Enroller Portal Plan-Based Enroller

User Guide

Outreach and Sales Division
PBECert@covered.ca.gov

Contents

Overview

The Enroller Portal Plan-Based Enroller User Guide outlines all features and functions available to Plan-Based Entity Enrollers in the Enroller Portal. This document details the functions of an Enroller user, how to complete the Enroller Portal profile, background clearance, and training requirements.

New Enroller User

This section provides instructions for new enroller users. As an Enroller, please complete the Counselor application process.

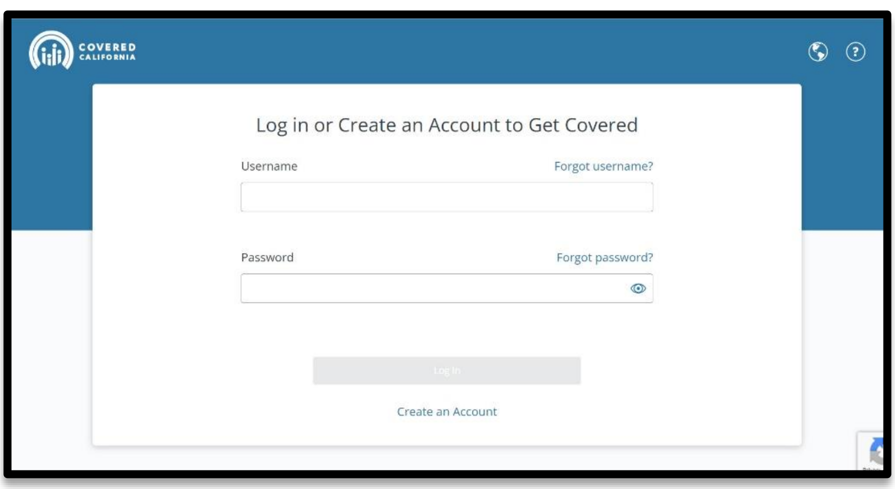
The Authorized Contact (AC) or Primary Contact (PC) listed on the entity roster must create the Enroller user account by completing the steps below.

Note. The PC typically creates the account for the Enroller(s).

Add Counselor Information (Authorized or Primary Contact Steps)

The Authorized or Primary Contact is responsible for initiating the process to add a new Enroller 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 Enroller.

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.

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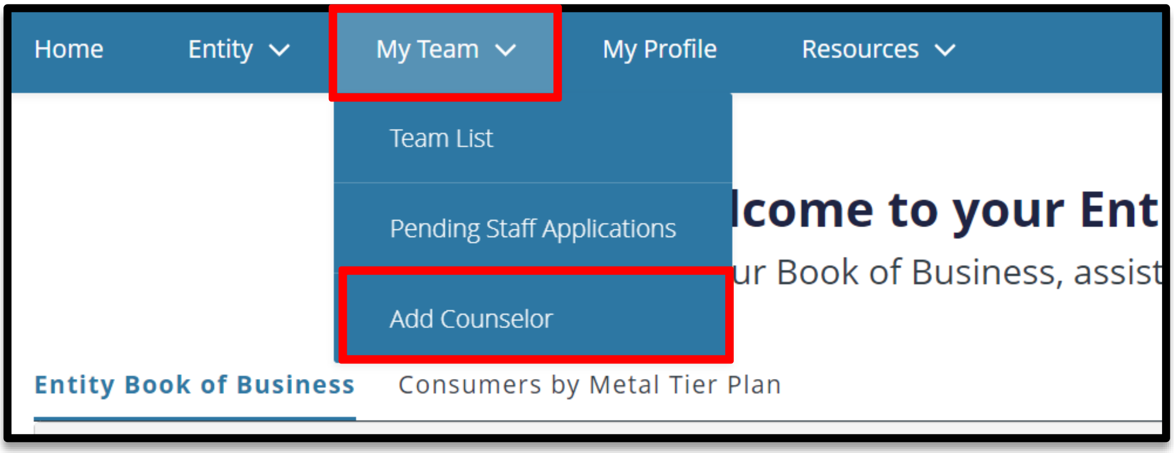
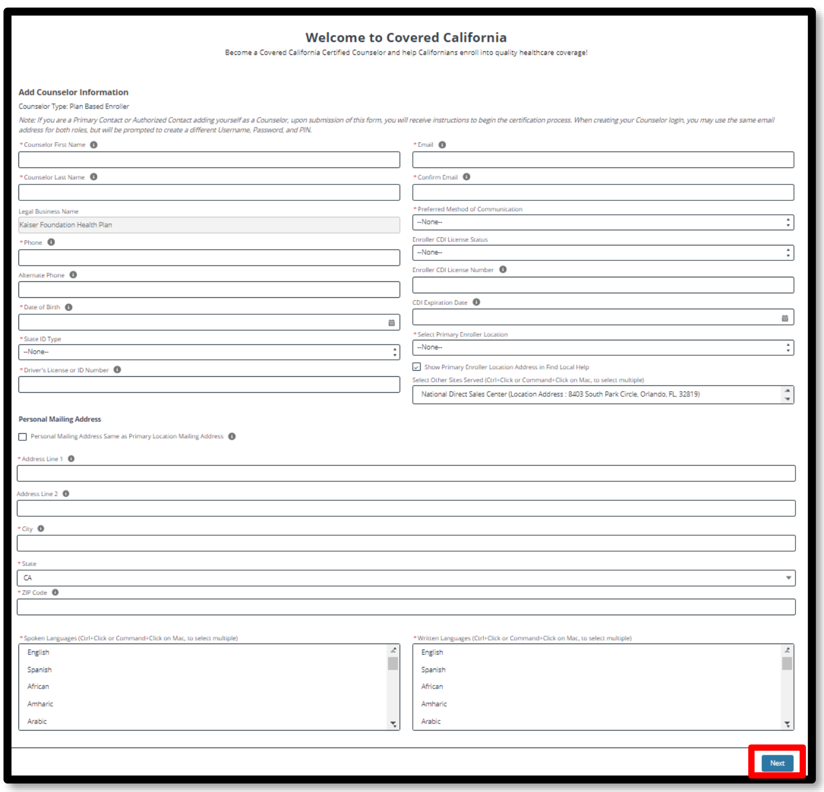
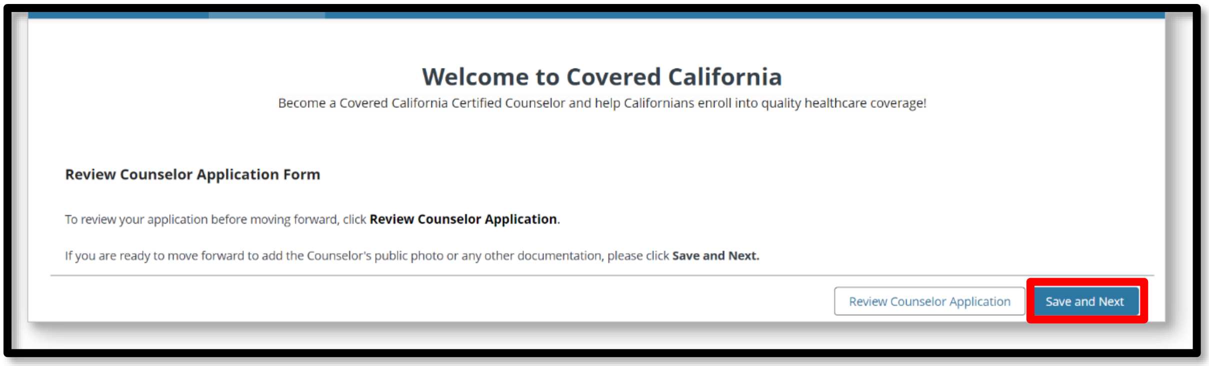


3. The *Add Counselor Information* page displays. Add Counselor details for the newly added Enroller**.** Select **Next** to continue.

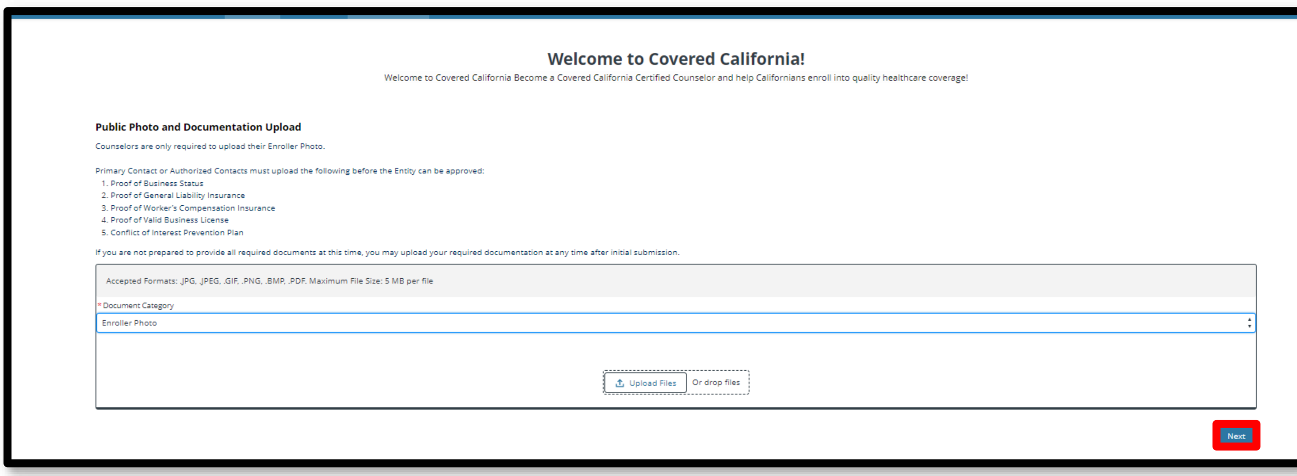


Important: Covered California will verify the status of the Enroller's agent license with the California Department of Insurance (CDI) to ensure it is Active and in good standing as outlined under Insurance Code Section 1626 to transact in Accident and Health or Sickness insurance. If the Enroller does not have an Active agent license, the enroller must complete the Criminal Record Disclosure (located in the Enroller Portal) and Live Scan fingerprinting process.

