Enroller Portal Plan-Based Entity

User Guide

Contents

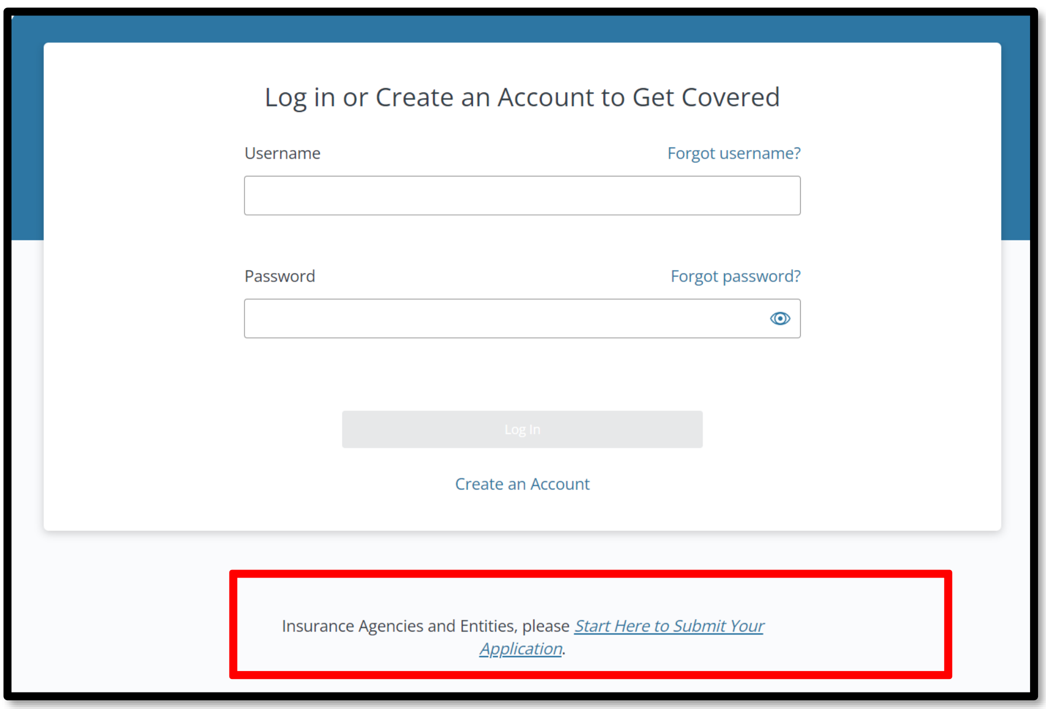
Overview

The Enroller Portal Plan-Based Entity User Guide outlines all features and functions available to Plan-Based Entity Business Contacts in the Enroller Portal. This document details the functions of an Entity user, account registration process, entity application process, managing Counselors, managing files, and required documentation.

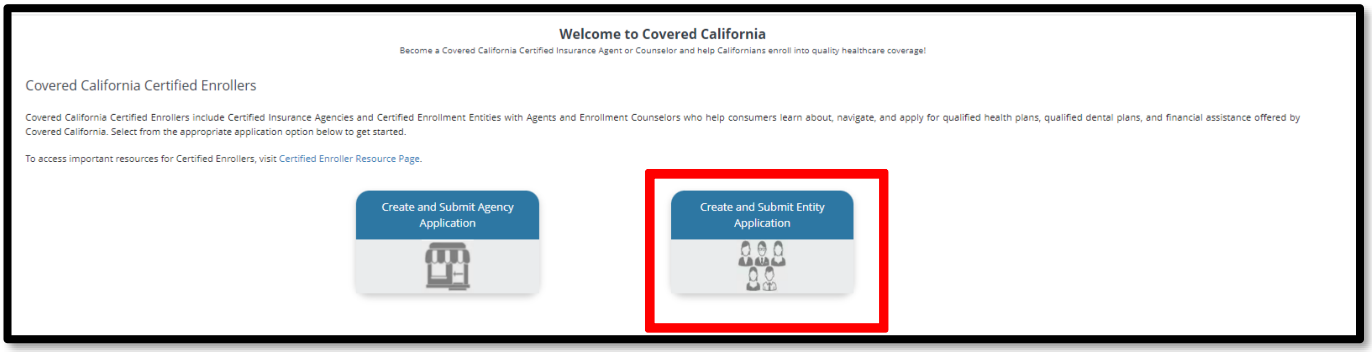
Account Creation Process (Authorized or Primary Contact Steps)

This section provides instructions for users to create a new Entity account.

The Authorized Contact (AC) or Primary Contact (PC) listed on the entity roster is responsible for creating the Enroller user account. Once the account is created, an email from the Enroller Portal will be sent to the Enroller:

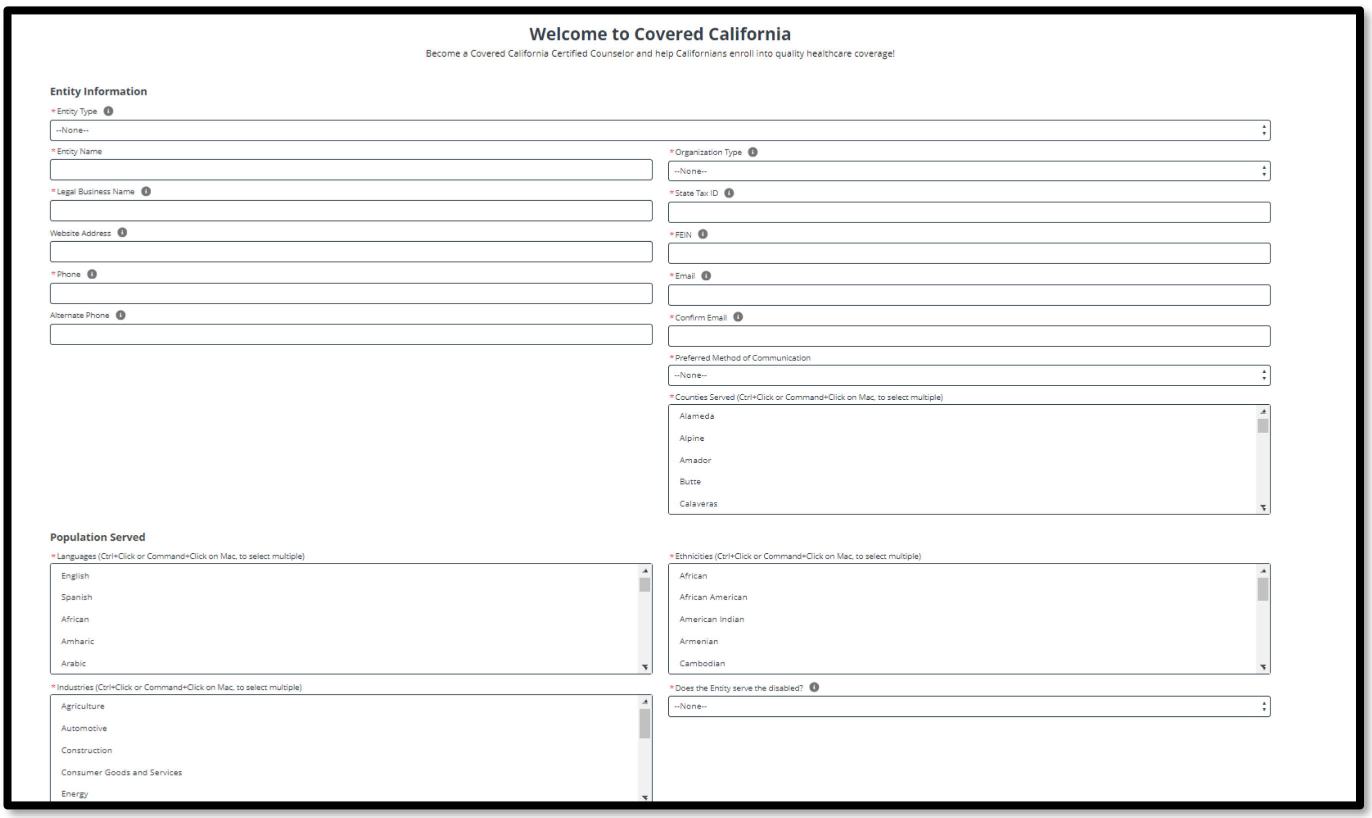


1. To access the Enroller Portal, you must navigate to the *Log In or Create an Account to Get Covered* page
2. Select the **Start Here to Submit Your Application** link



3. Select **Create and Submit Entity Application**

Note: The Entity will need to designate an AC or PC, and the first eligible Counselor to complete the certification process. Please designate a Counselor who can complete the process within the 90-day turnaround.



4. Fill out all the required fields and click **Next**.
   - Once the application has been submitted, two (2) emails will be sent with the login link and access code.

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

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 Entity Application")**.

2. Legal Business Name

3. Federal Employer Identification Number (FEIN)

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 Entity 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

Dear

Thank you for submitting your application.

Your Access Code to edit your Entity Application is **amr69sSy25**

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 Entity Application".**

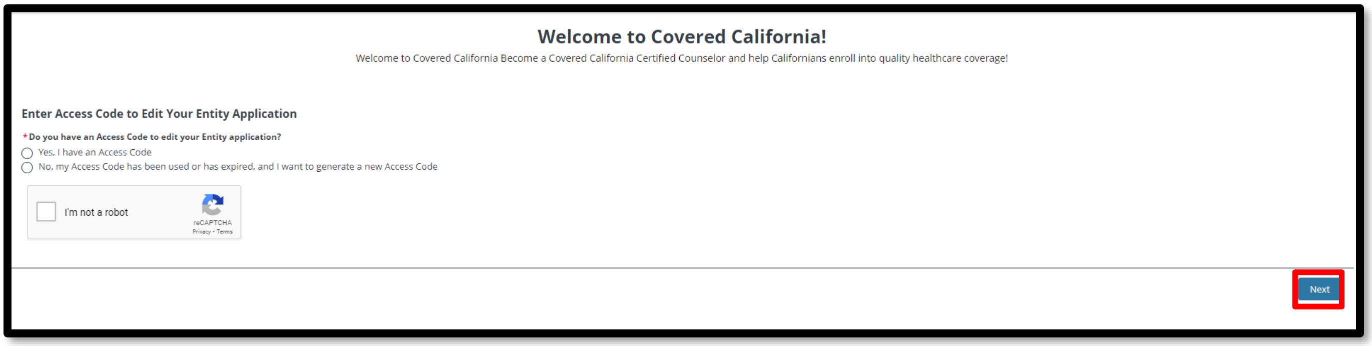
Questions? Visit coveredca.com/resources/ or contact CEC/PBE Helpline at (855) 324-3147 or email CommunityPartnerCertSupport@covered.ca.gov.

