



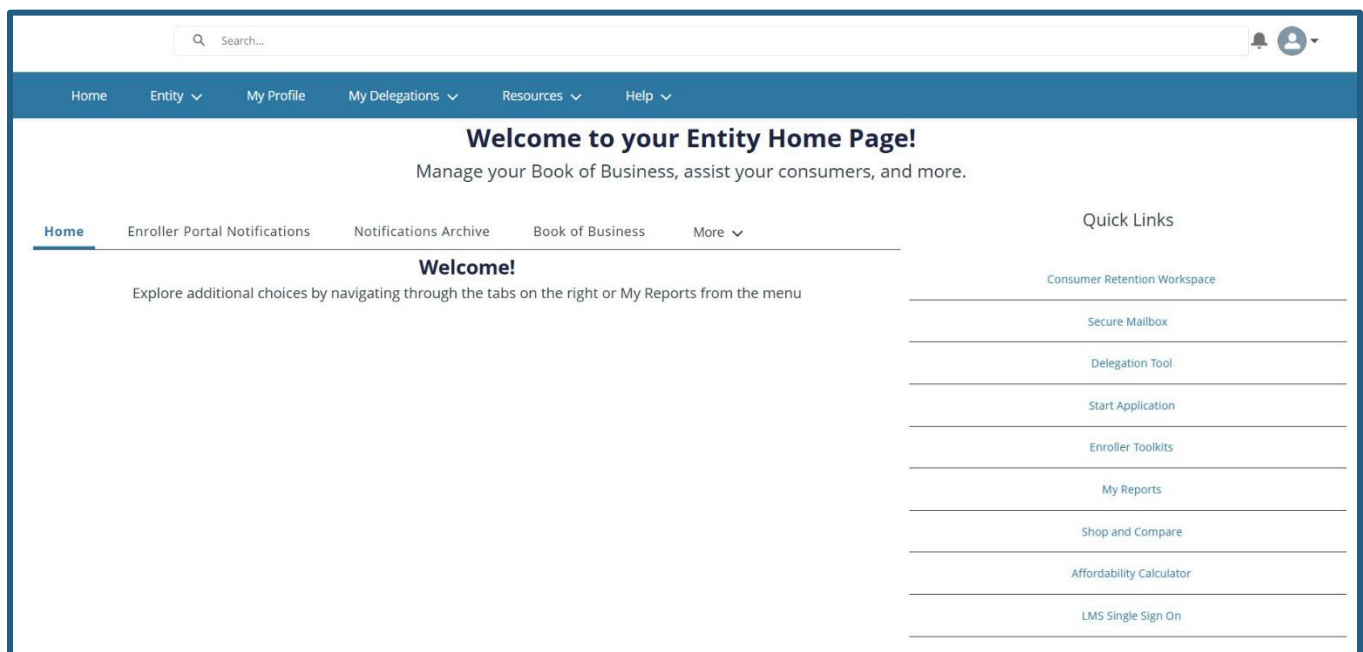
# Certified Enrollment Counselors Portal Quick Guide

## Overview

Certified Enrollment Counselors act in an operational role for their Entity. Counselors must ensure they complete the necessary steps and trainings to become certified with Covered California in order to gain access to their portal. The portal is the single point of entry to begin and manage consumer applications with Covered California.

## Login

Log into your Enroller Portal; you will see the Entity home page.



## Dashboard Navigation

- The navigation bar at the top of the portal has:
  - **Home:** to access the home page
  - **Entity:** to access Entity information
  - **My Profile:** to access account information
  - **My Delegations:** to manage active and pending delegates
  - **Resources:** to access Enroller Toolkits and Reports
  - **Help:** to submit a help request and view open and closed cases



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## Enroller Portal Notifications

Clicking 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.

The screenshot shows the 'Enroller Portal Notifications' page. The top navigation bar includes links for Home, Entity, My Profile, My Delegations, Resources, and Help. 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 is a breadcrumb trail: Home > Enroller Portal Notifications > Notifications Archive > Book of Business > Consumers by Metal Tier Plan. The page title is 'Enroller Portal Notifications'. A table with the following columns is shown: Notification Id, Notification, Received Date, and Archive Date. The table is currently empty, and the pagination shows 'Page 1 of 0'.