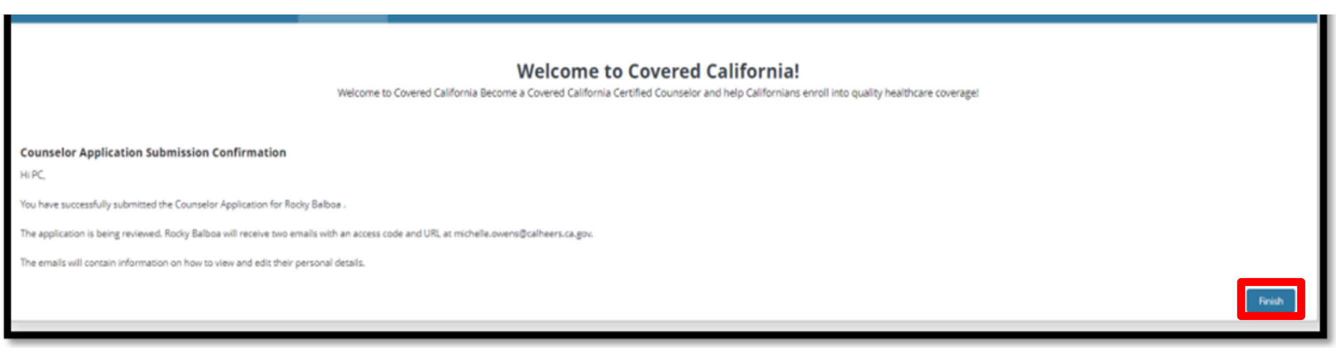
4. Review the Counselor Application to ensure accuracy. Select **Save and Next** to continue.



5. The *Public Photo and Documentation Upload* page will display. No action is required for Plan-Based Enrollers as badge photos are not a requirement for this program. Select **Next.**



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



Plan-Based Enroller Application Steps

The PBE Enroller will receive two emails from Covered California with the following subject lines: *Edit Your Plan Based Enroller Application* email and *Access Your Plan Based Enroller Application*.

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

Dear

Thank you for submitting your application.

To edit your application, you will need the following three items:

1. Access Code **(separate email titled, "Access Your Plan Based Enroller Application").**

2. Last Name

3. California Driver's License Number or State ID

Once you have retrieved your Access Code, click on the below link to edit your application. Please note, this Access Code expires after 24 hours and can only be used once per editing session. You may request a new Access Code via the link below, as needed.

If you are a Counselor or Approved Admin Staff, you are also required to update your application by adding information about your Criminal Record, which you can add by clicking the link below.

Click Here to Edit Your Plan Based Enroller Application.

Note: Please keep this email to edit your application until your application is certified or approved.

Questions? Visit coveredca.com/resources/ or contact CEC/PBE Helpline at (855) 324-3147 or email CommunityPartnerCertSupport@covered.ca.gov.

Sincerely,

Covered California

2. The *Access Your Plan Based Enroller Application* email includes an access code which is needed to gain access to *Edit Your Plan Based Enroller Application*.

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

Dear

Thank you for submitting your application.

Your Access Code to edit your Plan Based Enroller Application is **L5ZTQQz3XF**

Note: This Access Code expires after 24 hours and can only be used once per editing session. You may request a new Access Code via the link mentioned below, as needed.

To edit your application, you will need the link, **which is sent in separate email titled "Edit Your Plan Based Enroller Application".**

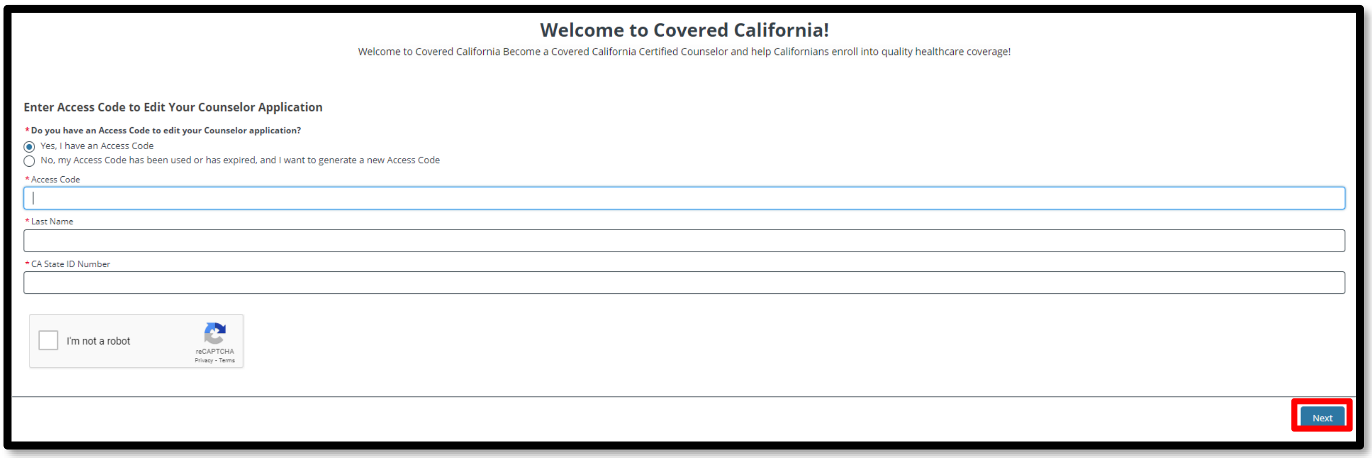
Questions? Visit coveredca.com/resources/ or contact CEC/PBE Helpline at (855) 324-3147 or email CommunityPartnerCertSupport@covered.ca.gov.

Sincerely,

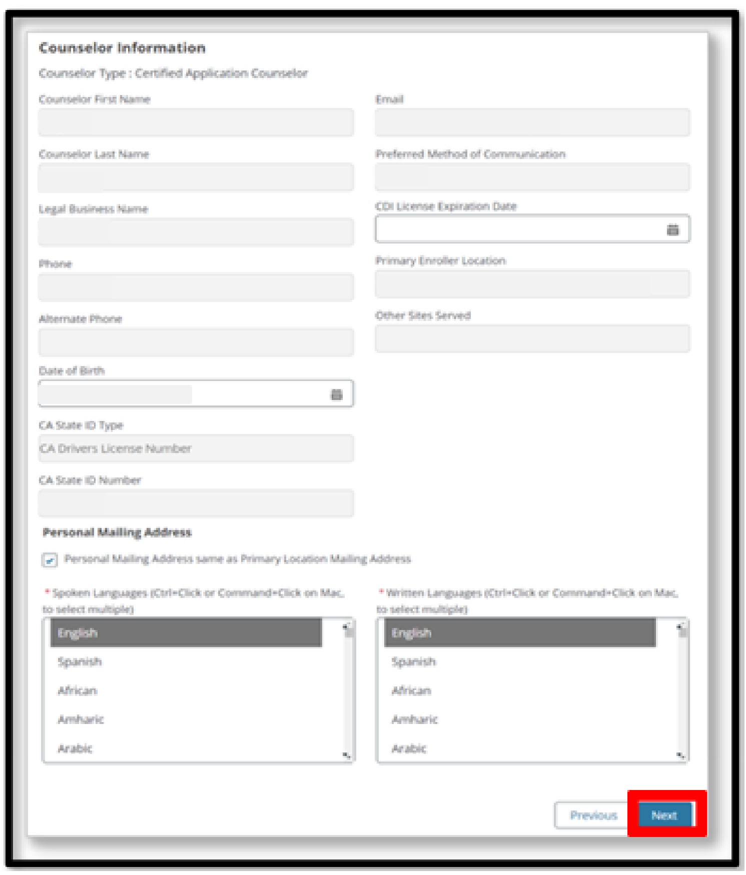
Covered California

Note: Enrollers can request a new access code by following the instructions at the bottom of the *Access Your Plan Based Enroller Application* email or you can send an email to PBECert@covered.ca.gov.

3. Select the **Yes, I have an Access Code** option and fill out the **Access Code**, **Last Name**, and **CA State ID Number** fields.
4. To proceed to the next page, select the **I'm not a robot** checkbox.
5. Select **Next** to continue.

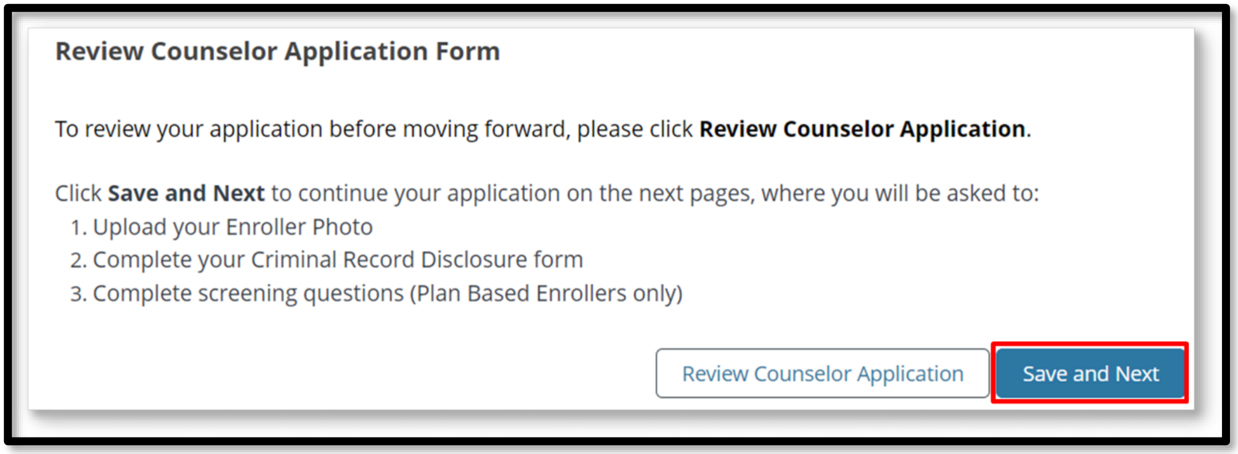


6. The *Counselor Information* page will display. The Enroller will need to verify the information and/or edit any fields, before selecting **Next** to continue.

