Document Upload Quick Guide for Certified Enrollers

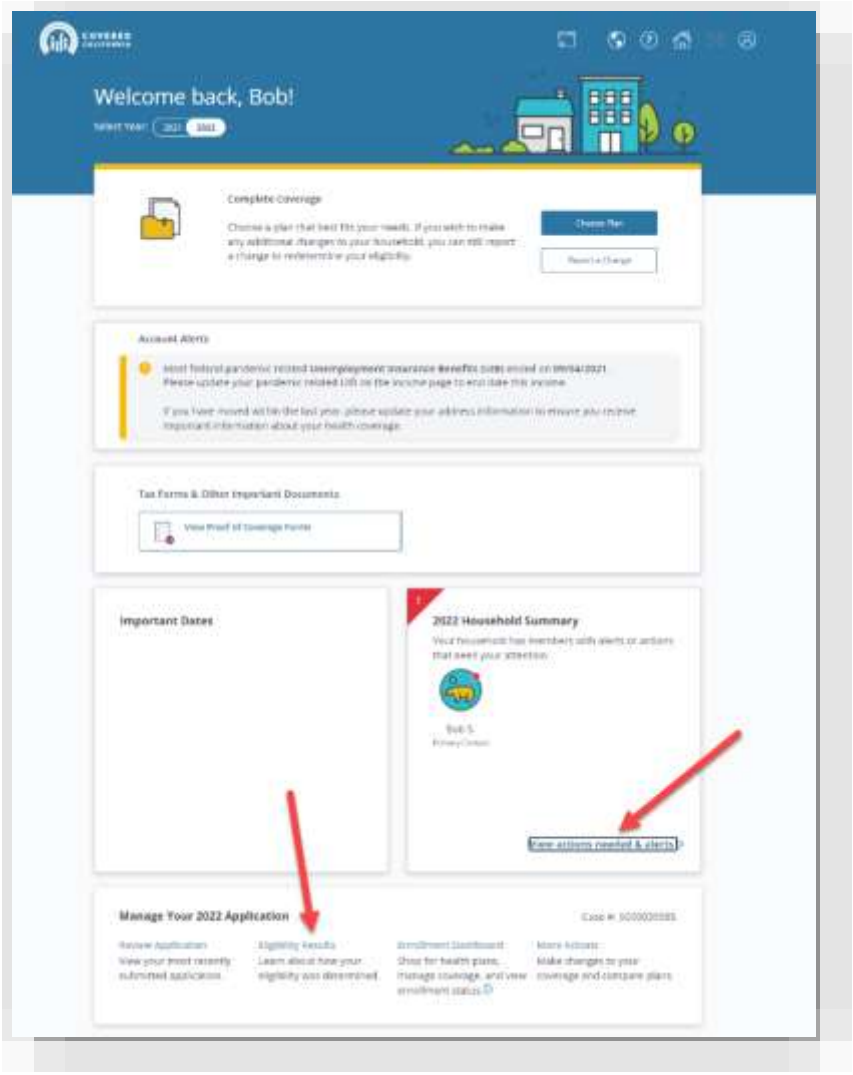
Overview

The purpose of this Quick Guide is to help enrollers know where and how to upload documents requested by CalHEERS.

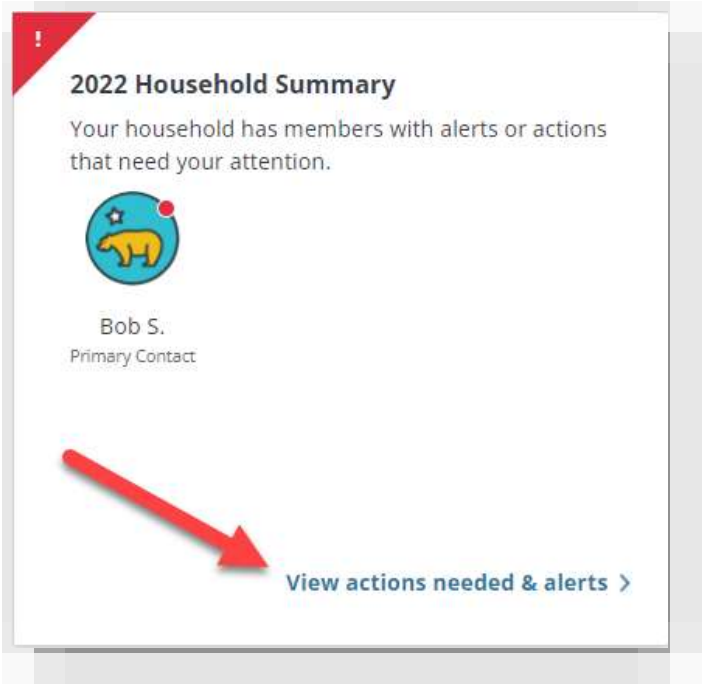
When CalHEERS requests documents, enrollers will receive an alert on their Daily Enroller Summary email (this will show as NODxx and the enroller can find the notice in the consumer's "Docs & Correspondence" section of the application).

