creation step is the FINAL step within the Certification process.



- 1. Once the AC or PC is Certified by Covered California, two emails will be sent from Covered California:
 - The AC or PC will receive an email titled Access Code for Your New Counselor Account with an access code and further instructions. The access code is valid for 24 hours only and for one-time use.
 - The AC or PC will receive an email titled Your Certified Enrollment Counselor Application is Approved with instructions and a link to create the account credentials. Click on **Click Here to Create Your Counselor Account using Your Access Code**. The Counselor will be directed to the Enter Access Code to Create Your Account landing page.
- 2. From the landing page, the Enroller should select **Yes, I have an Access Code.**



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

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

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

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

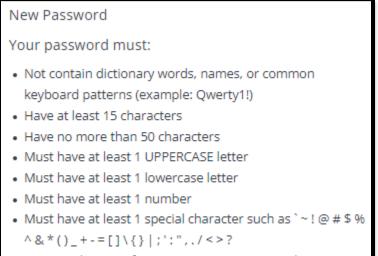
Password criteria:

- Passwords must have at least **15** characters (no more than 50).
- Passwords must contain **1** of the following:
 - Uppercase letter

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- o Lowercase letter
- o Number
- o Special character
- Passwords must not contain dictionary words, names, or common keyboard patterns. (i.e., QWERTY).
- When re-entering the password, it must match.



Must not be one of your previous 24 passwords



	salesforce
	Change Your Password
Ente	er a new password for
	Make sure to
ncl	ude at least:
\bigcirc	15 characters
~	1 uppercase letter
	1 lowercase letter
	1 number
0	1 special character 👔
* Ne	w Password
* Co	nfirm New Password
Seci	urity Question
	What is your mother's maiden name?
* An	swer
	Change Password
Pass	word was last changed on 11/6/2023 3:15 PM.
	© 2023 Salesforce, Inc. All rights reserved.

5. The Enroller must select a four-digit Pin Number

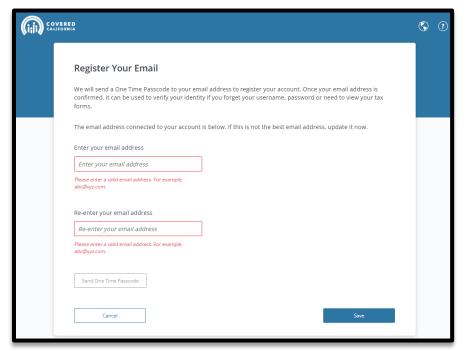
Note: Save this information for future use – Covered California will not have access to the Pin Number.

6. The system will now ask for the Enroller to select 3 Security Questions from a dropdown list of options.



VERED Ifornia		، ک
Choose Your Security Questions Security questions help us verify your identity and keep your information safe. Choose and answer 3 questions.		
Security Question 1	(+ Add)	
Security Question 2	(+ Add)	
Security Question 3	(+ Add)	
Cancel	Next	

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





RED BRNIA	S (?
Register Your Cell Phone We will send a One Time Passcode to your cell phone number to register your account. Once your number is		
confirmed, it can be used to verify your identity if you forget your password, username or need to view your tax forms. Enter your cell phone number Standard text message rate applies.		
Please enter a valid 10-digit phone number.		
Send One Time Passcode		
Cancel		

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

Entity User Home Page

This section provides navigation throughout the Entity Home Page.

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

Entity Dashboard

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

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

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

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

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

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

Note: For Counselors, a **My Book of Business** tab displays and automatically filtered to consumers with active delegations including consumer, application, eligibility, and enrollment details.

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

Home	Enroller Portal Notifications	Notifications Archive	Book of Business	Consumers by Metal Tier Plan
	Report: Enrollees Report Type Enrollments by Metal Tier P	an		C C Edit V

Entity Quick Links

Quick Links display based on user role.