Sincerely,

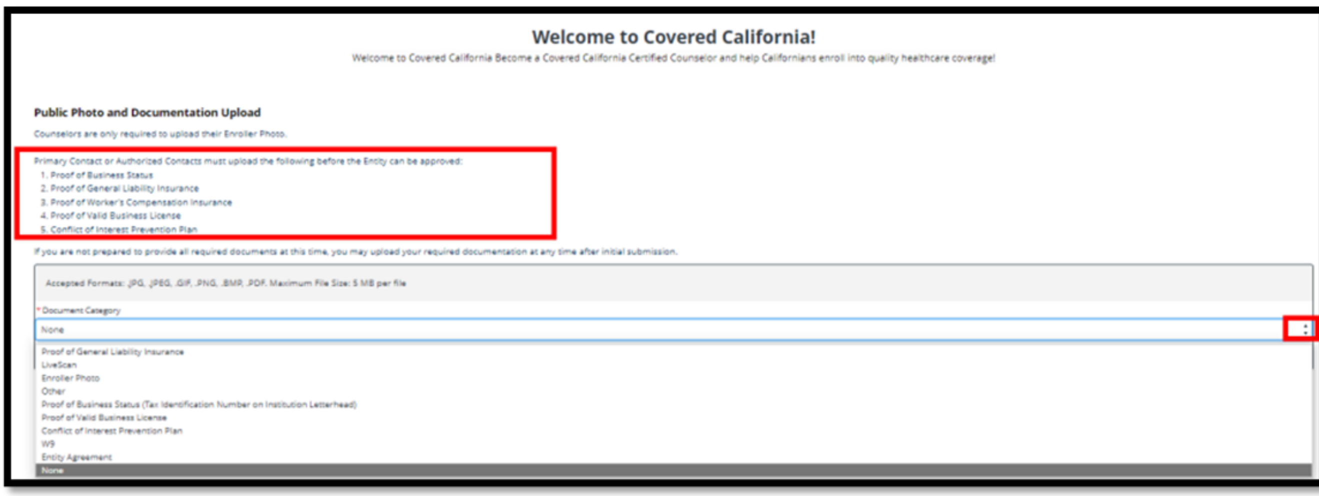
Covered California

Note: A third email will be sent with training login information for the Learning Management System (LMS). Primary Contacts only are required to complete the training. This is approximately a 30-minute training and does not have an exam requirement. Once enrolled, the Primary Contact will receive an email with further instructions on accessing the new LMS Training account.

5. Upon receipt of both emails, click the *Click Here to Edit Your Entity Application* link. Select the **Yes, I have an Access Code** option and **I'm not a robot checkbox.**



6. Next, enter the **Access Code**, the **Entity FEIN**, and PC's **Email Address**.
7. The *Public Photo and Documentation Upload* page displays. No action is required for Plan-Based Enrollers as badge photos are not a requirement for this program. Select **Next**.

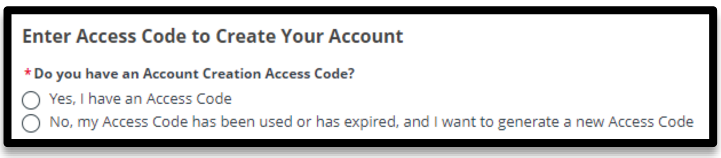


8. A confirmation page will indicate that the application was submitted successfully. Click **Finish.**

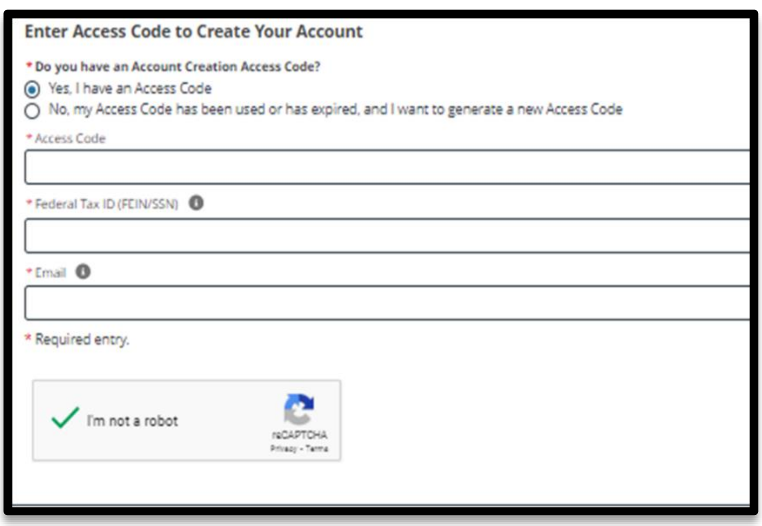
Account Creation Steps

The Account Creation step is the FINAL step within the Certification process.

1. Once the AC or PC is Certified by Covered California, two emails will be sent from Covered California:
    - The AC or PC will receive an email titled *Access Code for Your New Counselor Account* with an access code and further instructions. The access code is valid for 24 hours only and for one-time use.
    - The AC or PC 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. From the landing page, the Enroller should select **Yes, I have an Access Code.**



3. The AC or PC will enter the **Access Code**, **Entity's Federal Tax ID** (not social security number), and the **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.

Important: Once the Username has been created, it cannot be changed.

Password criteria:

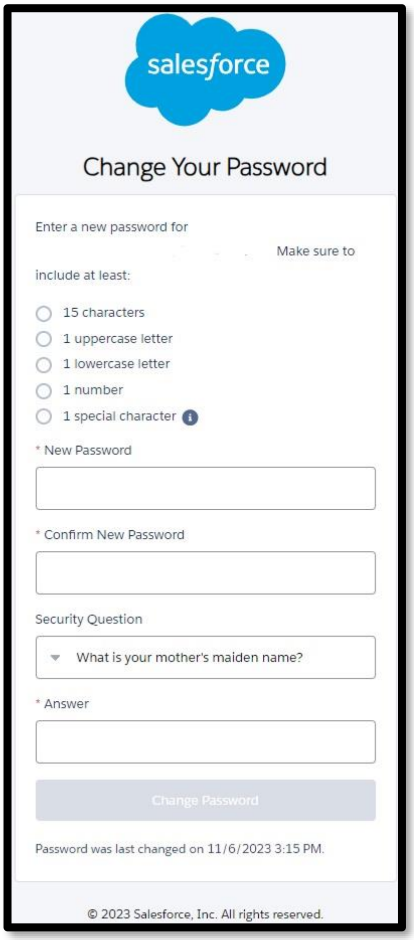
- Passwords must have at least **15** characters (no more than 50).
- Passwords must contain **1** of the following:
    - Uppercase letter

    - Lowercase letter
    - Number
    - Special character
- Passwords must not contain dictionary words, names, or common keyboard patterns. (i.e., QWERTY).
- When re-entering the password, it must match.

New Password

Your password must:

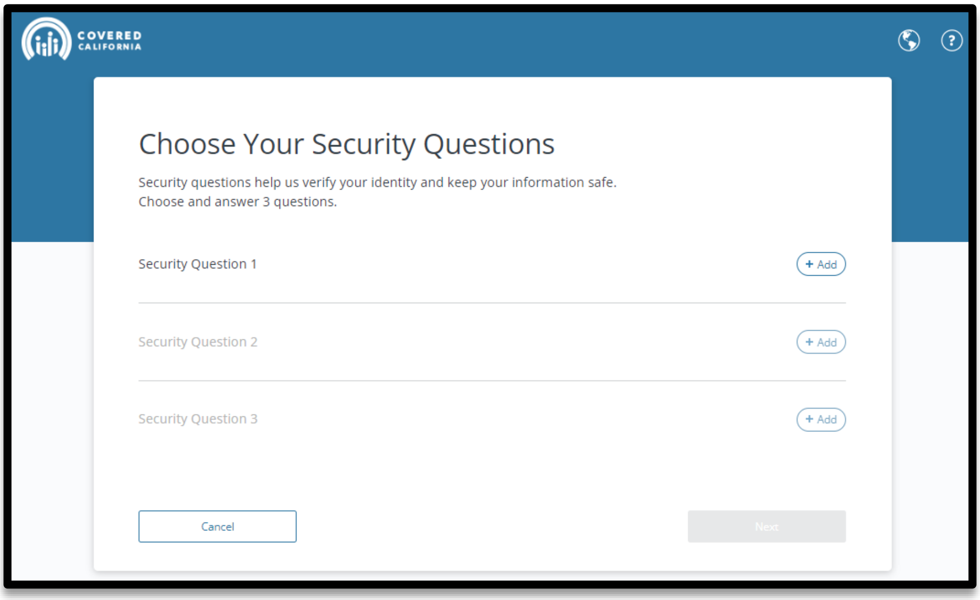
- Not contain dictionary words, names, or common keyboard patterns (example: Qwerty1!)
- Have at least 15 characters
- Have no more than 50 characters
- Must have at least 1 UPPERCASE letter
- Must have at least 1 lowercase letter
- Must have at least 1 number
- Must have at least 1 special character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