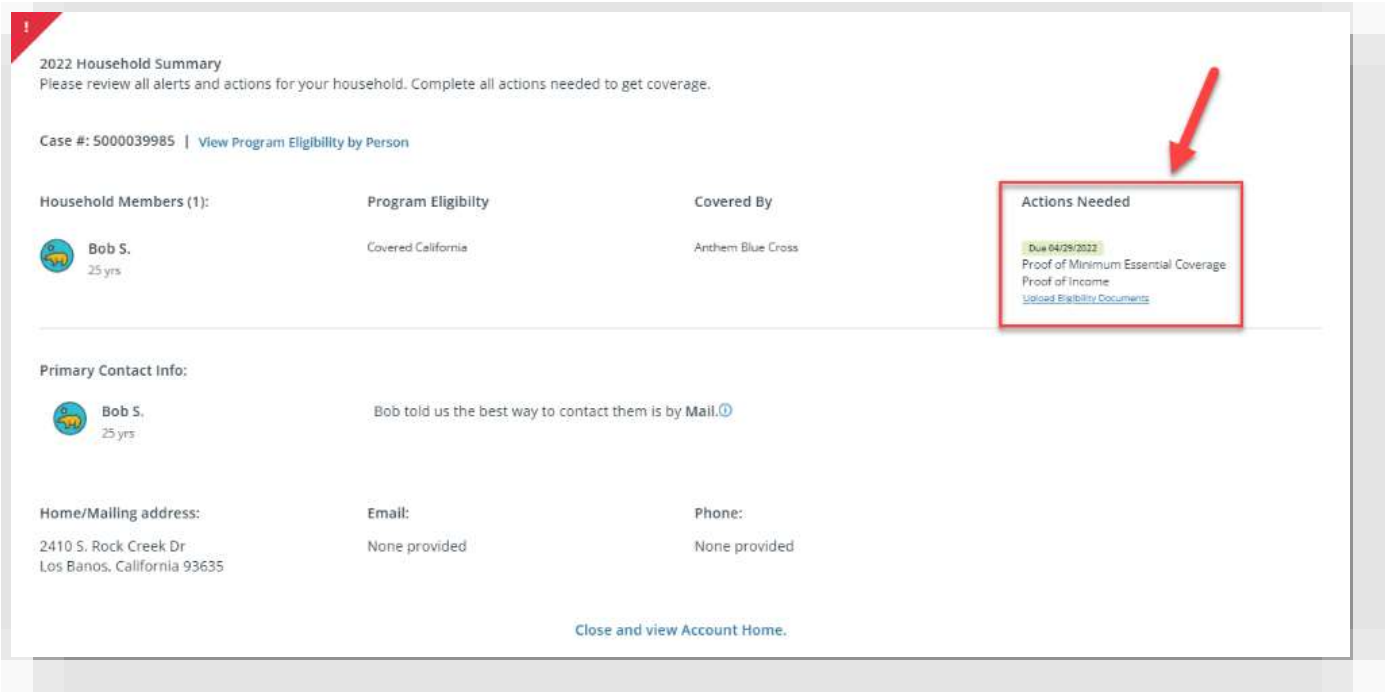
Steps

1. Login to the client's application. From the "Consumer Home Page", you can find the requested documents in one of two locations: in the **Household Summary** section or **Eligibility Results**, which is found in the "Manage Your 2022 Application" section.

