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IMPORTANT NOTE:

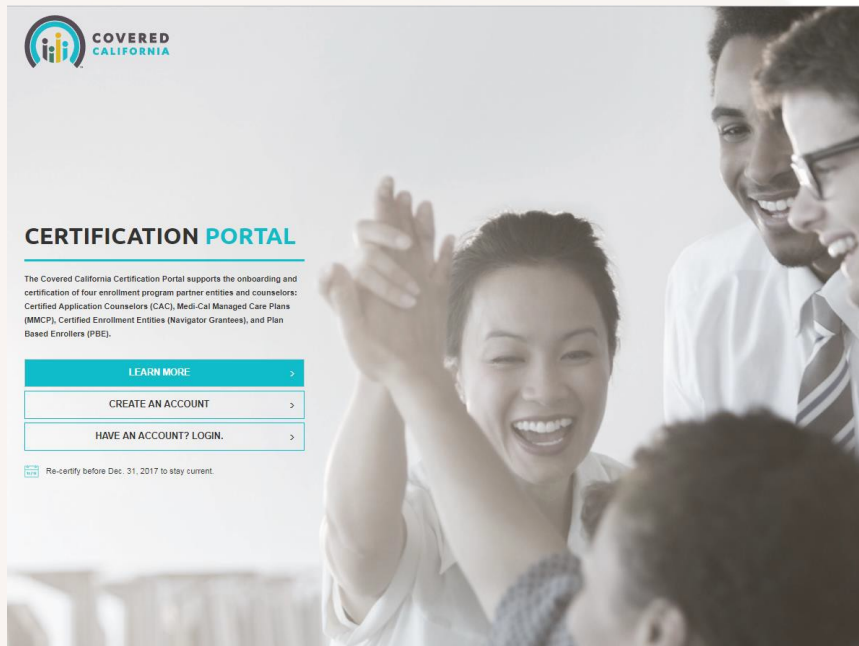
- 1. Entities that were Active in the old IPAS system ARE NOT REQUIRED to create an account or complete a NEW application in the Certification Portal.**
- 2. If you were an Active entity in the old IPAS system, you will receive an email from the Certification Portal with a username and instructions to login.**
- 3. 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

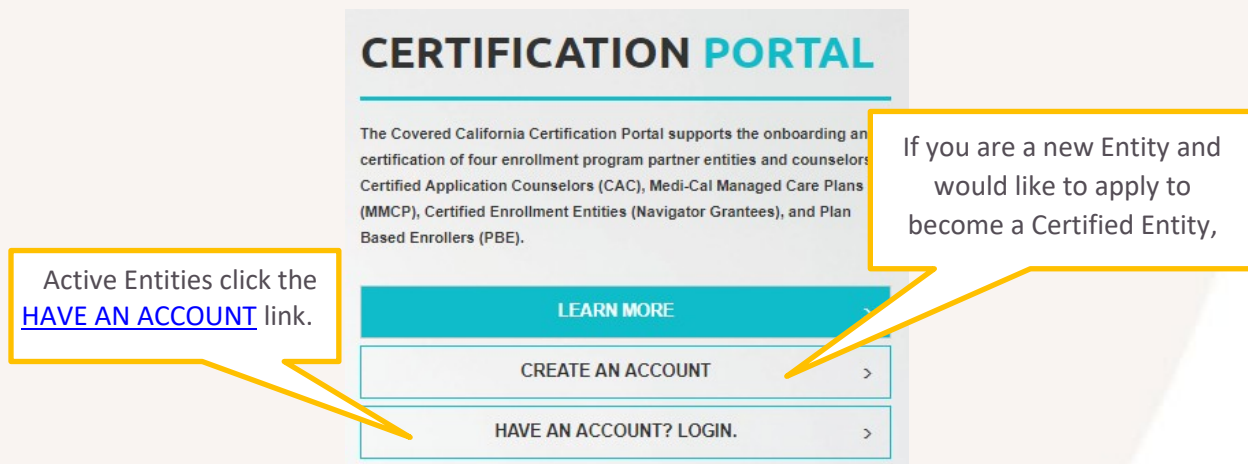
This document outlines all features and functions available to Entity Business Contacts in the Certification Portal. It details the functions that you as an Entity User have including the account registration process, entity application process, managing counselors, and managing files & required documentation.



ACCOUNT CREATION PROCESS

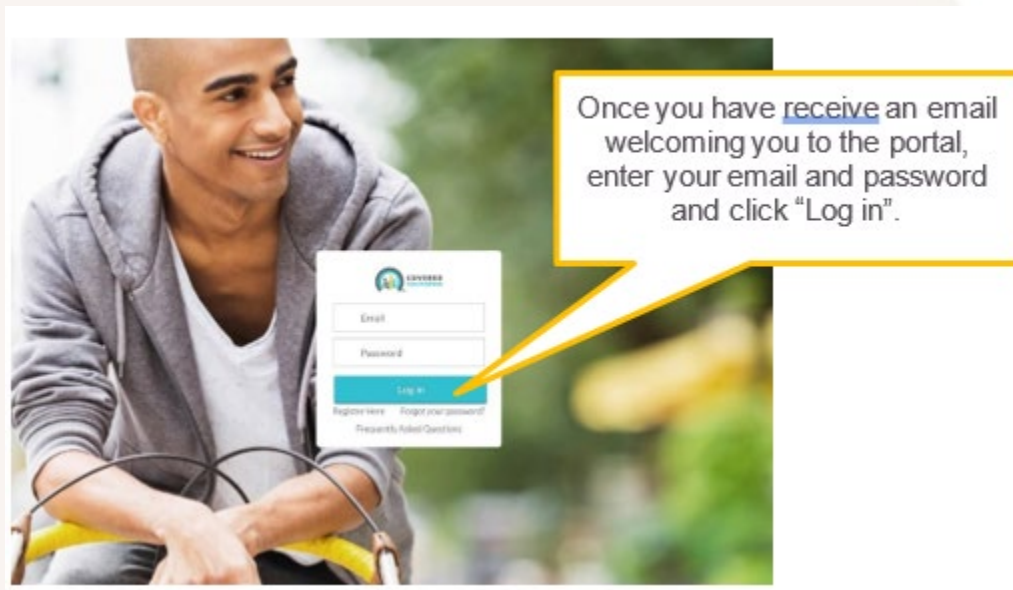
IMPORTANT NOTE:

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. 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:
3. 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

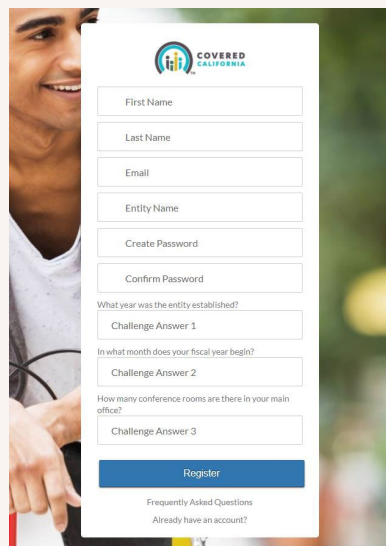
The Certification Portal login page can be found at <https://coveredca.force.com/Certification/s/login/>



ENTITY REGISTRATION

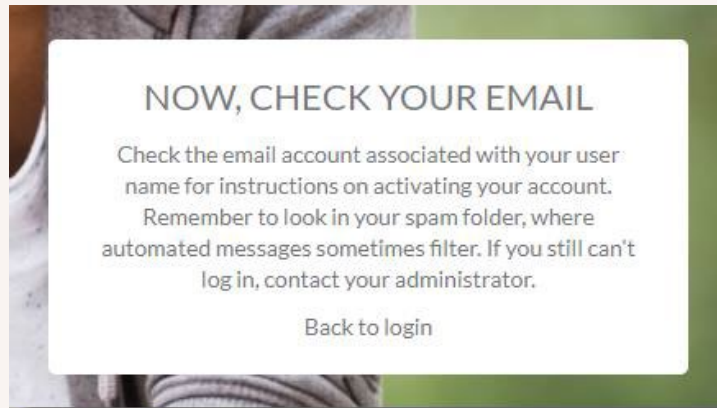
To register as a new Entity applicant, follow the steps below.

- 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

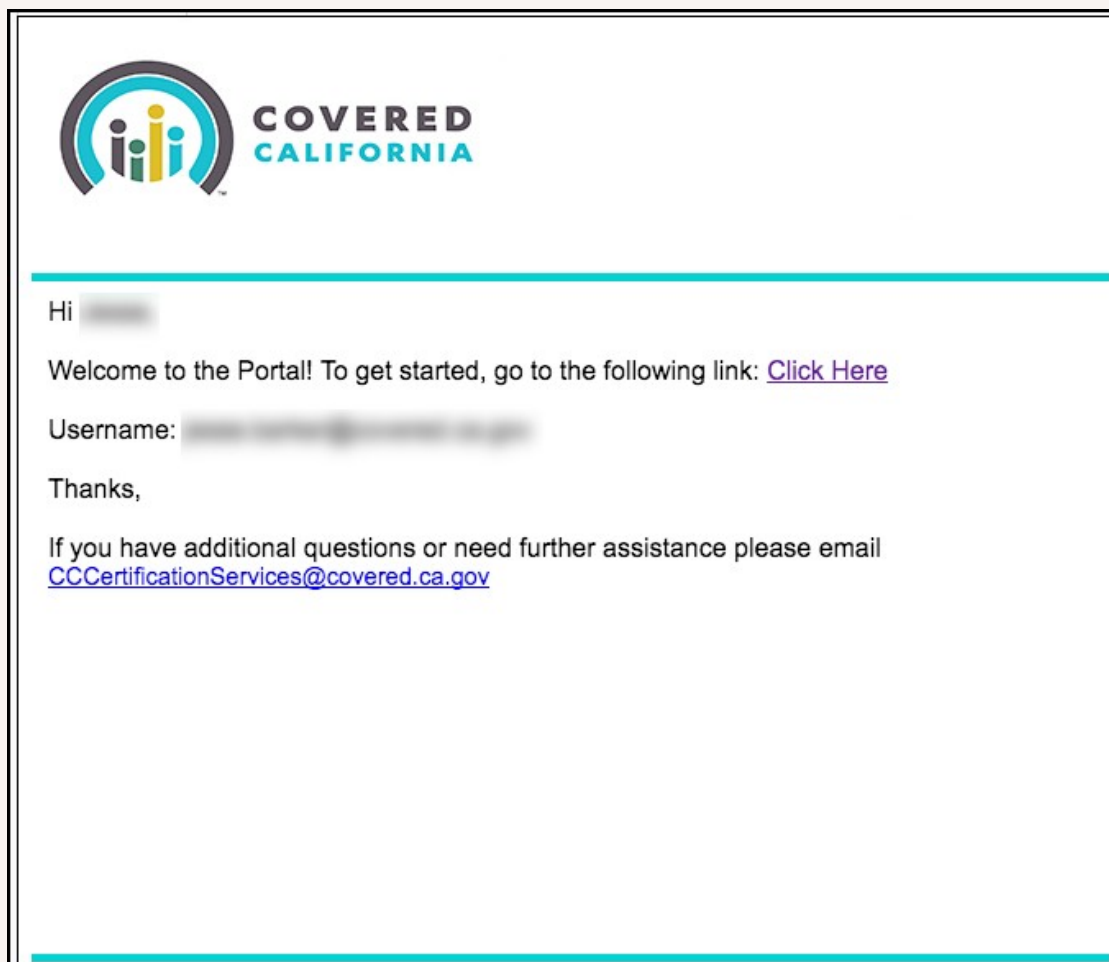


The image shows a registration form overlaid on a background image of a man on a bicycle. The form includes the following fields: First Name, Last Name, Email, Entity Name, Create Password, Confirm Password, What year was the entity established?, Challenge Answer 1, In what month does your fiscal year begin?, Challenge Answer 2, How many conference rooms are there in your main office?, Challenge Answer 3, and a Register button. Below the Register button are links for 'Frequently Asked Questions' and 'Already have an account?'.

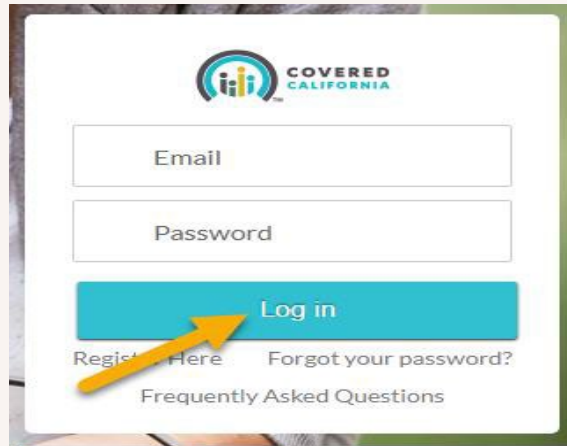
- B. After clicking the “Register” button you will see the following message on your screen. An email notification will be sent with a link to activate the new user account.



