

Steps to Become a Plan-Based Enroller

STEP 1 Employment with QHP

Individual must be employed by a Covered California Qualified Health Plan (QHP) as:

1. An Issuer Application Assister - QHP staff or contractor that are non-California Dept. of Insurance (DOI) licensed.
2. A Captive Agent – A DOI licensed Accident and Health Agent hired by or contracted with the QHP.

STEP 2 QHP Adds Prospective Enroller to Roster

The Qualified Health Plan's (QHP's) PBE Authorized Designee **MUST** add the prospective enroller applicant to the QHP's roster in the Certification Portal.

- Instructions to add prospective enrollers to the QHP's PBE roster are found in the "Counselors/Enroller" section of the **Certification Portal Entity User Overview Manual** at: <http://www.coveredca.com/community-enrollment-partners/job-aids/>

STEP 3 Register into the Certification Portal

When the QHP adds the prospective enroller applicant to the roster, the enroller applicant **MUST** register in the Certification Portal.

To register in the Certification Portal, the prospective enroller applicant will:

- Receive an email with credentials and instructions to access the portal to register.

Once registration in the portal is complete, the prospective enroller can access the enroller application through the Certification Portal.

STEP 4 Complete the Enroller Profile and Application

Enroller applicant logs into the Certification Portal and accesses the Enroller Application at: <https://coveredca.force.com/Certification/s/login/>

1. On the **Welcome** page, click on "My Profile".
2. **Complete the Enroller Application.** Follow the instructions of the "Certification Portal Counselor User Overview Manual Job Aid" available at: <http://www.coveredca.com/community-enrollment-partners/job-aids>

For more information regarding the Certification process, contact the Certification Support via email at: PBECert@coveredca.gov

For more information regarding Training or the Learning Management System (LMS), contact the Training Help Desk via email at: CCULearning@coveredca.gov

Background Clearance

STEP

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1. **Issuer Application Assistants MUST** pass a Background Check for Covered California by completing the following steps:
 - a. Complete and submit the Criminal Record disclosure on their Certification Portal during the application completion.
 - b. Download the Live Scan form and
 - I. Complete the “Applicant Information” on the form
 - II. Print **TWO** copies of the completed Live Scan Form.
 - III. Contact a Live Scan facility:
 - a. Schedule an appointment to submit fingerprint scans

NOTE: Plan-Based Enrollment Entity (PBEE) are responsible for payment of fingerprinting scan fees to the Live Scan vendor. Covered California DOES NOT pay for the PBE enroller applicants fingerprinting costs.

2. **Captive Agents MUST** be licensed and in good standing with the CA Department of Insurance
 - Captive Agent enroller applicants that meet the requirement in 2 satisfy the background clearance requirement for Covered California

Training

STEP

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Upon Covered California’s approval of the Enroller application:

1. The enroller applicant is enrolled in Training and
2. Receives an email with login ID and password information from Covered California’s Learning Management System (LMS).
3. Logs into LMS at <https://learning.coveredca.com> to access and complete the online Certification Training.

Enroller applicants **MUST**:

- A. Complete all courses within **90 days of the date enrolled into the Certification Training, and**
- B. Pass the Certification Training exam with **a score of 80% or better.**

STEP

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Register in CoveredCA.com

After enroller applicant meets all Certification requirements, he/she will:

- Receive an email with a personal Delegation Code to register as a Certified Plan-Based enroller in the CoveredCA.com system.

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