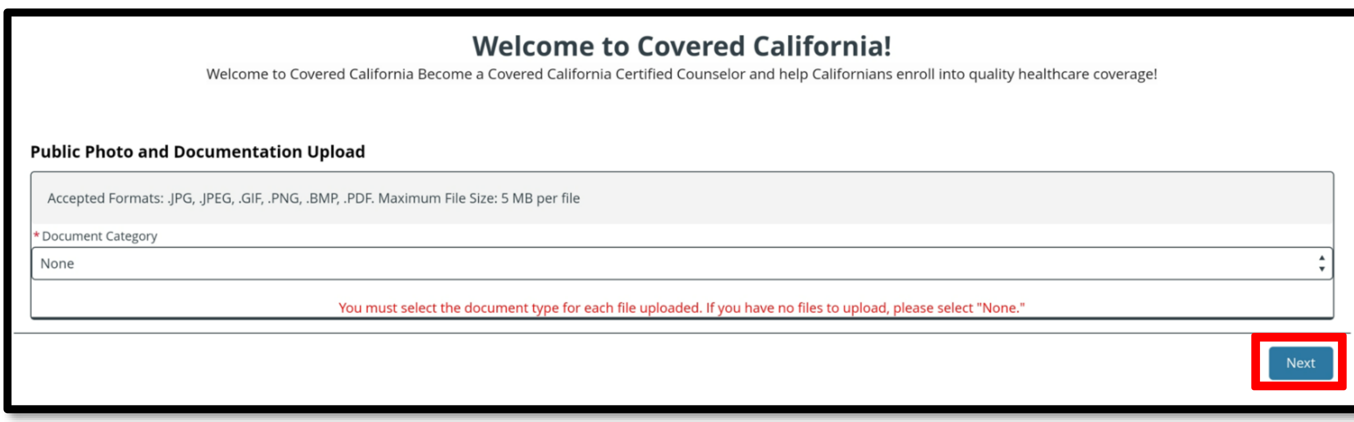


Note: If any of the greyed-out information needs to be updated, send an email to PBECert@covered.ca.gov to request the change.

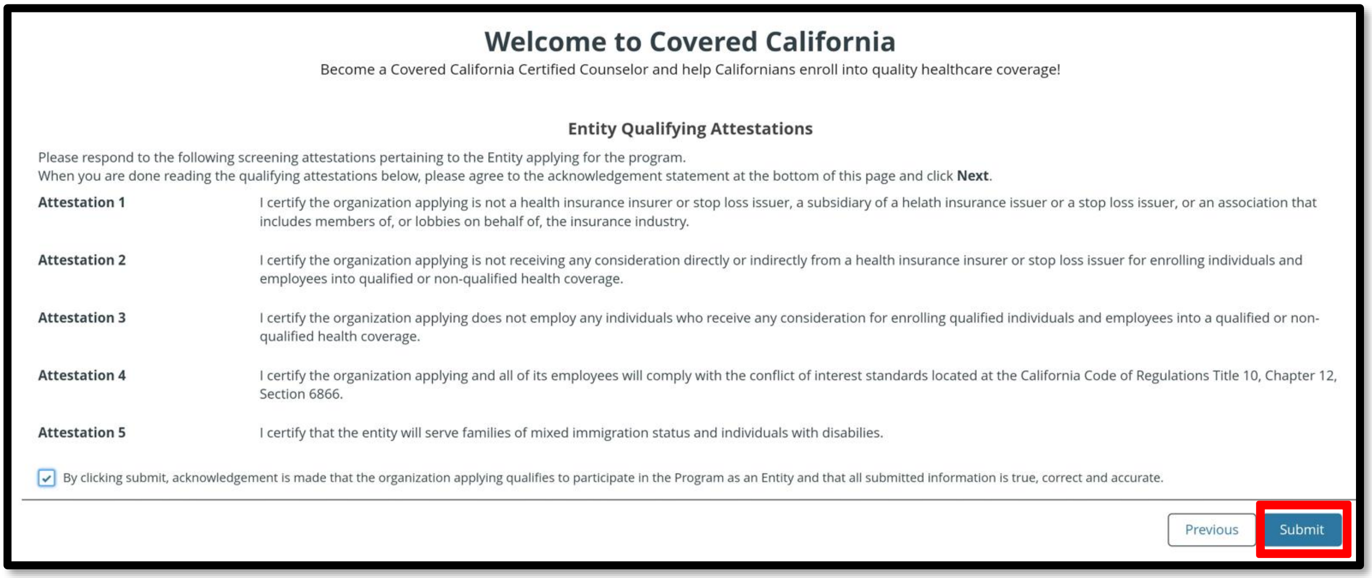
7. The *Review Counselor Application Form* page will display. Click **Save and Next** button to continue to the *Public Photo and Documentation Upload* page.



8. No action is required on the *Public Photo and Documentation Upload* page because Plan-Based Enrollers are not required to maintain a badge photo. Click **Next**.



9. The Enroller is required to read the *Entity Qualifying Attestations* and acknowledge the organization applying qualifies to participate in the Program as an Entity and that all submitted information is accurate. The Enroller 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 helath 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.

Previous Submit

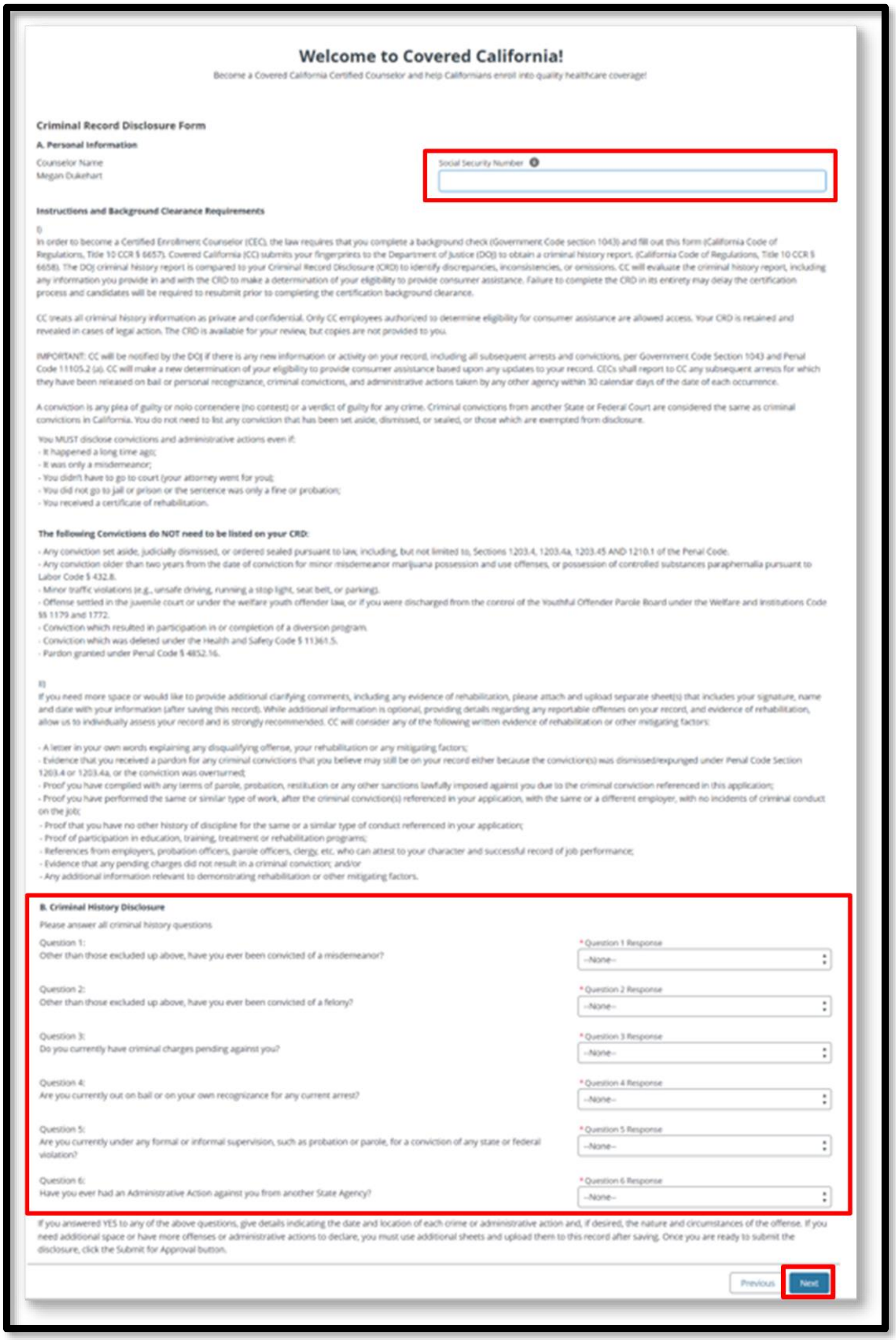
Note: To agree with the attestation statements, select the *By Clicking submit, acknowledgement is made that the organization applying qualifies to participate in the Program as an Entity and that all submitted information is true, correct, and accurate* checkbox.