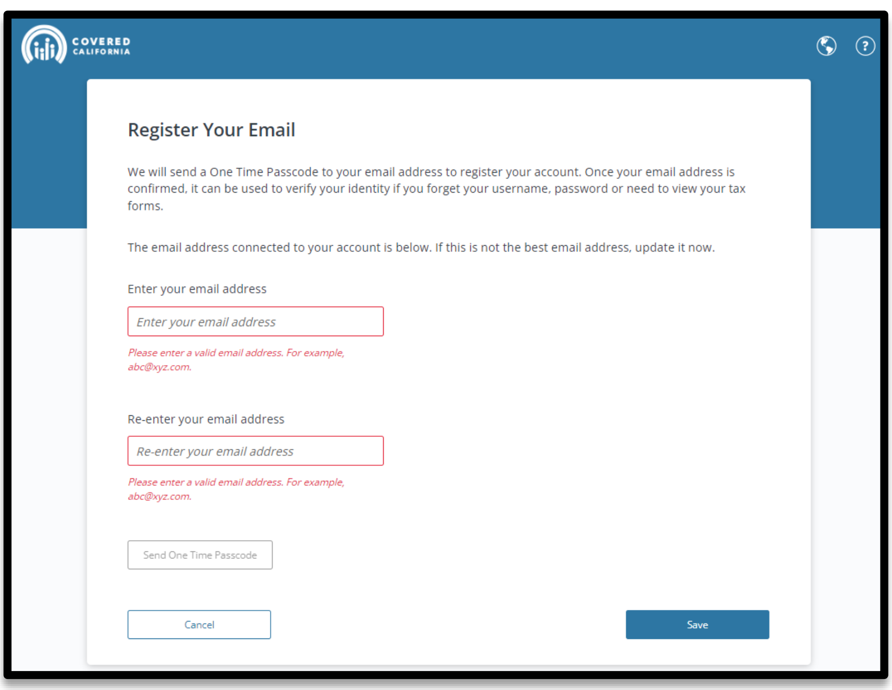
5. The Enroller must select a four-digit Pin Number

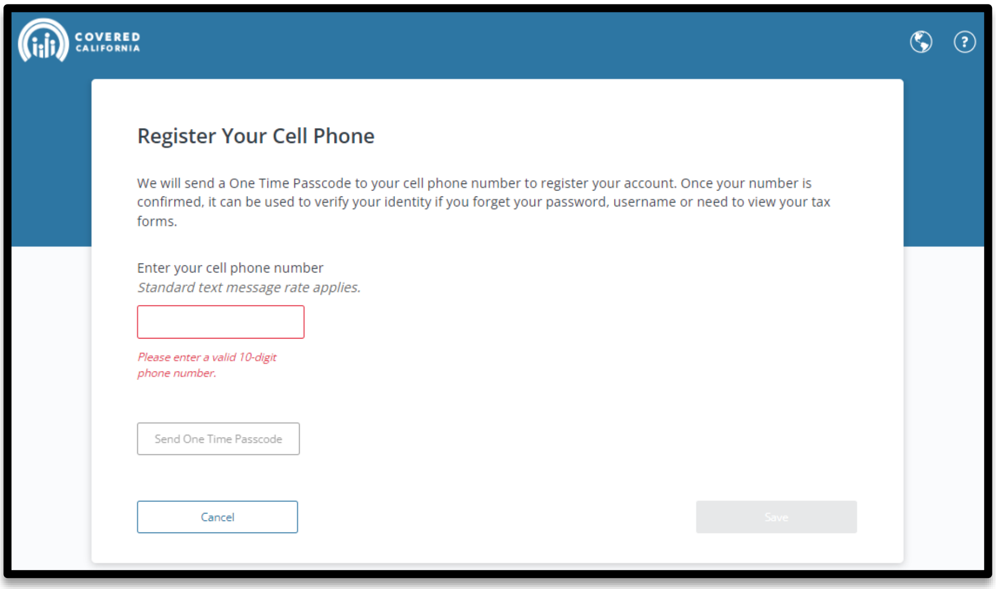
Note: Save this information for future use – Covered California will not have access to the Pin Number.

6. The system will now ask for the Enroller to select 3 Security Questions from a dropdown list of options.



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

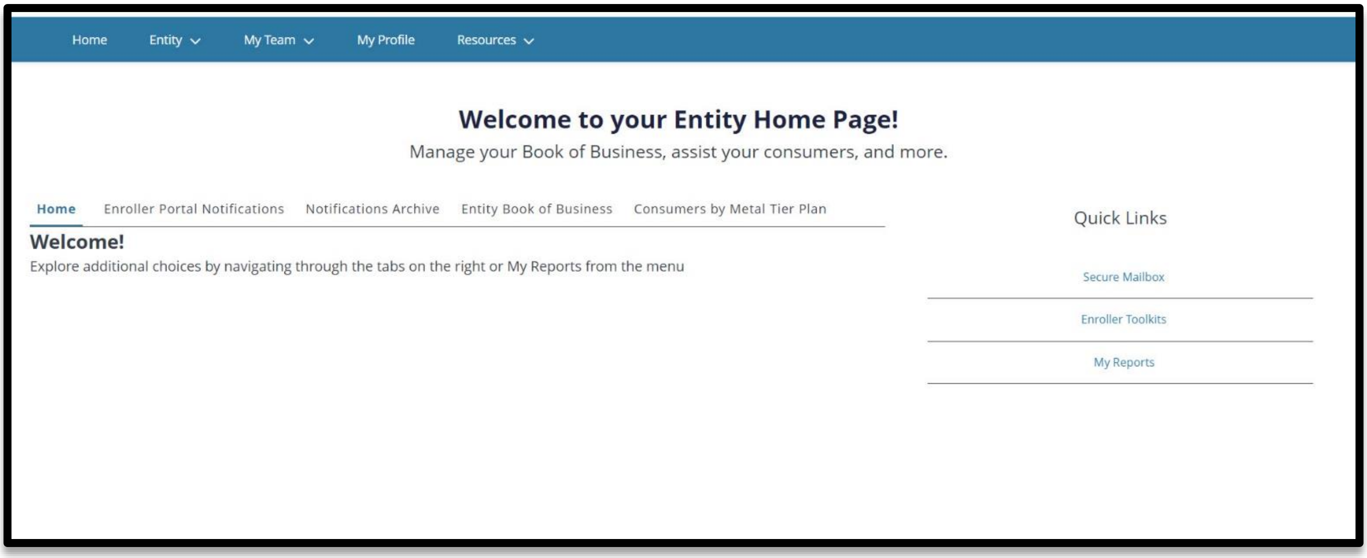




9. For each step, the system will send the AC or PC a passcode to validate the email address and/or cell phone number. Input the passcode to set up the password recovery option.
10. Once the Account Creation is complete the AC or PC can log in to the Enroller Portal with their username and password to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

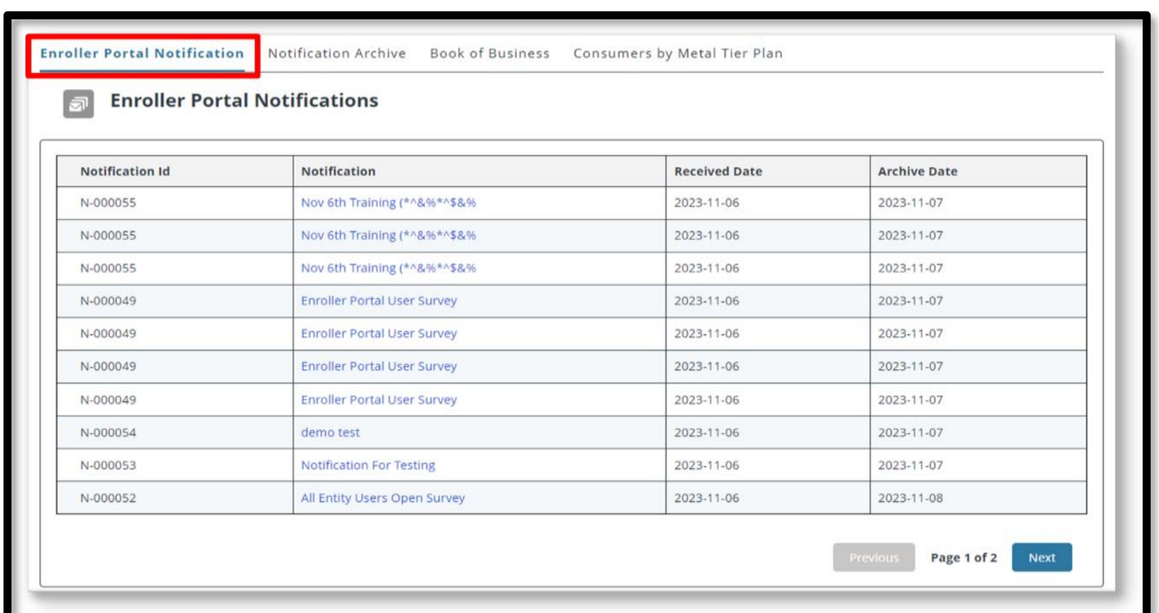
Entity User Home Page

This section provides navigation throughout the Entity Home Page.



