My Profile Page Guide for Certified Enrollers

Overview

This Guide illustrates the features available for account self-management on the My Profile page. The *My Profile* page is accessible by all users who have a CalHEERS account, including:

- Certified Enrollment Counselors (CECs)
- Certified Enrollment Entities (CEEs)
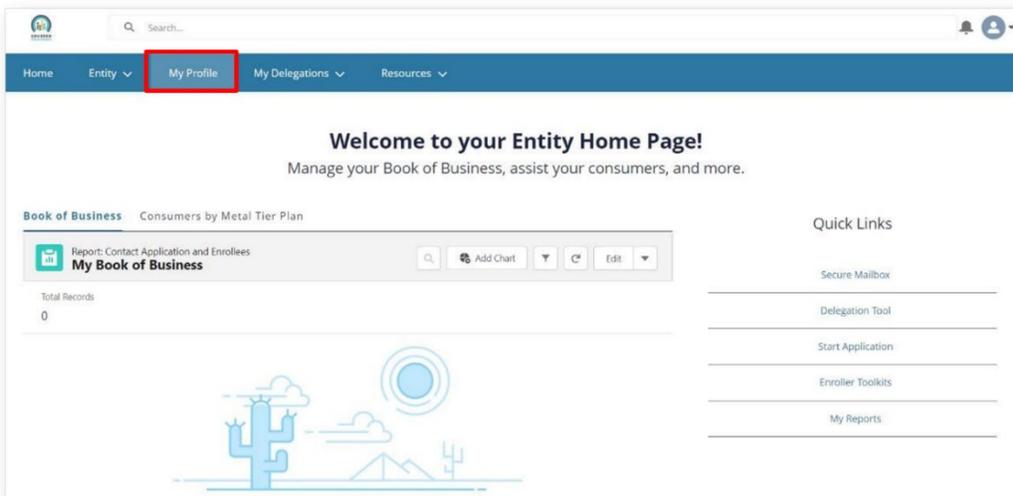- Certified Insurance Agents (CIAs)

Account Features

The following features are accessed on the *My Profile* page:

- User ID & Password
- Electronic PIN
- Personal Details
- Verification Methods

These features allow users to change their Covered California password, reset their security questions and answers, update their personal data, reset their PIN, and update their Verification Methods to receive a One Time Password (OTP).

Navigate to My Profile

A CEC/CEE/CIA may access the *My Profile* page by clicking the **My Profile** link located in the top navigational bar of their issuer portal dashboard.

The *My Profile* page displays and is divided into four independent sections:

- User ID & Password

- Electronic PIN

- Personal Details

- Verification Methods

Users may update one or more sections at a time.

As each section functions independently, all required fields in a section must be completed to update that specific setting successfully.

Help Features

The following Help features are available on the *My Profile* page:

- Click the Information icon above the field to display help information for that field

- Hover-over text displays a message for required fields to prompt the user

- Click the to reveal the hidden Password or PIN

- Error messages display when incorrect data is entered

My Profile

Please click on "Update" after each section to save your changes. Changes made on this page are for your login only, not your application. You can update name, date of birth, phone number or email address information on your application in the Account Home. Go to "Report a Change," "Apply Now," "Continue" or "Renew."

User ID & Password

Username: freddy123

Current Password

New Password

Your password must:
- Have at least 8 characters
- Have no more than 50 characters
- Not be one of your previous 24 passwords
- Not contain dictionary words, names, or common keyboard patterns (example: qwerty1)

And must contain at least three of the following:
- UPPERCASE letter (A-Z)
- Lowercase letter (a-z)
- Number (0-9)
- Special Character

Your password cannot:
- Be a previously used password
- Be changed more than once a day

Re-enter Password

Electronic PIN

To reset Electronic PIN please enter new 4 digit new PIN code

New PIN

Re-enter PIN

Personal Details

First Name

Fred

Last Name

Josephson

Update

Date of Birth

08/08/••••

Edit

Phone Number

Update

Email

By entering in your email address, you may receive emails about health information and your account from Covered California.

fredemail@email.com

Re-Enter Email

fredemail@email.com

Update

Verification Methods

If you wish to update your verification method(s), please select "Edit" below.

One Time Passcode

Email
No email registered

Cell phone number
(916) 216-0153

Security Questions

Questions on file
Yes

Edit

Back

User ID & Password

Users may change their password in the *User ID & Password* section (the Username, displayed on this page, is not modifiable.) Informational messaging at the top of the page reminds users that changes made on this page do not update their application. Clicking the **Account Home** link navigates the user to the Consumer Home page to update application details.

To change a password:

1. Type the existing password in the *Current Password* field.

2. Type the new password in the **New Password** field and again in the **Re-enter Password** field. The password criteria are listed. As each requirement is met, it is highlighted in green. A message displays in red text when a requirement is not met.