- 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.*



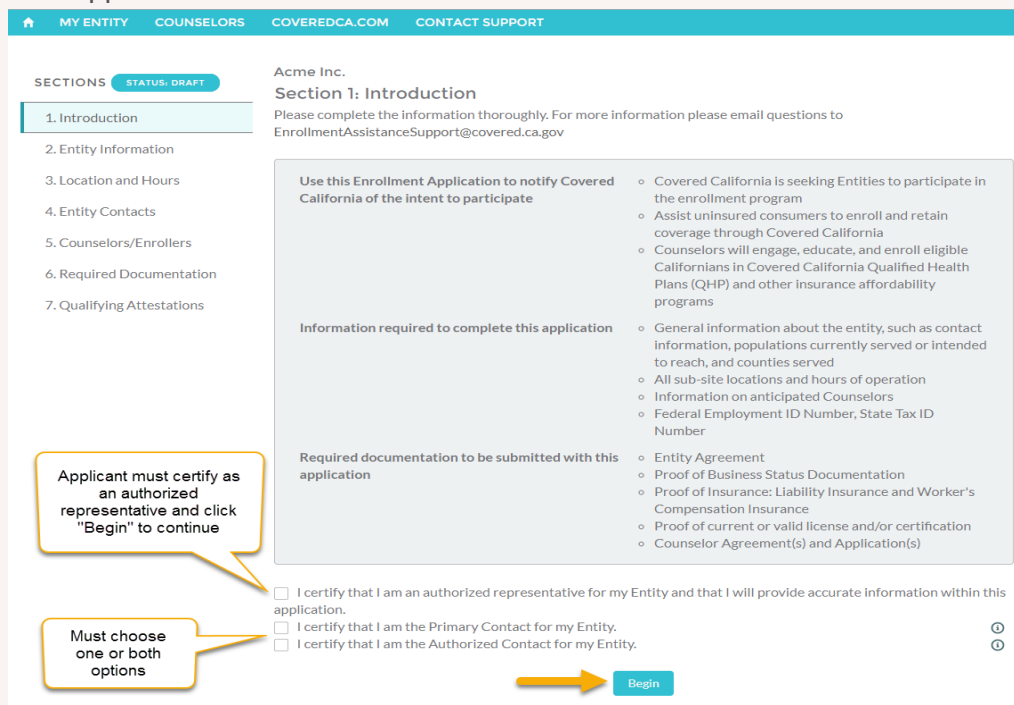
- D. Once you click the link in the email message, you will be directed back to the Login Page. Enter the Email and Password that was entered in the registration process. Click “Log in” once your Email and Password are entered.



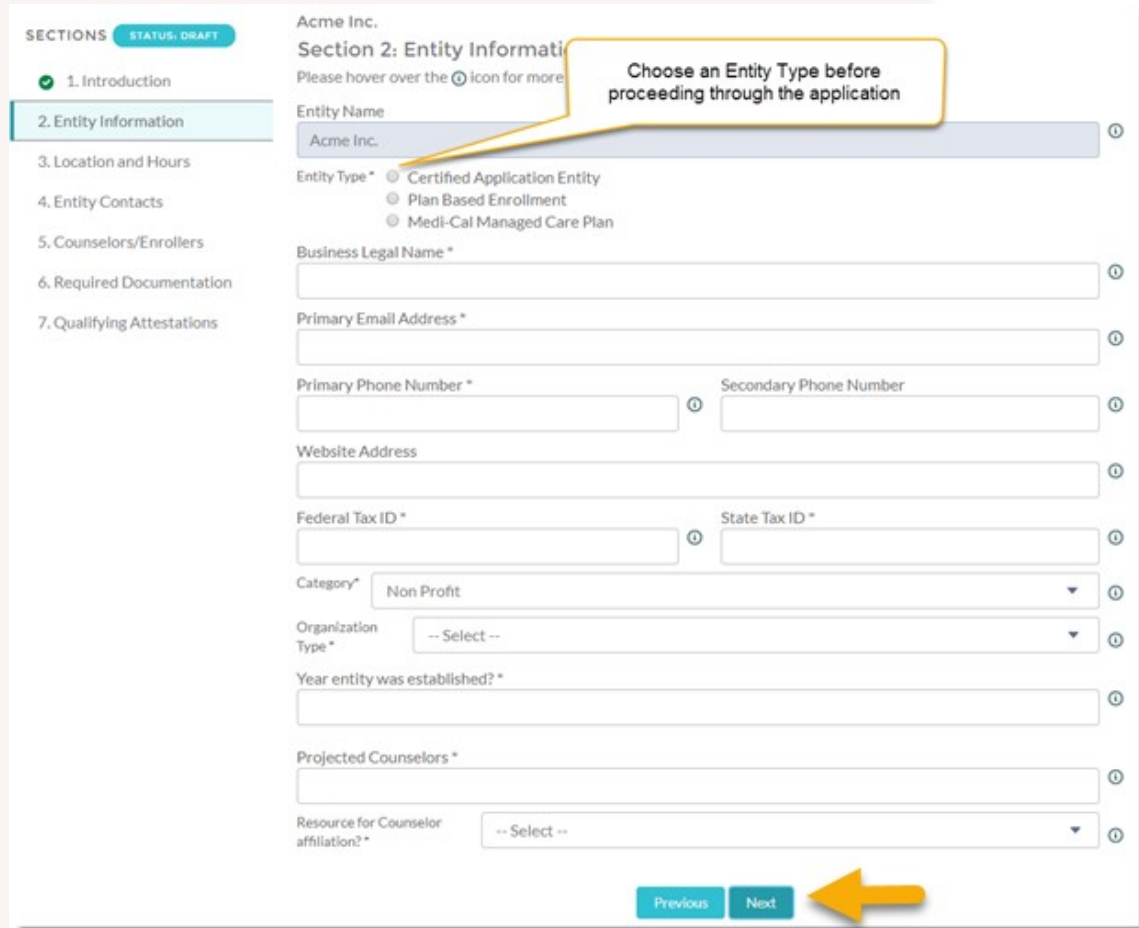
ENTITY APPLICATION

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.

- 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.

MY ENTITY
COUNSELORS
COVEREDCA.COM
CONTACT SUPPORT

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 Primary site and any sub-sites for your organization. Complete the information in the following categories.

SECTIONS STATUS: DRAFT

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

Type of Location

PRIMARY LOCATION

Estimated number of individuals served *

 ⓘ

Location Details

Location Name * ⓘ

Contact First Name * ⓘ Contact Last Name * ⓘ

Email Address * ⓘ

Phone Number * ⓘ Secondary Phone Number ⓘ

County* -- Select -- ⓘ

Hours of Operation

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. ⓘ

Same hours M-F? ⓘ
 Open 24/7? ⓘ

	Opening Time	Closing Time
Monday	<input style="width: 95%;" type="text" value="-- From --"/> ▼	<input style="width: 95%;" type="text" value="-- To --"/> ▼
Tuesday	<input style="width: 95%;" type="text" value="-- From --"/> ▼	<input style="width: 95%;" type="text" value="-- To --"/> ▼
Wednesday	<input style="width: 95%;" type="text" value="-- From --"/> ▼	<input style="width: 95%;" type="text" value="-- To --"/> ▼
Thursday	<input style="width: 95%;" type="text" value="-- From --"/> ▼	<input style="width: 95%;" type="text" value="-- To --"/> ▼
Friday	<input style="width: 95%;" type="text" value="-- From --"/> ▼	<input style="width: 95%;" type="text" value="-- To --"/> ▼
Saturday	<input style="width: 95%;" type="text" value="-- From --"/> ▼	<input style="width: 95%;" type="text" value="-- To --"/> ▼
Sunday	<input style="width: 95%;" type="text" value="-- From --"/> ▼	<input style="width: 95%;" type="text" value="-- To --"/> ▼

You must save the address information by clicking “Save Location” before clicking on “Next”.

Mailing Address

Mailing Street Address *

Mailing City *

Mailing State * Mailing Zip Code *

Physical Address Same as Mailing? ⓘ

Physical Street Address *

Physical City *

Physical State * Physical Zip Code *

Click to Save Location information

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.

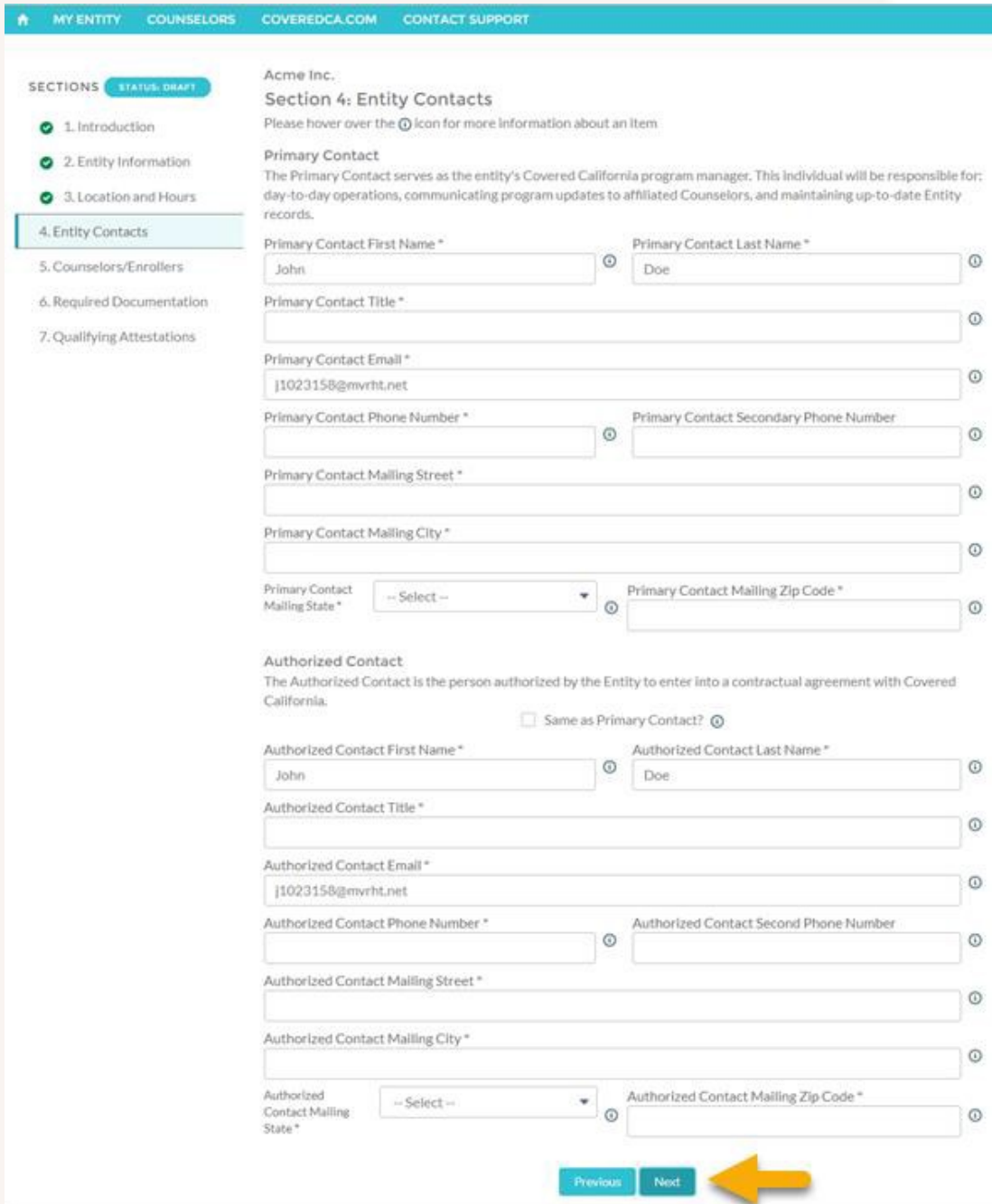
Section 3: Location and Hours

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

Please fill out the dialog boxes for information about the locations for your organization. Complete the information in the following categories.

LOCATION NAME
<div style="display: flex; justify-content: space-between; align-items: center;"> Acme Location 1 PRIMARY LOCATION </div>

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).



