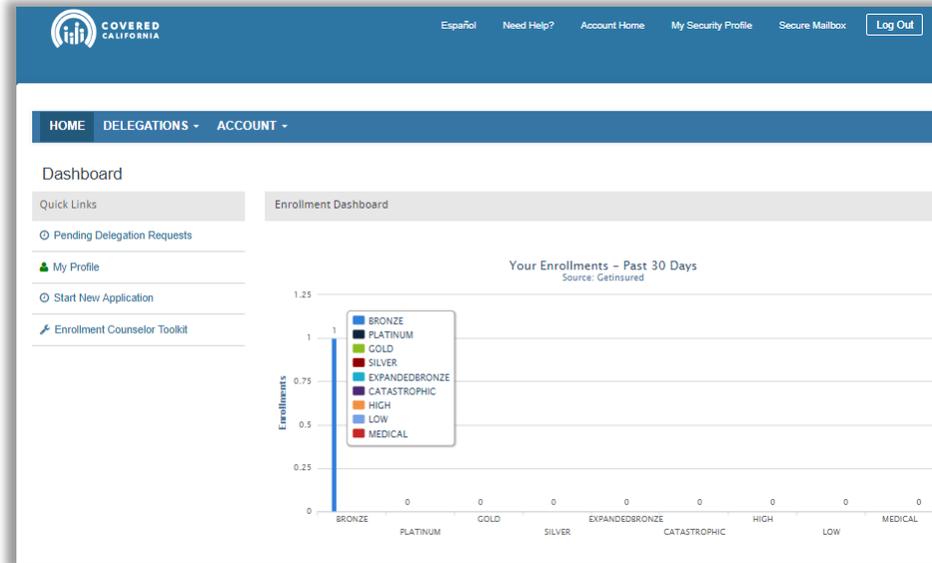


### Overview

Certified Enrollment Partners (Certified Enrollment and Application Counselors) act in an operational role for their Entity. Partners must ensure they complete the necessary steps and trainings to become certified with Covered California in order to gain access to their portal. The portal is the single point of entry to begin and manage consumer applications with Covered California.

### What you need to know

Partners will log into their CalHEERS account and see an Enroller Portal landing page, shown below.



### Enroller Dashboard Navigation

The navigation bar at the top of the portal has three menu columns:

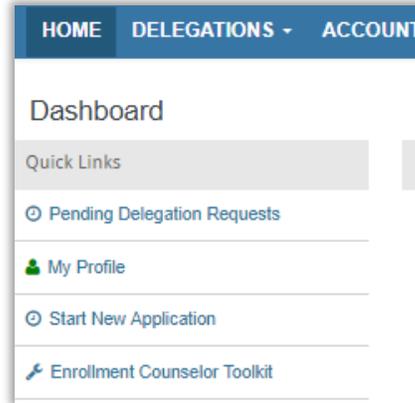
- 1) **Home**- Upon click, the Partner is navigated back to the dashboard homepage
- 2) **Delegations** – Where Partners go to manage their delegations
- 3) **Account** – Where Partners can go to manage their Account Information

Certified Enrollment Partners can also visit the “My Security Profile” link in the upper right-hand corner to update their password, email address, etc.

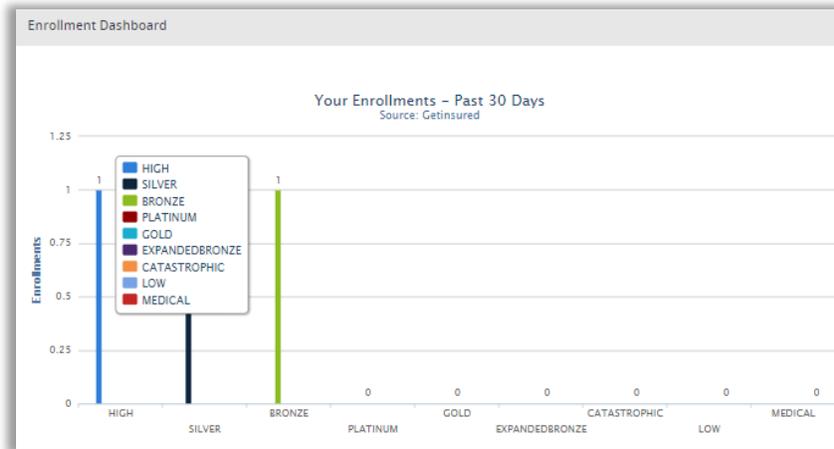
The left of the dashboard has Quick Links, intended to assist Partners with accessing sections within their portal quickly.