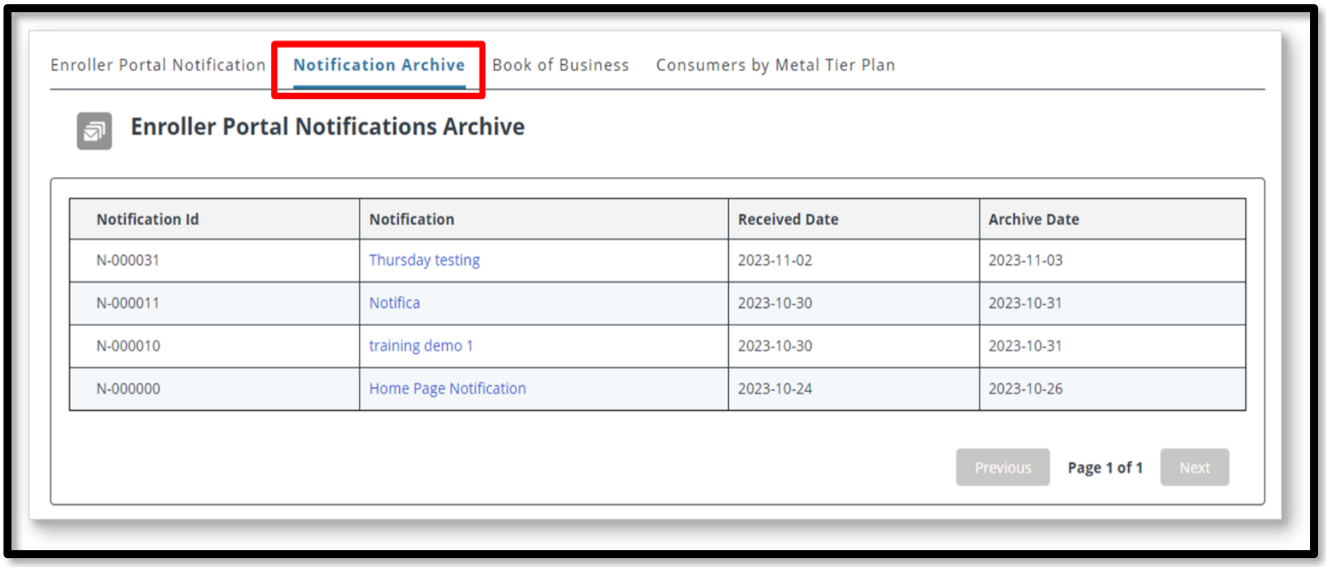
Entity Dashboard

- **Enroller Portal Notifications** tab:
  - Clicking the **Enroller Portal Notifications** tab displays the Counselor's active notifications sent by the Distribution Services Team. The most recent notification displays at the top of the list.
  - Clicking a link from the *Notification* column displays a popup with the notification details.



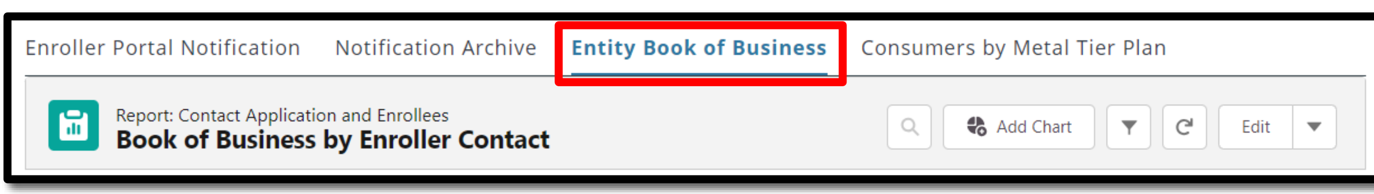
Notification Id	Notification	Received Date	Archive Date
N-000055	Nov 6th Training (*^&%*^$&%	2023-11-06	2023-11-07
N-000055	Nov 6th Training (*^&%*^$&%	2023-11-06	2023-11-07
N-000055	Nov 6th Training (*^&%*^$&%	2023-11-06	2023-11-07
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
N-000049	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

- **Notifications Archive** tab:
  - Clicking the **Notifications Archive** tab displays a list of the Counselor's archived notifications sent by the Distribution Services 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.



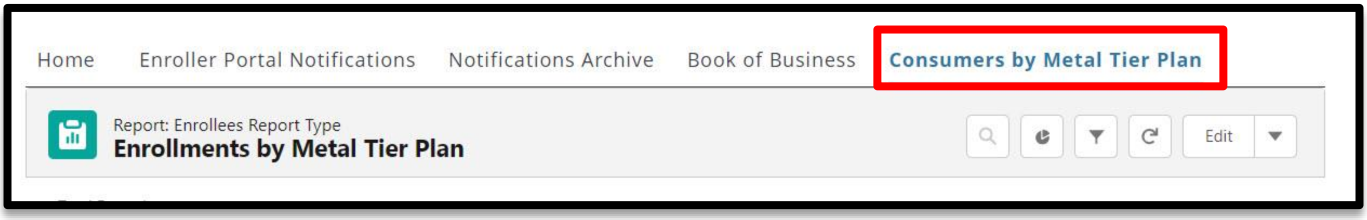
Notification Id	Notification	Received Date	Archive Date
N-000031	Thursday testing	2023-11-02	2023-11-03
N-000011	Notifica	2023-10-30	2023-10-31
N-000010	training demo 1	2023-10-30	2023-10-31
N-000000	Home Page Notification	2023-10-24	2023-10-26

- **Entity Book of Business** tab:
  - Clicking the **Entity Book of Business** tab displays the Book of Business by Enroller Contact report, allowing Enrollers to view consumers in the Entity's BoB, apply filters and edit the BoB, and save or export the BoB. 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 and automatically filtered to consumers with active delegations including 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.

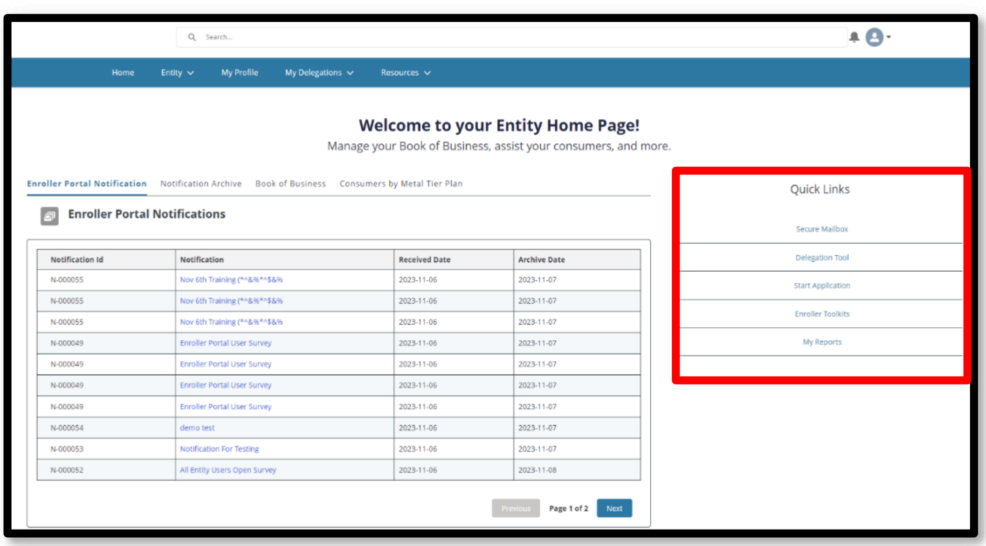


Entity Quick Links

Quick Links display based on user role.

Welcome to your Entity Home Page! displays a *Quick Links* section. Links display based on user role. The *Quick Links* section may contain the following links:

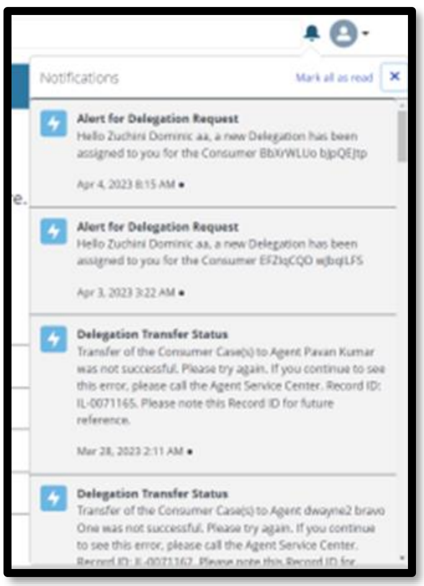
- **Secure Mailbox** – Navigates the user to the *Secure Mailbox* to view messages
- **Delegation Tool** – Navigates the user to the *Consumer Delegation* page to delegate a CEC to the case
  - Displays only for Counselors
- **Start Application** – Navigates the user to the Consumer Home page to begin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



