



**COVERED
CALIFORNIA**

Enroller Portal Counselor

User Guide



Contents

Overview	3
New Counselor User	3
Add Counselor Information (Authorized or Primary Contact Steps)	3
Certified Enrollment Counselor Application Steps	6
Background Clearance Steps	10
Counselor Agreement Steps	15
Account Creation Steps	16
Counselor User Home Page	21
Home Page Navigation.....	25
Forgot Password or Password Reset	28
Need Assistance	29



Overview

The Enroller Portal Counselor User Guide outlines all features and functions available to Entity Counselors in the Enroller Portal. This document details the functions of a Counselor User, how to complete the Enroller Portal profile, background clearance, and training requirements.

New Counselor User

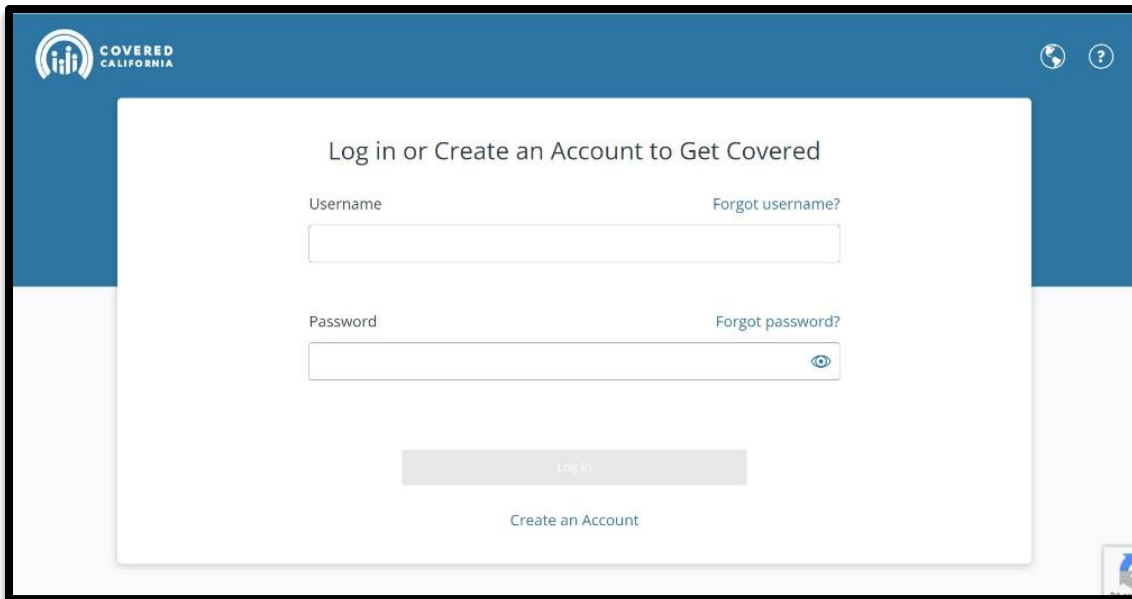
This section provides instructions for new counselor users.

The Authorized Contact (AC) or Primary Contact (PC) listed on the Entity roster create the Enroller user account by completing the steps below.

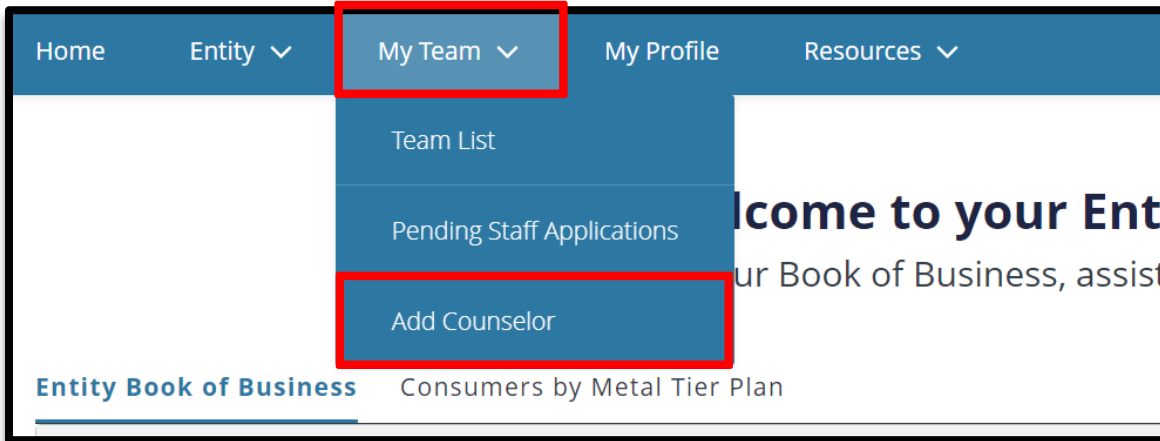
Add Counselor Information (Authorized or Primary Contact Steps)

The AC or PC is responsible for initiating the process to add a new Counselor on behalf of the Entity. The screenshot listed below will assist the AC or PC on how to initiate a Counselor application in the Enroller Portal. Once the information is completed, the AC or PC will submit the information on behalf of the Counselor.

1. Log In to the [Enroller Portal](#). Select **Log In**.



2. From the Entity Home Page, Select **My Team** tab and click on the **Add Counselor** option to continue to the *Add Counselor* page.



3. The *Add Counselor Information* page displays. Add Counselor details for the newly added Counselor. Select **Next** to continue.



4. Review the Counselor Application to ensure accuracy. Select **Save and Next** to continue.

5. The *Public Photo and Documentation Upload* page will display. Click the **Next** button when all documents are uploaded.

Note: Counselors are only required to upload their Enroller Photo. **Ensure the Photo is an actual photo and not a photo of an ID.**

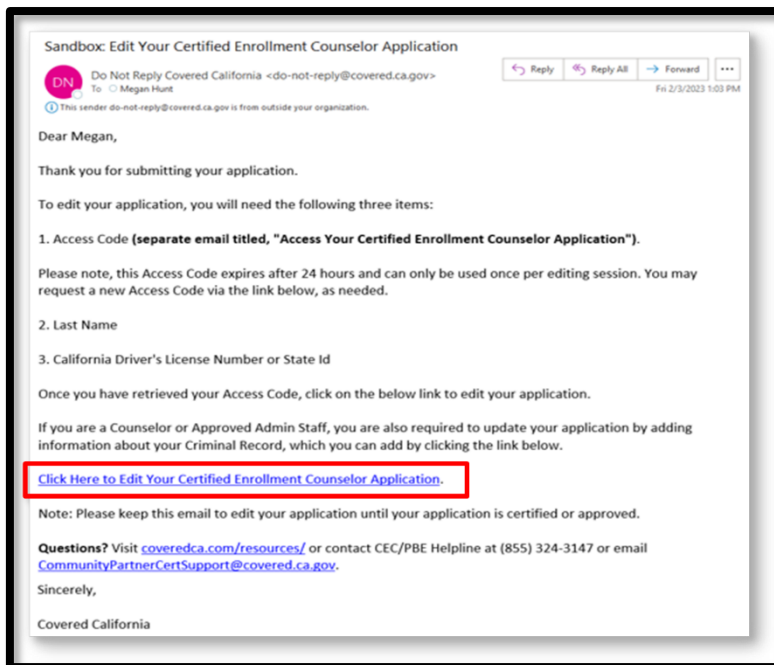
6. The *Counselor Application Submission Confirmation* page will display. Select the **Finish** button on the *Counselor Application Submission Confirmation* page to complete the submission. The application status will now reflect *Pending Review* with Covered California.