Consumers are allowed one password change per day, and the new password cannot be:

- One of the previous 24 passwords

OR

- A previously used password if that password has been compromised in a data breach

A tooltip in this section advises the user of new security features and recommends that the user create a new password.

An error message displays when a password that has been involved in a data breach on another website is entered: *We have added new security features. Please enter a new password.*

Click the **Update** button for this section to update the password. The *Password Update Success* popup displays.

Clicking the **OK** button closes the popup.

The *Unable to Update Password* popup displays when a user attempts to update the password more than once in a calendar day. Users are reminded that the password can be changed the next day, or they can contact the Service Center for more assistance.

Clicking the **OK** button closes the popup.
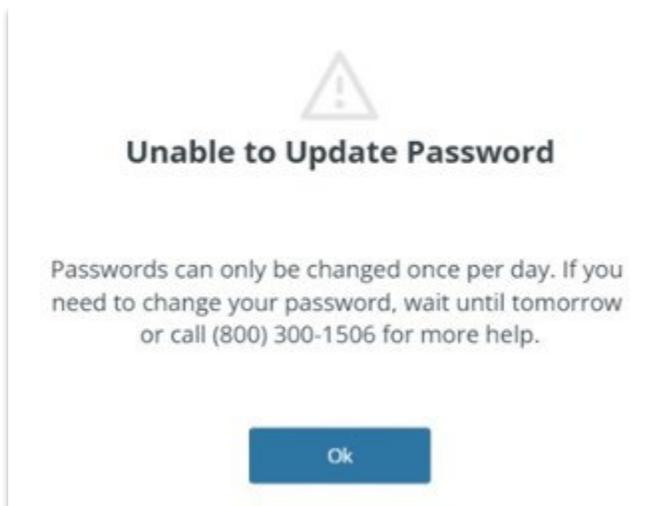
The *Update Profile Information* popup displays when the user attempts to leave the *My Profile* page by clicking any of the icons at the top right of the page or by clicking the **Back** button at the bottom of the page without first saving their changes:

Clicking the **No, go back** button closes the popup.

Clicking the **Yes, cancel** button navigates the user to the selected icon page.
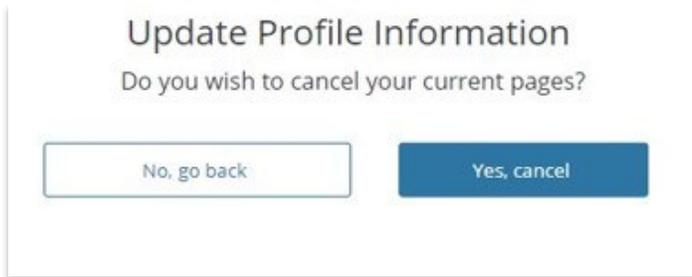
Electronic PIN

Users may change their PIN in the *Electronic PIN* section. The PIN is a 4-digit number that serves as the user's electronic signature.

To change a PIN:

1. Type a new PIN in the **New PIN** field. The data entered is hidden behind asterisks.

2. Type the PIN again in the **Re-enter PIN** field.

The two PIN fields must match, or an error message will display:

Click the **Update** button at the bottom of the section to submit the changes in this section. The *Update Profile Information* popup displays.

- Clicking the **Account Home** button navigates to the Consumer Home page.

- Clicking the **Ok** button closes the popup.
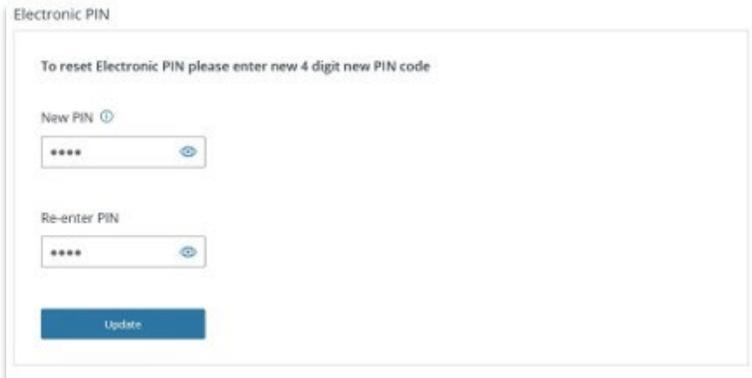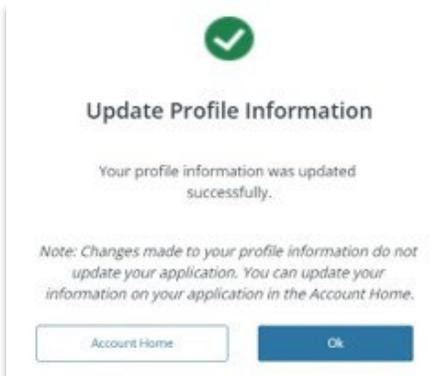
Personal Details