## Notifications Archive

Clicking 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.

The screenshot shows the 'Notifications Archive' page. The top navigation bar is the same as the previous page. 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 is a breadcrumb trail: Home > Enroller Portal Notifications > Notifications Archive > Book of Business > Consumers by Metal Tier Plan. The page title is 'Enroller Portal Notifications Archive'. A table with the following columns is shown: Notification Id, Notification, Received Date, and Archive Date. The table contains two rows of data:

| Notification Id | Notification         | Received Date | Archive Date |
|-----------------|----------------------|---------------|--------------|
| N-000019        | Testing Notification | 2023-12-19    | 2023-12-20   |
| N-000006        | Test - 11/29/2023    | 2023-11-29    | 2023-11-30   |

The pagination shows 'Page 1 of 1'.



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## Book of Business

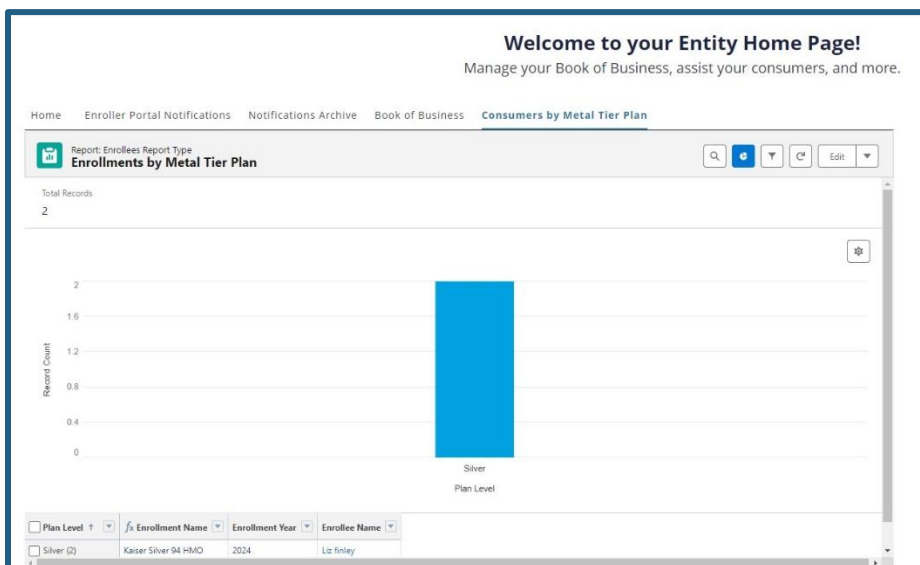
Clicking the Book of Business tab displays the Counselor's book of business that can be filtered to Consumers with active delegations along with Consumer name, application, eligibility, and enrollment details.

The screenshot shows the 'My Book of Business' report interface. At the top, there's a navigation bar with links: Home, Entity, My Profile, My Delegations, Resources, and Help. Below this, a welcome message reads 'Welcome to your Entity Home Page! Manage your Book of Business, assist your consumers, and more.' The main content area has a tabbed interface with 'Book of Business' selected. The report title is 'Report: Contact Application and Enrollees My Book of Business'. It shows 'Total Records: 4'. Below this is a table with columns: CalHEERS Case ID, Year of Application, First Name, Middle Name, Last Name, Customer DOB, SSN Last 4, Residence Address Line 1, and Residence Add. The table contains four rows of data for two different case IDs, each with two entries for the year 2024.

| CalHEERS Case ID | Year of Application | First Name | Middle Name | Last Name | Customer DOB | SSN Last 4 | Residence Address Line 1 | Residence Add |
|------------------|---------------------|------------|-------------|-----------|--------------|------------|--------------------------|---------------|
| 5193166278 (2)   | 2024                | Liz        | -           | finley    | 9/12/1987    | 8030       | 2345 Gateway oaks        | -             |
|                  | 2024                | Liz        | -           | finley    | 9/12/1987    | 8030       | 2345 Gateway oaks        | -             |
| 5193166287 (2)   | 2024                | Iivia      | -           | finley    | 9/9/1987     | 8030       | 2345 Gateway oaks        | -             |
|                  | 2024                | Iivia      | -           | finley    | 9/9/1987     | 8030       | 2345 Gateway oaks        | -             |

