How to Become a Certified Entity Quick Guide

Overview

How to become an Entity with Covered California.

Table of Contents

Application and Onboarding

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

- At least one counselor must complete the Certification process prior to the Entity becoming certified.

- Submit the application.

Application Review by Covered California

Covered California reviews the newly submitted Entity application for initial eligibility (this process can take up to 3 business days) and will reach out to the Entity to obtain missing information once it has been determined you are eligible to continue the application process. If eligible, Covered California will send an Access Code to continue with the application process, which includes designating a Primary Contact, Authorized Contact, and the first eligible Counselor to complete the certification process.

Important: Please designate a Counselor who will be able to complete the process within the 30-day time limit.

- Upload required documents:
  - Entity Agreement (DocuSign)
  - Proof of:
    - Current business license
    - Insurance coverage (general liability and workers' compensation.) Ensure Covered CA (1601 Exposition Blvd. Sacramento, CA 95815) is listed as a Certificate Holder.
  - Conflict of Interest Prevention Plan

    o   W-9 (for Entity)

Entity Management Training

Covered California emails instructions to the Entity Primary Contact to complete the required online Entity Management Training in the Learning Management System (LMS) within 30 days from registration. This is a 30-minute training and does not have an exam requirement.

- Upon completion, email Covered California at: communitypartnercertsupport@covered.ca.gov.

Register in Enroller Portal (covered.ca.com)

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

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

For more information and further assistance regarding the Certification process, refer to the Enroller Portal Entity User Guide.

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