The Personal Details section of the *My Profile* page displays personal information entered by the person who created the account. The following fields may be updated:

- **First Name** – Use to update the user's first name

- **Last Name** – Use to update the user's last name

- **Date of Birth** – Year of birth is masked to protect personal information

- **Phone Number** – Required where the user has selected *Phone* as their preferred method of contact

- **Email** – Prepopulated and read-only when email is selected for the preferred method of contact. The field is optional when the preferred method of contact is not email

Note: **Name**, **Phone**, and **Email** fields are read-only for CEEs, CECs, CIAs, and Agency staff.

Personal Details

First Name

Lisa

Last Name

Sonder

Update

Date of birth

08/08/●●●●

Edit

Phone Number ⓘ

(602) 549-0038

If you would like to get calls and text messages about health information and your account from Covered California, please select the phone number:

☐ (602) 549-0038

Update

Email ⓘ *Optional*

By entering in your email address, you may receive emails about health information and your account from Covered California.

Enter your email address

Re-Enter Email *Optional*

Update

Editing the Date of Birth

Users edit the *Date of Birth* field by entering the new date of birth. The **Update** button enables when the date of birth is entered in the correct format.

An error message displays when the date of birth is not entered in the correct format.

Click the **Update** button. The *Update Profile Information* popup displays.

- Clicking the **Account Home** button navigates to the Consumer Home page.
- Clicking the **Ok** button closes the popup.

Verification Methods

Verification Methods are used to authenticate a user or to offer a secondary verification method (such as cell phone and email).

The *Verification Methods* section allows users to update, remove, or add an Email address, a Cell phone number, or Security Questions. Clicking the **Edit** button navigates the user to the *Register Your Account* page.

Register Your Account

The *Register Your Account* page encourages the user to register an email or a cell phone number. Should the user forget their username or password, registering the account helps them self-serve via a One Time Passcode (OTP) to regain access to their account.

At least one verification method is required to continue. Otherwise, the following validation message displays: *Please choose at least one option to register your account*.
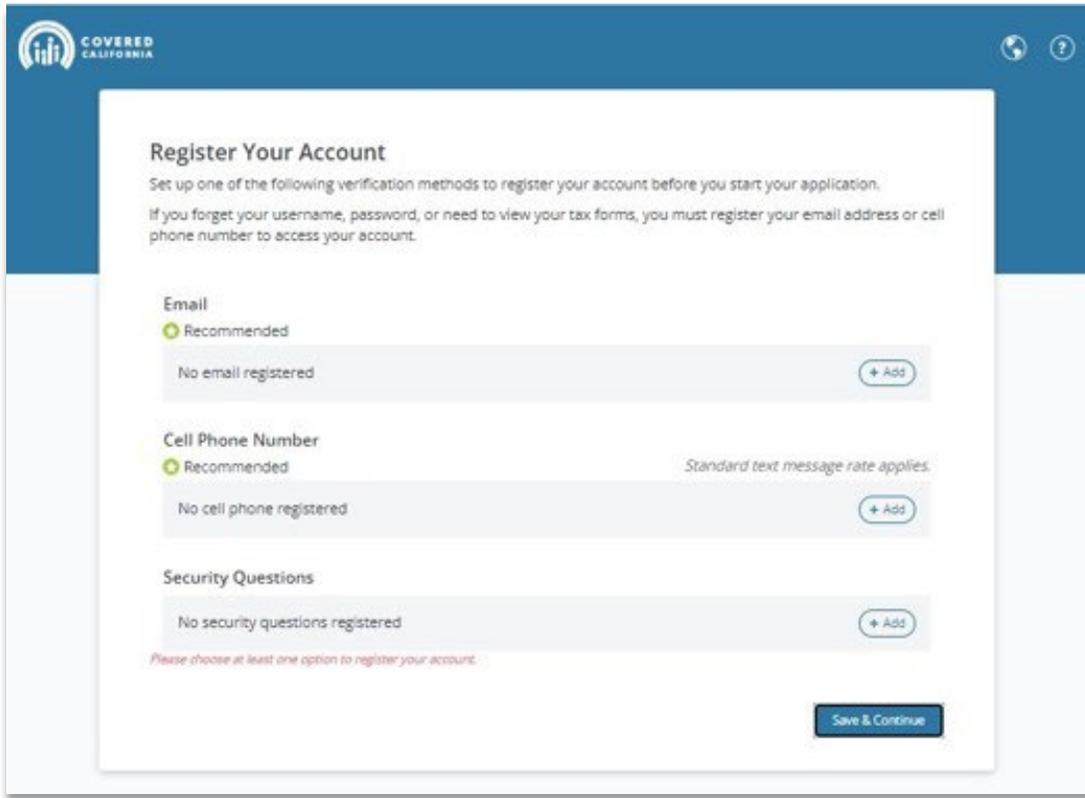
Register Email Address