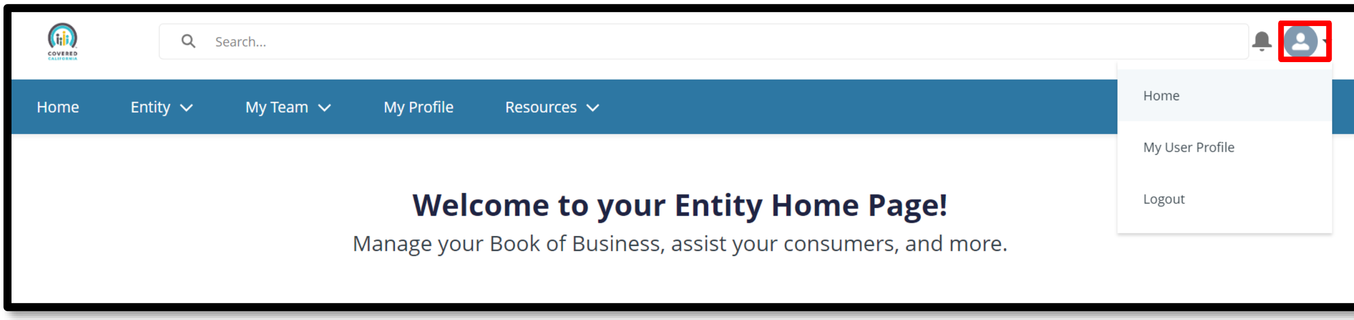
Home Page Navigation

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

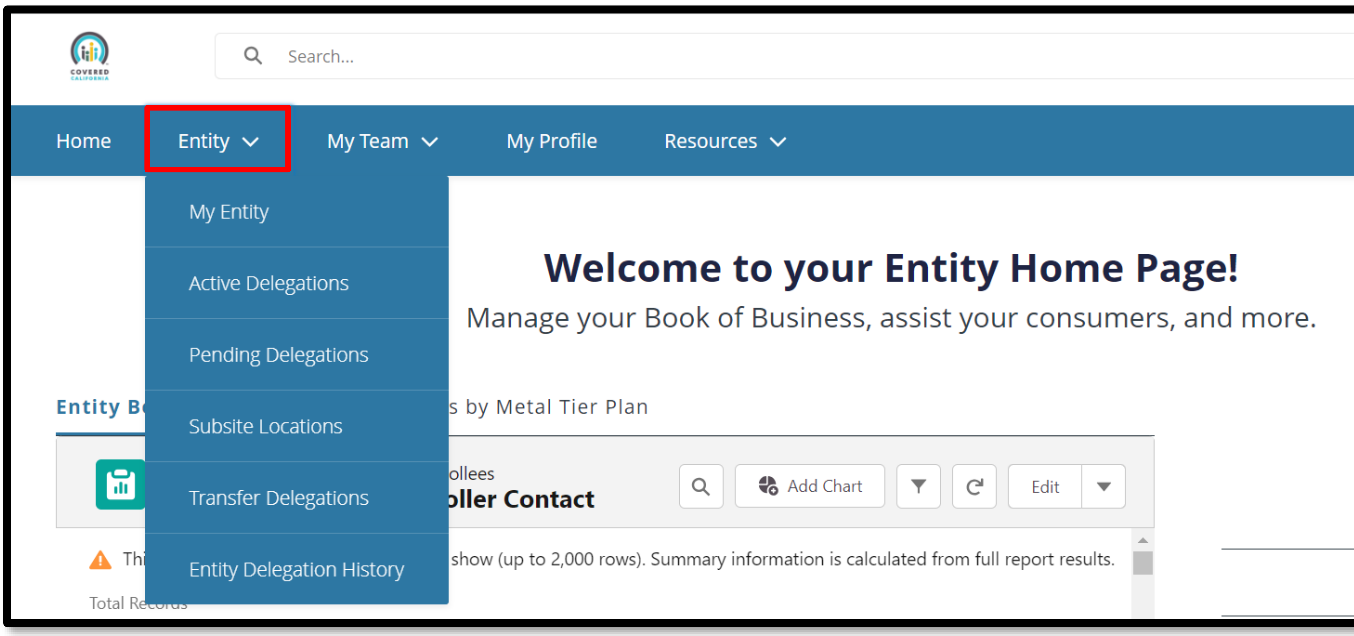
- **Search** Field – Allows staff to search for Contacts, Leads, and Accounts
- **Notifications Bell Icon** – Displays a red number when a pending notification is present



- 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
  - **LiveScan DocuSign Envelope Failed** – The LiveScan DocuSign failed

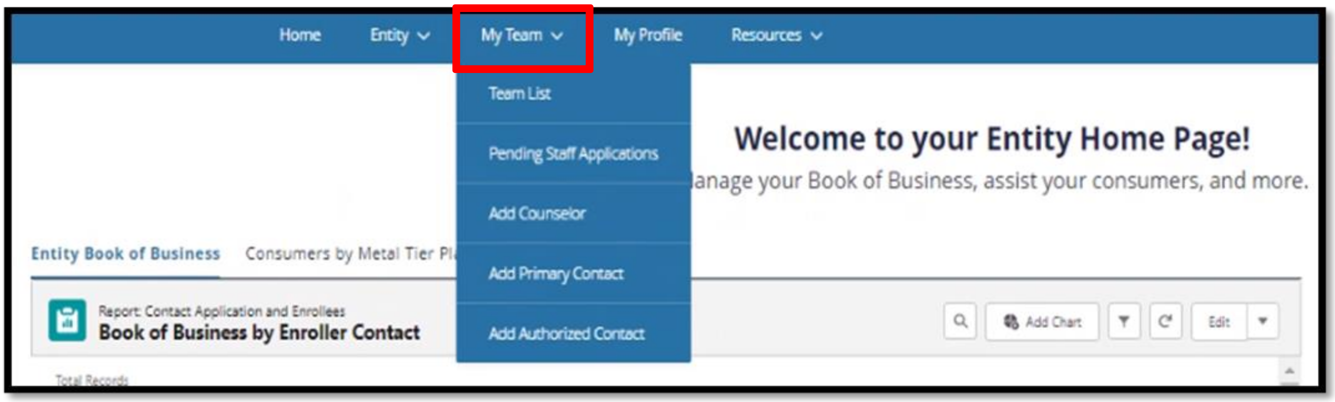


- **Profile** icon – If you hover-over the icon, it will display a dropdown description with the following options:
  - **Home** – Navigates the users to the *Welcome to your Entity Home Page!*
  - **My User Profile** – Navigates the user to the *My Security Profile* Page
  - **Logout** – Logs the user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



- **Entity** tab dropdown – Displays for all Entity staff with the following links:
  - **My Entity** – Navigates user to Entity account page with navigator contact information, Entity contacts, population served, and certification/approval status
  - **Active Delegations** – Navigates user to all active delegations
  - **Pending Delegations** – Navigates the user to all pending delegations
  - **Subsite Locations** – Navigates the user to Entity subsite locations. On this page, user can add subsite, update subsite, and remove subsite.
  - **Transfer Delegations** – Navigates the user to the transfer delegations landing page where the user can select either *Transfer all delegations from one enroller to another enroller* or *Select one or more specific delegations to transfer to another enroller.*

- Entity Delegation History – Navigates the user to the *Entity Delegation History* page

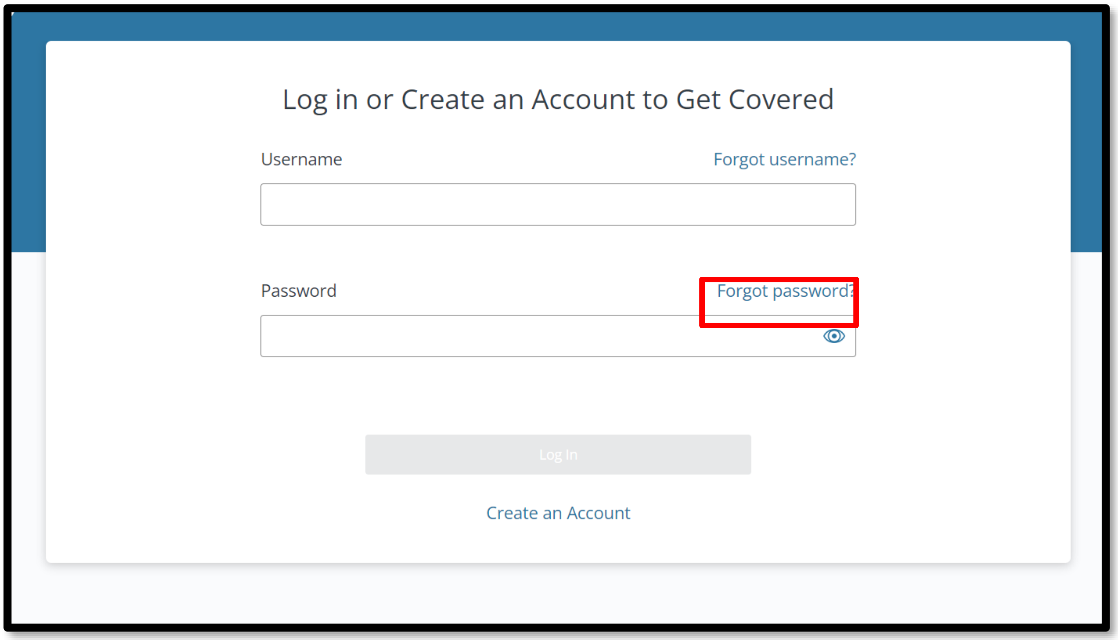


- **My Team** tab dropdown – Displays for all Entity staff with the following links:
  - **Team List** – Navigates the users to the *Contacts – My Entity Staff* page to view Entity team members.
    - Displays for all Entity staff
  - **Pending Staff Applications** – Navigates the user to the *Leads – My Pending Staff Applications* page to view and manage pending staff applications
    - Displays for Primary Contact and Authorized Contact
  - **Add Counselor** – Navigates the user to the *Welcome to Covered California – Add Counselor Information* page to apply for Counselor Type: Plan Based Enroller
    - Displays for Primary Contact and Authorized Contact
  - **Add Primary Contact** - Navigates the user to the *Welcome to Covered California – Add Primary Contact Information* page to apply for a Primary Contact
    - Displays for Primary Contact and Authorized Contact
  - **Add Authorized Contact** – Navigates the user to the *Welcome to Covered California – Add Authorized Contact Information* page to apply for an Authorized Contact
    - Displays for Primary Contact and Authorized Contact

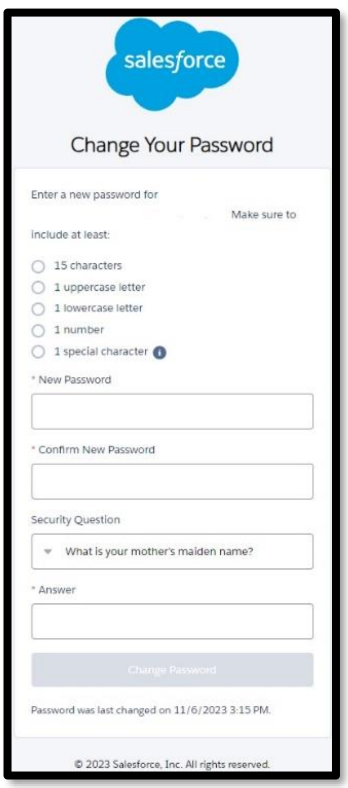
Forgot Password or Password Reset

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 PBECert@covered.ca.gov.

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



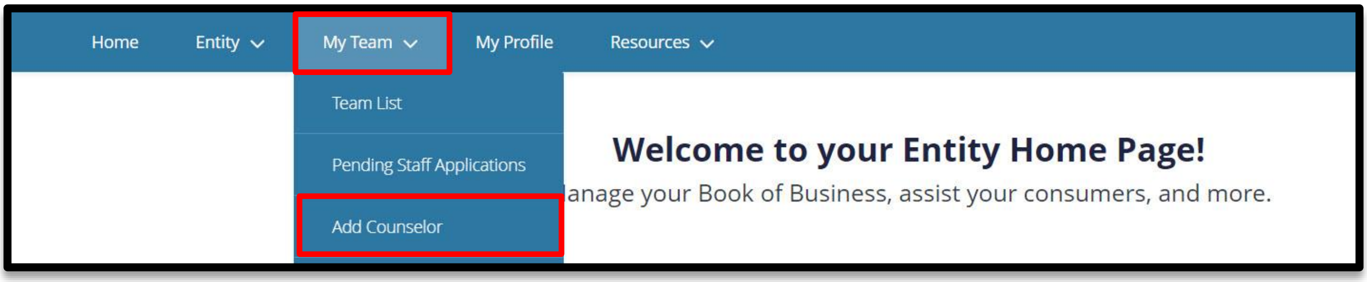
2. An email will be sent to the registered email with a link to reset the password
3. The password must contain 15 characters, with 1 uppercase letter, 1 lowercase letter, 1 number, and 1 special character.