Background Clearance Steps

The Background Clearance process is comprised of 2 parts: **Criminal Record Disclosure and Live Scan** are completed only when an Enroller *does not have* an Active Insurance Agent License with the Department of Insurance.

Note: If the Enroller has an Active Insurance Agent License with the Department of Insurance the background clearance step is **NOT** required.

1. The Criminal Record Disclosure Form page displays. The Enroller must complete the *Criminal Record Disclosure Form* by providing their social security number and completing **Section B** of the *Criminal History Disclosure* selecting the appropriate dropdown answer for the six criminal history disclosures questions. Select **Next** to continue.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Criminal Record Disclosure Form

A. Personal Information

Counselor Name
Megan Dukehart

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 § 4852.16.

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 believe 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--

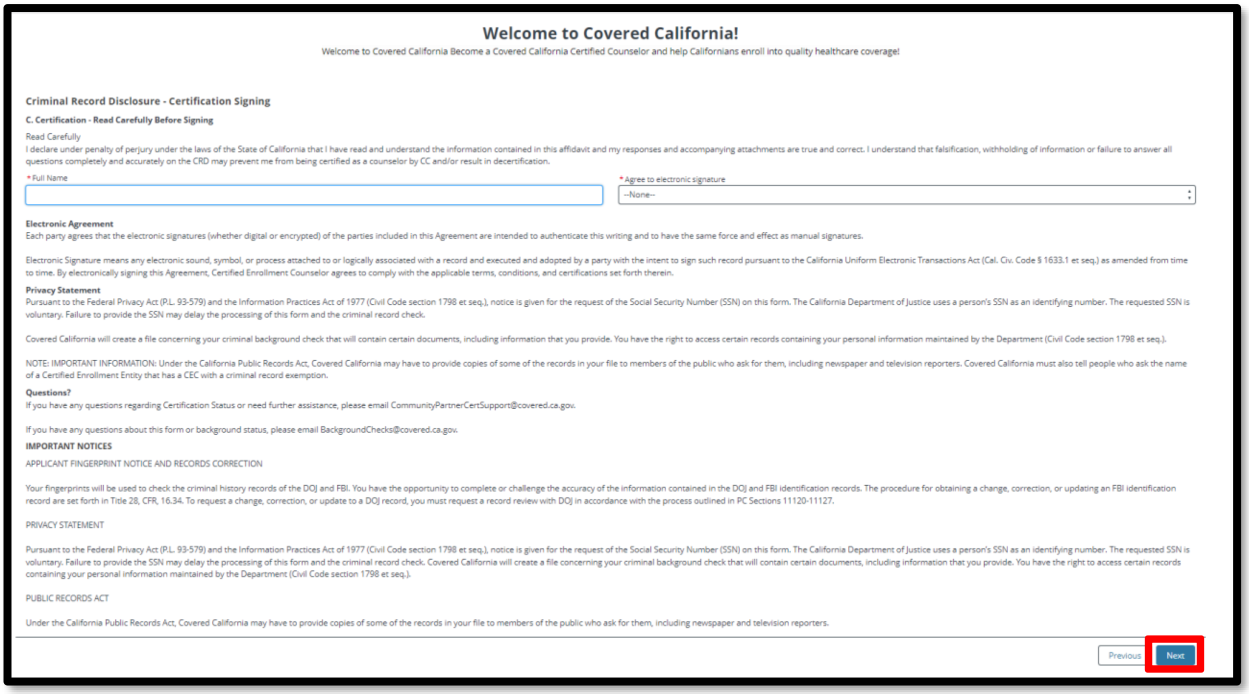
Question 6:
Have you ever had an Administrative Action against you from another State Agency?

* Question 6 Response
--None--

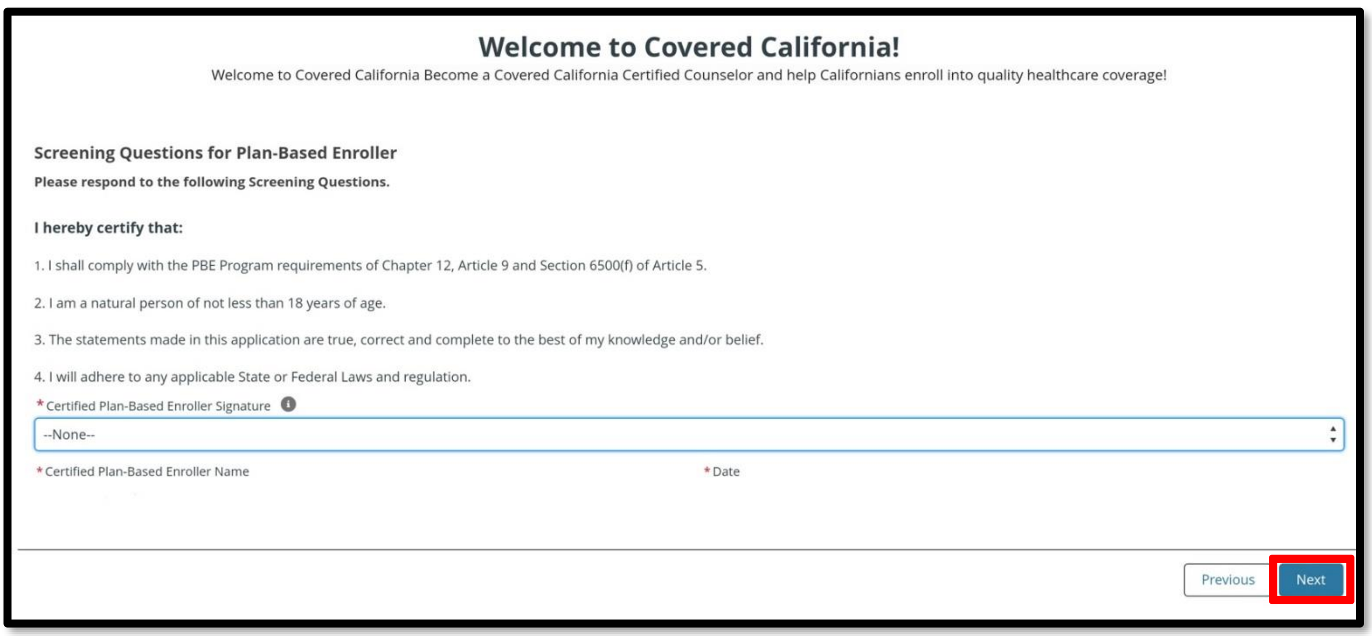
If you answered YES to any of the above questions, give details indicating the date and location of each crime or administrative action and, if desired, the nature and circumstances of the offense. If you need additional space or have more offenses or administrative actions to declare, you must use additional 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

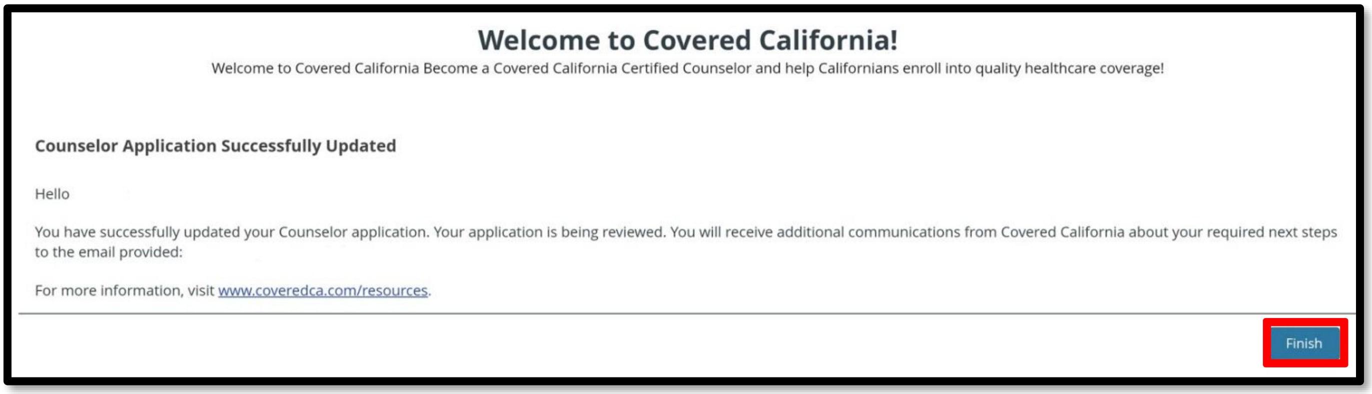
2. The *Criminal Records Disclosure – Certification Signature* page will display. The Enroller must enter their full name and select **Yes** or **No** from the *Agree to Electronic Signature* dropdown. Review the information listed on the page. Select the **Next** button.



3. The Enroller must read the *Screening Questions for Plan-Based Enroller* and select **Yes** or **No** to acknowledge program qualifying questions. Select **Next** to continue.



4. The Enroller will receive confirmation the application was successfully updated. Select the **Finish** button to submit the application.



Welcome to Covered California!