The *Register Your Email* page displays when clicking the **+Add** button next to the No email registered message. If the user selected **Email** as the preferred method of contact during account creation, that email address automatically pre-populates here. The user can provide a different email address if preferred. The email address entered in the *Enter your email address* box must be entered in the *Re-enter your email address* box as well.
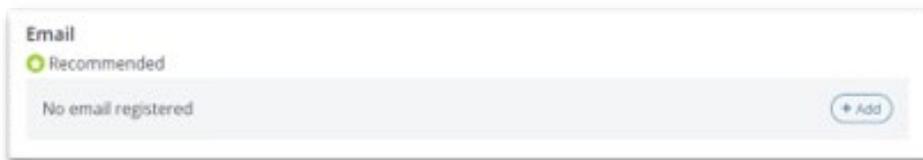

1. Click the **Send One Time Passcode** button. An email containing an OTP Temporary Passcode is emailed to the email address provided. The OTP is needed to complete the email address registration.

2. In the box titled *Enter One Time Passcode*, enter the OTP sent in the email.

3. Click the **Save** button to save the email information. The *Register Your Account* page displays with the email address entered. A green check mark displays next to the verification method to indicate it has been verified.

   - Clicking the **Cancel** button returns the user to the initial *Register Your Account page.*
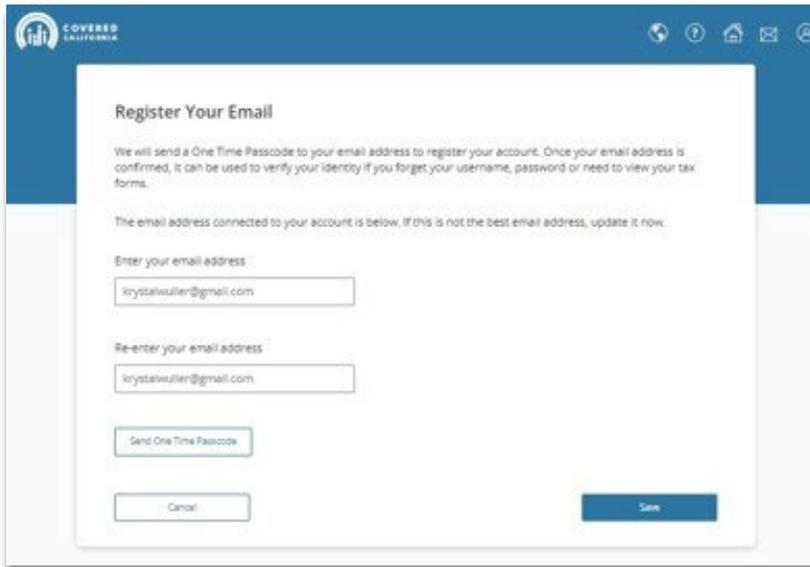
Note: The user must keep the *Register Your Email* page open and enter the passcode within 15 minutes. The passcode is no longer valid when the page is closed or the passcode is not entered within 15 minutes. The user is required to generate another OTP from this page.
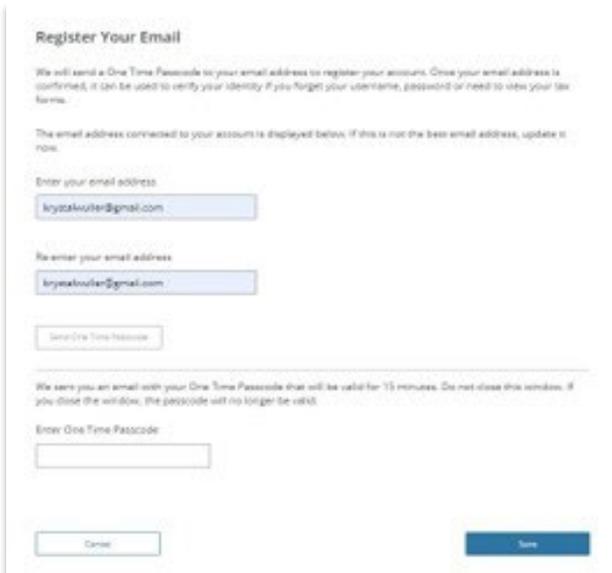
The *Register Your Account* page displays with the email address entered. A green check mark displays next to the verification method indicating it has been verified.