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

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

	Q. Search			≜ (] •
Home	Entity 🗸 My Profile My Delegations	✓ Resources ✓		
	Ma		IF Entity Home Page! ss, assist your consumers, and mo	re.
ller Portal Notificatio	n Notification Archive Book of Business C	Consumers by Metal Tier Plan		Quick Links
Enroller Porta	al Notifications			Secure Mailbox
Notification Id	Notification	Received Date	Archive Date	Delegation Tool
N-000055	Nov 6th Training (*^&%*^\$&%	2023-11-05	2023-11-07	Start Application
N-000055	Nov 6th Training (*^&%*^\$8%	2023-11-06	2023-11-07	
N-000055	Nov 6th Training (*^&%*^\$8%	2023-11-06	2023-11-07	Enroller Toolkits
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07	My Reports
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07	
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07	
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07	
N-000054	demo test	2023-11-06	2023-11-07	
N-000053	Notification For Testing	2023-11-06	2023-11-07	
N-000052	All Entity Users Open Survey	2023-11-06	2023-11-08	
			Previous Page 1 of 2 Next	

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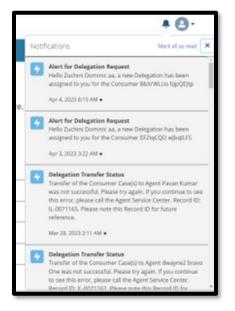


Home Page Navigation

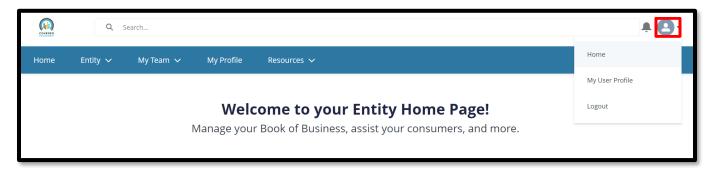
The Entity landing pages are similar and display the following functionality at the top of the page:

		Q s	earch			
Home	Entity	~	My Team 🗸	My Profile	Resources 🗸	Home
						My User Profile

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



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



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

COYFEED	Q :	Search		
Home	Entity 🗸	My Team 🗸	My Profile	Resources 🗸
	My Entity			
	Active Deleg	gations		ome to your Entity Home Page! Book of Business, assist your consumers, and more.
	Pending De	legations	Manage your	book of business, assist your consumers, and more.
Entity Bo	Subsite Loc	ations	s by Metal Tier Pla	n
	Transfer De		ollees oller Contact	Q Add Chart Y Cl Edit Y
🛕 Thi Total Rec	, ,	ation History	show (up to 2,000 rows). Summary information is calculated from full report results.

- Entity tab dropdown Displays for all Entity staff with the following links:
 - **My Entity** Navigates user to Entity account page with navigator contact information, Entity contacts, population served, and certification/approval status
 - Active Delegations Navigates user to all active delegations
 - Pending Delegations Navigates the user to all pending delegations
 - **Subsite Locations** Navigates the user to Entity subsite locations. On this page, user can add subsite, update subsite, and remove subsite.
 - **Transfer Delegations** Navigates the user to the transfer delegations landing page where the user can select either *Transfer all delegations from one enroller to another enroller* or *Select one or more specific delegations to transfer to another enroller*.

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 Entity Delegation History – Navigates the user to the Entity Delegation History page

Home Entity 🗸	My Team 🗸	My Profile	Resources 🗸
	Team List		
	Pending Staff A		Welcome to your Entity Home Page! anage your Book of Business, assist your consumers, and more.
	Add Counselor		
Entity Book of Business Consumers by Metal Tier Pl	Add Primary Co	intact	
Report: Contact Application and Enrollees Book of Business by Enroller Contact	Add Authorized	Contact	Q 🚯 Add Chart 🕎 C ^a Edit 💌
Total Records			A