Certified Enrollment Counselor Application Steps

Counselor(s) will receive two emails from Covered California with the following subject lines: *Edit Your Certified Enrollment Counselor* email and the *Access Your Certified Enrollment Counselor Application* email.

1. The *Edit Your Certified Enrollment Counselor Application* email will include a link to **Edit** the enrollment application and allow the Counselor to update and/or edit the application details entered by the AC or PC.

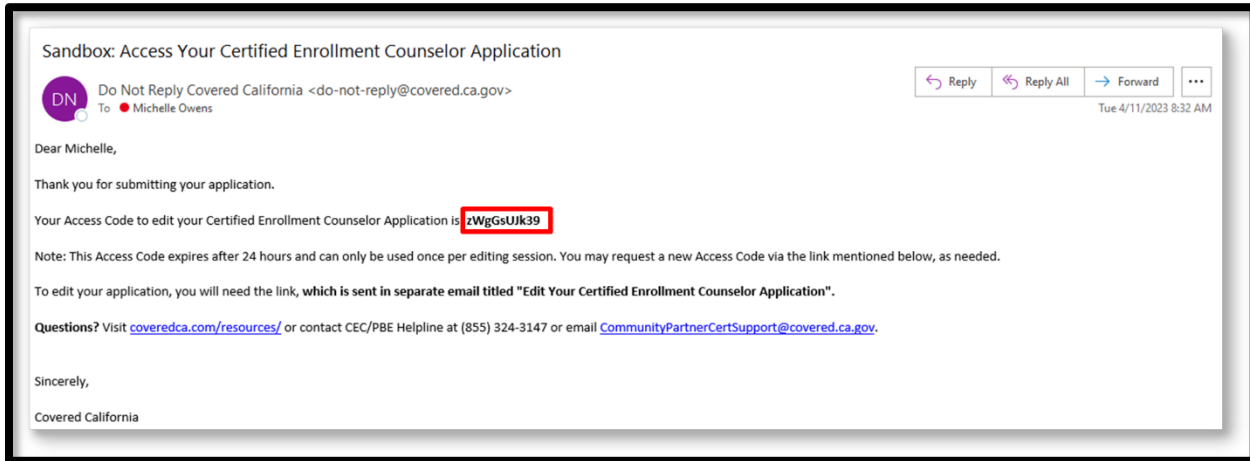


2. The *Access Your Certified Enrollment Counselor Application* email includes an access code which is needed to gain access to *Edit Your Counselor Application*.

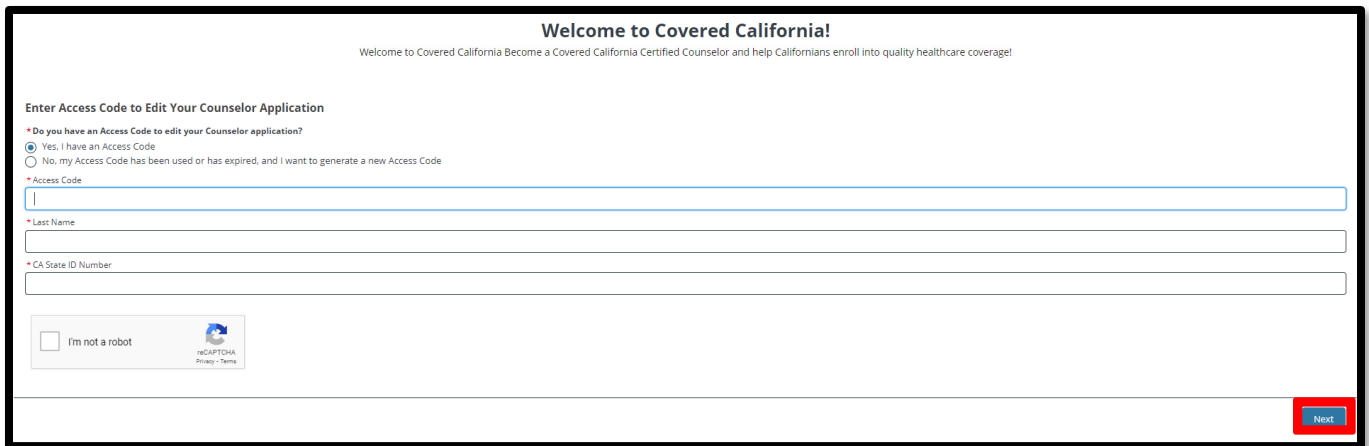
Important: The access code is **valid for 24 hours only and for one-time use**.

Note: A new Access Code can be requested by following the instructions at the bottom of the *Access Your Certified Enrollment Counselor Application* email.

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3. Select the **Click Here to Edit Your Certified Enrollment Counselor Application** link on the *Edit Your Certified Enrollment Counselor Application* email.
4. Select the **Yes, I have an Access Code** option and fill out the **Access Code, Last Name, and CA State ID Number** fields.
5. To proceed to the next page, select the **I'm not a robot** checkbox.
6. Select **Next** to continue.



7. The *Counselor Information* page will display. Counselor will need to verify the information and/or edit any fields, before selecting **Next** to continue.



Counselor Information

Counselor Type : Certified Application Counselor

Counselor First Name

Counselor Last Name

Legal Business Name

Phone

Alternate Phone

Date of Birth

CA State ID Type

CA Drivers License Number

CA State ID Number

Email

Preferred Method of Communication

CDI License Expiration Date

Primary Enroller Location

Other Sites Served

Personal Mailing Address

Personal Mailing Address same as Primary Location Mailing Address

* Spoken Languages (Ctrl+Click or Command+Click on Mac, to select multiple)

English
Spanish
African
Amharic
Arabic

* Written Languages (Ctrl+Click or Command+Click on Mac, to select multiple)

English
Spanish
African
Amharic
Arabic

Previous **Next**

Note: If any of the greyed-out information needs to be updated, send an email request to: CommunityPartnerCertSupport@covered.ca.gov.

8. The *Review Counselor Application Form* page will display. Click **Save and Next** button to continue to the *Public Photo and Documentation Upload* page.