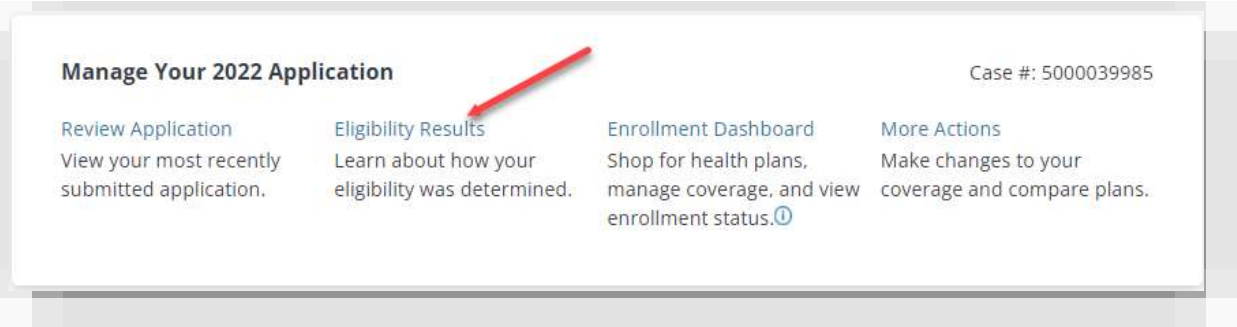


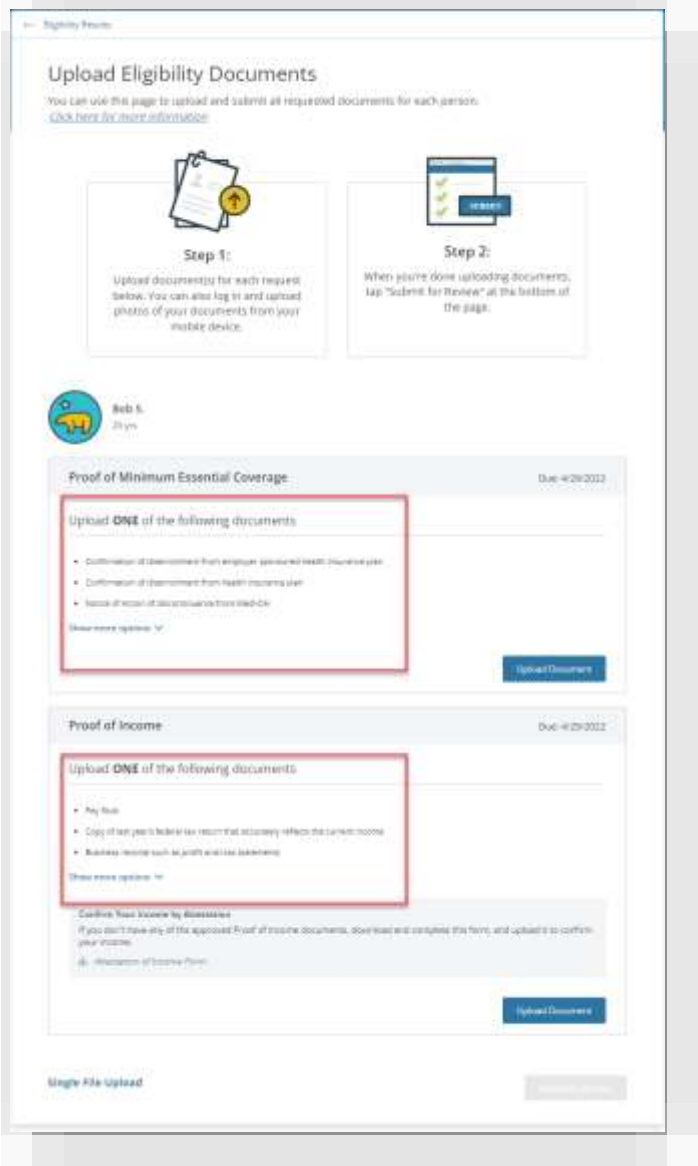
Clicking on the "View actions needed & alerts" link of the **Household Summary** will take you to where you'll find what documents are being requested.