MY ENTITY COUNSELORS COVEREDCA.COM CONTACT SUPPORT

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 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@mvrht.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 * ⓘ

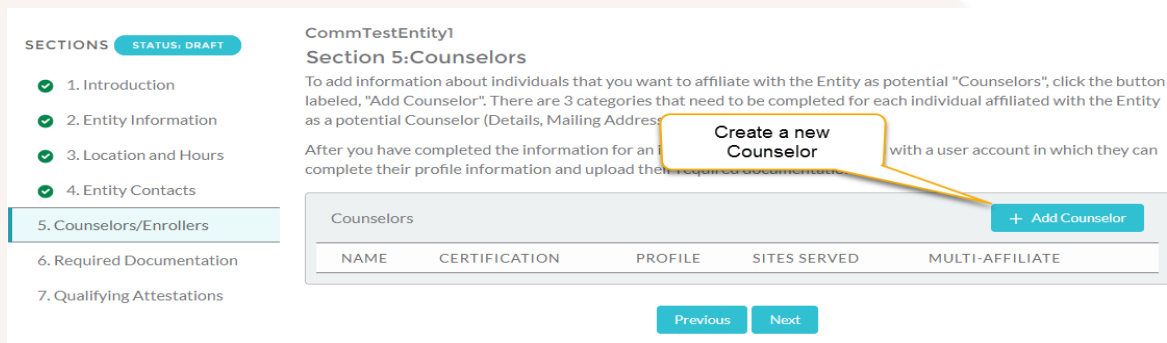
Authorized Contact
The Authorized Contact is the person authorized by the Entity to enter into a contractual agreement with Covered California.

Same as Primary Contact? ⓘ

Authorized Contact First Name * John ⓘ
Authorized Contact Last Name * Doe ⓘ
Authorized Contact Title * ⓘ
Authorized Contact Email * j1023158@mvrht.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 * ⓘ

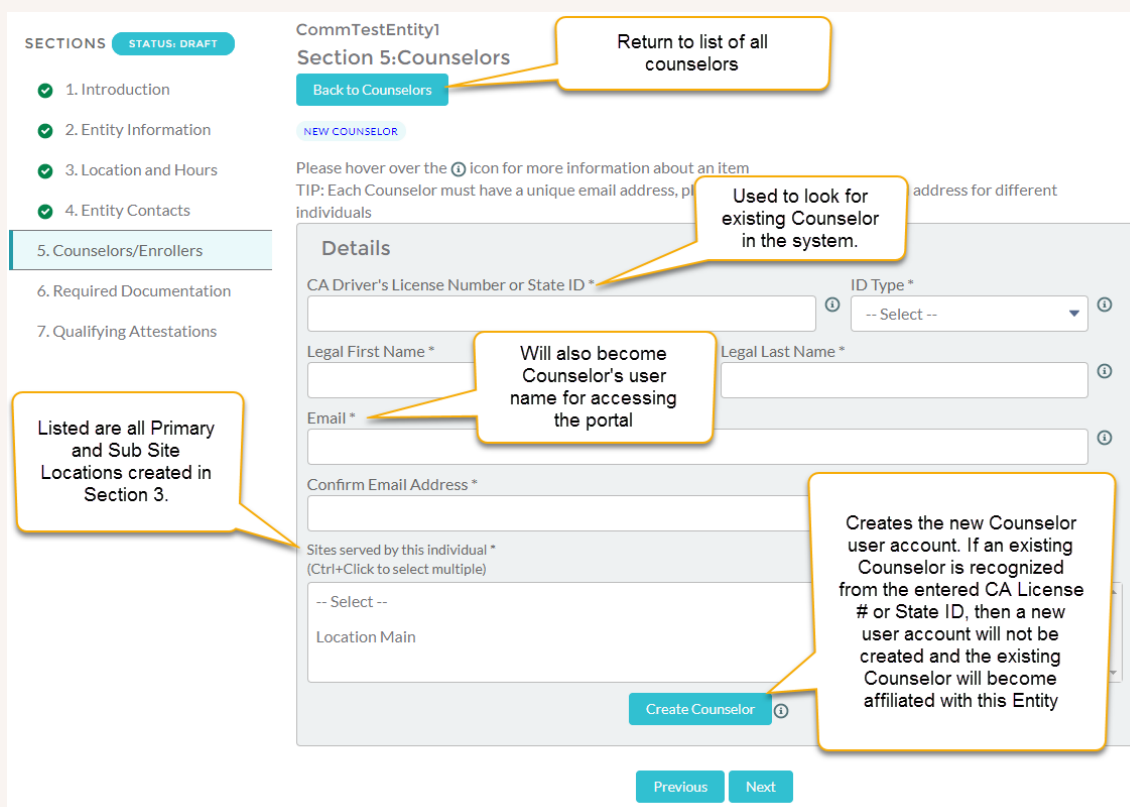
Previous Next 

5. 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.



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.

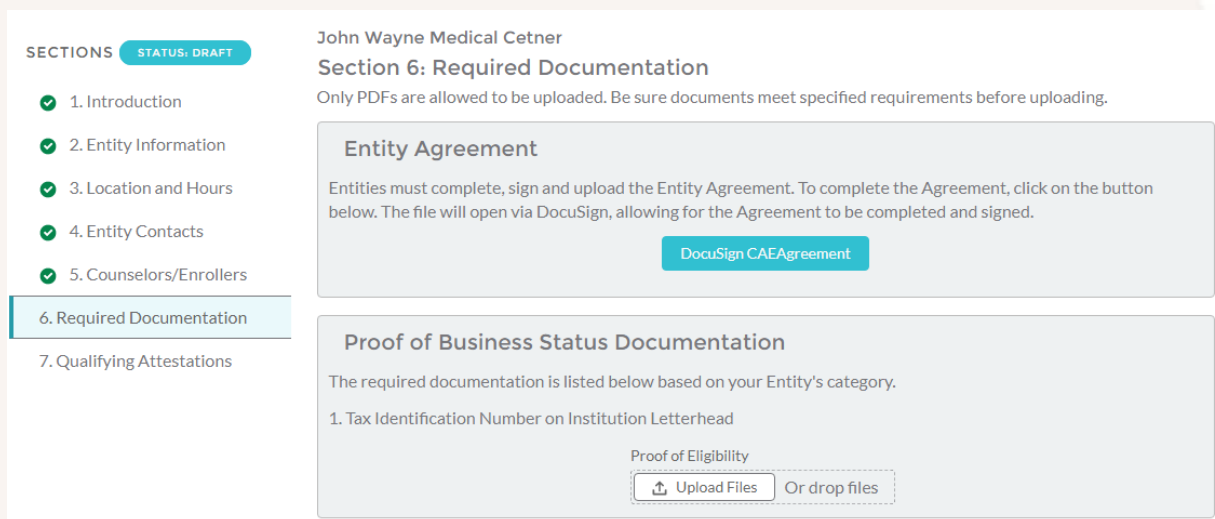


After creating the counselor, select “Back to Counselors” to view a refreshed list of all the counselors (with the option to create more), or proceed to the next section of the application by clicking “Next”.

6. REQUIRED DOCUMENTATION:

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 Center
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 CAE Agreement](#)

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 CSS Team (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.



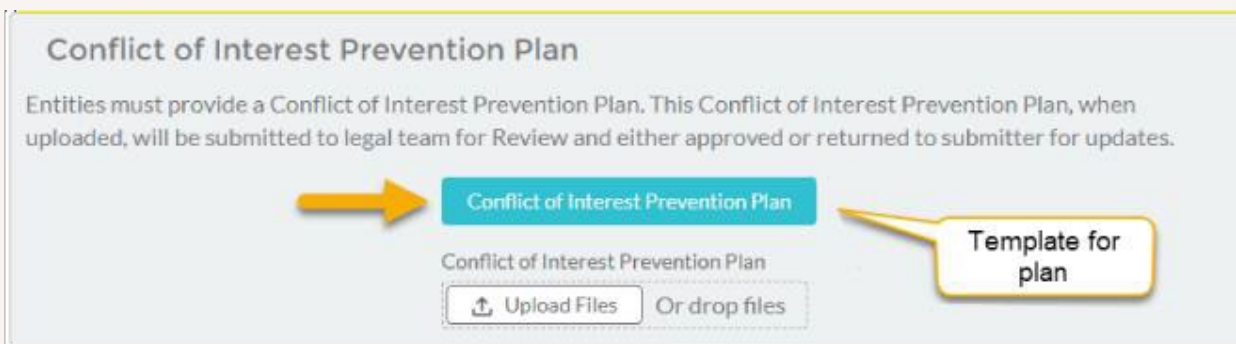
Proof of License

Upload Files 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

Conflict of Interest Prevention Plan

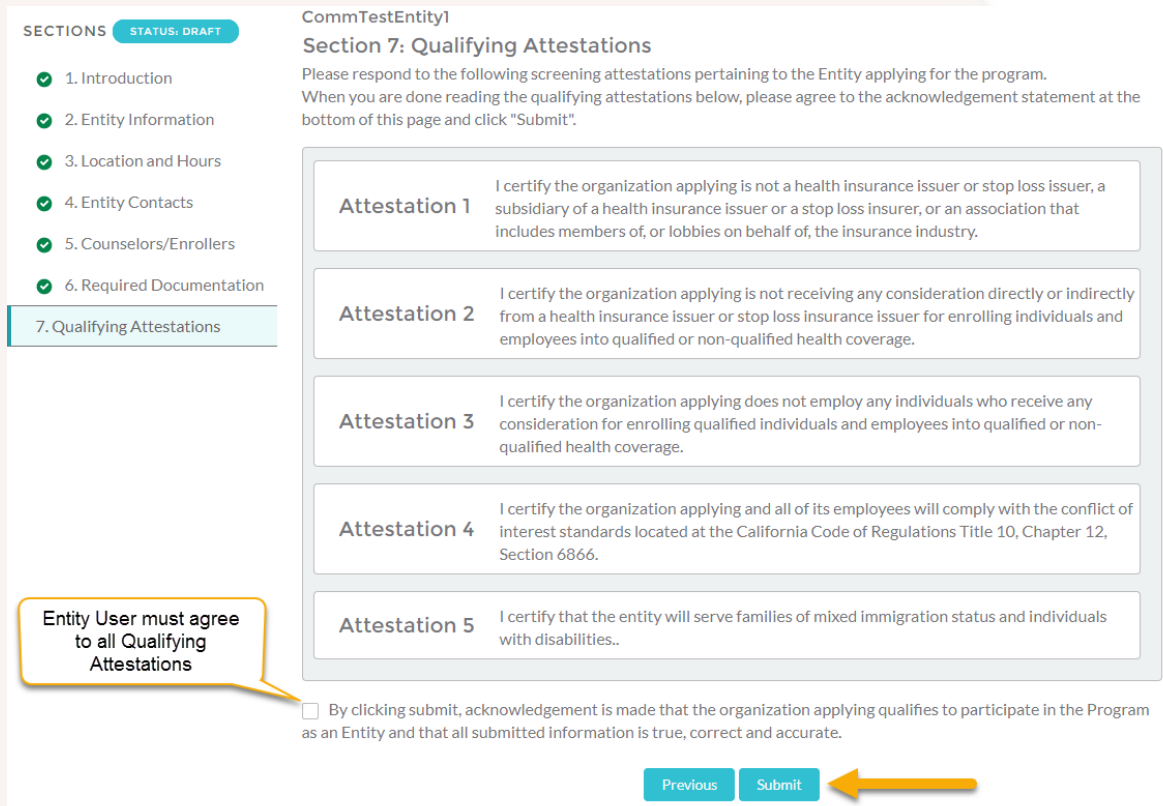
Upload Files Or drop files

Template for plan

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.

7. 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.



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.

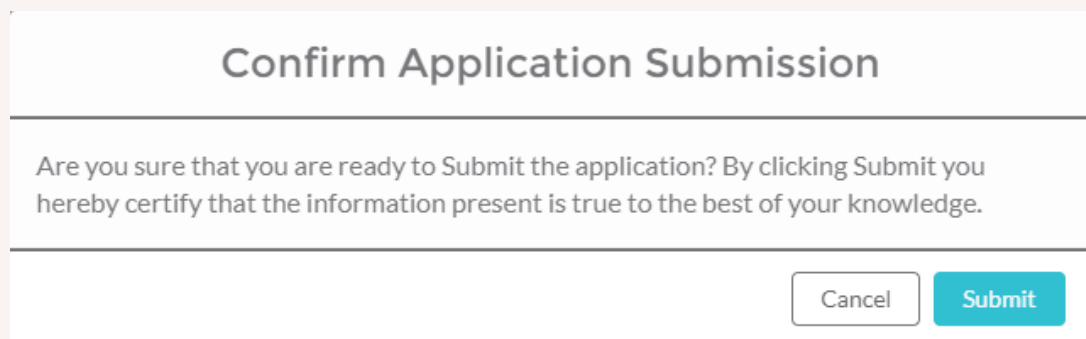
Attestation 4 I certify the organization applying and all of its employees will comply with the conflict of interest standards located at the California Code of Regulations Title 10, Chapter 12, Section 6866.