Review Counselor Application Form

To review your application before moving forward, please click **Review Counselor Application**.

Click **Save and Next** to continue your application on the next pages, where you will be asked to:

1. Upload your Enroller Photo
2. Complete your Criminal Record Disclosure form
3. Complete screening questions (Plan Based Enrollers only)

Review Counselor Application **Save and Next**

9. Select *Enroller Photo* from the *Document Category* dropdown menu. Counselors are required to upload an Enroller Photo. Submit an actual front-facing photo and not a photo of an ID. Select **Next**.

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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 Business Status
2. Proof of General Liability Insurance
3. Proof of Worker's Compensation Insurance
4. Proof of Valid Business License
5. Conflict of Interest Prevention Plan

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, .PNG, .BMP, .PDF. Maximum File Size: 5 MB per file

* Document Category
Enroller Photo

Or drop files

Title	File Type	Document Type	Delete
Agreement	PDF	Agreement	

10. The Counselor is required to read the *Entity Qualifying Attestations* and acknowledge the organization applying qualifies to participate in the Program as an Entity and accuracy of submitted information. The Counselor will place a check mark in the box. Select **Submit** to continue.

Welcome to Covered California

Become a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!

Entity 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 **Next**.

Attestation 1 I certify the organization applying is not a health insurance insurer or stop loss issuer, a subsidiary of a health insurance issuer or a stop loss issuer, 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 insurer or stop loss 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 a 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.



Background Clearance Steps

The Background Clearance must be completed as part of the Counselor application process. The process is comprised of 2 parts: **Criminal Record Disclosure and Live Scan.**

1. The *Criminal Record Disclosure Form* page displays. The Counselor must complete the *Criminal Record Disclosure Form* by:
 - Providing their social security number;
 - Completing **Section B** of the *Criminal History Disclosure*; and
 - Selecting the appropriate dropdown answer for the six criminal history disclosures questions.

Select **Next** to continue.



Welcome to Covered California!

Become a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!

Criminal Record Disclosure Form

A. Personal Information

Counselor Name
Megan Dukerhart

Social Security Number

Instructions and Background Clearance Requirements

i)

In order to become a Certified Enrollment Counselor (CEC), the law requires that you complete a background check (Government Code section 1043) and fill out this form (California Code of Regulations, Title 10 CCR § 6657). Covered California (CC) submits your fingerprints to the Department of Justice (DOJ) to obtain a criminal history report. (California Code of Regulations, Title 10 CCR § 6658). The DOJ criminal history report is compared to your Criminal Record Disclosure (CRD) to identify discrepancies, inconsistencies, or omissions. CC will evaluate the criminal history report, including any information you provide in and with the CRD to make a determination of your eligibility to provide consumer assistance. Failure to complete the CRD in its entirety may delay the certification process and candidates will be required to resubmit prior to completing the certification background clearance.

CC treats all criminal history information as private and confidential. Only CC employees authorized to determine eligibility for consumer assistance are allowed access. Your CRD is retained and revealed in cases of legal action. The CRD is available for your review, but copies are not provided to you.

IMPORTANT! CC will be notified by the DOJ if there is any new information or activity on your record, including all subsequent arrests and convictions, per Government Code Section 1043 and Penal Code 11105.2 (a). CC will make a new determination of your eligibility to provide consumer assistance based upon any updates to your record. CECs shall report to CC any subsequent arrests for which they have been released on bail or personal recognizance, criminal convictions, and administrative actions taken by any other agency within 30 calendar days of the date of each occurrence.

A conviction is any plea of guilty or nolo contendere (no contest) or a verdict of guilty for any crime. Criminal convictions from another State or Federal Court are considered the same as criminal convictions in California. You do not need to list any conviction that has been set aside, dismissed, or sealed, or those which are exempted from disclosure.

You **MUST** disclose convictions and administrative actions even if:

- It happened a long time ago;
- It was only a misdemeanor;
- You didn't have to go to court (your attorney went for you);
- You did not go to jail or prison or the sentence was only a fine or probation;
- You received a certificate of rehabilitation.

The following Convictions do NOT need to be listed on your CRD:

- Any conviction set aside, judicially dismissed, or ordered sealed pursuant to law, including, but not limited to, Sections 1203.4, 1203.4a, 1203.45 AND 1210.1 of the Penal Code.
- Any conviction older than two years from the date of conviction for minor misdemeanor marijuana possession and use offenses, or possession of controlled substances paraphernalia pursuant to Labor Code § 432.8.
- Minor traffic violations (e.g., unsafe driving, running a stop light, seat belt, or parking).
- Offense settled in the juvenile court or under the welfare youth offender law, or if you were discharged from the control of the Youthful Offender Parole Board under the Welfare and Institutions Code §§ 1179 and 1772.
- Conviction which resulted in participation in or completion of a diversion program.
- Conviction which was deleted under the Health and Safety Code § 11361.5.
- Pardon granted under Penal Code § 4852.1c.

ii)

If you need more space or would like to provide additional clarifying comments, including any evidence of rehabilitation, please attach and upload separate sheet(s) that includes your signature, name and date with your information (after saving this record). While additional information is optional, providing details regarding any reportable offenses on your record, and evidence of rehabilitation, allow us to individually assess your record and is strongly recommended. CC will consider any of the following written evidence of rehabilitation or other mitigating factors:

- A letter in your own words explaining any disqualifying offense, your rehabilitation or any mitigating factors;
- Evidence that you received a pardon for any criminal convictions that you may still be on your record either because the conviction(s) was dismissed/expunged under Penal Code Section 1203.4 or 1203.4a, or the conviction was overturned;
- Proof you have complied with any terms of parole, probation, restitution or any other sanctions lawfully imposed against you due to the criminal conviction referenced in this application;
- Proof you have performed the same or similar type of work, after the criminal conviction(s) referenced in your application, with the same or a different employer, with no incidents of criminal conduct on the job;
- Proof that you have no other history of discipline for the same or a similar type of conduct referenced in your application;
- Proof of participation in education, training, treatment or rehabilitation programs;
- References from employers, probation officers, parole officers, clergy, etc. who can attest to your character and successful record of job performance;
- Evidence that any pending charges did not result in a criminal conviction; and/or
- Any additional information relevant to demonstrating rehabilitation or other mitigating factors.

B. Criminal History Disclosure

Please answer all criminal history questions

Question 1:

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

* Question 1 Response

--None--

Question 2:

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

* Question 2 Response

--None--

Question 3:

Do you currently have criminal charges pending against you?

* Question 3 Response

--None--

Question 4:

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

* Question 4 Response

--None--

Question 5:

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

* Question 5 Response

--None--

Question 6:

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

* Question 6 Response

--None--

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

Previous

Next

2. The *Criminal Records Disclosure – Certification Signature* page will display. The Counselor must enter their full name and select **Yes** or **No** from the *Agree to Electronic Signature* dropdown. Review the information listed on the page. Select the **Next** button.