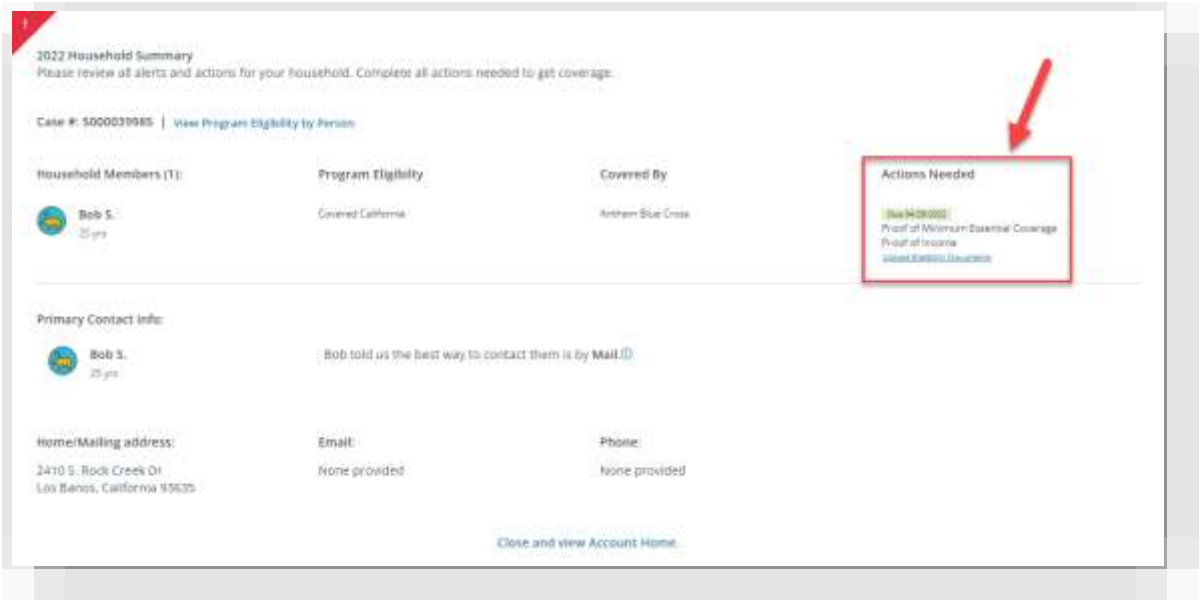


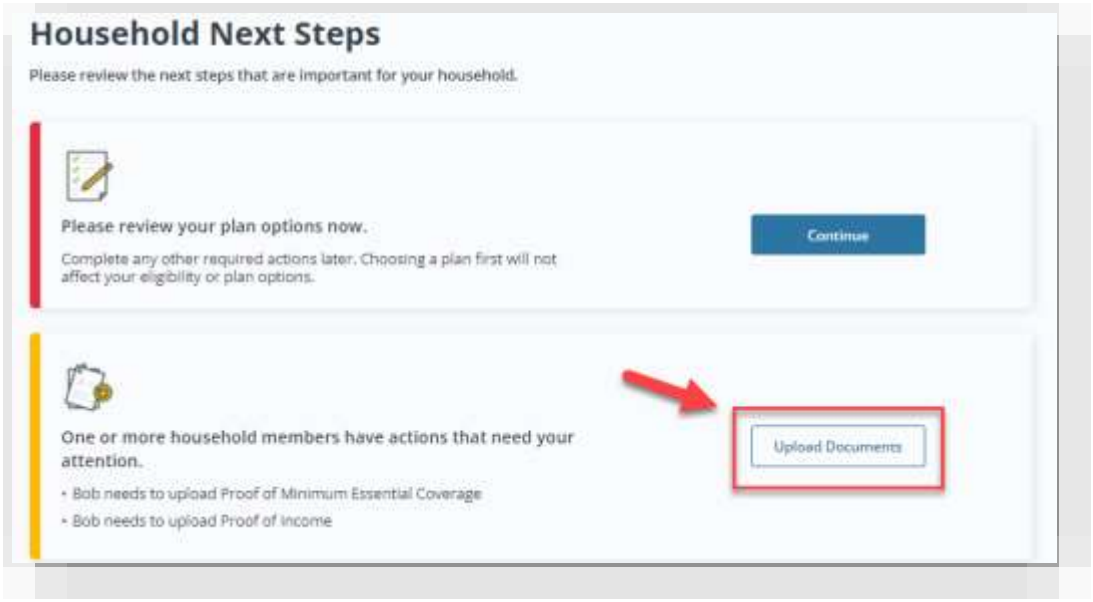
The **Eligibility Results** link in the "Manage Your 2022 Application" section will also take you to where you can find what documents are being requested.