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

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.



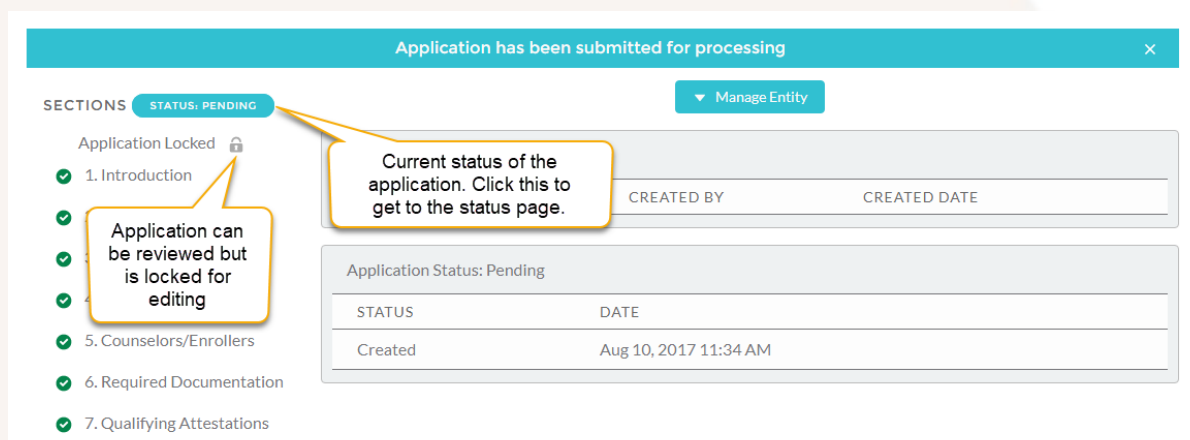
Confirm Application Submission

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 FROM COVERED CALIFORNIA

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 application status page. At the top, a teal banner reads "Application has been submitted for processing". Below this, the status is "STATUS: PENDING" and there is a "Manage Entity" button. A sidebar on the left lists sections: "Application Locked" (with a lock icon), "1. Introduction", "5. Counselors/Enrollers", "6. Required Documentation", and "7. Qualifying Attestations". A callout box points to the "1. Introduction" section, stating "Application can be reviewed but is locked for editing". Another callout box points to the "STATUS: PENDING" label, stating "Current status of the application. Click this to get to the status page." The main content area shows a table with columns "CREATED BY" and "CREATED DATE". Below this, a section titled "Application Status: Pending" contains a table with columns "STATUS" and "DATE", showing a single entry: "Created" on "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.

The screenshot shows the 'Application Status' page. On the left, a sidebar lists sections: 1. Introduction, 2. Entity Information, 6. Required Documentation, and 7. Qualifying Attestations. A callout box points to section 2 with the text 'Notes added by the Covered CA review team'. Another callout box points to the status history table with the text 'History of status changes'. The 'Application Notes' table has one entry: 'Draft Please correct the Mailing Address on the Primary Location. The Zip Code does not match the city provide'. The 'Application Status' table shows a history of changes:

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 have the ability to 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.

The screenshot shows the 'Manage Entity' dropdown menu open, with 'Entity Disclosure Update' selected. The 'Application Notes' table is visible below, showing the same draft note as in the previous screenshot.

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.

Sample Application Approval Email

COVERED CALIFORNIA

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

NEXT STEPS To Complete Certification Requirements:

1. 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.
2. 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]
3. Ensure that your Counselor Roster is finalized in the Entity application by completing all the Counselor candidate information.
4. The Counselor must complete the following steps for their profile and agreement:
 - a. 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.
 - b. 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
 - c. Sign & Submit their Counselor agreement
 - d. Upload a head shot photo for Counselor badge.
5. 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.

If you have additional questions or need further assistance please email certificationportal@covered.ca.gov.

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:

Entity details are displayed on the left side of the page.

Required documents are managed here. Click here (or View All) to view all records.

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

Any files outside of Required Documentation can be uploaded and managed here.

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

Entity Primary and Sub Site Locations

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

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

CalHEERS Username

CalHEERS Password

CalHEERS Pin

System Info

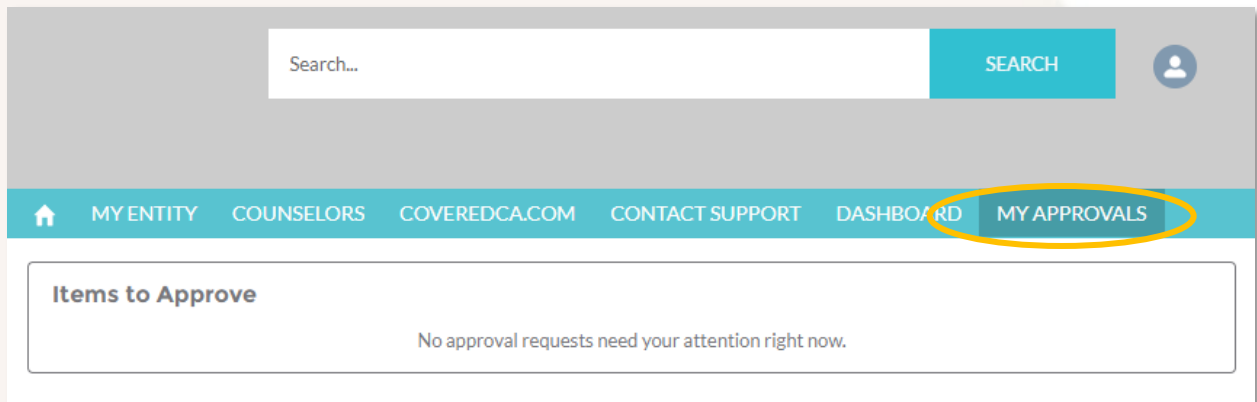
Created By: Andy Hilliard, 10/15/2015 4:29 PM

There are two types of change requests: Change Request and Withdrawal Requests

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

NEW – ENTITY ACCOUNT “MY APPROVAL”

Primary Contacts or Authorized Contacts are required to approve or reject pending requests located under the “Items to Approve” tab.

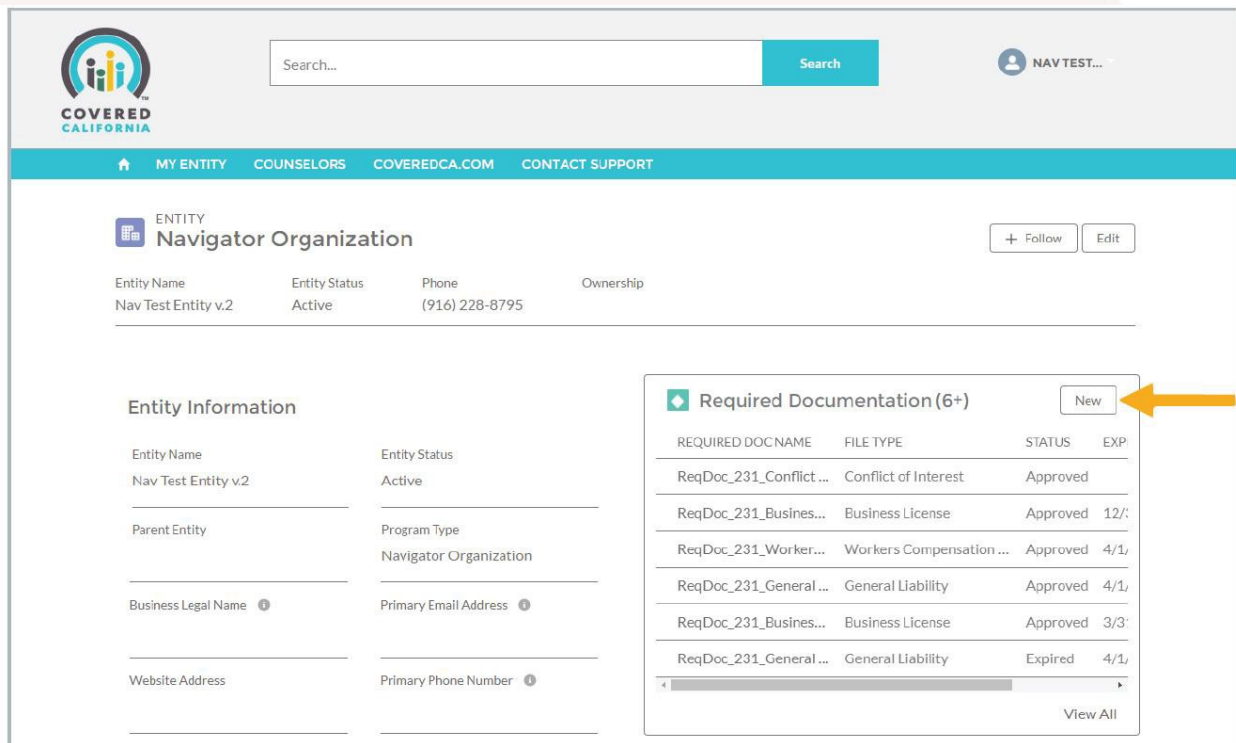


REQUIRED DOCUMENTS & MY FILES

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, certain Required Documents will expire over time and will need to be updated.

UPDATING EXPIRED REQUIRED DOCUMENTS:

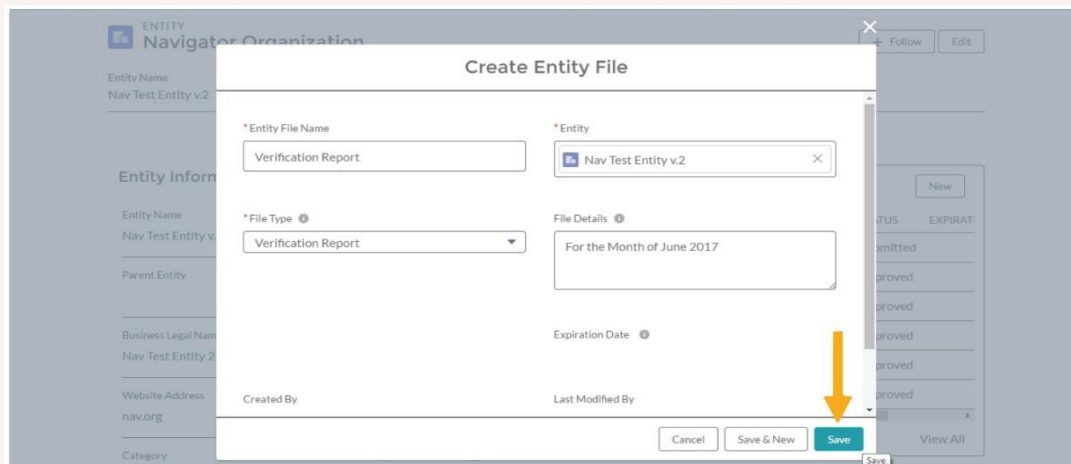
Expired Required Documents can be updated through the following procedure: Click on the “New” button next to Required Documents



The screenshot shows the 'Navigator Organization' entity page. On the right side, there is a 'Required Documentation (6+)' table. A yellow arrow points to the 'New' button located at the top right of this table. The table contains the following data:

REQUIRED DOCNAME	FILE TYPE	STATUS	EXP
ReqDoc_231_Conflict...	Conflict of Interest	Approved	
ReqDoc_231_Busines...	Business License	Approved	12/...
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/...