- Clicking the **Remove** link removes the registered email.
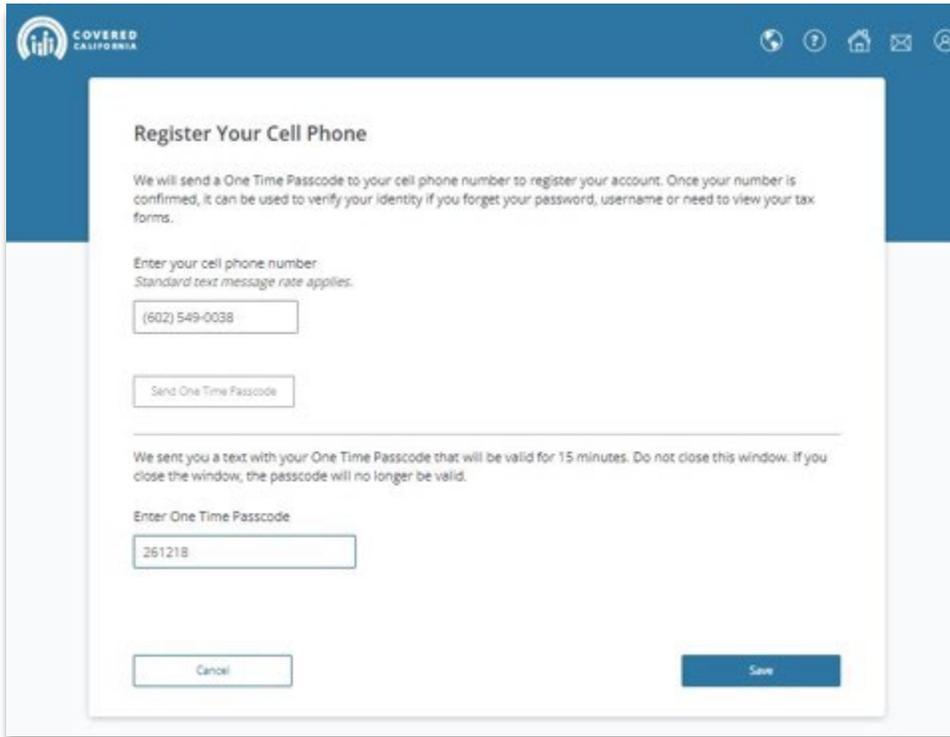- Clicking the **Edit** link allows the user to edit the registered email.
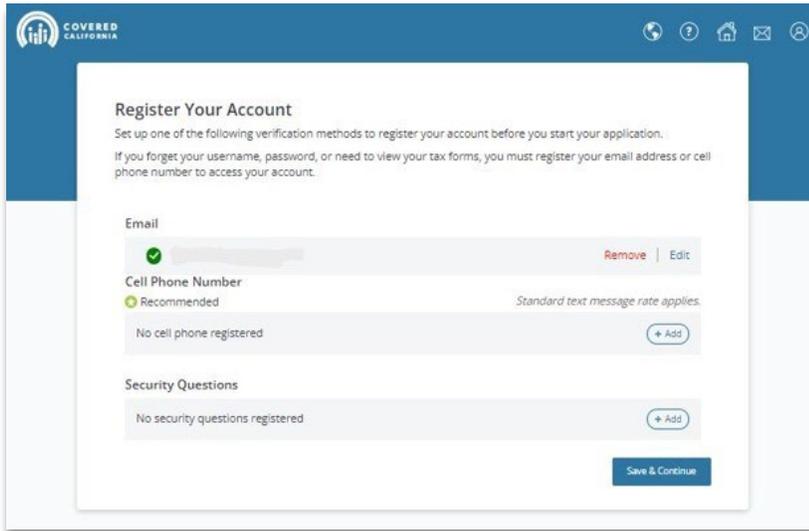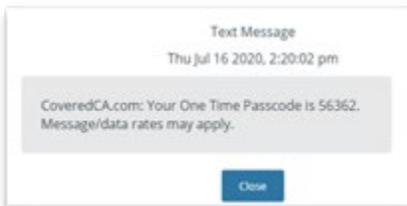

Register Cell Phone Number

1. Click the **+Add** button next to No cell phone registered message. The *Register Your Cell Phone* page displays. Click in the **Enter your cell phone number** field. Enter the nine-digit cell phone number without spaces.
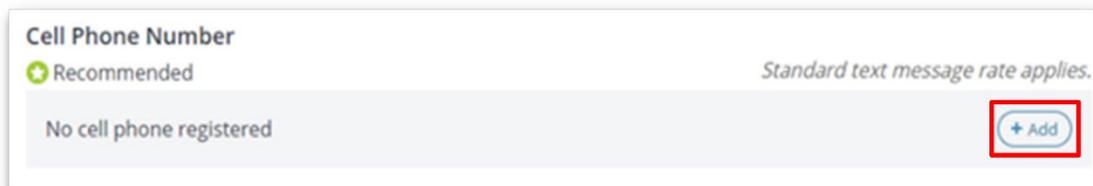

2. Click the **Send One Time Passcode** button.

Note: Messaging displays to remind the user *that Standard text message rate applies*.