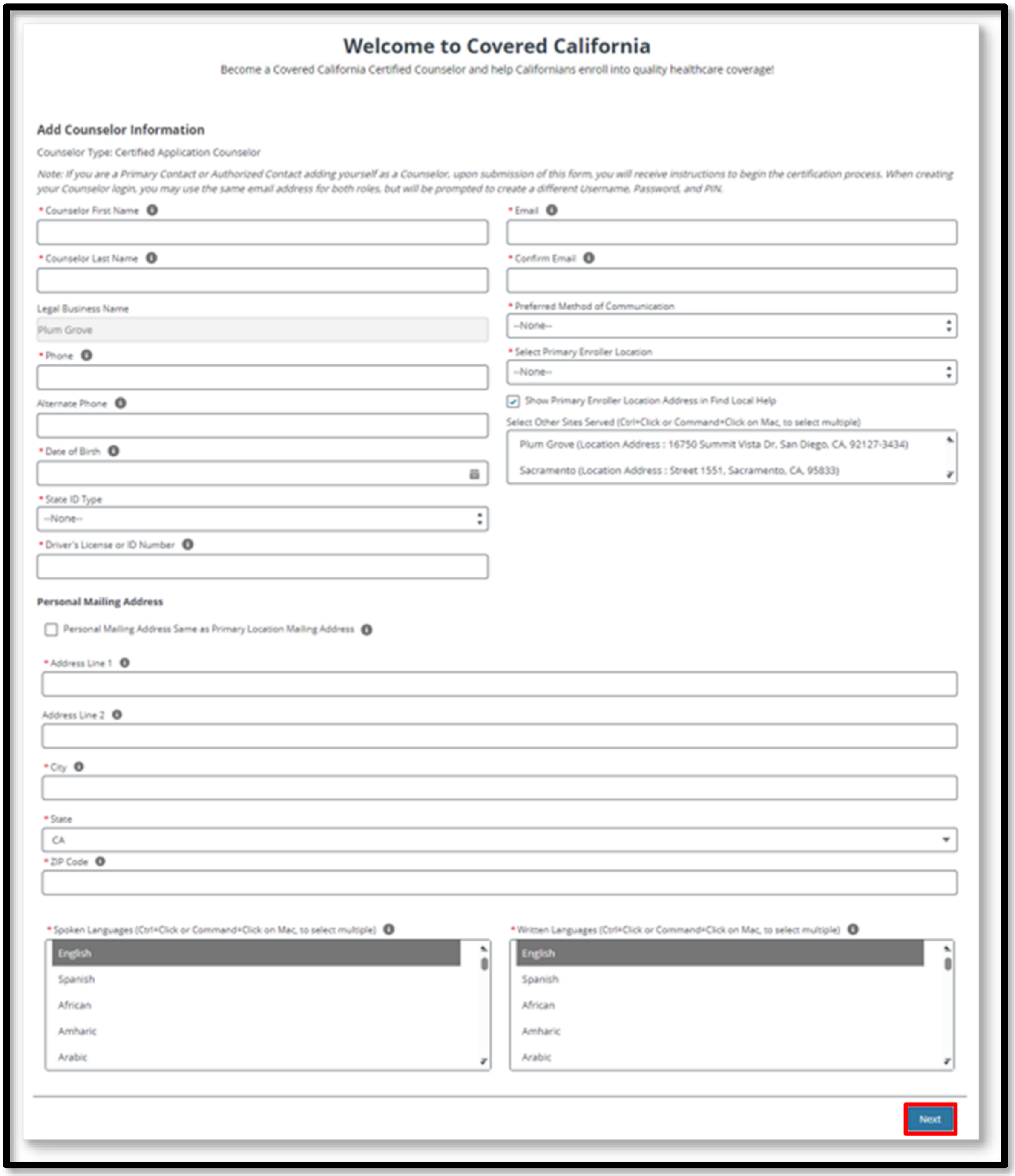
Add Enrollers Steps

Once the Entity is in active status, the AC or PC can add more Enrollers to its roster.

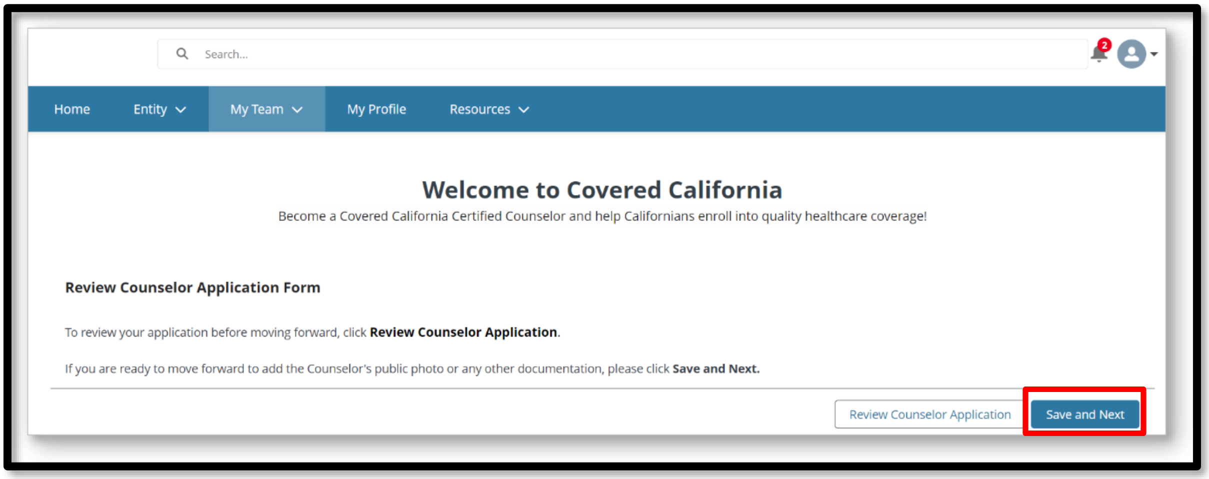
1. To add a new enroller, click on the **My Team** dropdown then click on **Add Counselor**.



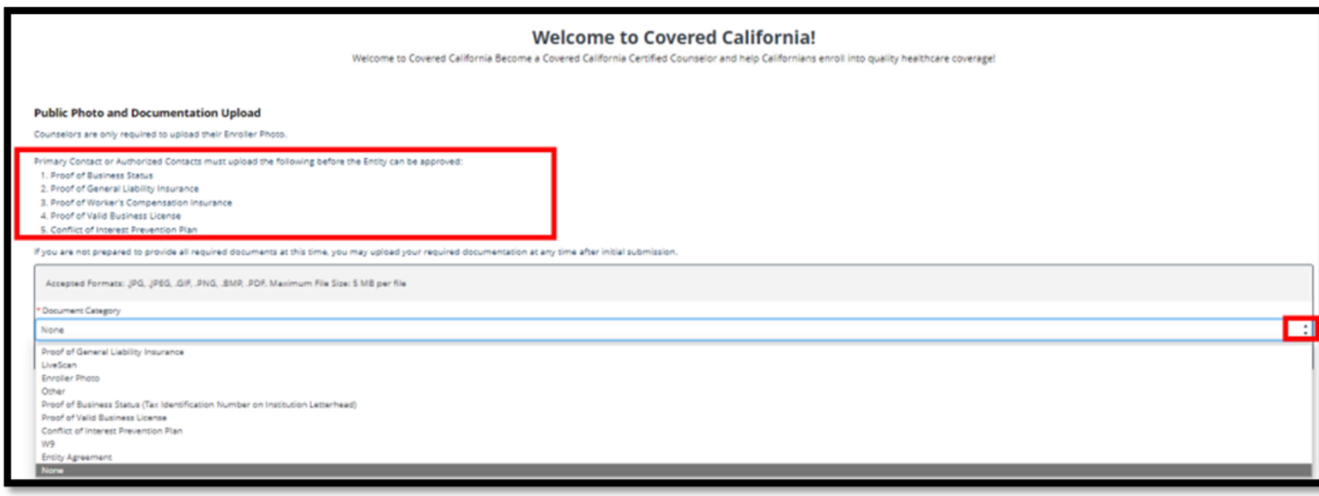
2. The *Add Counselor Information* page displays. The *Counselor Type* pre-populates with *Certified Enrollment Counselor.* Complete all required fields indicated with a red asterisk and click the **Next** button.



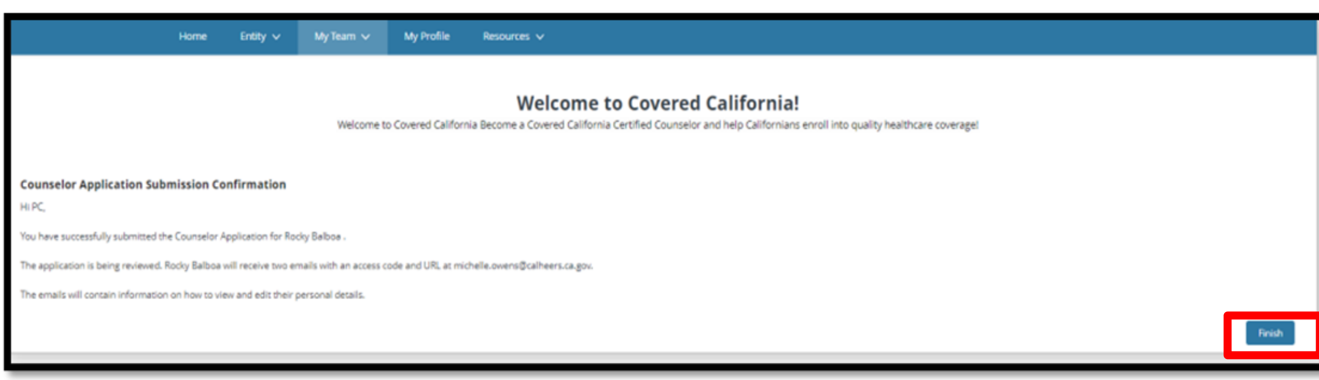
3. The *Review Counselor Application Form* page displays Click the **Save and Next** button.