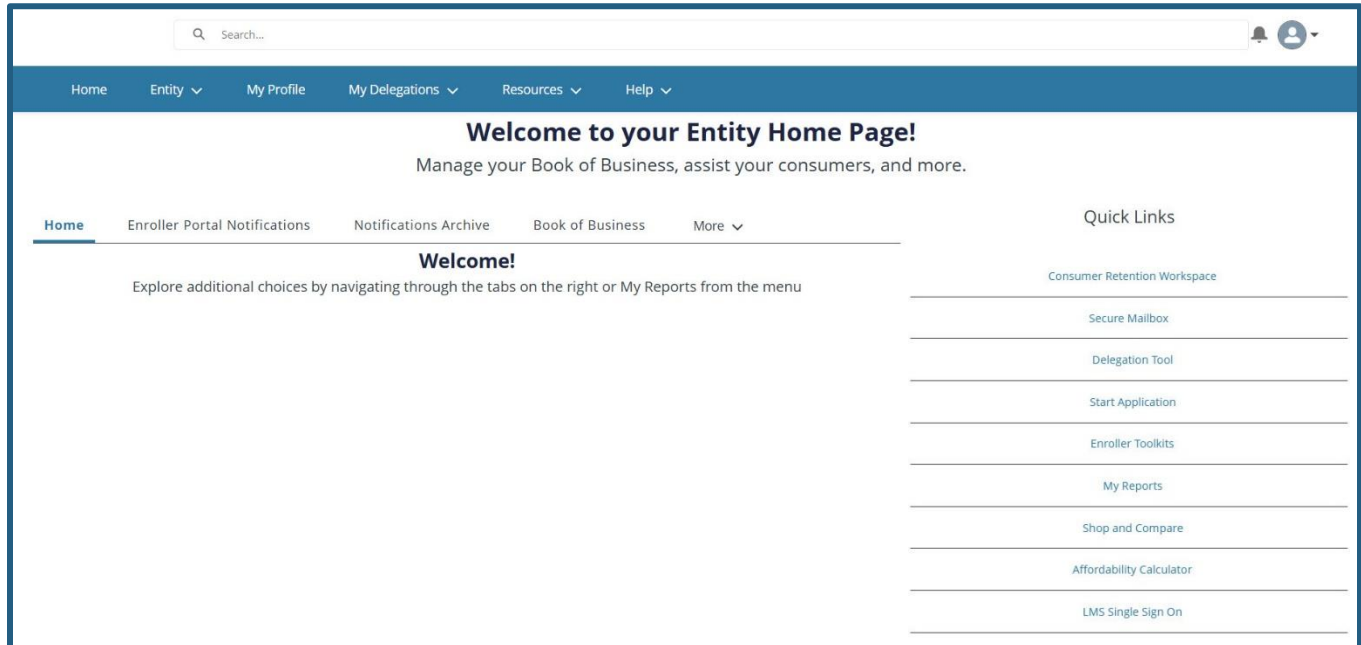
## Consumers by Metal Tier Plan

The *Consumers by Metal Tier Plan* tab provides a visual summation of the plan tiers that consumers are enrolled in. You can specify the time period for which you want to view the summation.



## Quick Links

A list of *Quick Links* are located on the right-hand side of the Home page.