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Welcome to Covered California!
Welcome to Covered California. Become a Covered California Certified Counselor and help Californians enroll into quality healthcare coverage!

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

* Full Name
* Agree to electronic signature

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

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

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

Covered California will create a file concerning your criminal background check that will contain certain documents, including information that you provide. You have the right to access certain records containing your personal information maintained by the Department (Civil Code section 1798 et seq.).

NOTE: IMPORTANT INFORMATION: Under the California Public Records Act, Covered California may have to provide copies of some of the records in your file to members of the public who ask for them, including newspaper and television reporters. Covered California must also tell people who ask the name of a Certified Enrollment Entity that has a CEC with a criminal record exemption.

Questions?
If you have any questions regarding Certification Status or need further assistance, please email CommunityPartnerCertSupport@covered.ca.gov.

If you have any questions about this form or background status, please email BackgroundChecks@covered.ca.gov.

IMPORTANT NOTICES
APPLICANT FINGERPRINT NOTICE AND RECORDS CORRECTION
Your fingerprints will be used to check the criminal history records of the DOJ and FBI. You have the opportunity to complete or challenge the accuracy of the information contained in the DOJ and FBI identification records. The procedure for obtaining a change, correction, or updating an FBI identification record are set forth in Title 28, CFR, 16.34. To request a change, correction, or update to a DOJ record, you must request a record review with DOJ in accordance with the process outlined in PC Sections 11120-11127.

PRIVACY STATEMENT
Pursuant to the Federal Privacy Act (P.L. 93-579) and the Information Practices Act of 1977 (Civil Code section 1798 et seq.), notice is given for the request of the Social Security Number (SSN) on this form. The California Department of Justice uses a person's SSN as an identifying number. The requested SSN is voluntary. Failure to provide the SSN may delay the processing of this form and the criminal record check. Covered California will create a file concerning your criminal background check that will contain certain documents, including information that you provide. You have the right to access certain records containing your personal information maintained by the Department (Civil Code section 1798 et seq.).

PUBLIC RECORDS ACT
Under the California Public Records Act, Covered California may have to provide copies of some of the records in your file to members of the public who ask for them, including newspaper and television reporters.

- The *Counselor Application Successfully Updated* page will display. Select the **Finish** button to submit the application.

Counselor Application Successfully Updated

Hello

You have successfully updated your Counselor application. Your application is being reviewed. You will receive additional communications from Covered California about your required next steps to the email provided:

For more information, visit www.coveredca.com/resources.

- A Live Scan form will be sent to the Counselor via DocuSign.



START

Covered California Request for Live Scan
 Certified Enrollment and Certified Application Counselors
 Applicant Form

COVERED CALIFORNIA

CONTRACT CODE: DFJK

This form is only intended for the use of the individual listed below. Altering or sharing this document is prohibited. Please complete the document and ensure the information is valid and up-to-date (Print in CAPITAL LETTERS).

Applicant Information

Name:	Suffix:
Alias:	
Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female	Eye Color:
Date of Birth:	Hair Color:
Social Security Number:	Height:
California Driver's License:	Weight:

Home Address

Street Address:	City:
State: CA	Zip:

OCA

 Name of the Certified Enrollment Entity

Live Scan Agency Name	Live Scan Id (LSID)	Date
Name of Operator	ATI Number	OATI (Resubmission Only)

Attestation Acknowledgement

All applicants must acknowledge they have received these Privacy Notices prior to being Live Scanned or Fingerprinted for hard cards, acknowledged by signature on this live scan form:

I have received and signed the included Privacy Notice, Privacy Act Statement, and Applicant's Privacy Rights.
 11/17/2023

 Applicant Signature Date

5. Complete and sign the Live Scan form and submit it. It will automatically be uploaded to the Certification application.
 - Review the Privacy Notice documents included in the Live Scan form.
6. Print two (2) copies of the pre-populated Live Scan forms to be provided to the live scan facility.
7. Contact the Live Scan facility to schedule a fingerprinting appointment. For a list of locations, download or access the service locations using the following link:
https://www.applicantservices.com/CA-Social-Distancing/Live_Scan_Locations
Do not go to a Live Scan facility that is not listed.

Note: For the purposes of this program, the Covered CA Live Scan form is the only acceptable form. Any other Live Scan form is unacceptable.

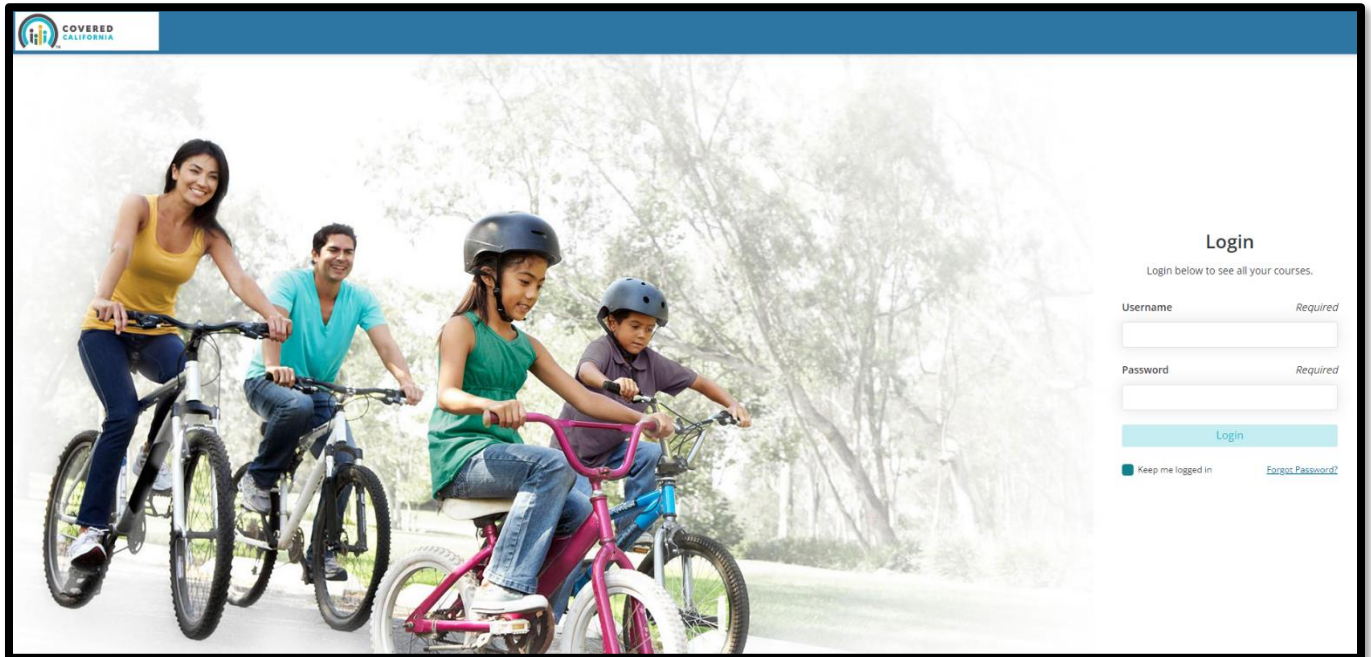
If there are issues or you have questions about the background check process, reach out to backgroundchecks@covered.ca.gov for assistance.