4. The *Public Photo and Documentation Upload* page displays. As a Plan-Based Entity, a photo is not a program requirement. Click **Next** to continue

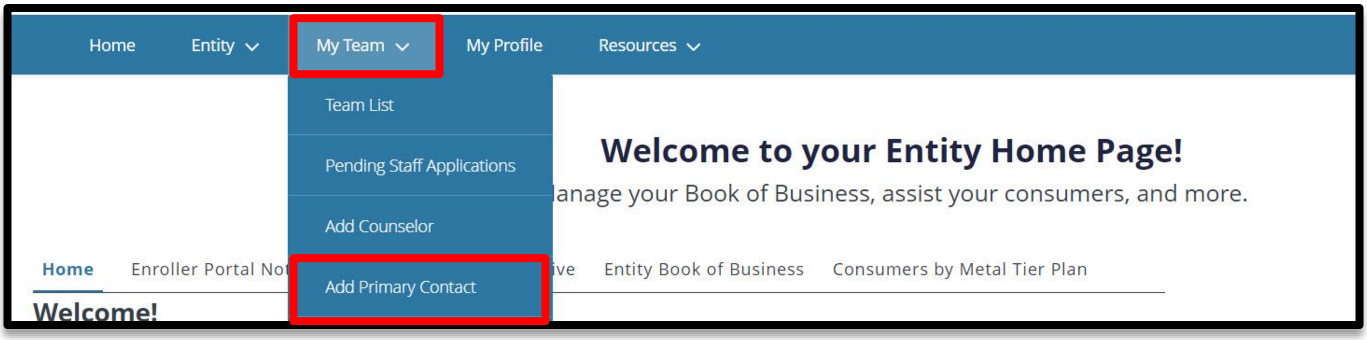


5. *The Counselor Application Submission Confirmation* page displays once the AC or PC completes all entries. Select **Finish** to complete the submission. The application status will be updated to *Pending Review* with Covered California.

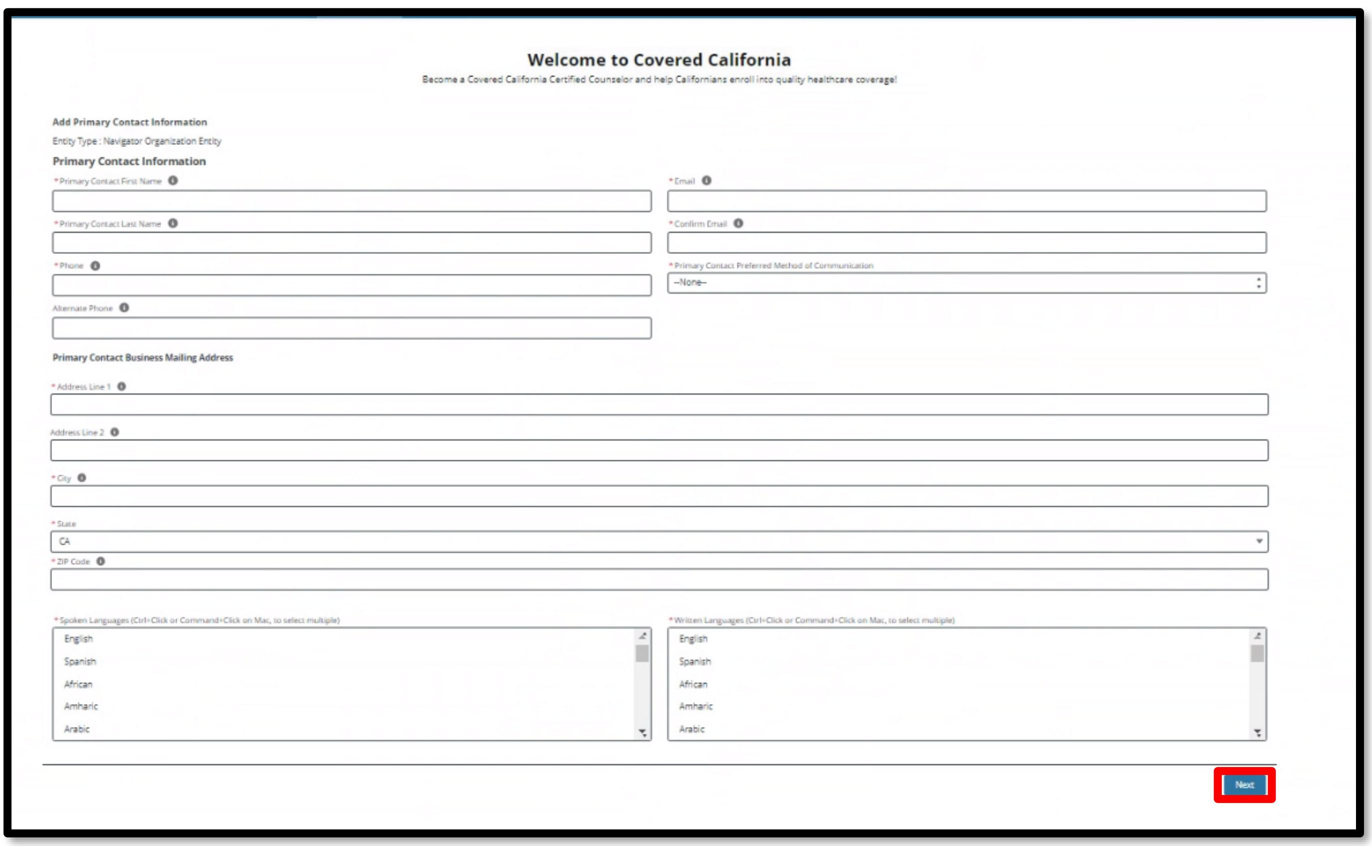


Add Primary Contact Steps

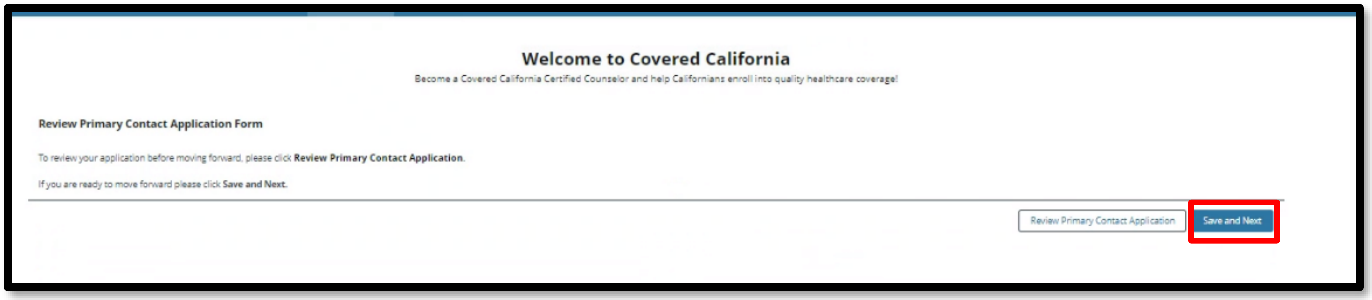
1. To add a PC, click on the **My Team** dropdown, click **Add Primary Contact**.

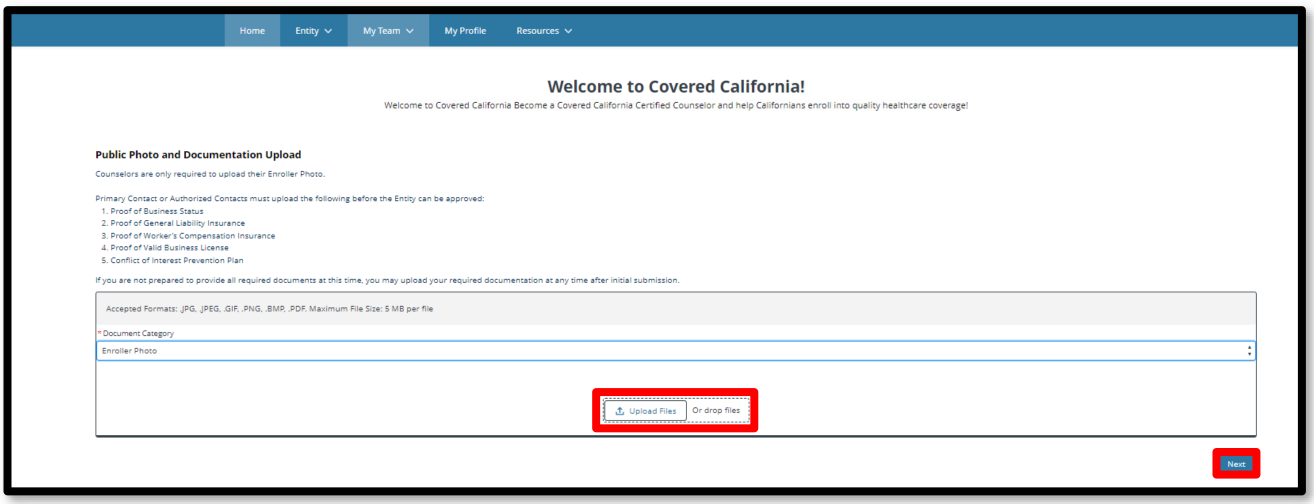


2. The *Add Primary Contact Information* page displays. Complete all required fields indicated with a red asterisk and click the **Next** button.