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

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:

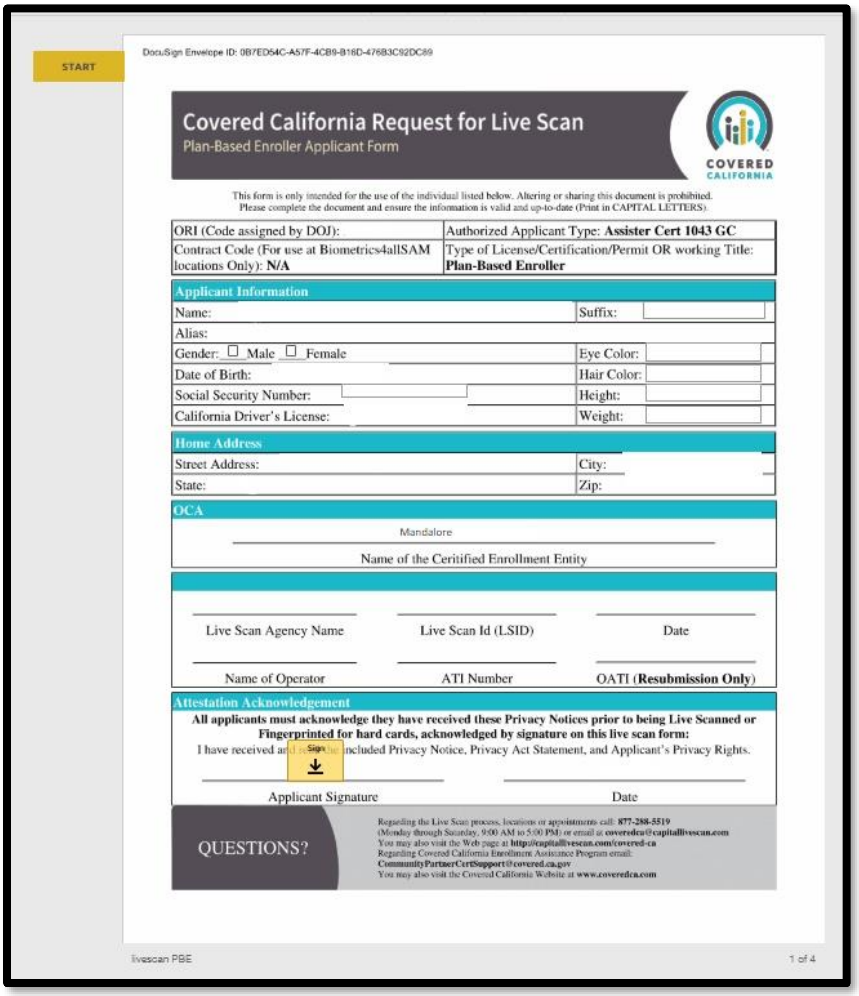
For more information, visit www.coveredca.com/resources.

Finish

5. If applicable, the Enroller will receive a Live Scan form via DocuSign to complete the background clearance process. If you sign the DocuSign form, you do not need to upload the document as it will automatically be uploaded to the Certification application. If you print the form and sign it, you must upload the signed document to the Enroller Portal.

   The Live Scan will have three additional Privacy Notices documents that you must read.

   - Print two (2) copies of the pre-populated Live Scan forms to take with you to the Live Scan facility (Capital Live Scan) as they will need to keep the forms.
   - 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



START

DocuSign Envelope ID: 0B7ED54C-A57F-4CB9-B18D-476B3C92DC89

Covered California Request for Live Scan
Plan-Based Enroller Applicant Form

COVERED CALIFORNIA

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).

ORI (Code assigned by DOJ):	Authorized Applicant Type: **Assister Cert 1043 GC**
Contract Code (For use at Biometrics4allSAM locations Only): **N/A**	Type of License/Certification/Permit OR working Title: **Plan-Based Enroller**

Applicant Information	
Name:	Suffix:
Alias:	
Gender: ☐ Male ☐ Female	Eye Color:
Date of Birth:	Hair Color:
Social Security Number:	Height:
California Driver's License:	Weight:

Home Address	
Street Address:	City:
State:	Zip:

OCA

Mandalore

Name of the Ceritified 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 read the included Privacy Notice, Privacy Act Statement, and Applicant's Privacy Rights.

Sign

Applicant Signature | Date

QUESTIONS?

Regarding the Live Scan process, locations or appointments call: **877-288-5519**
(Monday through Saturday, 9:00 AM to 5:00 PM) or email at **coveredca@capitallivescan.com**
You may also visit the Web page at **http://capitallivescan.com/covered-ca**
Regarding Covered California Enrollment Assistance Program email:
CommunityPartnerCertSupport@covered.ca.gov
You may also visit the Covered California Website at **www.coveredca.com**

livescan PBE

1 of 4

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.

Enroller Certification Training Steps

Covered California will enroll you in the [Learning Management Training (LMS) Courses](#) once the Enroller eligibility requirements are reviewed. The Enroller 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 Enroller 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 Enroller application.
- Enroller(s) **must** complete all courses within 90 days of the date they were enrolled into the Certification Training courses.
- The Enroller must pass the Certification Training exam with a score of 80% or greater.
- The Exam is an open book, and the Enroller is encouraged to use the study guides provided in LMS.
- The Enroll will have 3 attempts to pass the exam. If the Enroller fails, the exam three times they must contact the AC or PC to further request Covered California re-enrolls the Enroller in the LMS training course and exam.

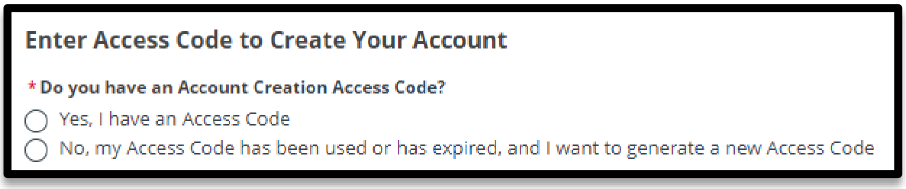
Account Creation Steps

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

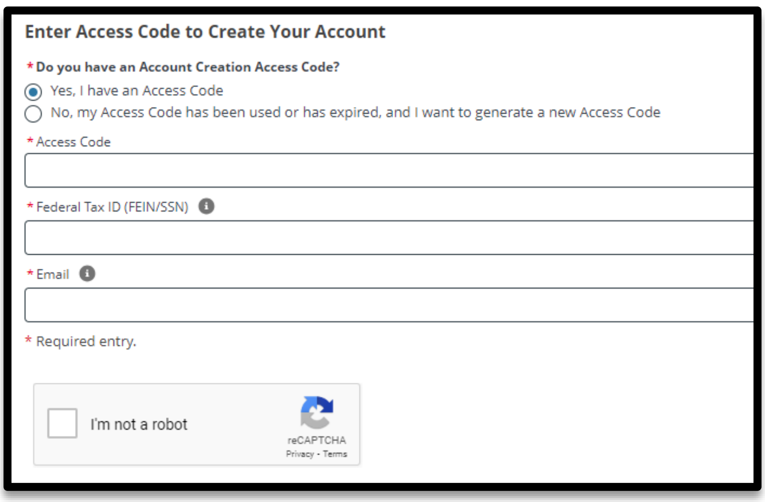
1. Once the Enroller is certified by Covered California, they will receive two emails from Covered California:
   - The Enroller will receive an email titled *Access Code for Your New Counselor Accoun*t with an Access Code and further instructions awaiting the arrival of the second email. The Access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



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



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.

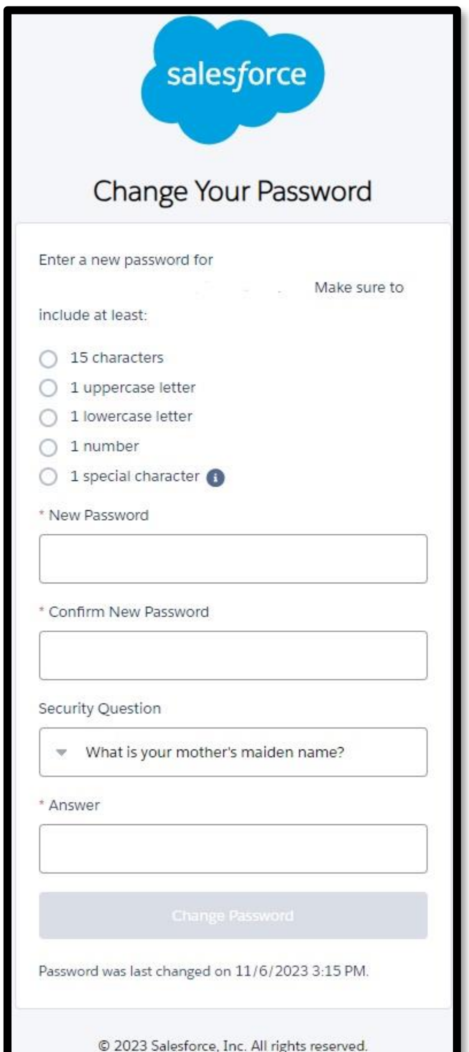
Password criteria:

- Passwords must have at least **15** characters (no more than 50).
- Passwords must contain **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



Change Your Password

Enter a new password for Make sure to include at least:

- 15 characters
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- 1 special character

* New Password

* Confirm New Password

Security Question

What is your mother's maiden name?

* Answer

Change Password

Password was last changed on 11/6/2023 3:15 PM.