- **My Team** tab dropdown Displays for all Entity staff with the following links:
 - **Team List** Navigates the users to the *Contacts My Entity Staff* page to view Entity team members.
 - Displays for all Entity staff
 - **Pending Staff Applications** Navigates the user to the *Leads My Pending Staff Applications* page to view and manage pending staff applications
 - Displays for Primary Contact and Authorized Contact
 - Add Counselor Navigates the user to the *Welcome to Covered California* Add *Counselor Information* page to apply for Counselor Type: Plan Based Enroller
 - Displays for Primary Contact and Authorized Contact
 - Add Primary Contact Navigates the user to the Welcome to Covered California Add Primary Contact Information page to apply for a Primary Contact
 - Displays for Primary Contact and Authorized Contact
 - Add Authorized Contact Navigates the user to the Welcome to Covered California – Add Authorized Contact Information page to apply for an Authorized Contact
 - Displays for Primary Contact and Authorized Contact

Forgot Password or Password Reset

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

1. On the login page, select *Forgot Password*



Log in or Create an Account to Get Covered Username Forgot username? Password Forgot password? Create an Account			
Password Torgot passwo	Log in or Ci	reate an Account to Get C	Covered
Log in	Username	For	got username?
Cog in			
Log in	Password	For	rgot password?
			٢
Create an Account			
		Create an Account	

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

Change Your Password hter a new password for Make sure to helude at least: 1 Scharacters 1 uppercase letter 1 lowercase letter 1 number 1 special character • New Password Confirm New Password
Make sure to 1 S characters 1 uppercase letter 1 lowercase letter 1 number 1 special character New Password
15 characters 1 uppercase letter 1 lowercase letter 1 number 1 special character New Password
) 1 uppercase letter) lowercase letter) 1 number) 1 special character New Password
1 lowercase letter 1 number 1 special character New Password
) 1 number) 1 special character () New Password
1 special character 🚺 New Password
New Password
Confirm New Password
ecurity Question
What is your mother's maiden name?
Answer
Charige Password
assword was last changed on 11/6/2023 3:15 PM.



Add Enrollers Steps

Once the Entity is in active status, the AC or PC can add more Enrollers to its roster.

1. To add a new enroller, click on the **My Team** dropdown then click on **Add Counselor**.

Home Entity 🗸	My Team 🧹	My Profile	Resources 🗸
	Team List		
	Pending Staff Ap		Welcome to your Entity Home Page! anage your Book of Business, assist your consumers, and more.
	Add Counselor		anage your book of business, assist your consumers, and more.

2. The *Add Counselor Information* page displays. The *Counselor Type* pre-populates with *Certified Enrollment Counselor.* Complete all required fields indicated with a red asterisk and click the **Next** button.



become a covered canornia cerones cours		vered California elp Californians enroll into quality healthcare coverage!	
dd Counselor Information unselor Type: Certified Application Counselor			
		mission of this form, you will receive instructions to begin the certification process. When cr	eating
ur Counselor login, you may use the same email address for both roles, but will be p	vompted to	reate a different Username, Password, and PIN. • Email • Email	
Counselor First Name		- Email Q	
		Made ford A	
Counselor Last Name		Confirm Email	
		Preferred Method of Communication	
pal Business Name um Grove		None-	:
		Select Primary Enroller Location	
hone 0		-None-	:
ernace Phone		Show Primary Enroller Location Address in Find Local Help	
ernece Priorie . 👽		Select Other Sites Served (Ctri+Click or Command+Click on Mac, to select multiple)	
and the the second s		Plum Grove (Location Address : 16750 Summit Vista Dr. San Diego, CA, 92127-3434)	
lace of Birth 🔘	ä	Sacramento (Location Address : Street 1551, Sacramento, CA, 95833)	,
			-
kate ID Type None	:		
kriver's License ar ID Number 🛛			
wher's License or ID Number rsonal Mailing Address Personal Mailing Address Same as Primary Location Mailing Address Address Line 1			
Viver's License or ID Number rsonal Mailing Address Personal Mailing Address Same as Primary Location Mailing Address Address Line 1			
Wiver's License or ID Number rsonal Mailing Address Personal Mailing Address Same as Primary Location Mailing Address			
Vriver's License or ID Number rsonal Mailing Address Personal Mailing Address Same as Primary Location Mailing Address Address Line 1 ddress Line 2			
Viver's License or ID Number rsonal Mailing Address Personal Mailing Address Same as Primary Location Mailing Address Address Line 1			
			*
		•Witten Languages (Chti-Click or Command=Click on Mar. to select multical)	
		English	
		English Spanish	
		English Spanish African	
https://www.initegradient.com/operations/acti		English Spanish African Amharic	
		English Spanish African	×
https://www.initegradient.com/operations/acti		English Spanish African Amharic	