3. A text message with the OTP is sent to the cell phone number entered. Enter the OTP in the **Enter One Time Passcode** field.

4. Click the **Save** button on *the Register Your Cell Phone* page. The *Register Your Account* page displays with the registered cell phone number.

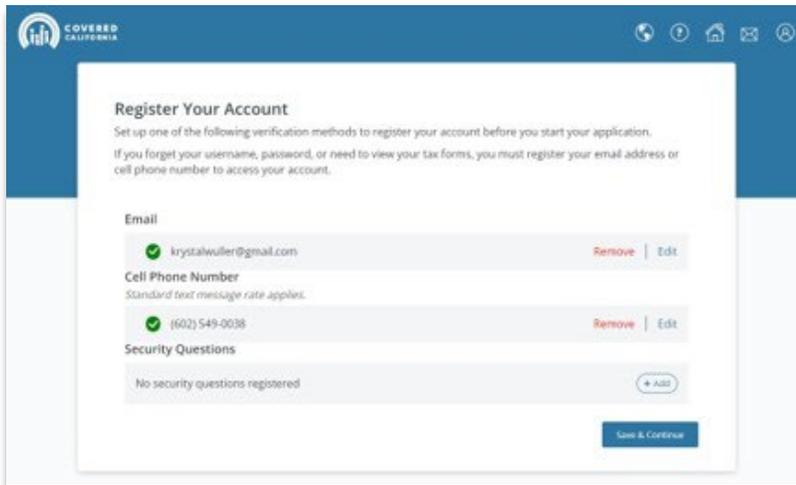   - Clicking the **Cancel** button returns the user to the *Register Your Account* page.
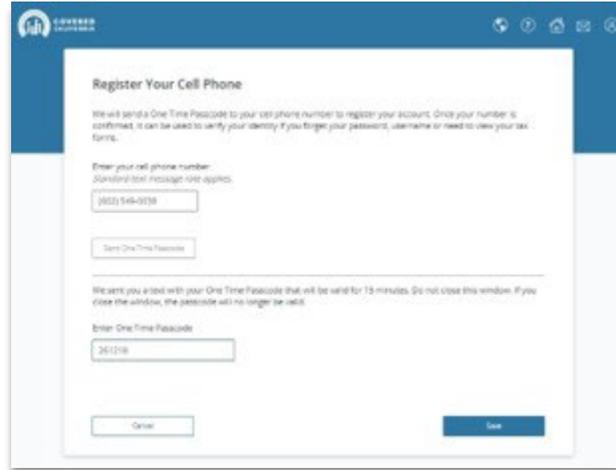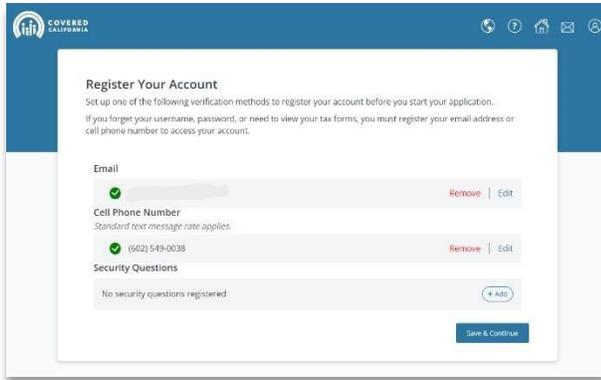
Remove/Edit Verification Method

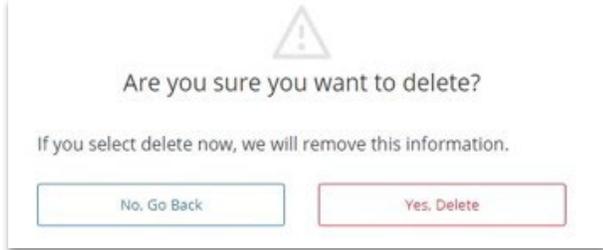The Consumer may remove or edit a registered verification method.

To remove a verification method:

1. Click the **Remove** link next to the registered verification method, a popup displays*: Are you sure you want to delete?*


2. Click the **Yes, Delete** button on the popup to remove the registered verification method. The **+ Add** button displays next to the removed item allowing another method of registration to be selected.

   Note: Clicking the **No, Go Back** button cancels the action and keeps the current registered methods.

To edit a registered verification method:

1. Click the **Edit** link next to the item. In the case of editing a registered cell phone number, the *Register Your Cell Phone* page displays.