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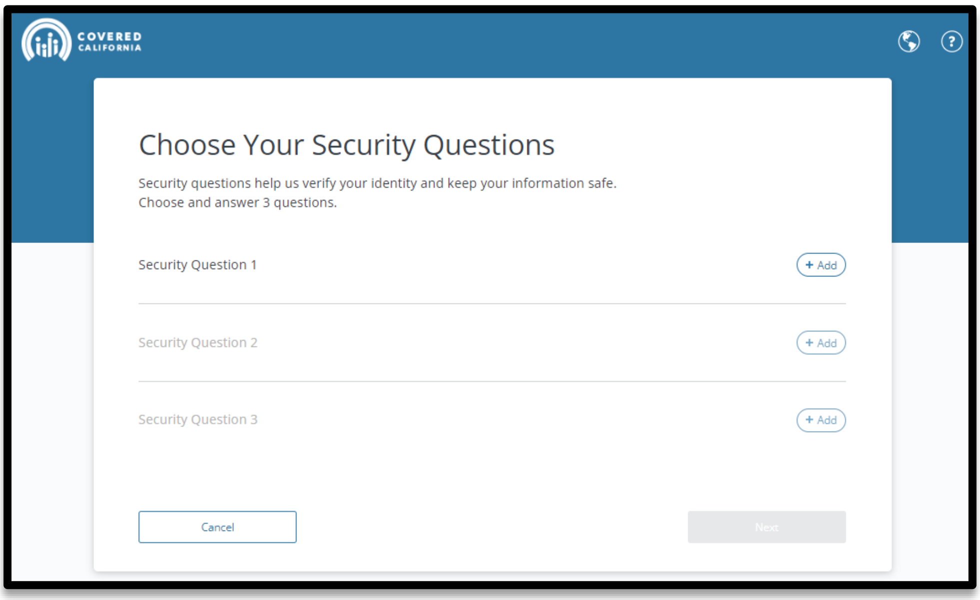
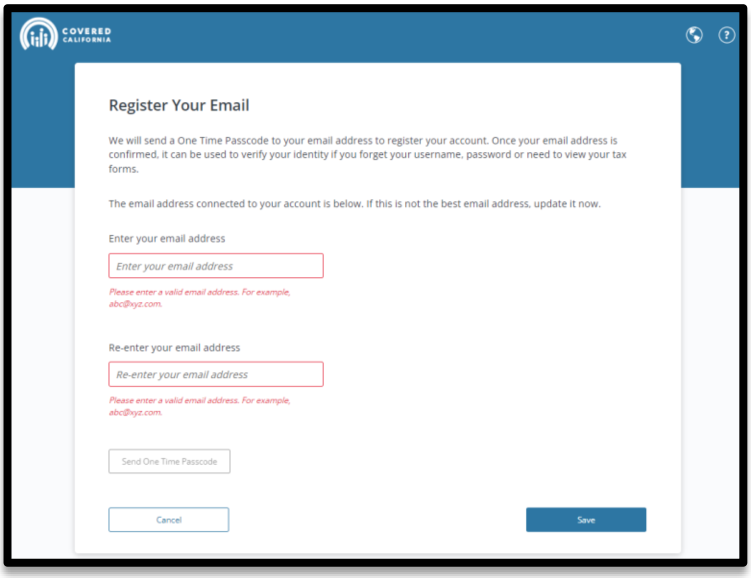
6. The Enroller must select a four-digit PIN Number

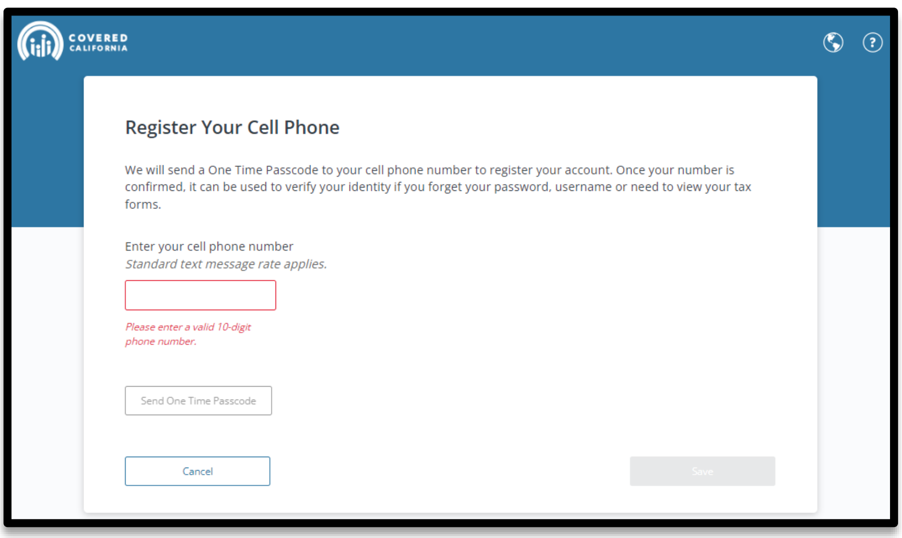
Note: Save this information for future use – Covered California will not have access to the PIN Number.

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



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





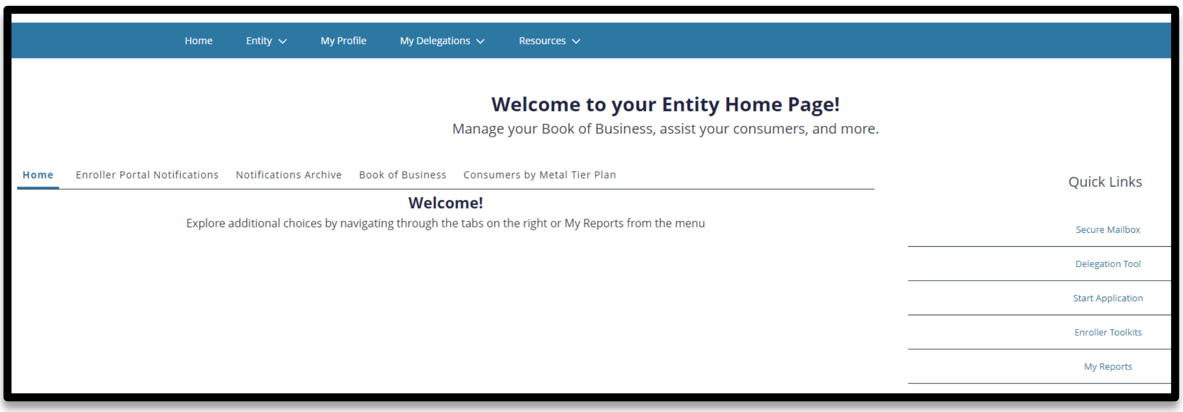
10. For each step, the system will send the Enroller a passcode to validate the email address and/or cell phone number. Input the passcode to set up the password recovery option.
11. Once the Account Creation is complete the Enroller can log in to Enroller Portal with their username and password to access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

Enroller User Home Page

After an Enroller 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 Enrollers with a navigation overview of the Enroller Portal dashboard tabs frequently used.

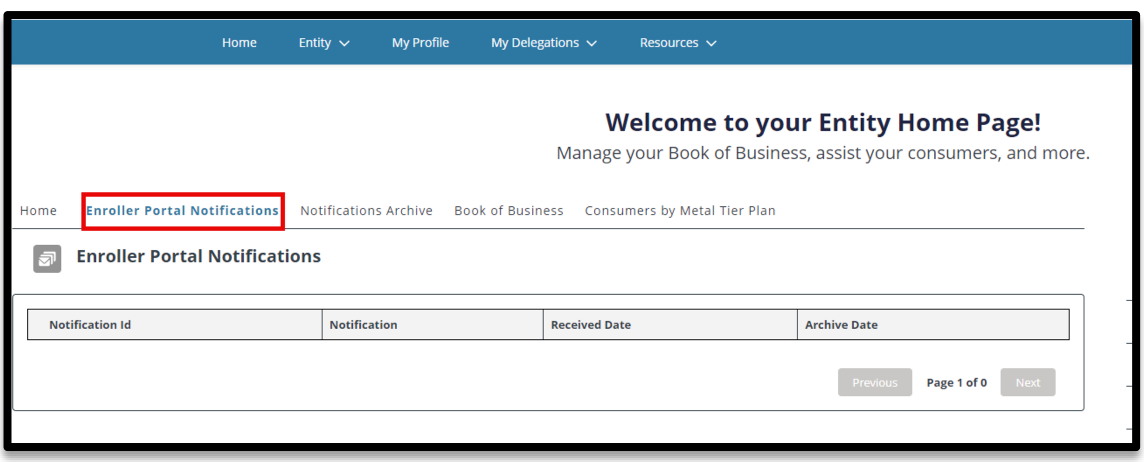
Enroller Home Page tab:

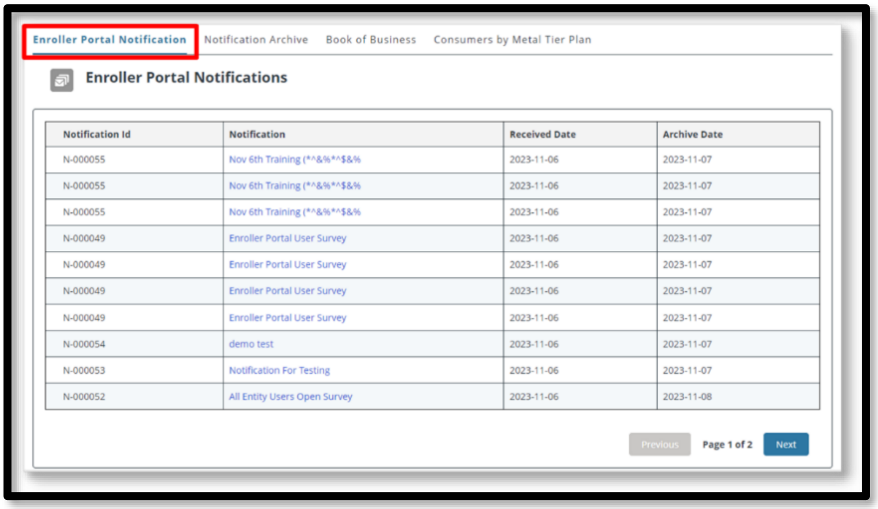
When the Enroller logs in to the system, they will land on the *Welcome to your Entity Home Page*. The Enroller can access high-level information regarding their certification status, starting an application, delegation tool, reports, quick links, and more.



