



# Enroller Portal and Enrollment and Shopping Section Toolkit for Certified Enrollers

## Overview

Below is a list of resources for the newly updated *Enroller Portal* and updated *Enrollment and Shopping* section of the consumer application, effective Monday, May 8, 2023. Please reference these materials to be ready to access your portal, work your Book of Business, and assist your consumers through the enrollment process.

## Resources

Resource	Type	Description
<a href="#">Enroller Portal Overview</a>	Quick Guide	Provides an overview of the Enroller Portal for Agency and Entity users.
<a href="#">Enroller Portal and CalHEERS 23.4 Updates for Agency Roles</a>	Video	Agency Roles webinar training video to prepare for new enroller portal and upcoming changes within CalHEERS.
<a href="#">Enroller Portal and CalHEERS 23.4 Updates for Entity Roles</a>	Video	Entity Roles webinar training video to prepare for new enroller portal and upcoming changes within CalHEERS.
<a href="#">Enroller Portal Demo – Agency Roles</a>	Video	Demonstration of the new Enroller Portal for Agency Roles.
<a href="#">Enroller Portal Demo – Entity Roles</a>	Video	Demonstration of the new Enroller Portal for Entity Roles.
<a href="#">Agency User Role FAQ</a>	FAQ	Document containing questions and answers for the recent Enroller Portal webinars specifically for Agency Users.
<a href="#">Entity User Role FAQ</a>	FAQ	Document containing questions and answers for the recent Enroller Portal webinars specifically for Entity Users.



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<a href="#">23.4 Report a Defect Form</a>	Form	Report system issues to Covered California by completing and submitting this form. One form should be submitted for individual issue reports.
<a href="#">Enrollment Dashboard</a>	Quick Guide	Illustrates the <i>Enrollment Dashboard</i> with an at-a-glance view of a consumer's enrollment information and application progress.
<a href="#">Single Streamlined Application</a>	Quick Guide	Provides an overview of the Single Streamlined Application, with a focus on highlighting features and pages for Certified Insurance Agents (Agents), Certified Enrollment Counselors (CECs), and Plan Based Enrollers (PBEs).
<a href="#">Covered California Plan Selection</a>	Job Aid	How to assist consumers with reviewing, selecting, and enrolling in a Covered California Qualified Health Plan (QHP).
<a href="#">Consumer Premium Payment</a>	Job Aid	How to assist consumers making a premium payment for a Qualified Health Plan (QHP) or Qualified Dental Plan (QDP).
<a href="#">Change Plan</a>	Job Aid	How to change a Qualified Health Plan (QHP) or Qualified Dental Plan (QDP).
<a href="#">Daily Summary Email</a>	Quick Guide	Outline of daily summary notification alerts sent by CalHEERS to the Secure Mailbox page.
<a href="#">Delegating and Removing Delegations</a>	Task Guide	Provides Agents and Certified Counselors steps for delegating, de-delegating, and transferring Consumer cases or Book of Business.



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<a href="#">Search and Filter Active Delegations</a>	Task Guide	Informs users how to access their Book of Business report to view, export, and search and filter active and pending Consumer delegations.
<a href="#">Create a Certified Enrollment Counselor</a>	Task Guide	Informs Primary Contact (PC) and Authorized Contact (AC) user roles on how to create a Certified Enrollment Counselor (CEC) application and account using the application and submission processes.
<a href="#">Agency Manager Toolkit</a>	Toolkit	Resources for Covered California's Agency Managers to review resources to assist in navigating the Agency Portal.
<a href="#">Approved Admin Staff Role Toolkit</a>	Toolkit	Resources to assist Approved Admin Staff with online application support, managing Agency delegations (Level 2 only), creating new profiles for Agents (Level 2 only), and much more.