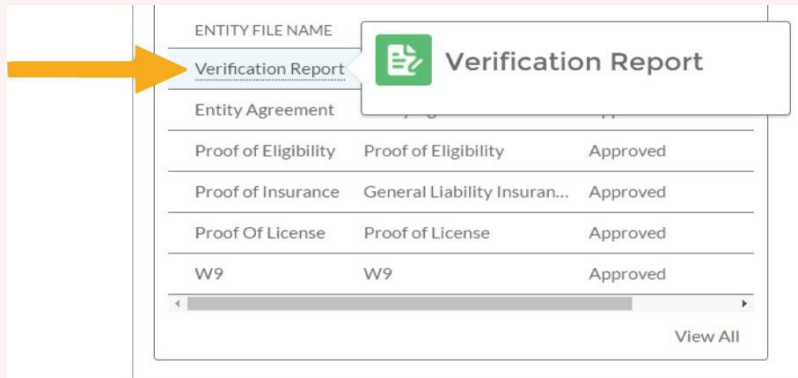
1. Complete required fields and click on the “Save” button



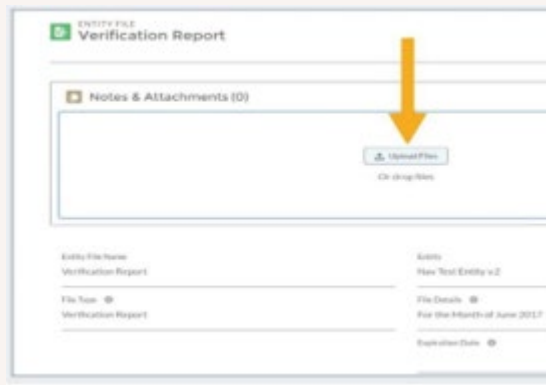
The screenshot shows the 'Create Entity File' modal form. The 'Save' button at the bottom right is highlighted with a yellow arrow. The form contains the following fields:

- *Entity File Name: Verification Report
- *Entity: Nav Test Entity v.2
- *File Type: Verification Report
- File Details: For the Month of June 2017
- Expiration Date
- Created By
- Last Modified By

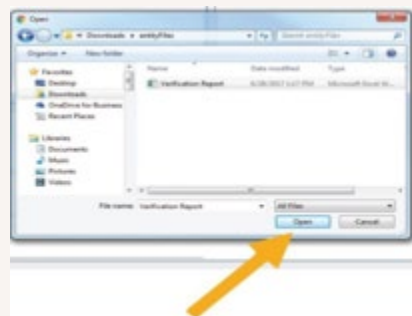
2. Click the name of the file you just created



3. Click the "Upload Files" button



4. Select the file you want to upload

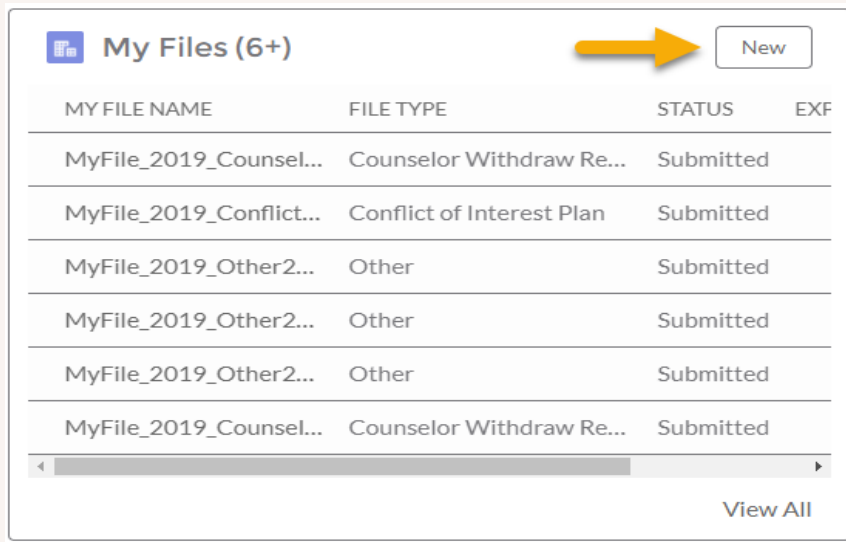


NOTE: Required Document Entry has now been completed.

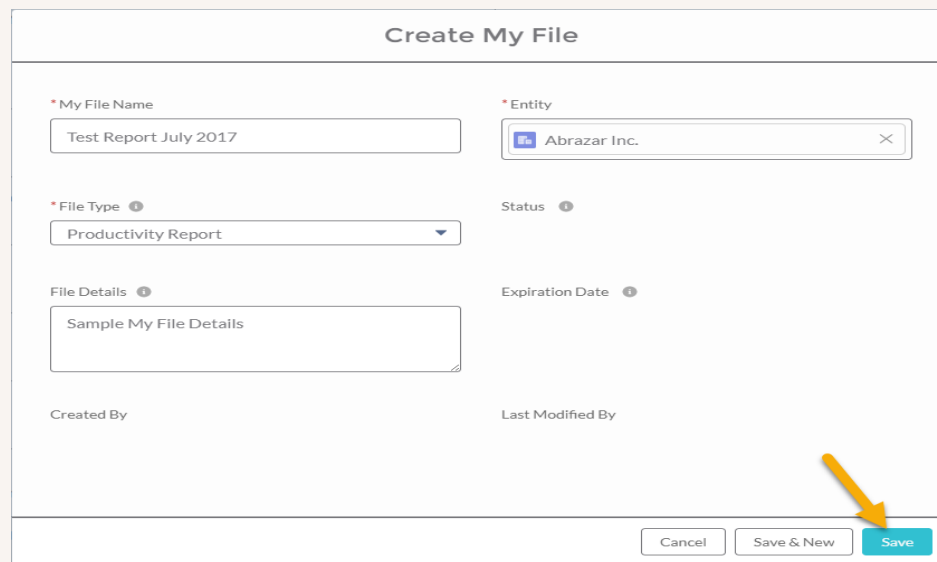
CREATING MY FILES:

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 My Files related list.



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



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
Test Report July 2017

Edit Delete Clone

My File Name Test Report July 2017	Entity Abrazar Inc.
File Type ⓘ Productivity Report	Status ⓘ
File Details ⓘ Sample My File Details	Expiration Date ⓘ
Created By [User Name], 7/27/2017 10:40 AM	Last Modified By [User Name], 7/27/2017 10:40 AM

Notes & Attachments (0)

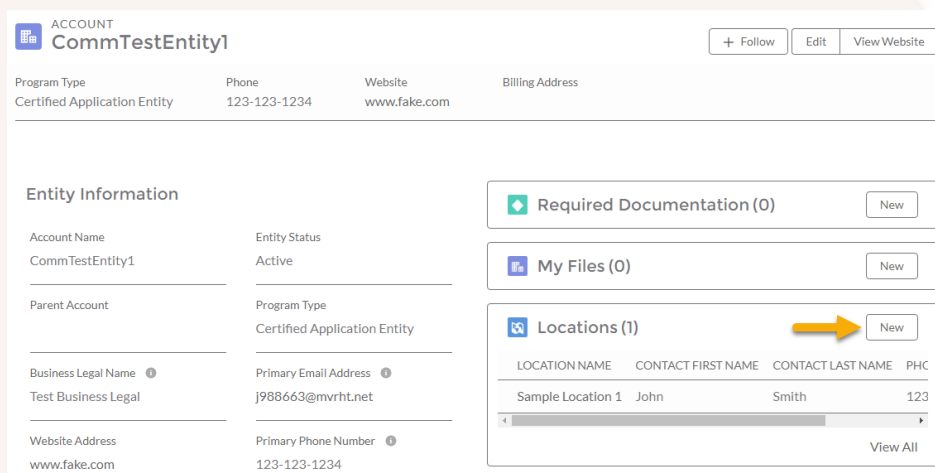
Or drop files

Status and Expiration Date fields will be managed by the internal review 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 given 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]

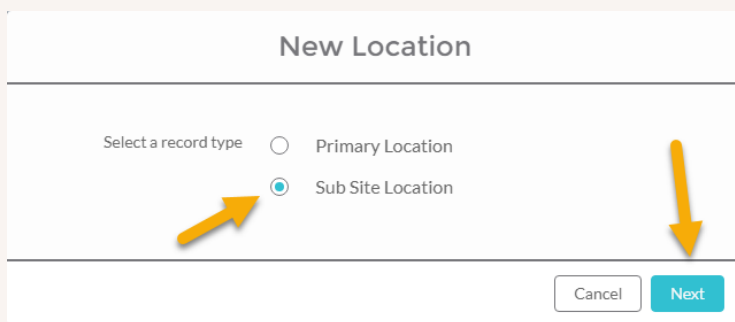
My Files (0) [New]

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 ⓘ
100

Primary Location ⓘ
Sample Location 1

Record Type
Sub Site Location

Location Details

* Location Name
Sample Sub Site

* Entity
CommTestEntity1

* Contact First Name ⓘ
Jane

Contact Last Name ⓘ
Smith

* Phone Number ⓘ
111-111-1111

Secondary Phone Number ⓘ
222-222-2222

* Email Address ⓘ
jane@sampleco.com

* County ⓘ
Amador

Cancel Save & New Save

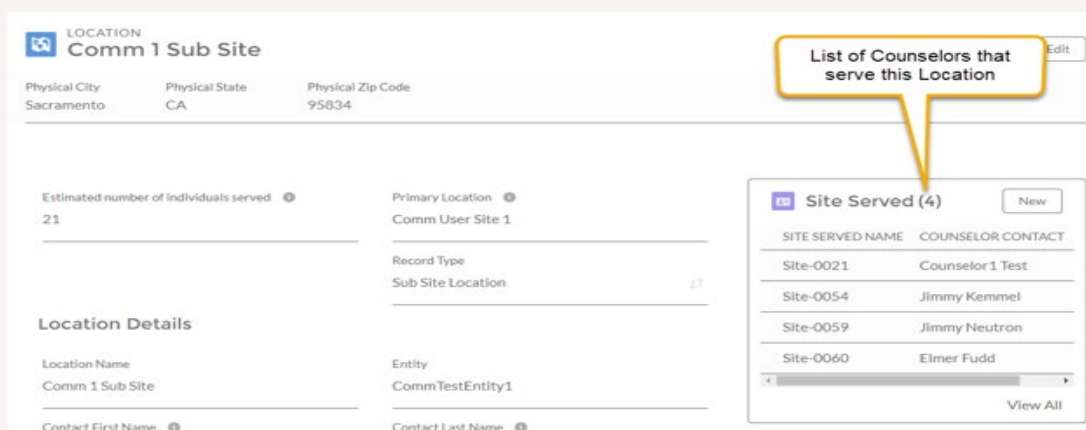
NOTE: Changes to an existing site in the Certification Portal will initiate a Change Request for CalHEERS so the systems remain in sync. Refer to the Entity Change Requests section on Page 33 for a full list of Entity Change Requests and approvals required for the change to take effect.

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.

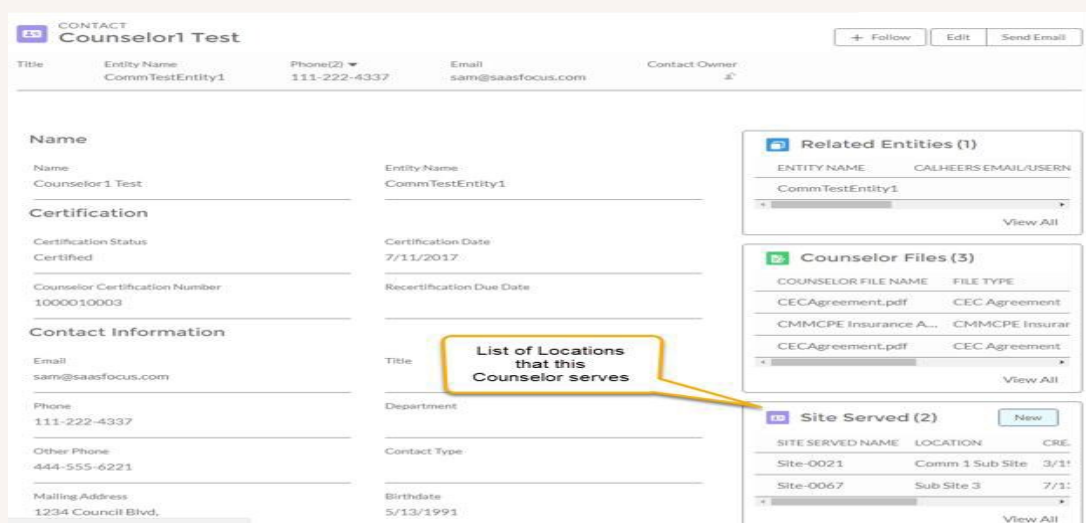
VIEWING SITES SERVED:

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.