Enroller Portal Notifications tab:

- The **Enroller Portal Notifications** tab displays the Enroller's active notifications sent by the Distribution Services Communications Team. The most recent notification is displayed at the top of the list.
- Clicking a link from the *Notification* 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

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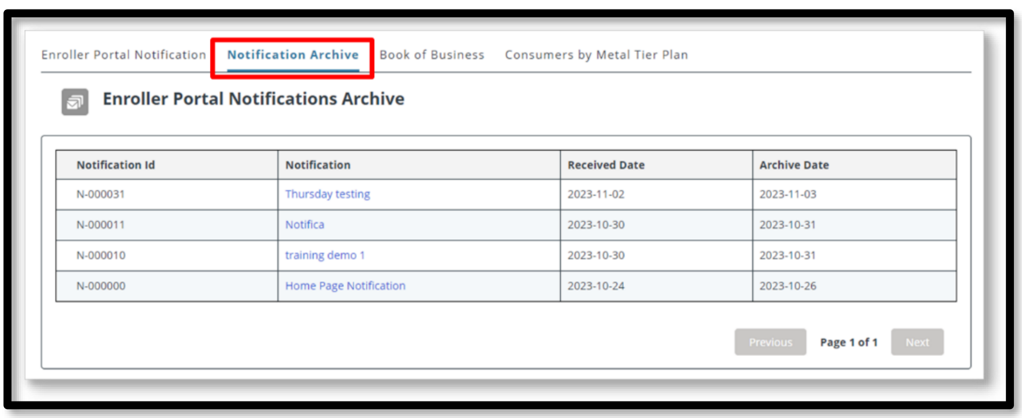
Notification Archive tab:

- **The Notifications Archive** tab displays a list of the Enroller's archived notifications sent by the Distribution Services Communications Team. The most recent notification is displayed 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

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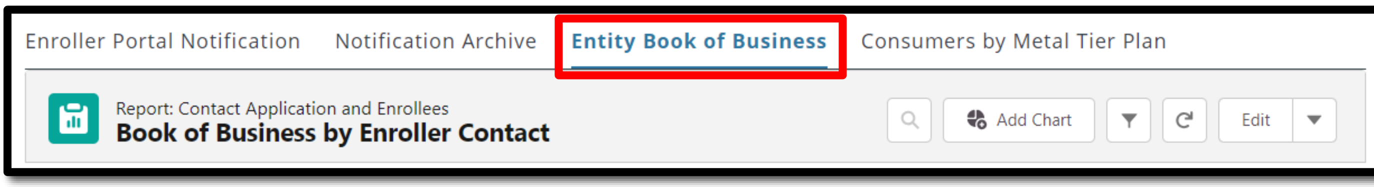
Entity Book of Business tab:

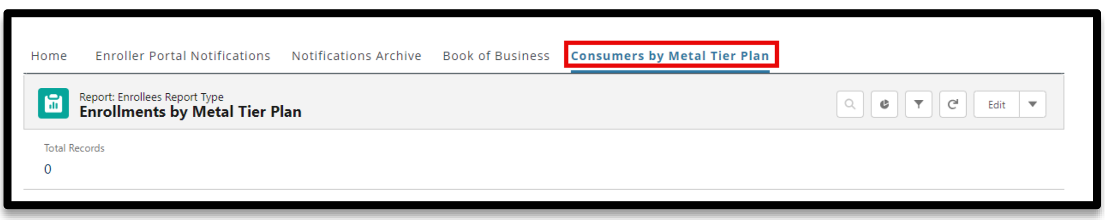
- The **Entity Book of Business** tab displays the *Book of Business by Enroller Contact* report, allowing Enrollers to view Consumers in the Entity's book of business, apply filters to and edit the book of business, and save or export the book of business. Export options include *Formatted* or *Details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



Note: For Enrollers, 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:

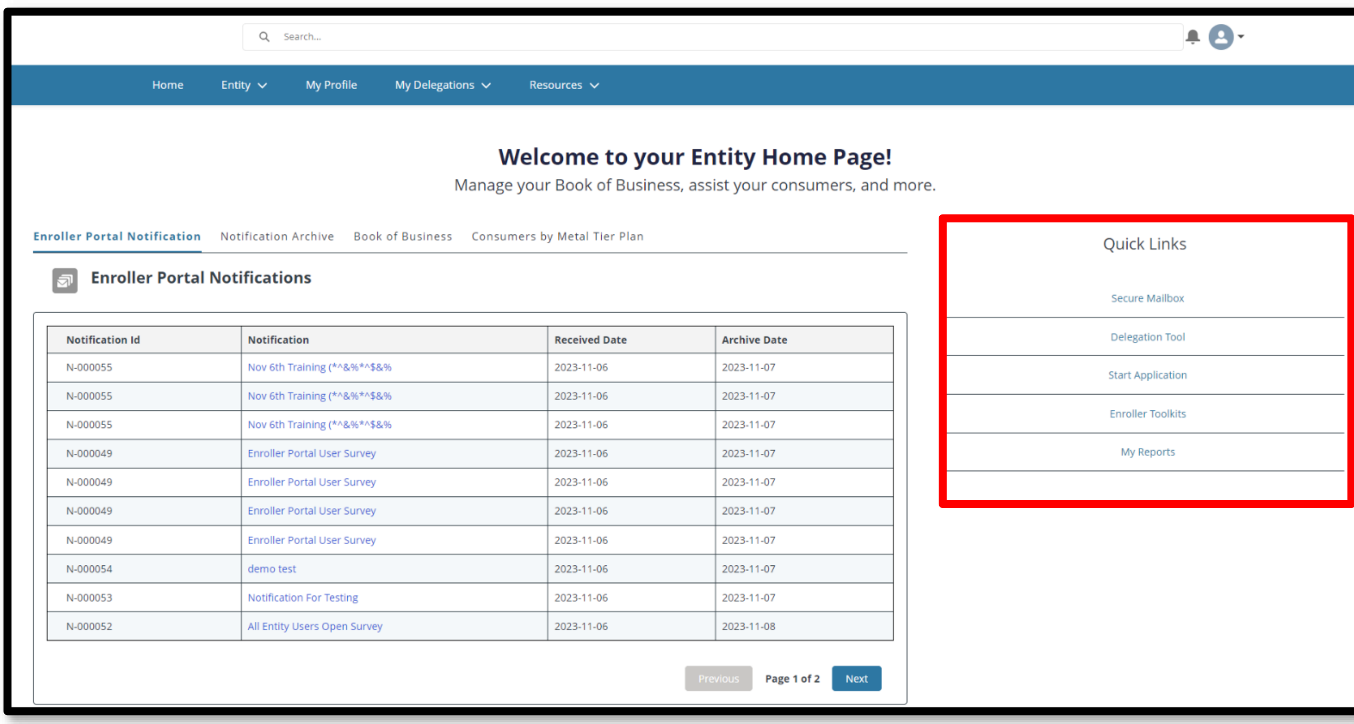
The **Consumers by Metal Tier Plan** tab displays the *Enrollment by Metal Tier Plan Type* report, allowing Staff to view the number of Consumers delegated to them for each metal tier plan Level. A *Consumers by Metal Tier* bar graph is also available.



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:

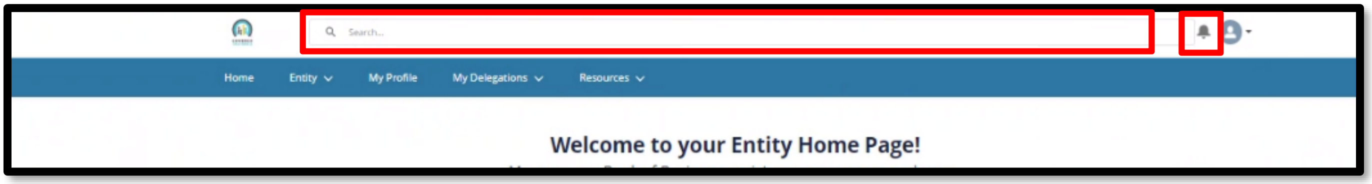
- **Secure Mailbox** – Navigates the user to the *Secure Mailbox* to view messages
- **Delegation Tool** – Navigates the user to the *Consumer Delegation* page to delegate a CEC to the case
    - Displays only for Counselors
- **Start Application** – Navigates the user to the Consumer Home page to begin 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.