2. Follow the same steps as indicated above to register a new cell phone number
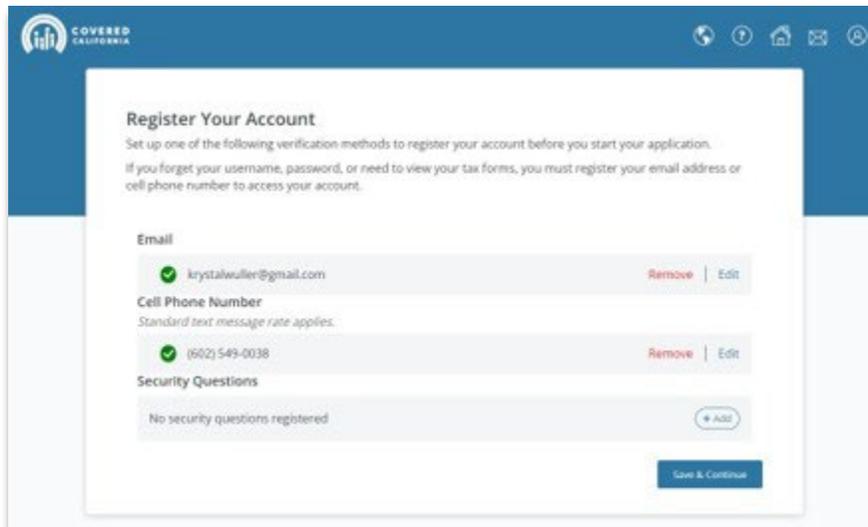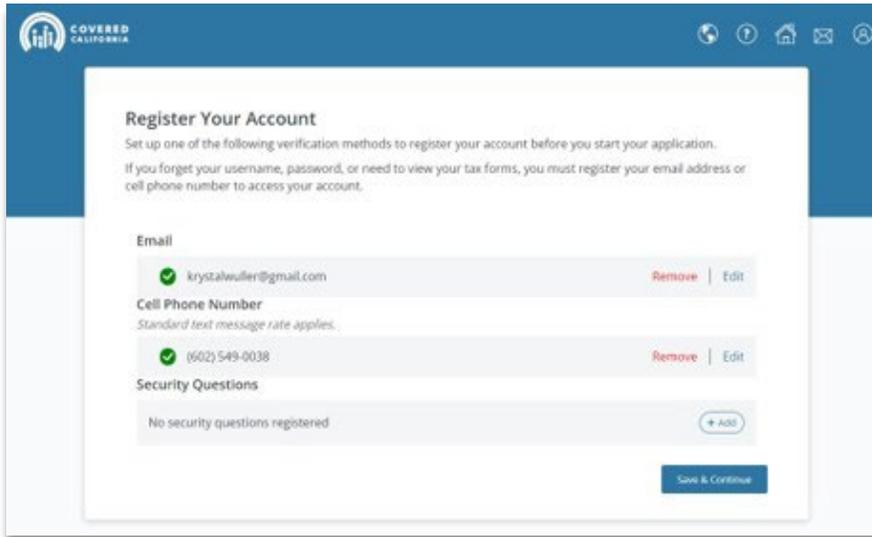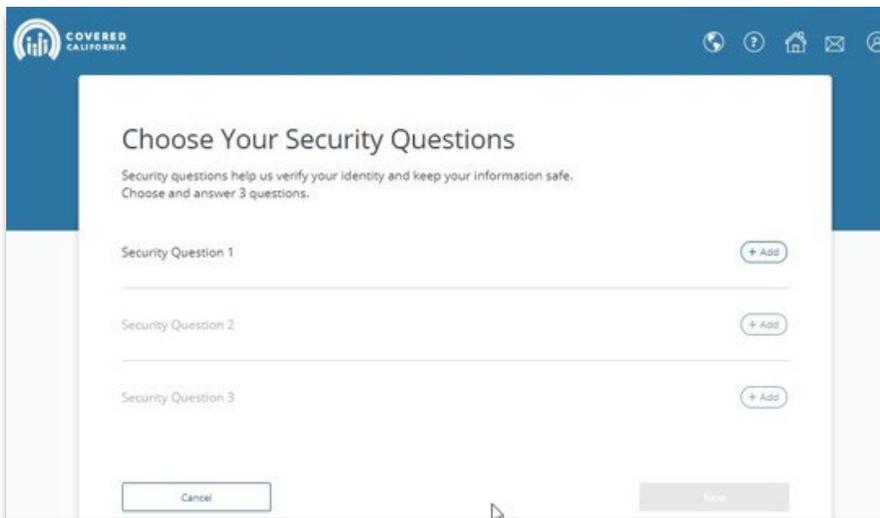

Security Questions

Security questions can be added but cannot be used to retrieve a username or password information.

To add Security Questions:

1. Click the **+ Add** button next to the *No security questions registered* message. The *Choose Your Security Questions* page displays.