SITE SERVED NAME	COUNSELOR CONTACT
Site-0021	Counselor 1 Test
Site-0054	Jimmy Kemmel
Site-0059	Jimmy Neutron
Site-0060	Elmer Fudd

Location view of Sites Served

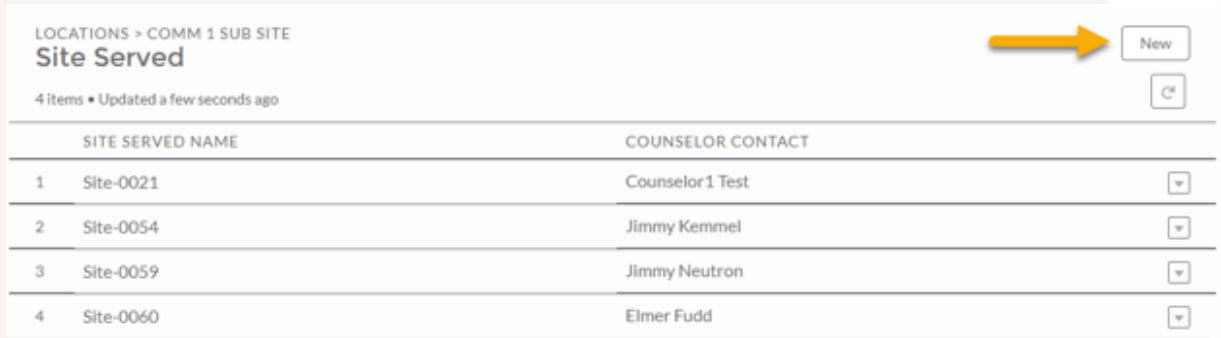


SITE SERVED NAME	LOCATION	CRE
Site-0021	Comm 1 Sub Site	3/11
Site-0067	Sub Site 3	7/11

Counselor view of Sites Served

CREATING LOCATION SITES SERVED:

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

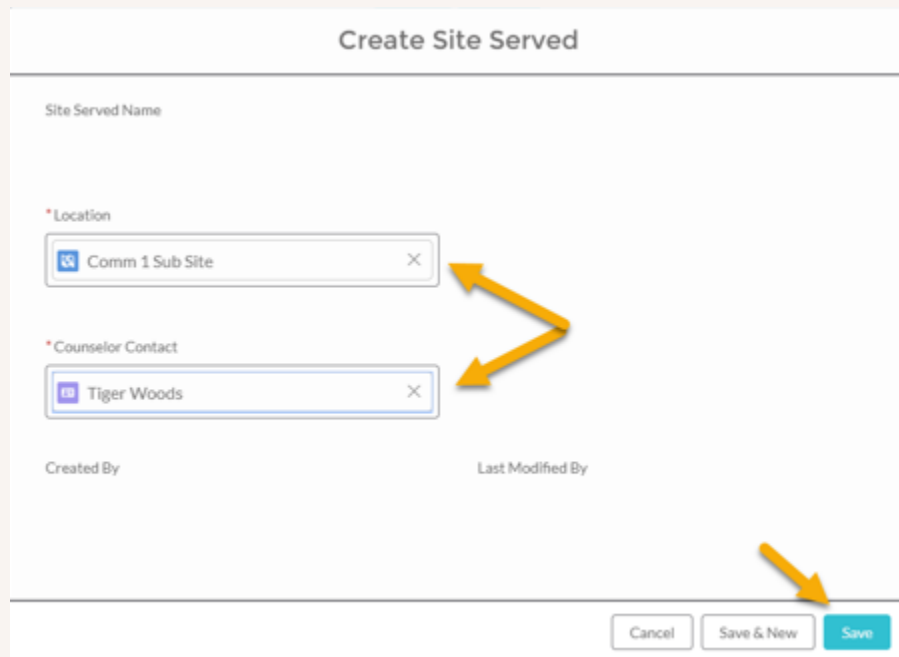


LOCATIONS > COMM 1 SUB SITE
Site Served
4 Items • Updated a few seconds ago

	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

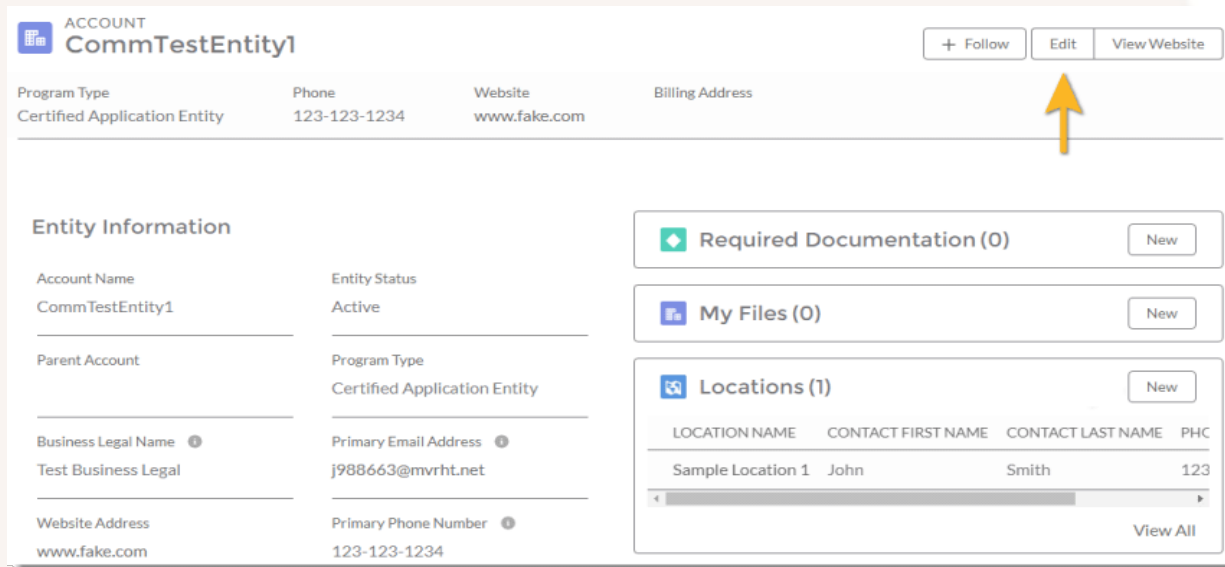
Cancel Save & New Save

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 shows the 'My Entity' page for 'CommTestEntity1'. At the top right, there are three buttons: '+ Follow', 'Edit', and 'View Website'. An orange arrow points to the 'Edit' button. Below the buttons, there is a header section with the following information:

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

The main content area is divided into several sections:

- Entity Information:** A list of fields including 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), and Primary Phone Number (123-123-1234).
- Required Documentation (0):** A section with a 'New' button.
- My Files (0):** A section with a 'New' button.
- Locations (1):** A section with a 'New' button and a table of locations.

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

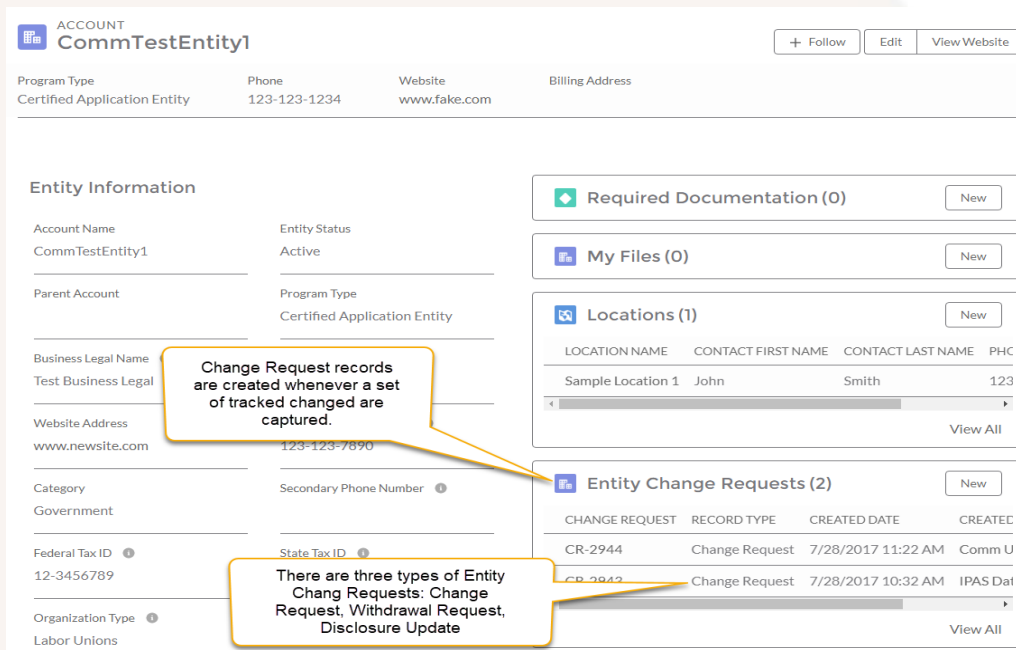
At the bottom right of the Locations section, there is a 'View All' link.

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

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



ACCOUNT
CommTestEntity1

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 | 123-123-7890
 Category: Government | Secondary Phone Number
 Federal Tax ID: 12-3456789 | State Tax ID
 Organization Type: Labor Unions

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]

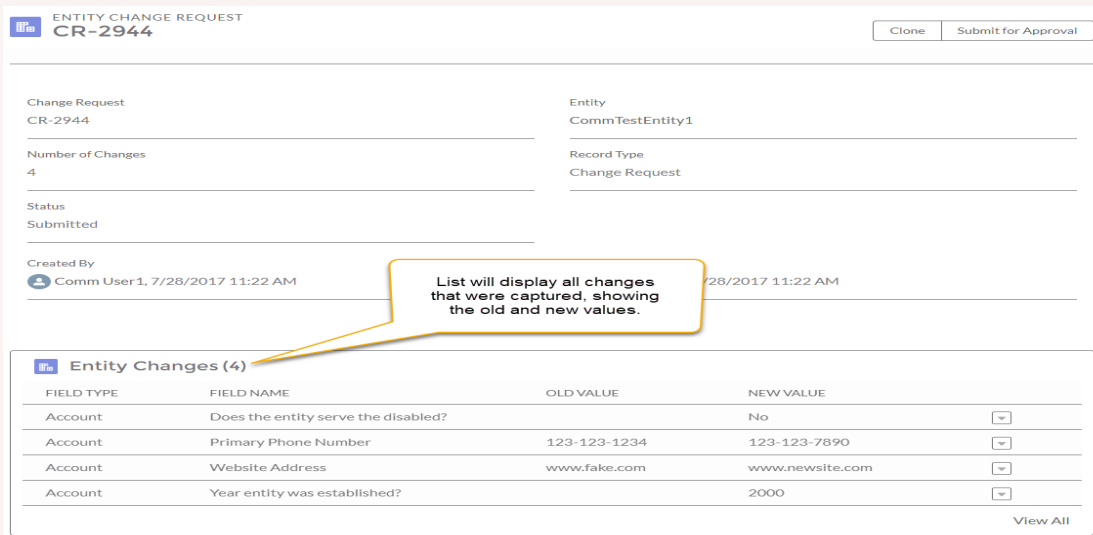
CHANGE REQUEST	RECORD TYPE	CREATED DATE	CREATED BY
CR-2944	Change Request	7/28/2017 11:22 AM	Comm U
CR-2942	Change Request	7/28/2017 10:32 AM	IPAS Dat

[View All]

Callout 1: Change Request records are created whenever a set of tracked changes are captured.

Callout 2: There are three types of Entity Change Requests: Change Request, Withdrawal Request, Disclosure Update

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 User 1, 7/28/2017 11:22 AM

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

Entity Changes (4)

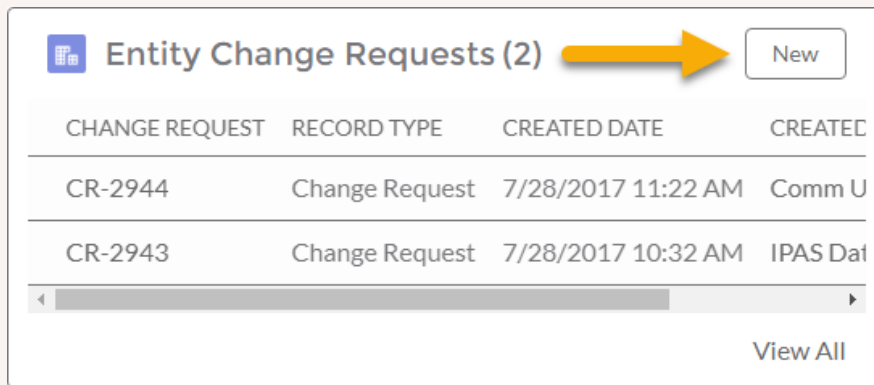
FIELD TYPE	FIELD NAME	OLD VALUE	NEW VALUE
Account	Does the entity serve the disabled?		No
Account	Primary Phone Number	123-123-1234	123-123-7890
Account	Website Address	www.fake.com	www.newsite.com
Account	Year entity was established?		2000


[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.