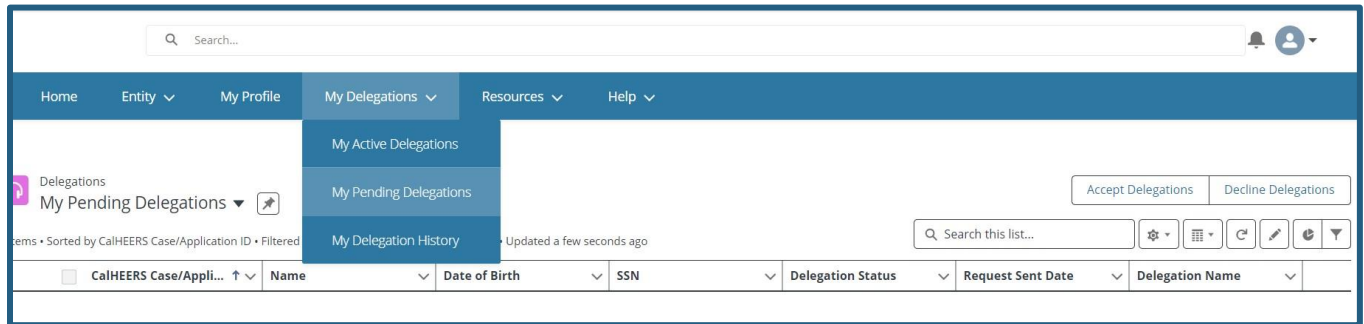
- *Consumer Retention Workspace*: Navigates the user to the CRW dashboard to view reports for CRW cases.
- *Secure Mailbox*: Navigates the user to their *Secure Mailbox* to view messages.
- *Delegation Tool*: Navigates the user to the *Consumer Delegation* page to delegate a Counselor to a case.
- *Start Application*: Navigates the user to the Consumer Home page to start an application for a Consumer.
- *Enroller Toolkits*: Navigates the user to the *Enrollment Partner Toolkit* page.
- *My Reports*: Navigates the user to the *Reports* page to view, generate, extract, or file available reports.
- *Shop and Compare*: Navigates the user to the Shop and Compare tool.

## My Delegations Tab

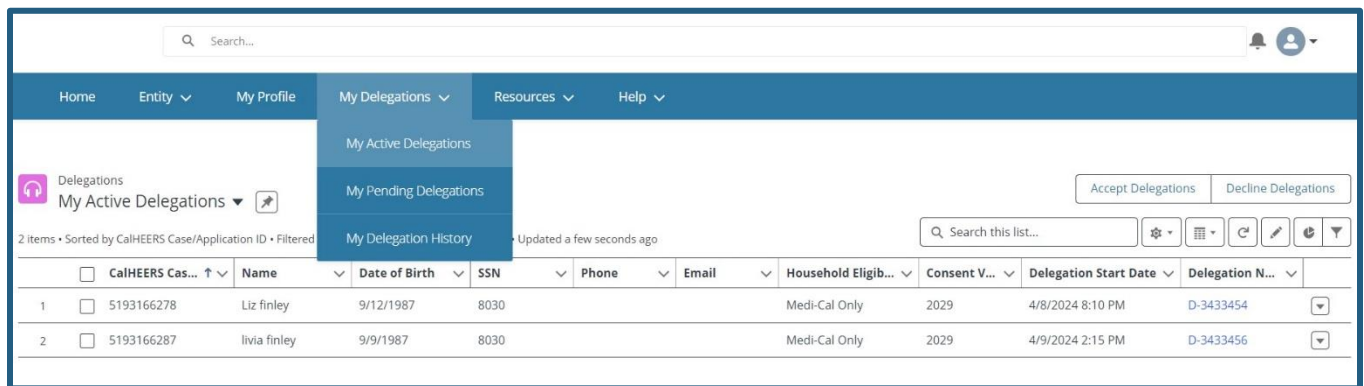
- Click **Pending Delegations** to accept or decline pending delegations. If you select Decline, you will not have access to the consumer's case and will lose the delegation.



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- Click **Active Delegations** to view a comprehensive list of all consumers delegated to you. The list includes [in addition to other information]:
  - Consumer contact details
  - Case number
  - Eligibility



