



How to Become a Plan-Based Entity Quick Guide

Overview

How to become a Plan-Based Entity with Covered California.

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Application and Onboarding

Entity Primary Contact must access the Enroller Portal self-registration page at: <https://covered-ca.my.site.com/enrollerportal/s/launch-application> and complete all required fields.

- At least one Enroller must complete the Certification process prior to the Entity becoming certified.
- Submit the application.

Application Review by Covered California

Covered California reviews the newly submitted Plan-Based Entity application for initial eligibility (this process can take up to 3 business days) and will reach out to the Plan-Based Entity to obtain missing information once it has been determined you are eligible to continue the application process.

- If eligible, Covered California will send an access code to continue with the application process, which includes designating a Primary Contact, Authorized Contact, and the first eligible counselor to complete the certification process

Important: Please designate a Counselor that will be able to complete the process within the 90-day time limit.

Entity Management Training

Covered California will email instructions to the Plan-Based Entity Primary Contact to complete the required online Entity Management Training in the Learning Management System (LMS) within 90 days from registration. This is a 30-minute training with no exam.

- Upon completion, an email notification must be sent to Covered California at: PBECert@covered.ca.gov



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Register in Enroller Portal (covered.ca.com)

After an Entity application meets all registration requirements, the following must be completed:

1. Primary Contact, Authorized Contact, and Enroller will receive two (2) emails: one with an access code to create a username to gain entry to their dashboards and begin assisting consumers. Another email with the [link to enter the access code](#) as well as further instructions. Once username is created, log in the [Enroller Portal](#) (coveredca.com).
2. Complete the security questions, and update email address and cell phone number for password recovery.
3. Upon completion of all registration requirements, the certified Entity may complete their enrollment counselor roster and prepare to enroll consumers in affordable health care insurance.

For more information regarding the Certification process, refer to the [Enroller Portal Plan-Based Entity User Guide](#). For additional assistance, email PBECert@covered.ca.gov.

For more information related to training or the Learning Management System (LMS), contact the Training Help Desk via email at: CCULearning@covered.ca.gov.