Counselor Certification Training Steps

Covered California will enroll you in the [Learning Management Training \(LMS\) Courses](#) once the Counselor eligibility requirements are reviewed. The Counselor will receive an email with their login ID (your email address) and temporary password from LMS.

Use this weblink <https://learning.coveredca.com/#/login> to access and complete the online Certification Training courses.



Training Reminders:

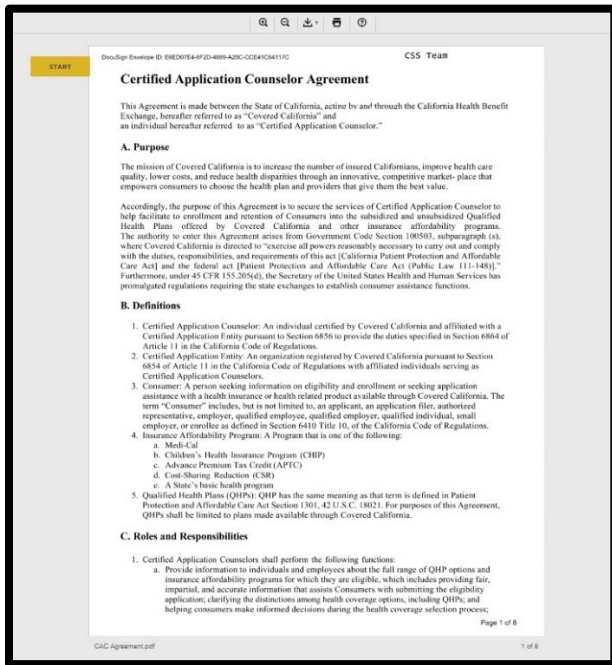
- The Counselor will receive an email with a link to create a password to login to the Learning Management System (LMS).
- Your username will be the same as the email address on the file listed on the Counselor application.
- Counselor(s) **must** complete all courses within 30 days of the date they were enrolled into the Certification Training courses.
- The Counselor must pass the Certification Training exam with a score of 80% or greater.
- The Exam is an open book, and the Counselor is encouraged to use the study guides provided in LMS.
- The Counselor will have 3 attempts to pass the exam. If the Counselor fails, the exam three times they must contact the AC or PC to further request Covered California re-enrolls the Counselor in the LMS training course and exam.



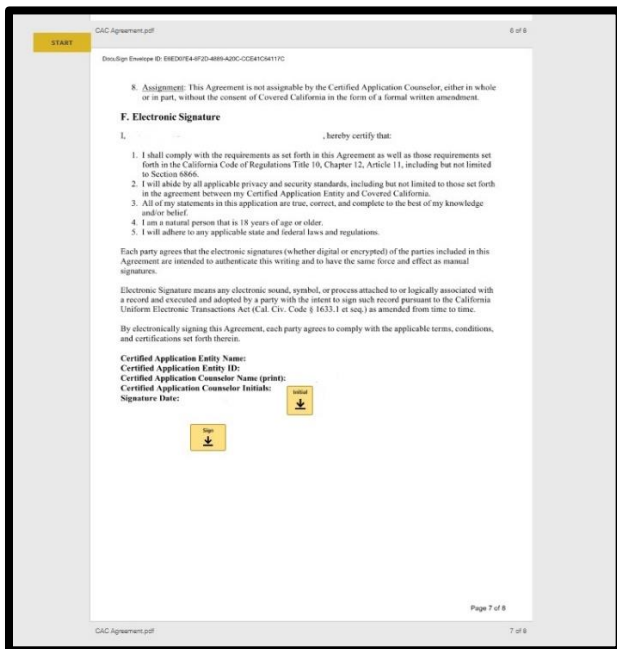
Counselor Agreement Steps

Upon successfully completing Covered California's LMS training and exam, a Counselor Agreement will be emailed to the counselor via DocuSign.

1. Ensure the Entity and Counselor information in the document are accurate.



2. Digitally sign the document and submit it for Covered California review and approval.

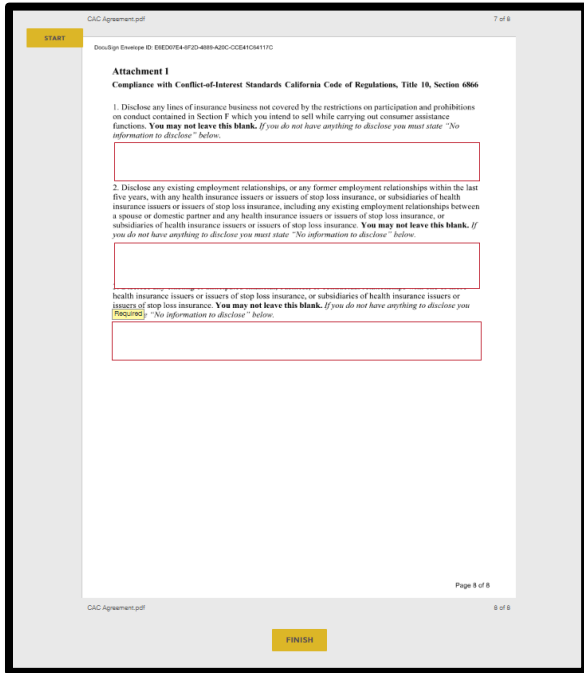


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3. Read and complete the 3 disclosure sections at the end of the document.

Important: If there is nothing to disclose state “*I have nothing to disclose*”. Failure to comply will result in the document being declined and a new DocuSign will then need to be completed.



Account Creation Steps

The Account Creation step is the FINAL part of the Certification process.

1. Once the Counselor is Certified by Covered California, they will receive two emails from Covered California:
 - The Counselor will receive an email titled “**Access Code for Your New Counselor Account**” with an Access Code and further instructions awaiting the arrival of the second email. The Access Code is **ONLY** valid for 24 hours and a one-time use.
 - The Counselor 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. Once on the landing page, the Counselor should select **Yes, I have an Access Code**.



Enter Access Code to Create Your Account

* Do you have an Account Creation Access Code?

Yes, I have an Access Code

No, my Access Code has been used or has expired, and I want to generate a new Access Code

3. The Counselor will enter the access code, Entity’s Federal Tax ID (not social security), and Counselor’s 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?

Yes, 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.