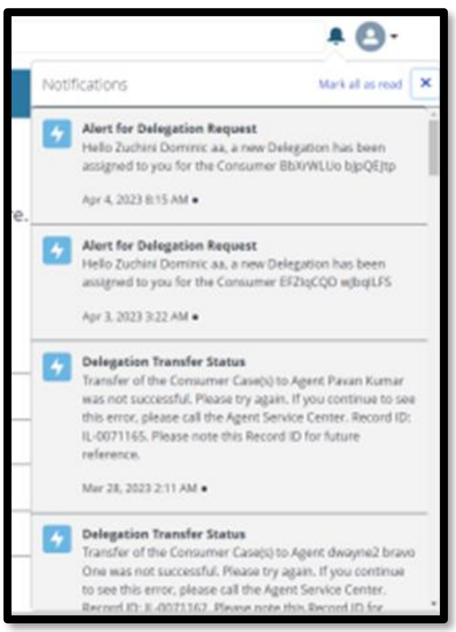
Home Page Navigation

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

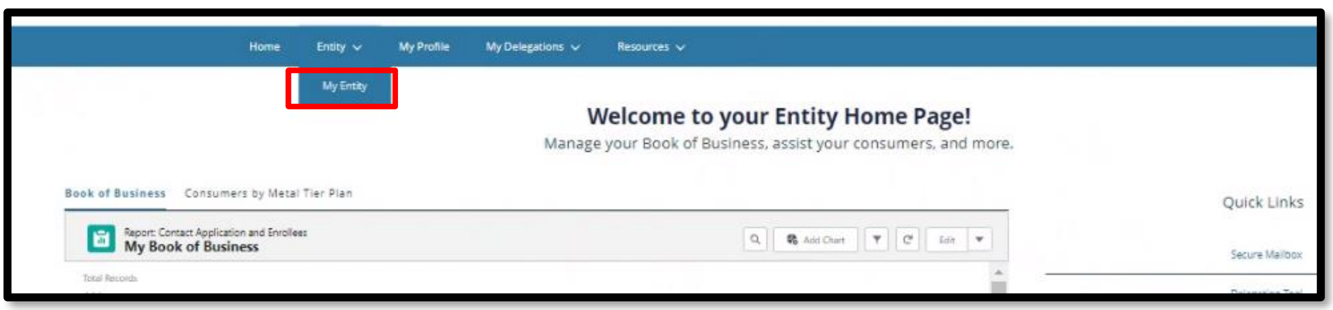


- Notifications may display the following:
    - **Alert for Delegation Request** – Delegation has been assigned
    - **Contract DocuSign Envelope Failed** – Contract DocuSign failed
    - **Delegation Transfer Status** – Indicates the status of a delegation transfer
    - **Live Scan DocuSign Envelope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

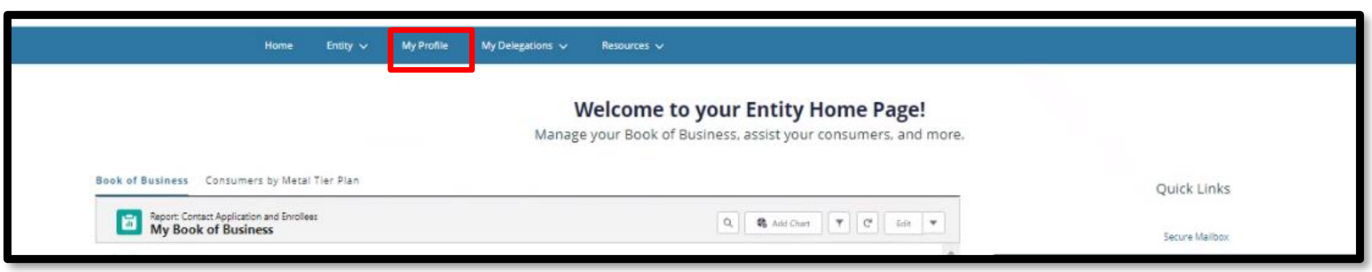


- **Profile icon** – If you hover-over the icon, it will display a dropdown description with the following options:
  - **Home** – Navigates the users to the Welcome to your Entity Home Page!
  - **My User Profile** – Navigates the user to the My Security Profile Page
  - **Logout** – Logs the user out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

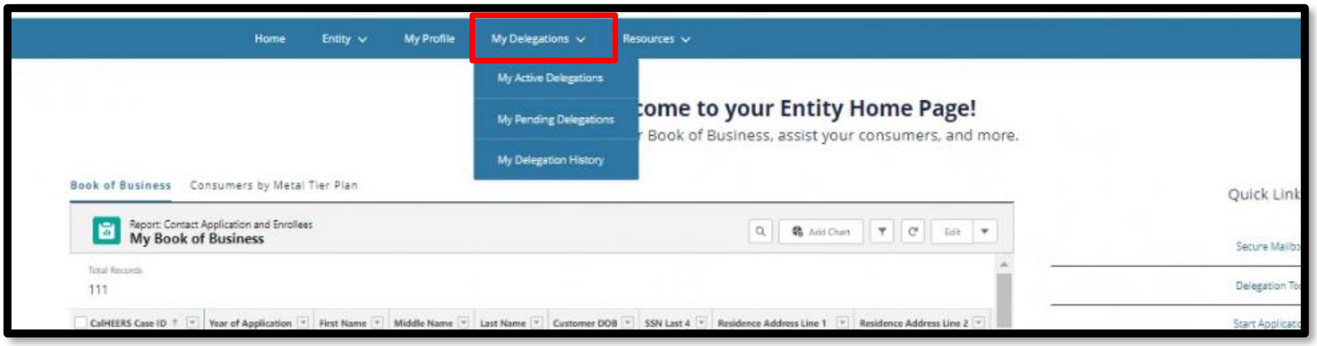
- **Entity** tab dropdown – Displays for all Entity staff with the following link:
  - **My Entity** – Navigates user to Entity account page with navigator contact information, Entity contacts, population served, and certification/approval status



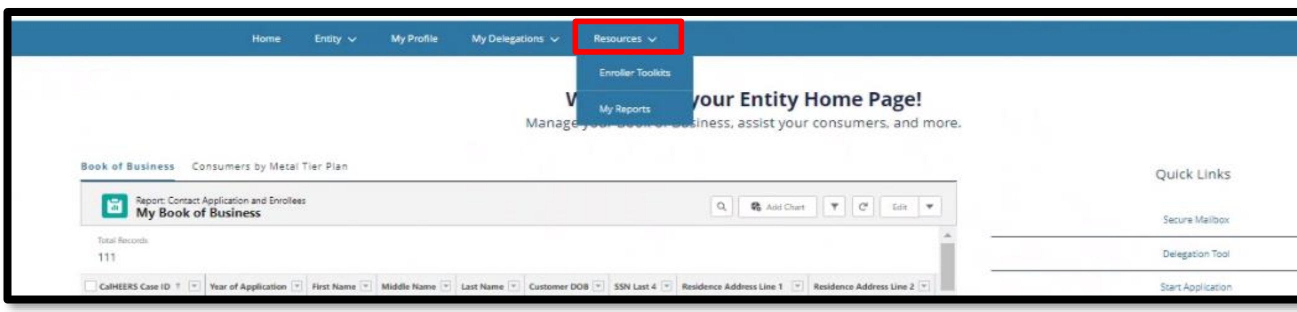
- **My Profile** tab – Navigates the user to the *Contact* page to view their profile.



- **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



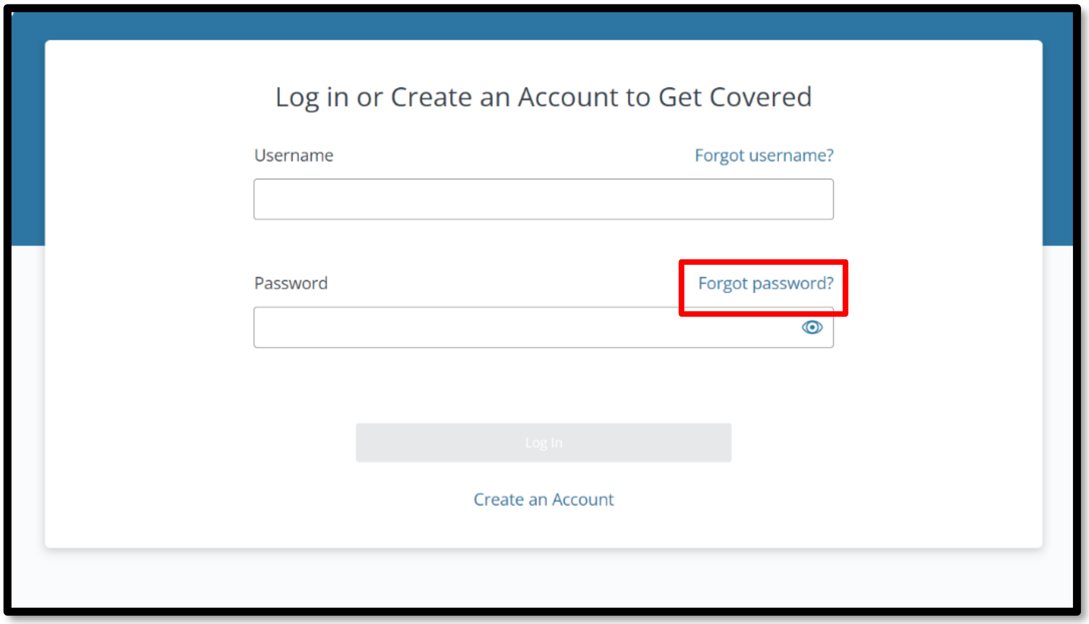
- **Resources** tab dropdown – Displays for all Entity staff with the following links:
    - **Enroller Toolkits** – Navigates the user to the *Enrollment Partner Toolkits and Resources* page of the Covered California website
    - **My Reports** – Navigates the user to *Entity Reports*



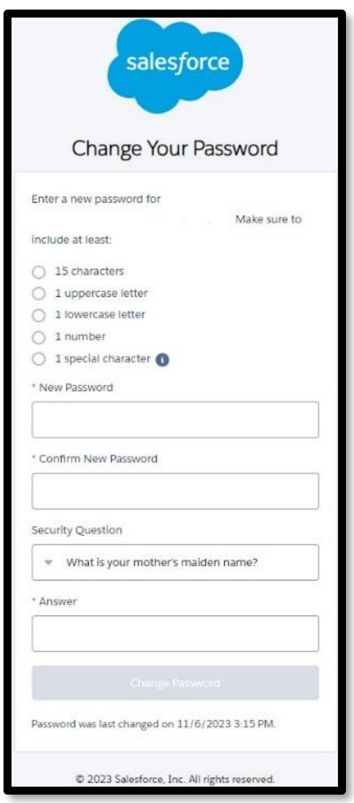
Forgot Password or Password Reset

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**



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.



Need Assistance

This concludes the Enroller Portal Plan-Based Enroller User Guide 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 PBECert@covered.ca.gov.