



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



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



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Search and Filter Active Delegations	Task Guide	Informs users how to access their Book of Business report to view, export, and search and filter active and pending Consumer delegations.
Create a Certified Enrollment Counselor	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.
Agency Manager Toolkit	Toolkit	Resources for Covered California's Agency Managers to review resources to assist in navigating the Agency Portal.
Approved Admin Staff Role Toolkit	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.