I'm not a robot  reCAPTCHA
[Privacy](#) - [Terms](#)

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

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 at least **1** of the following:
 - Uppercase letter
 - Lowercase letter
 - Number
 - Special character
- Passwords must not contain dictionary words, names, or common keyboard patterns.
- When re-entering the password, it must match.



New Password

Your password must:

- Not contain dictionary words, names, or common keyboard patterns (example: Qwerty1!)
- Have at least 15 characters
- Have no more than 50 characters
- Must have at least 1 UPPERCASE letter
- Must have at least 1 lowercase letter
- Must have at least 1 number
- Must have at least 1 special character such as ` ~ ! @ # \$ % ^ & * () _ + - = [] \ { } | ; ' : " , . / < > ?
- Must not be one of your previous 24 passwords

5. The Counselor must select a four-digit PIN Number

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



- The system will now ask for the Counselor to select 3 Security Questions from a group of options and to provide answers to each.

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

A screenshot of a web form titled "Register Your Cell Phone" within the Covered California system. The form is set against a blue header with the Covered California logo and navigation icons. The main content area is white and contains the following elements:

- Title:** Register Your Cell Phone
- Text:** 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.
- Input Field:** A text box labeled "Enter your cell phone number" with the subtext "Standard text message rate applies." Below the box is a red error message: "Please enter a valid 10-digit phone number."
- Buttons:** A "Send One Time Passcode" button, a "Cancel" button, and a disabled "Save" button.

9. For each step, the system will send the Counselor a passcode to validate the email address and/or cell phone number. Input the passcode and it will set up the option.
10. Once the Account Creation is complete the Counselor can log in to [Enroller Portal](#) with their Username and password to access their Certified account.

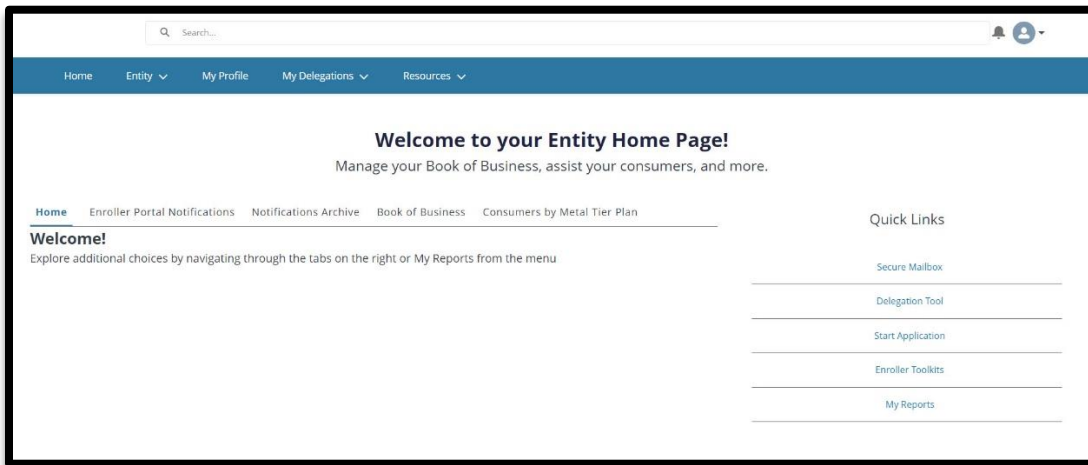


Counselor User Home Page

After a Counselor completes their Account Creation process, they will have access to the Enroller Portal to assist and manage consumer they assist with enrollment. The following section provides Counselors with a navigation overview of the Enroller Portal dashboard tabs frequently used.

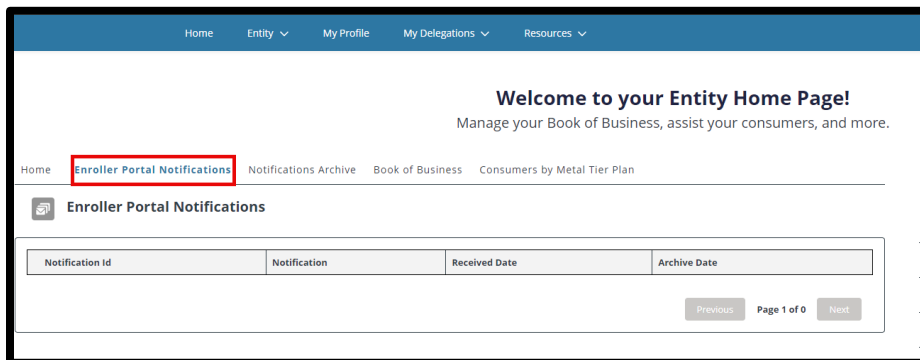
Enroller Entity Home Page tab:

When the Counselor logs in to the system, they will land on the Welcome to your Entity Home Page. The Counselor can access high-level information regarding their certification status, starting an application, delegation tool, reports, quick links, and more.



Enroller Portal Notifications tab:

- The **Enroller Portal Notifications** tab displays the Counselor's active notifications sent by the Distribution Services Communications 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.





Enroller Portal Notification Notification Archive Book of Business Consumers by Metal Tier Plan

Enroller Portal Notifications

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
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-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

Notifications Archive tab:

- The **Notifications Archive** tab displays a list of the Counselor’s archived notifications sent by the Distribution Services Communications 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.

Enroller Portal Notification **Notification Archive** Book of Business Consumers by Metal Tier Plan

Enroller Portal Notifications Archive

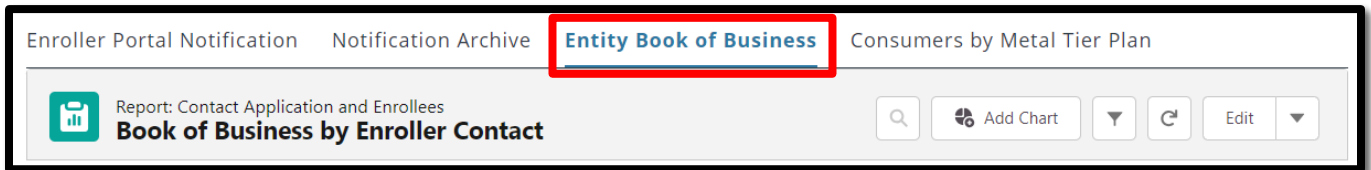
Notification Id	Notification	Received Date	Archive Date
N-000031	Thursday testing	2023-11-02	2023-11-03
N-000011	Notifica	2023-10-30	2023-10-31
N-000010	training demo 1	2023-10-30	2023-10-31
N-000000	Home Page Notification	2023-10-24	2023-10-26

Previous Page 1 of 1 Next



Entity Book of Business tab:

