Enroller Portal Frequently Asked Questions for Entity Users

Overview

This document contains questions and answers for the Enroller Portal webinars specific to for Entity Users.

Frequently Asked Questions (FAQs) and Answers

Is the Enrollment Counselor view the same as an Agents' view?

Certified Insurance Agents and Certified Enrollment Counselors have similar views in the Enroller Portal with the same features.

How do I enroll Counselors?

You can add a new CEC to the Entity through the portal. The Primary Contact/Authorized Contact will be able add new counselors to the Entity.

What do I do when we see multiple cases appear under "Delegation"? Do we call the CEC Help Hotline and ask the agent to combine those cases into one active case?

Please contact the Helpline for assistance with duplicate cases. For general questions and support on Covered California products and information on training and certification, call the CEC/PBE Helpline at (855) 324-3147.

When an enroller deactivates a delegation, what happens to the consumer's delegation? Are they defaulted to someone else, or do they simply have no one delegated to their case?

Enrollers can mark a consumer as inactive. When they do this the delegation is removed. The consumer will not have a delegated enroller unless they choose a new one.

Can a CEC make Entity changes such as a personal mailing address etc.? Currently, only the admin account or the Entity representative is allowed to make those changes.

The Primary Contact/Authorized Contact will have the ability to update the personal mailing address for their counselors.

Can you explain in detail the delegation from the client to the enroller without call CoveredCA directly?

Consumers can delegate their case to a certified enroller via text message. Follow the Accelerated Consumer Delegation Consent Quick Guide to review the steps enrollers can take to self-serve and delegate a consumer's case using the Accelerated Consumer Delegation Consent tool.

Consumers can delegate to an Agent or CEC at any point in the application process using the Find Local Help link after a consumer has created an account. They can then search for Agents and Certified Enrollment Entities (CEEs) based on location and language. Once they find the Agent or CEC of their preference, consumers can send their delegation request to the Agent or CEC. Agents and CECs can then accept pending delegation requests once they login to their CalHEERS portal. Once the delegation is accepted, they can view the consumer's application and assist with the enrollment process.

Agents and CECs can also start a new application on behalf of consumers from their CalHEERS portal. When an application is created directly from the Enroller Portal, the delegation is automatically created. The consumer can view the delegation details under the **Manage Delegates** link found in the footer of their CalHEERS home screen.

If someone has left the Entity 2-5 years ago, can we transfer all the accounts to another counselor?

If the Counselor is still in an active status in the entity you can transfer delegations.

Is there a way to show active clients that have active coverage with a health provider? Some active clients have cancelled their actual health care plans.

This can be accomplished by filtering your Book of Business extract to remove consumers with enrollment status *cancel* or *terminated*.

To add a new counselor, do all CEC's have access?

CECs cannot add other CECs to an Entity. This has to be completed by the Authorized Contact or the Primary Contact.

Can you have more than one Primary Contact?

Entities can multiple Primary Contacts (PC 1 and PC 2) as well as multiple Authorized Contacts (AC 1 and AC 2).

Can you sort by health insurance company on your book of business?

Yes. You can filter by carrier by scrolling to the right when you view your Book of Business. Click on the caret next to *Carrier Name* and this will allow you to sort. Moreover, every column in the Book of Business is designed to be filtered.

Will everyone have access to change Entity information and add counselors?

Only the Primary and Authorized Contacts are permitted to make changes to Entity information or add new counselors.

Will we be able to export members with enrolled status by carrier in the custom reporting section?

Yes. You can export a Book of Business that includes carrier status by clicking the caret next to the **Edit** button. A dropdown appears allowing you to export information into a spreadsheet.

When transferring delegations does the other Counselor get notified that they now have a delegation that was transferred to them?

On the top right corner of the page, there is a bell icon for notifications. Users will receive notifications at this location for delegation actions.

Is there a way to remove people from our team list instead of just marking them as inactive?

No. The person will always remain on the *Team List*. The Enroller Portal will allow you to create a report and apply filters to remove the person.