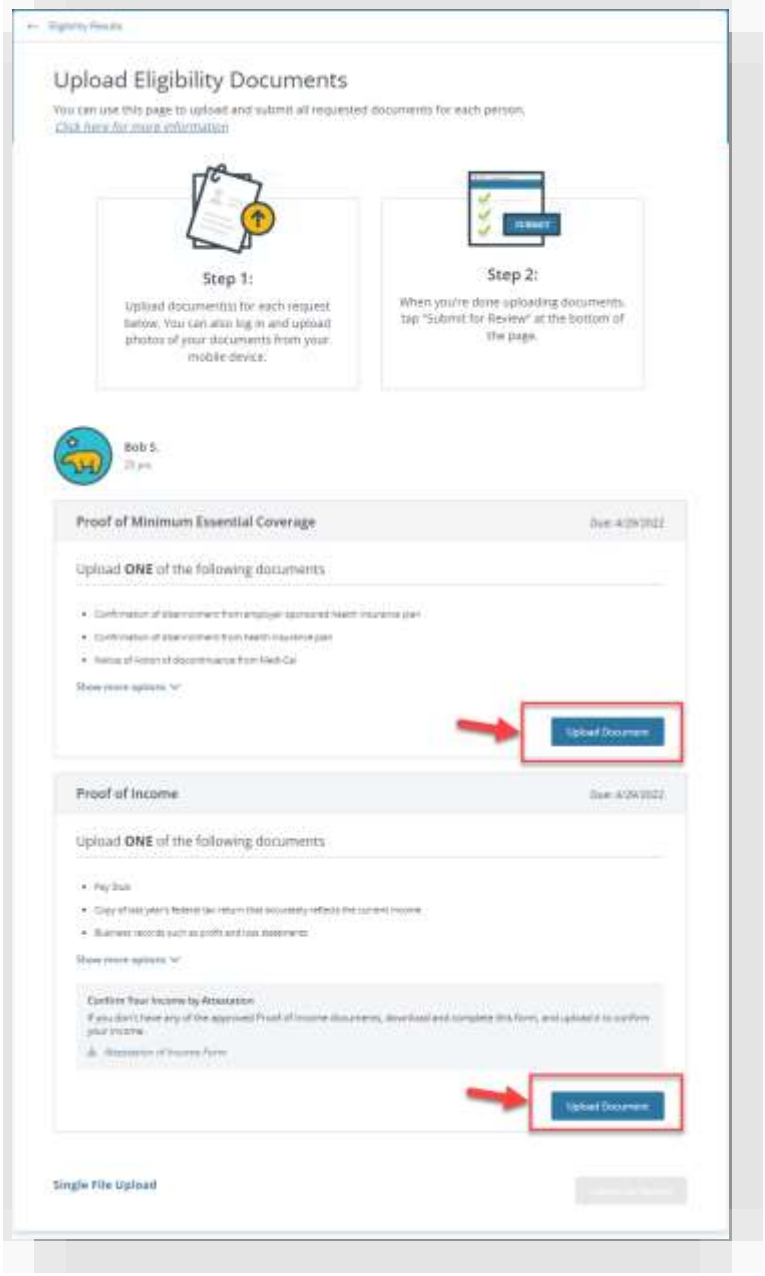


2. Once you have identified what documents are being requested, you can now upload the documents into the application. Whether you choose the **Household Summary** section or the **Eligibility Results** section, use the provided link to upload the documents, as shown below.



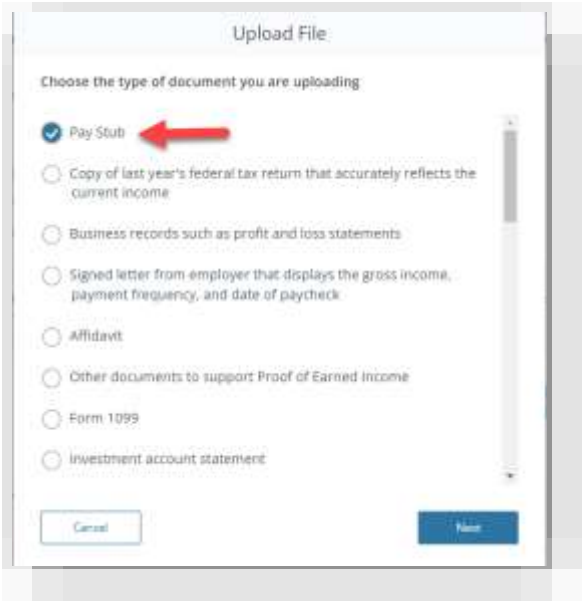


Once you've clicked the "Upload Document" link, you will be taken to another page to select which document is to be uploaded.