3. The Review Counselor Application Form page displays Click the Save and Next button.

	Q s	earch					P • •
Home	Entity 🗸	My Team 🗸	My Profile	Resources 🗸			
Review	Counselor Ap	Become			overed California I help Californians enroll into quality healthcare cove	rage!	
To review	your application	before moving forwa	rd, click Review C	ounselor Application.			
If you are	ready to move fo	orward to add the Cou	inselor's public ph	oto or any other document	on, please click Save and Next.		
					Review C	ounselor Application	Save and Next

4. The *Public Photo and Documentation Upload* page displays. As a Plan-Based Entity, a photo is not a program requirement. Click **Next** to continue

Welcome to Covered California! Welcome to Covered California Become a Covered California Certified Counseior and help Californians enroll into quality healthcare coverage!	
Public Photo and Documentation Upload Counteriors are only required to upload their Envolve Photo.	
Primary Contact or Authorized Contacts must upload the following before the Entity can be approved: 1. Proof of Business Statua 2. Proof of Vanieral Lability Insurance 3. Proof of Vanieral Liberation Insurance 4. Proof of Valid Business Liberate 5. Conflict of Inserts Prevention Plan	
If you are not prepared to provide all required documents at this time, you may uplead your required documentation at any time after initial submission.	
Accepted Formatic JPG, JPEG, dJR, JPNG, 8MP, POF, Maximum File Stote 5 MB per file	
*Document Gategory	
None	:
Proof of General Lability Insurance Lucision Fonder Proco Orier Proof of Existens Status (ExistensEction Number on Institution Lettenheed) Proof of Asistenses Science (ExistensEction Number on Institution Lettenheed) Proof Provide Basiness Linner Confict of Insurest Prevention Plan VP Entity Agreement Nome	

5. *The Counselor Application Submission Confirmation* page displays once the AC or PC completes all entries. Select **Finish** to complete the submission. The application status will be updated to *Pending Review* with Covered California.

Home Entity v My Team v My Profile Resources v	
Welcome to Covered California! Welcome to Covered California Become a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!	
Counselor Application Submission Confirmation	
HIPC,	
You have successfully submitted the Counselor Application for Rody Beboe .	
The application is being reviewed. Rody Balboa will receive two emails with an access code and URL at michelle.ovens@calheers.ca.gov.	
The emails will contain information on how to view and edit their personal details.	
	Reish



Add Primary Contact Steps

1. To add a PC, click on the My Team dropdown, click Add Primary Contact.

Hor	me Entity 🗸	My Team 🧹	My Profile	Resources 🗸
		Team List		
		Pending Staff Ap	oplications	Welcome to your Entity Home Page! Ianage your Book of Business, assist your consumers, and more.
		Add Counselor		lanage your book of business, assist your consumers, and more.
Home Welco	Enroller Portal Not	Add Primary Co		ive Entity Book of Business Consumers by Metal Tier Plan

2. The *Add Primary Contact Information* page displays. Complete all required fields indicated with a red asterisk and click the **Next** button.

Become a Covered	ad California Certified Counselor and help Californians enroll into quality healthcare coverage!
dd Primary Contact Information	
ntity Type : Navigator Organization Entity	
rimary Contact Information	
Primary Contact First Name	*Email
Primary Contact Last Name	* Confirm Email
Phone 0	* Primary Contact Preferred Method of Communication
	-Noné-
kernate Phone 🕚	
rimary Contact Business Mailing Address	
Address Line 1 0	
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3. The AC must review the entries to ensure accuracy. Select **Save and Next** to continue.