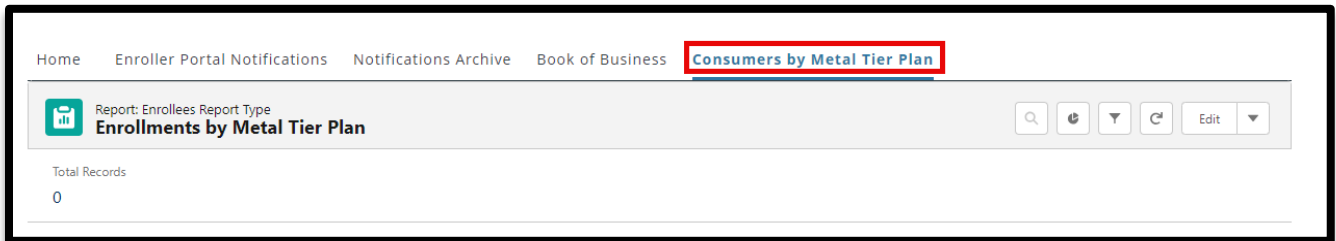
- The **Entity Book of Business** tab displays the *Book of Business by Enroller Contact* report, allowing Counselors to view Consumers in the Entity’s book of business, apply filters to and edit the book of business, and save or export the book of business. Export options include *Formatted* or *Details 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.



Note: For Counselors, a My Book of Business tab displays instead, automatically filtered to Consumers with active delegations along with 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.





Entity Quick Links

Quick Links display on user role similar to the Agency Home page, the *Welcome to your Entity Home Page!* displays a 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
 - Displays only for Counselors
- **Start Application** – Navigates the user to the Consumer Home page to begin a new application on behalf of a Consumer
 - Displays only for Counselors
- **Enroller Toolkits** – Navigates the user to the *Enrollment Partner Toolkit* page
 - Displays for PC, AC 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.

The screenshot shows the 'Entity Home Page' interface. At the top, there is a search bar and navigation tabs: Home, Entity, My Profile, My Delegations, and Resources. The main heading is 'Welcome to your Entity Home Page!' with the subtext 'Manage your Book of Business, assist your consumers, and more.' Below this, there are tabs for 'Enroller Portal Notification', 'Notification Archive', 'Book of Business', and 'Consumers by Metal Tier Plan'. The 'Enroller Portal Notifications' section is active, displaying a table with the following data:

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
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-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

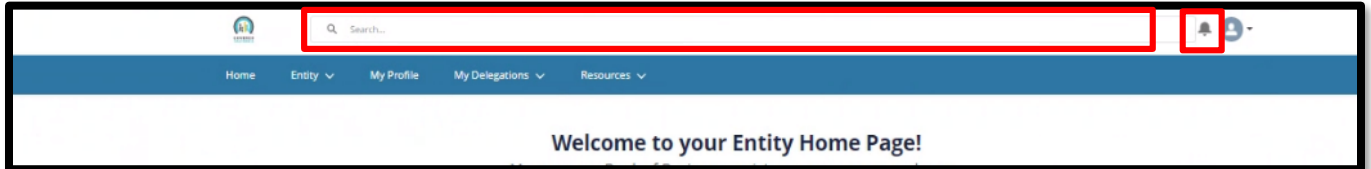
At the bottom of the table, there are 'Previous', 'Page 1 of 2', and 'Next' buttons. On the right side of the page, there is a 'Quick Links' sidebar with the following links: Secure Mailbox, Delegation Tool, Start Application, Enroller Toolkits, and My Reports. This sidebar is highlighted with a red border in the screenshot.



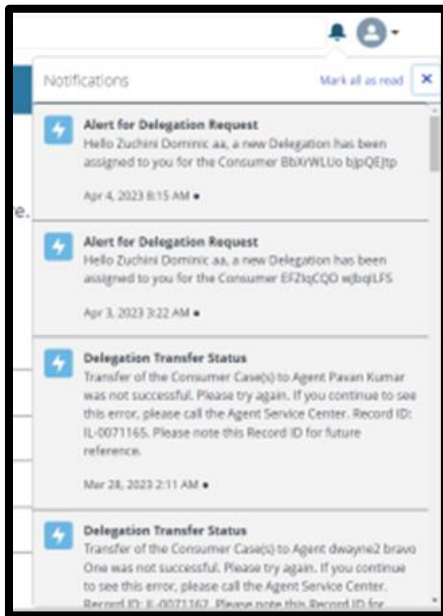
Home Page Navigation

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

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

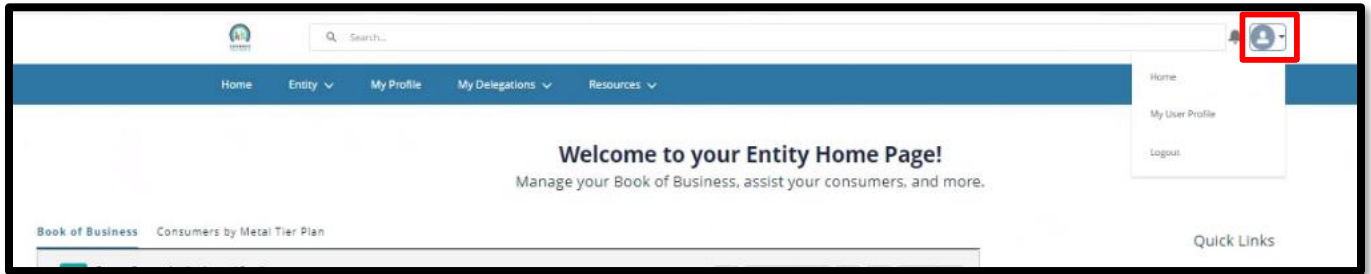


- Notifications may display the following:
 - **Alert for Delegation Request** – Delegation has been assigned
 - **Contract DocuSign Envelope Failed** – Contract DocuSign failed
 - **Delegation Transfer Status** – Indicates the status of a delegation transfer
 - **Live Scan DocuSign Envelope Failed**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