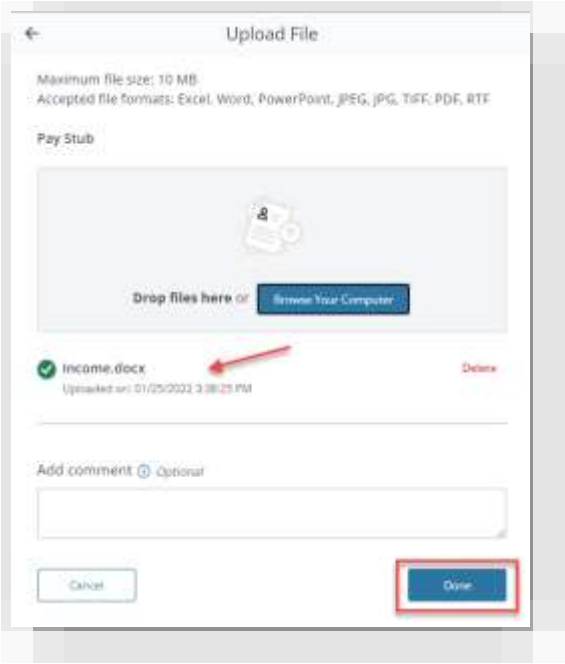


Depending on which document is needed, click on the "Upload Document" button.

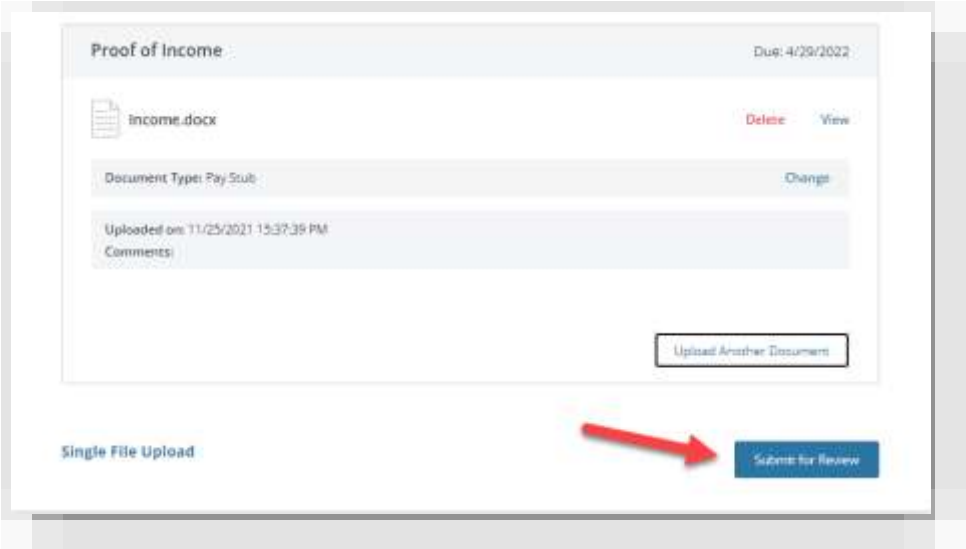
Select what type of document you will be submitting.



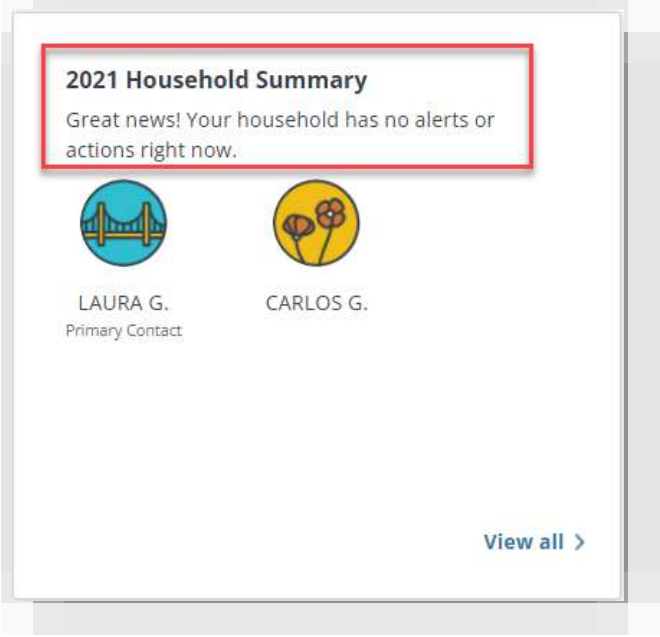
Once you have selected what type of document you will be submitting, click “Next”. You will then be prompted to upload your document (acceptable file formats are Excel, Word, PowerPoint, JPEG, JPG, TIFF, PDF, and RTF). Once the document has been uploaded, click “Done”.



After clicking “Done”, you will be prompted to submit the document for review.



Once the document has been submitted, it will be sent for review by Covered California staff. During the review period, acceptable documents will be passed, and the alert will be cleared.



If the Review Team has questions about the document, you will receive a call requesting more documentation.