3. The AC must review the entries to ensure accuracy. Select **Save and Next** to continue.



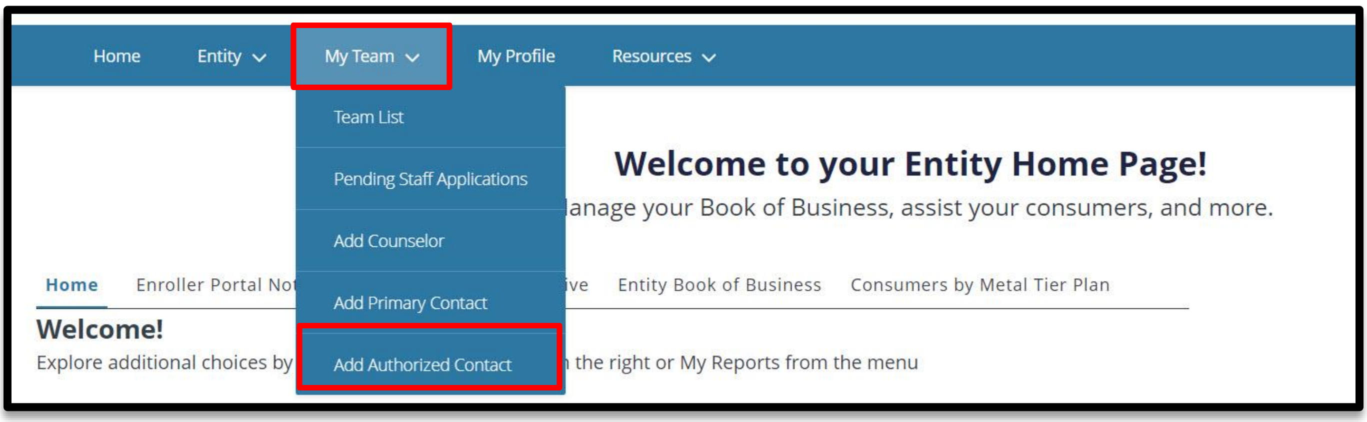


4. The *Public Photo and Documentation Upload* page will display. No action required for Plan-Based Enrollers as badge photos are not a requirement for this program. Select **Next** to continue.

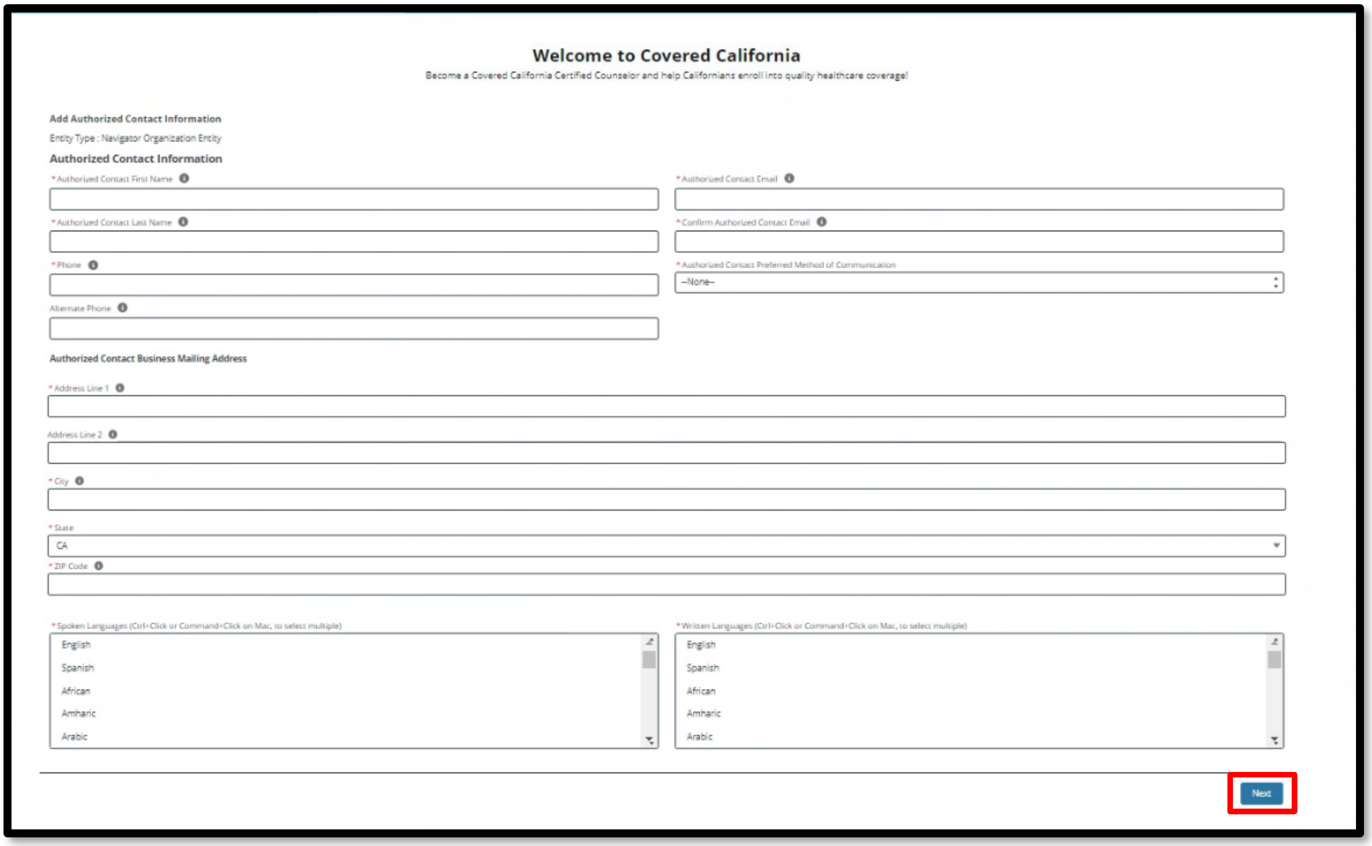
5. Click the **Finish** button on the *Primary Contact Application Submission Confirmation* page to complete the submission. The application status will be updated to *Pending Review* with Covered California.

Add Authorized Contact Steps

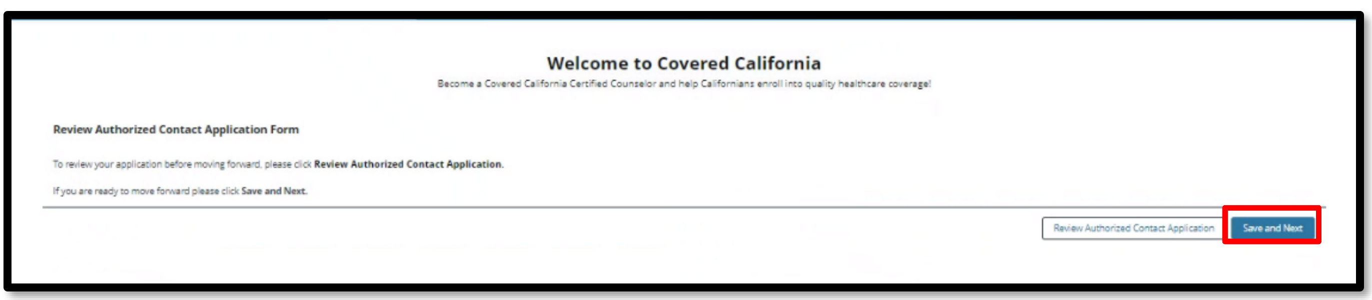
1. To add an AC, click on the **My Team** dropdown then click on **Add Authorized Contact**.



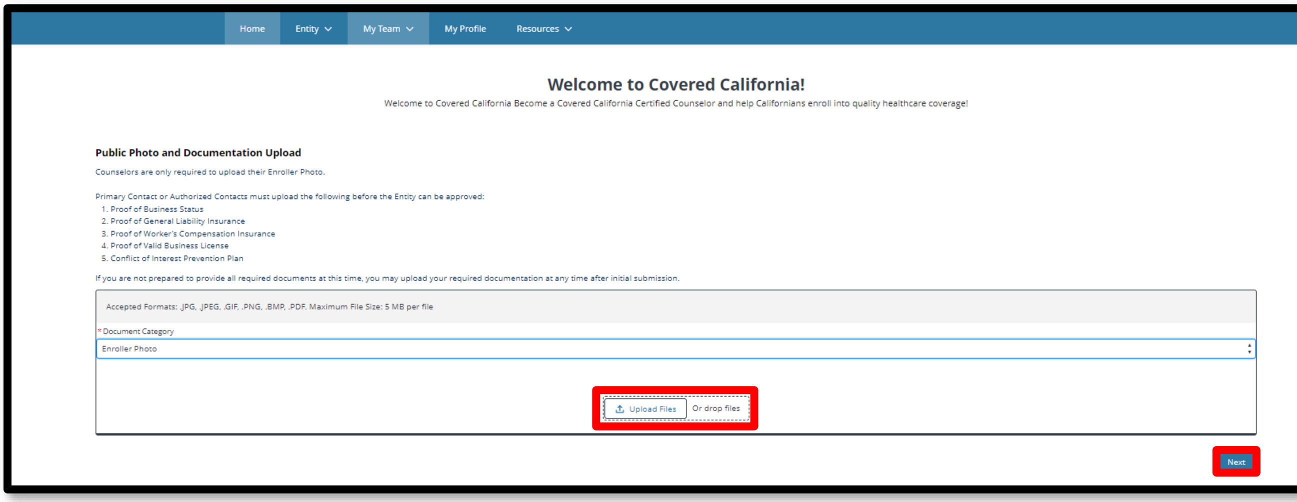
2. The *Add Authorized Contact Information* page displays. Complete all required fields indicated with a red asterisk and click the **Next** button.



3. PC must review the entries to ensure accuracy. Select **Save and Next** to continue



4. The *Public Photo and Documentation Upload page* will be displayed. No action required for Plan-Based Enrollers as badge photos are not a program requirement. Select **Next** to continue.



5. Click the **Finish** button on the *Authorized Contact Application Submission Confirmation* page to complete the submission. The application status will be updated to *Pending Review* with Covered California.

Need Assistance

This concludes the Enroller Portal Plan-Based Enroller 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 Team an email at PBEcert@covered.ca.gov