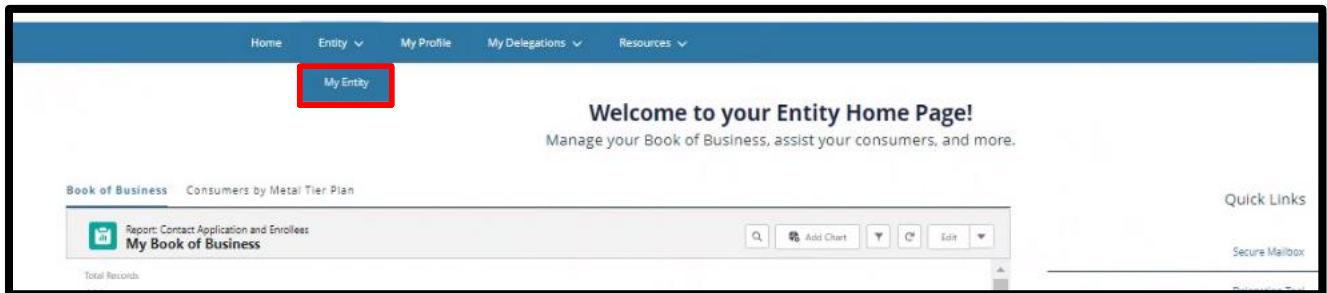




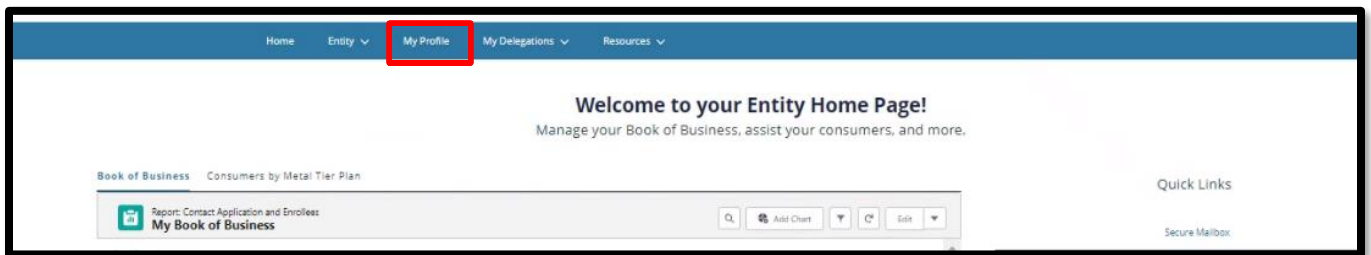
- **Profile icon** – If you hover-over the icon, it will display a dropdown description with the following options:
 - **Home** – Navigates the users to the Welcome to your Entity Home Page!
 - **My User Profile** – Navigates the user to the My Security Profile Page
 - **Logout** – Logs the user out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



- **Entity tab dropdown** – Displays for all Entity staff with the following link:
 - **My Entity** – Navigates user to Entity account page with navigator contact information, Entity contacts, population served, and certification/approval status

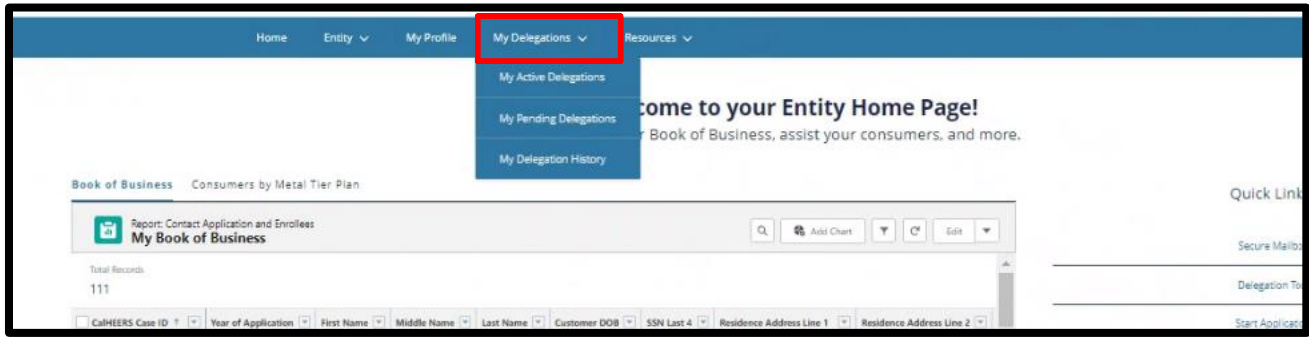


- **My Profile tab** – Navigates the user to the *Contact* page to view their profile.

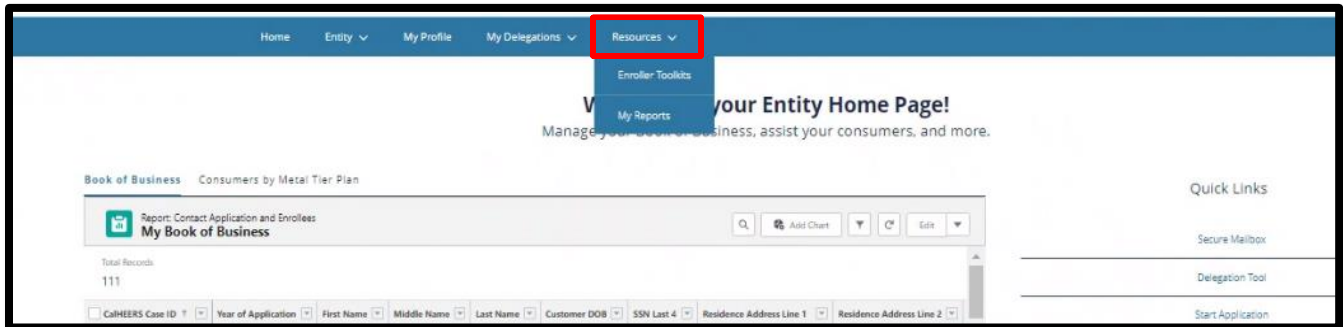




- **My Delegations** tab
 - **Active Delegations** – Navigates user to all active delegations
 - **Pending Delegations** – Navigates the user to all pending delegations
 - **My Delegation History** – Navigates the user to the *Entity Delegation History* page



- **Resources** tab dropdown – Displays for all Entity staff with the following links:
 - **Enroller Toolkits** – Navigates the user to the *Enrollment Partner Toolkits and Resources* page of the Covered California website
 - **My Reports** – Navigates the user to Entity Reports





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 CommunityPartnerCertSupport@covered.ca.gov.

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

The screenshot shows a login form titled "Log in or Create an Account to Get Covered". It has two input fields: "Username" and "Password". To the right of the "Username" field is a link "Forgot username?". To the right of the "Password" field is a link "Forgot password?" which is highlighted with a red rectangular box. Below the input fields are two buttons: "Log In" and "Create an Account".

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

The screenshot shows the Salesforce "Change Your Password" page. At the top is the Salesforce logo. Below it is the title "Change Your Password". The page has a section "Enter a new password for" with a "Make sure to" indicator. Underneath, there are five radio button options for password requirements: "15 characters", "1 uppercase letter", "1 lowercase letter", "1 number", and "1 special character" (which is selected). Below these are two input fields: "* New Password" and "* Confirm New Password". There is a "Security Question" section with a dropdown menu showing "What is your mother's maiden name?". Below that is an "Answer" input field. At the bottom is a "Change Password" button. A footer note says "Password was last changed on 11/6/2023 3:15 PM." and a copyright notice "© 2023 Salesforce, Inc. All rights reserved." is at the very bottom.



Need Assistance

This concludes the Enroller Portal Counselors 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 Section Team at CommunityPartnerCertSupport@covered.ca.gov.