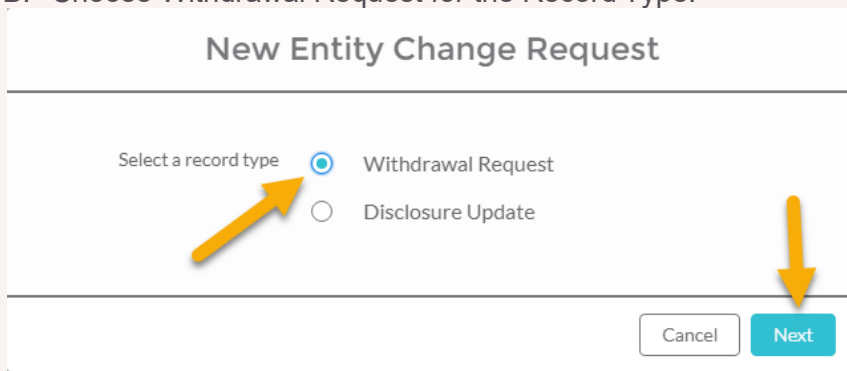


Entity Change Requests (2) 

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

View All

B. Choose Withdrawal Request for the Record Type.

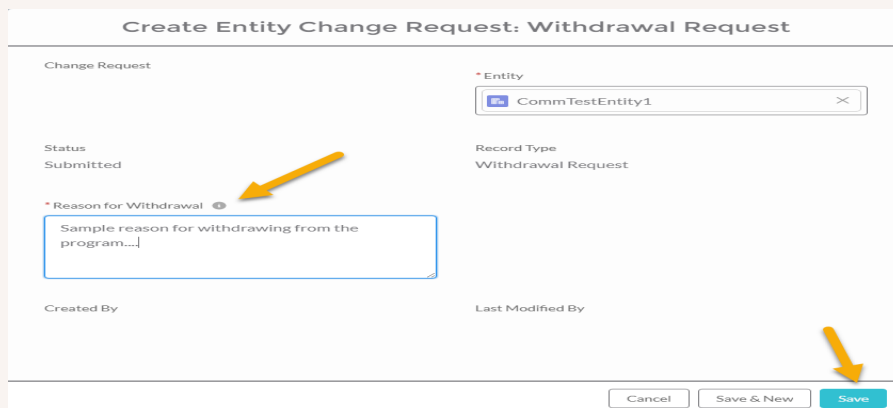


New Entity Change Request

Select a record type Withdrawal Request
 Disclosure Update

Cancel Next


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



Create Entity Change Request: Withdrawal Request

Change Request


Status Submitted

* Reason for Withdrawal 
Sample reason for withdrawing from the program...]

* Entity
CommTestEntity1

Record Type
Withdrawal Request

Created By Last Modified By

Cancel Save & New Save 

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 Clone

Change Request: CR-2945
 Entity: CommTestEntity1
 Status: Submitted
 Record Type: Withdrawal Request
 Reason for Withdrawal: Sample reason for withdrawing from the program...
 Created By: Comm User1, 7/28/2017 11:51 AM
 Modified By: Comm User1, 7/28/2017 11:51 AM

Approval History (2) Recall

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

View All

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.

Entity Change Requests (6+) New

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.

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.

ALL COUNSELORS COUNSELOR OVERVIEW COUNSELOR PROGRESS AGREEMENT STATUS TRAINING MORE

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 (Name, Address, and profile information). After you have completed the information, you will be provided with a user account. You will need to complete their profile information and upload their required documentation.

List of all Counselors affiliated with the Entity

NAME	PROFILE	SITES SERVED	MULTI-AFFILIATE
Barker, Sofia	Incomplete		<input type="checkbox"/>
Chao, Janet	Certified	Primary Location	<input type="checkbox"/>
Cloud, Cumulus	Incomplete		<input type="checkbox"/>

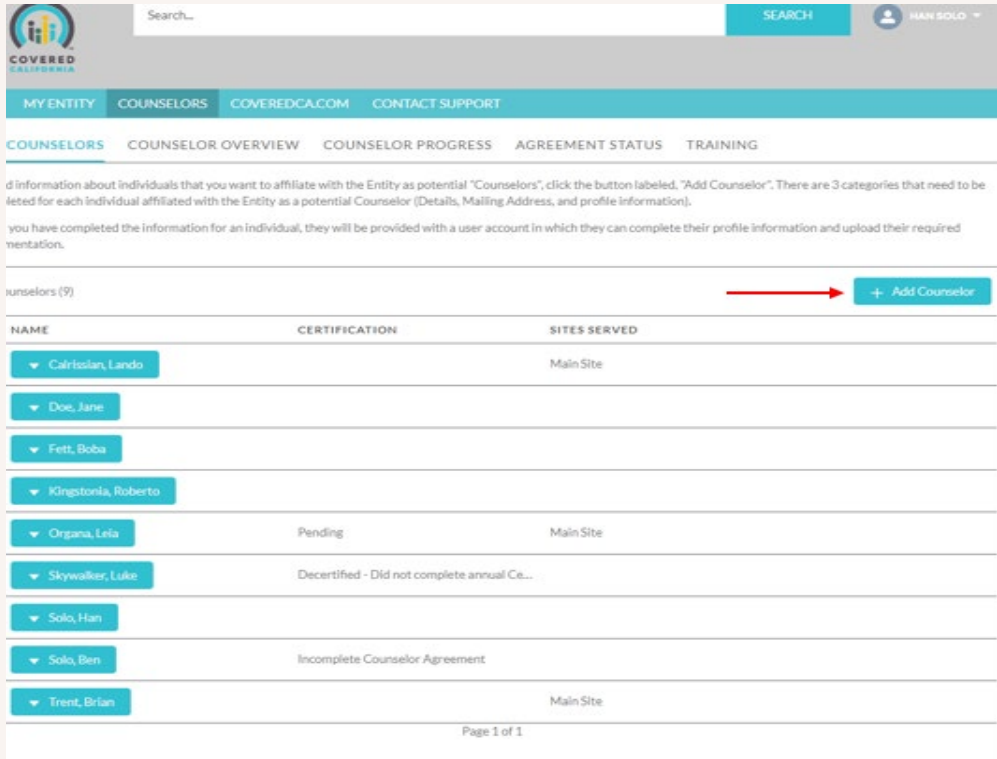
Click to view Contact record

Add new Counselor

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.



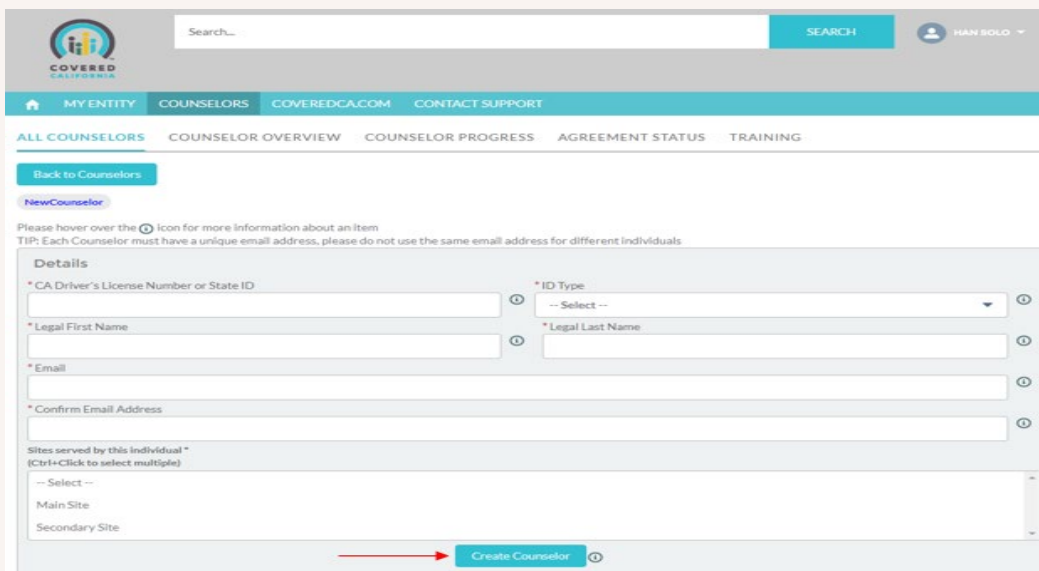
Information about individuals that you want to affiliate with the Entity as potential "Counselors", click the button labeled, "Add Counselor". There are 3 categories that need to be listed for each individual affiliated with the Entity as a potential Counselor (Details, Mailing Address, and profile information). Once you have completed the information for an individual, they will be provided with a user account in which they can complete their profile information and upload their required documentation.

Counselors (9) + Add Counselor

NAME	CERTIFICATION	SITES SERVED
▼ Carlislan, Lando		Main Site
▼ Doe, Jane		
▼ Fett, Boba		
▼ Kingstonia, Roberto		
▼ Organa, Leia	Pending	Main Site
▼ Skywalker, Luke	Decertified - Did not complete annual Ce...	
▼ Solo, Han		
▼ Solo, Ben	Incomplete Counselor Agreement	
▼ Trent, Brian		Main Site

Page 1 of 1

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.



Back to Counselors

NewCounselor

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)

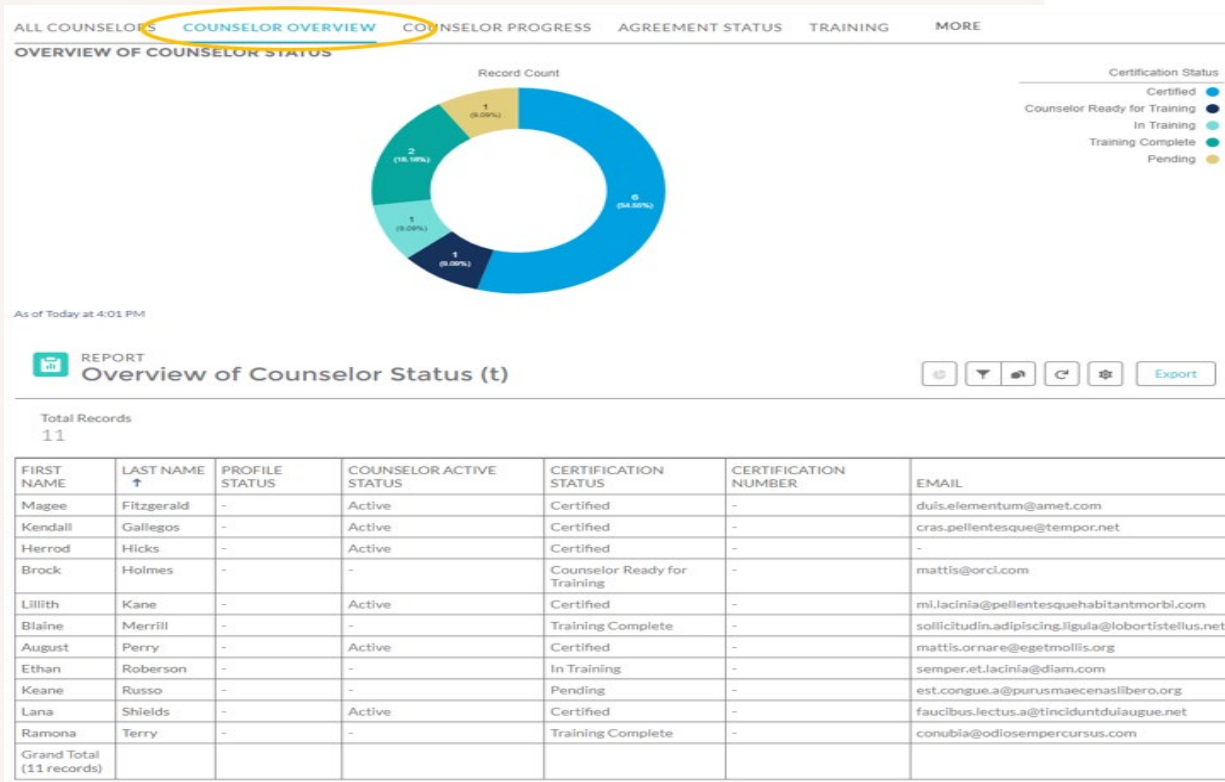
-- Select --

Main Site

Secondary Site

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

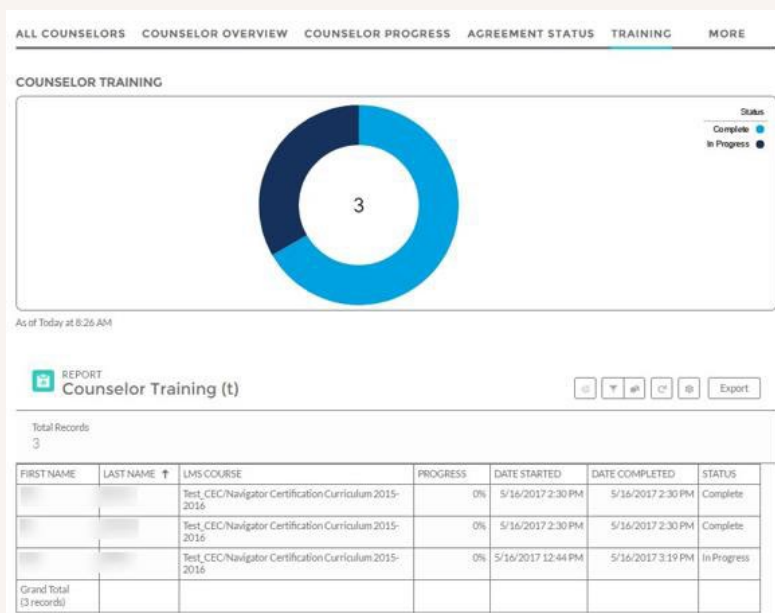
REPORT
Counselor Agreement Status

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)							