2. Click the **+ Add** button next to the Security Question 1, the Security Question 1 popup displays with a list of questions.
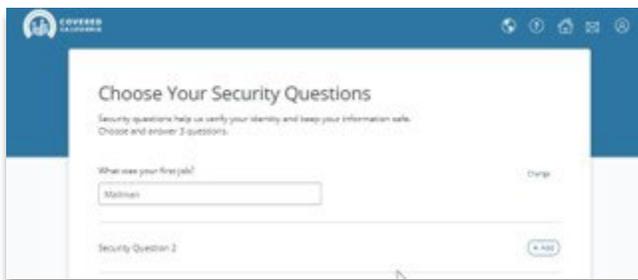

Note: Clicking the Cancel button cancels all Security Question selections and navigates the user to the *Register Your Account* page.
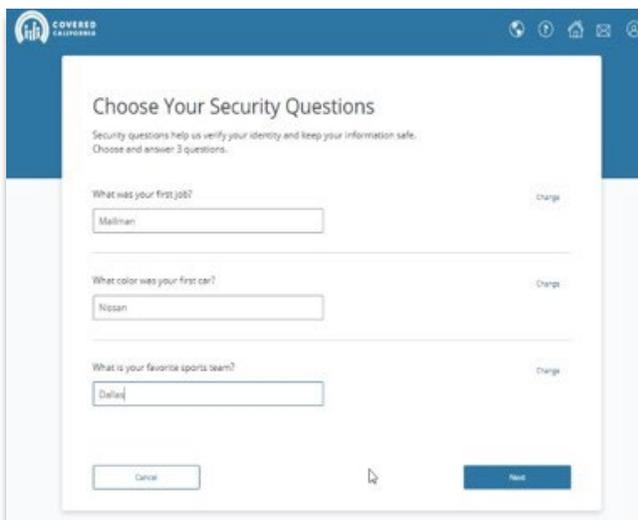
3. Select a question on the *Choose Your Security Question 1* popup. The *Choose Your Security Question* page displays with the selected question.
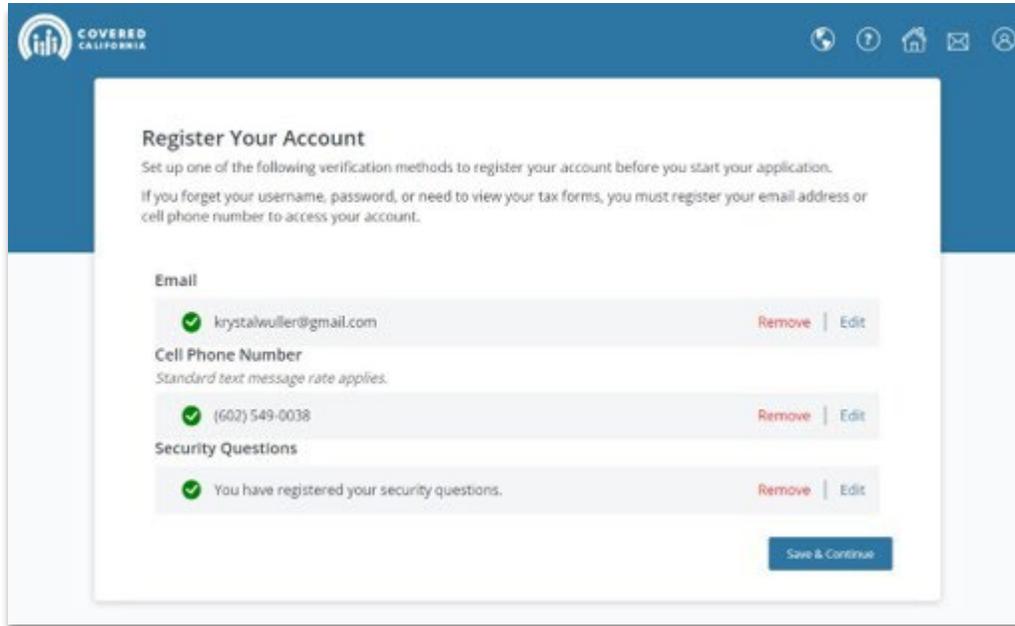

4. Enter an answer in the text field below the previously selected security question.

5. The Consumer repeats these steps for all three questions (the Next button enables).

6. Click the **Next** button. The *Register Your Account* page displays with a green check mark next to the You have registered your security questions. Message.

Note: The Remove link removes the set of Security Questions previously selected.

Registering for an OTP method or selecting Security Questions is required in order to proceed to the Consumer Home page.

Note: The *Update Your Profile* popup displays when at least one OTP has not been registered. In addition to the reminder popup, a banner displays on the Consumer Home page as a reminder that registering for at least one OTP is required in order to reset a password or view tax forms.