Welcome to Covered California Become a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!		
Review Primary Contact Application Form		
To review your application before moving forward, please dick Review Primary Contact Application.		
If you are ready to move forward please click Sawe and Next.		
	Review Primary Contact Application	and Next

	Home	Entity 🗸	My Team 🗸	My Profile	Resources V
			Welcome 1	to Covered Californ	Welcome to Covered California! formia Become a Covered California Certified Counselor and help Californians envol into quality healthcare coverage!
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Counselors are only required to u	pload their En	roller Photo.			
2. Proof of General Liability Insu 3. Proof of Worker's Compensat 4. Proof of Valid Business Licen: 5. Conflict of Interest Prevention If you are not prepared to provid Accepted Formats: JPG, JPEG.	tion Insurance se n Plan e all required do	ocuments at this t			locumentation at any time after initial submission.
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4. The *Public Photo and Documentation Upload* page will display. No action required for Plan-Based Enrollers as badge photos are not a requirement for this program. Select **Next** to continue. 5. Click the **Finish** button on the *Primary Contact Application Submission Confirmation* page to complete the submission. The application status will be updated to *Pending Review* with Covered California.

Become a Coverer	Welcome to Cover d California Certified Counselor and help C	 overage!	
rimary Contact Application Submission Confirmation			
to have successfully submitted the Primary Contact Application for			
e application is being reviewed. will receive two emails with an access code and URL at			
e emails will contain information on how to view and edit their personal details.			
			Hrish

Add Authorized Contact Steps

1. To add an AC, click on the My Team dropdown then click on Add Authorized Contact.

Home Entity 🗸	My Team 🗸	My Profile	Resources 🗸
	Team List		
	Pending Staff Ap		Welcome to your Entity Home Page!
	Add Counselor		lanage your Book of Business, assist your consumers, and more.
Home Enroller Portal Not	Add Primary Co	ntact	ive Entity Book of Business Consumers by Metal Tier Plan
Welcome! Explore additional choices by	Add Authorized	Contact	the right or My Reports from the menu

2. The *Add Authorized Contact Information* page displays. Complete all required fields indicated with a red asterisk and click the **Next** button.



Be	Welcome to Covered California come a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!	
dd Authorized Contact Information		
Entity Type : Navigator Organization Entity		
Authorized Contact Information		
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3. PC must review the entries to ensure accuracy. Select Save and Next to continue

	come to Covered California tified Counselor and help Californians enroll into quality healthcare coverage!	
Review Authorized Contact Application Form		
To review your application before moving forward, please click Review Authorized Contact Application.		
If you are ready to move forward please click Save and Next.		
		Review Authorized Contact Application Save and Next

4. The *Public Photo and Documentation Upload page* will be displayed. No action required for Plan-Based Enrollers as badge photos are not a program requirement. Select **Next** to continue.



	Home	Entity 🗸	My Team 🗸	My Profile	Resources V
			Welcome t	o Covered Califor	Welcome to Covered California! nia Become a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!
Public Photo and Docum	entation Up	load			
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Proof of Business Status Proof of General Liability Ins Proof of Worker's Compensa Proof of Walkid Business Licer S. Conflict of Interest Preventio If you are not prepared to provid Accepted Formats: JPG, JPEG	ition Insurance ise in Plan le all required de	ocuments at this t			umentation at any time after Initial submission.
Document Category					
Enroller Photo					

5. Click the **Finish** button on the *Authorized Contact Application Submission Confirmation* page to complete the submission. The application status will be updated to *Pending Review* with Covered California.

Welcome to Cov	ered California	
Become a Covered California Certified Counselor and h	alp Californians enroll into quality healthcare coverage!	
Contact Application Submission Confirmation		
ou have successfully submitted the Primary Contact Application for		
he application is being reviewed. Will receive two emails with an access code and URL at		
he emails will contain information on how to view and edit their personal details.		
		Finish

Need Assistance

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