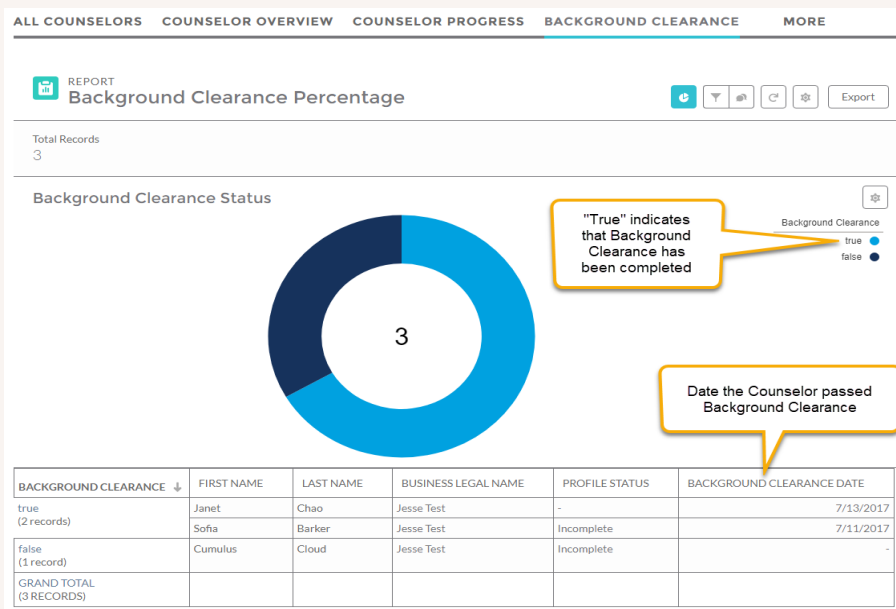
TRAINING

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



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** **AGREEMENT STATUS** **DELEGATION CODE** **MORE**

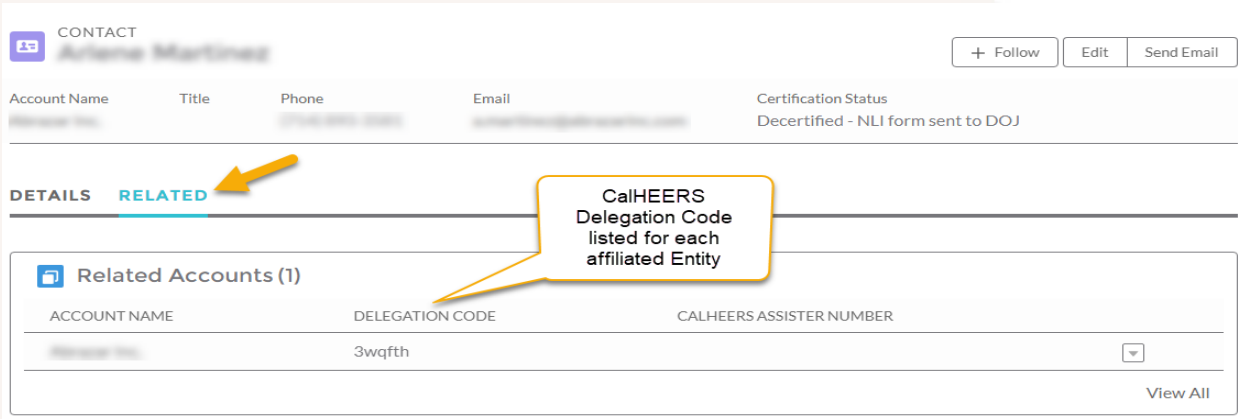
 **REPORT**
Counselor Delegation Code      

Total Records
5

FULL NAME ↑	ACTIVATION DATE
Cumulus Cloud	-
Janet Chao	7/13/2017 3:45 PM
	-
	-
Sofia Barker	7/14/2017 12:11 PM
Grand Total (5 records)	

Select a Contact to view Delegation Code

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



CONTACT
Arlene Martinez

+ Follow Edit Send Email

Account Name	Title	Phone	Email	Certification Status
...	...	(714) 999-3333	...	Decertified - NLI form sent to DOJ

DETAILS **RELATED**

Related Accounts (1)

ACCOUNT NAME	DELEGATION CODE	CALHEERS ASSISTER NUMBER
...	3wqfth	...

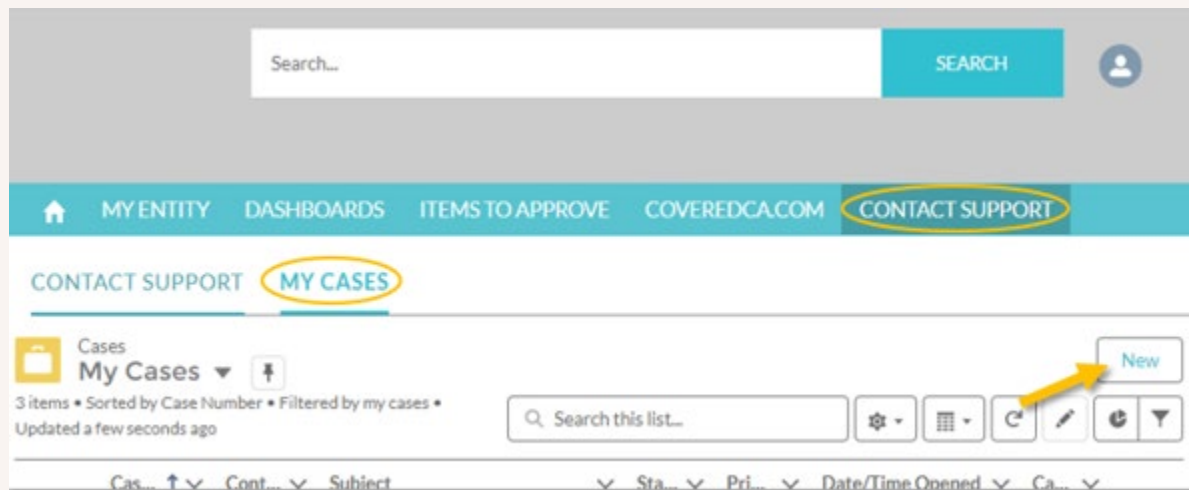
View All

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 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

MY ENTITY DASHBOARDS ITEMS TO APPROVE COVEREDCA.COM **CONTACT SUPPORT**

CONTACT SUPPORT **MY CASES**

Cases
My Cases 3 items • Sorted by Case Number • Filtered by my cases • Updated a few seconds ago

Search this list... [Settings] [Grid] [Refresh] [New]

Cas... Cont... Subject Sta... Pri... Date/Time Opened Ca...

Once completed with full details, select “Save”.

New Case: Enroller Support

<p>Case Owner John Doe</p> <p>Contact Name</p> <p>Subject <input type="text" value="testing 2 submitted from Portal"/></p> <p>Description <input type="text" value="test submit by counselor"/></p> <p>Case Origin <input type="text" value="Certification Portal"/></p> <p>Web Email</p>	<p>Account Name</p> <p>Status <input type="text" value="Open"/></p> <p>Priority <input type="text" value="Medium"/></p>
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Existing support cases that have been submitted can be reviewed in the **My Cases** sub tab.

HOME
MY ENTITY
DASHBOARDS
ITEMS TO APPROVE
COVEREDCA.COM
CONTACT SUPPORT

CONTACT SUPPORT
MY CASES

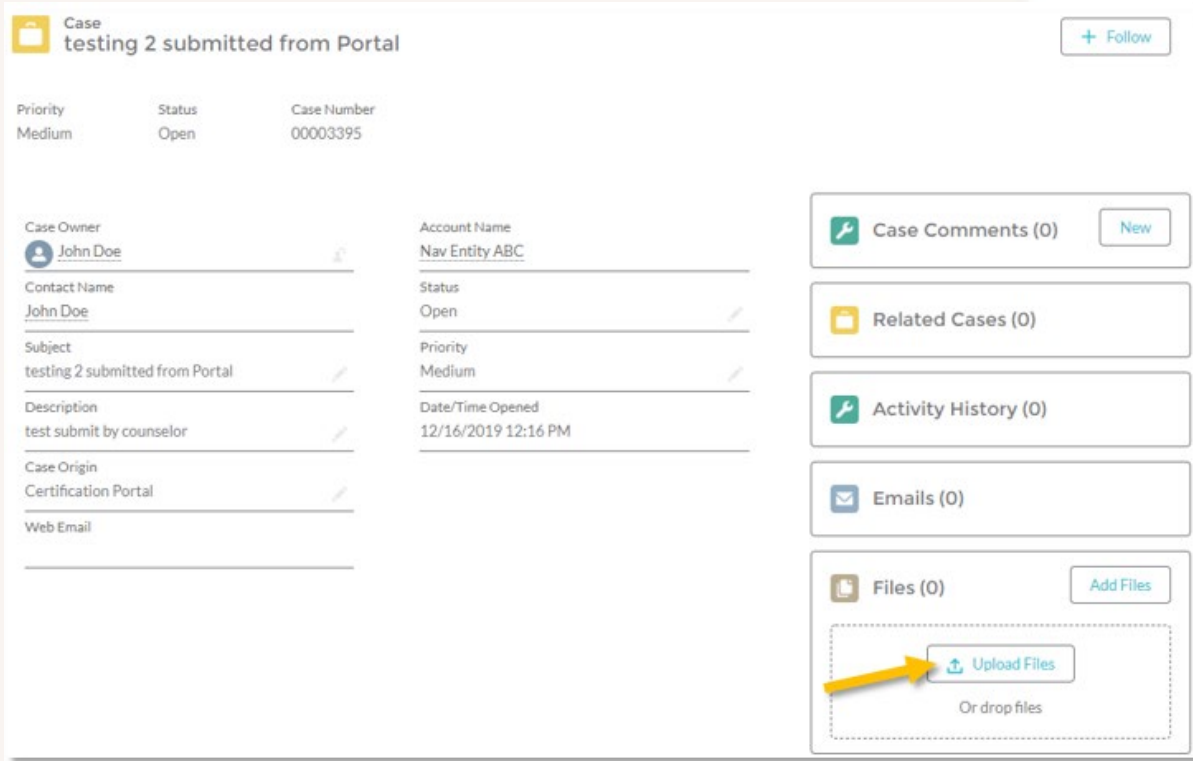
Cases

My Cases

3 items • Sorted by Case Number • Filtered by my cases • Updated a minute ago

	Cas...	Cont...	Subject	Sta...	Pri...	Date/Time Opened	Ca...
1	00003395	John Doe	testing 2 submitted from Portal	Open	Medium	12/16/2019 12:16 PM	jdoe
2	00003396	John Doe	test3 upload to files	Open	Medium	12/16/2019 12:25 PM	jdoe
3	00003397	John Doe	Update Entity Required Document	Open	Medium	2/7/2020 1:26 PM	jdoe

To add an attachment, select the **Upload Files** button and add your document to your Case.



Case testing 2 submitted from Portal + Follow

Priority	Status	Case Number
Medium	Open	00003395

Case Owner
John Doe

Contact Name
John Doe

Subject
testing 2 submitted from Portal

Description
test submit by counselor

Case Origin
Certification Portal

Web Email

Account Name
Nav Entity ABC

Status
Open

Priority
Medium

Date/Time Opened
12/16/2019 12:16 PM

Case Comments (0) New

Related Cases (0)

Activity History (0)

Emails (0)

Files (0) Add Files

[Upload Files](#)
Or drop files