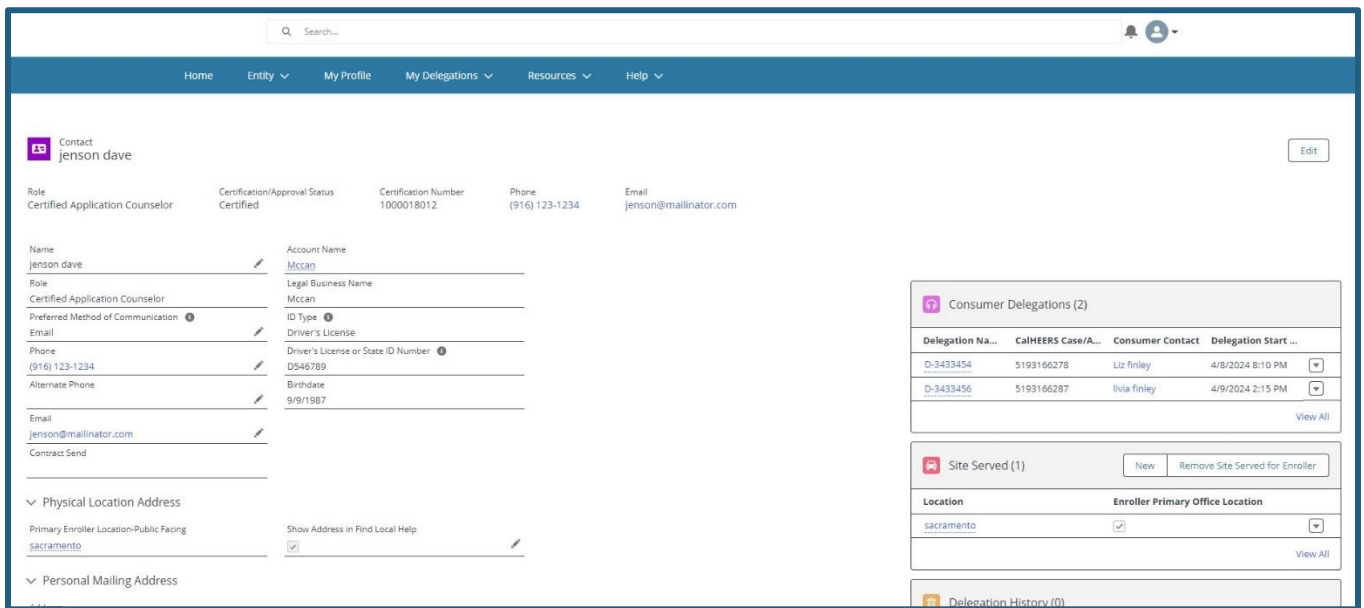
You can also utilize the search function at the top to locate a specific consumer.

## My Profile Tab

Click **My Profile** to view and edit the information entered by the Primary Contact/Authorized Contact during the application process. It displays your contact information, role, certification status, phone number, and more.

**Please Note:** The Physical Location Address is populated in Find Local Help. (If a Counselor is assigned to a Sub site, the Sub Site will populate in Find Local Help.)

A Primary Contact/Authorized Contact may add/delete Sub Sites.



**Contact**  
jenson dave

Role: Certified Application Counselor | Certification/Approval Status: Certified | Certification Number: 1000018012 | Phone: (916) 123-1234 | Email: jenson@mailinator.com

Name: jenson dave | Account Name: Mccan  
 Role: Certified Application Counselor | Legal Business Name: Mccan  
 Preferred Method of Communication: | ID Type: | Driver's License:  
 Email: | Driver's License or State ID Number: |  
 Phone: (916) 123-1234 | Birthdate: 9/9/1987  
 Alternate Phone: |  
 Email: jenson@mailinator.com  
 Contract Send:

Physical Location Address  
 Primary Enroller Location-Public Facing: sacramento | Show Address in Find Local Help: ☒

Personal Mailing Address

**Consumer Delegations (2)**

| Delegation Na... | CalHEERS Case/A... | Consumer Contact | Delegation Start ... |
|------------------|--------------------|------------------|----------------------|
| D-3433454        | 5193166278         | Liz finley       | 4/8/2024 8:10 PM     |
| D-3433456        | 5193166287         | Ivia finley      | 4/9/2024 2:15 PM     |

View All

**Site Served (1)** | New | Remove Site Served for Enroller

| Location   | Enroller Primary Office Location    |
|------------|-------------------------------------|
| sacramento | <input checked="" type="checkbox"/> |

View All

**Delegation History (0)**

**Note:** The Primary Contact/Authorized Contact may update certain fields in this section. Fields that cannot be changed will need to be updated by the Entity Admin.

## Help Tab

The *Help* tab has the following options:

- *Submit a Help Request*
- *My Open Cases*
- *My Closed Cases*