They are able to access:

- Pending Delegation Requests
- My Profile
- Start a New Application
- Enrollment Counselor Toolkit



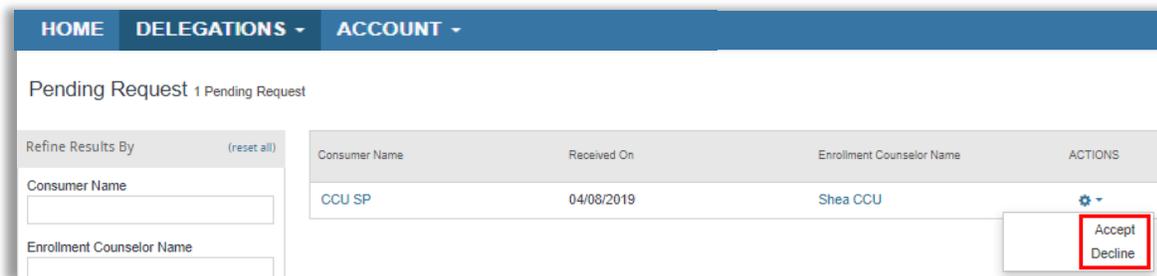
The Certified Enroller Portal landing page also has an Enrollment Dashboard that provides a visual summation of the Plan tiers that they have enrolled consumers in within the past 30 days.



## Delegations Tab

### Pending Delegations

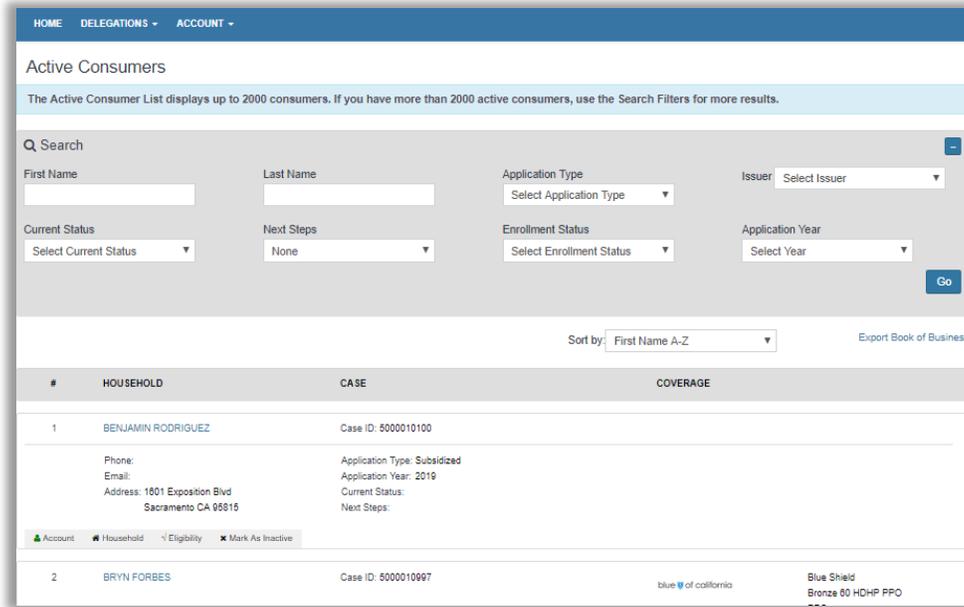
- The Certified Partner can select “Pending Delegations” link to accept or decline pending delegations on behalf of counselors within their Entity.
- If they select “Decline”, the counselor will not have access to the consumer’s case and the Counselor will lose the delegation.



### Active Delegations List

The Active Delegations list contains a comprehensive list of all consumers delegated to the Partner. The list contains:

- **Household** – The Name of the Primary Contact, Phone Number, Email and Address
- **Case** – Case Number for the consumer account
- **Coverage** – Plan information



HOME DELEGATIONS ACCOUNT

Active Consumers

The Active Consumer List displays up to 2000 consumers. If you have more than 2000 active consumers, use the Search Filters for more results.

Q Search

First Name:

Last Name:

Application Type:

Issuer:

Current Status:

Next Steps:

Enrollment Status:

Application Year:

Sort by:

Export Book of Business

| # | HOUSEHOLD  | CASE   | COVERAGE  |
|---|--|--|---|
| 1 | BENJAMIN RODRIGUEZ   | Case ID: 5000010100  |   |
|   | Phone:<br>Email:<br>Address: 1601 Exposition Blvd<br>Sacramento CA 95815 | Application Type: Subsidized<br>Application Year: 2019<br>Current Status:<br>Next Steps: |   |
| 2 | BRYN FORBES  | Case ID: 5000010997  | blue of california<br>Blue Shield<br>Bronze 60 HDHP PPO |

Account Household Eligibility Mark As Inactive

The Partner can also utilize the search function at the top to locate a specific consumer by:

- **Name**
- **Application Type**
- **Issuer**
- **Current Status**
- **Next Steps**
- **Enrollment Status**
- **Application Year**

### Inactive Delegations

The Inactive Consumers page will display any consumer delegation that has been marked inactive whom the Partner no longer has access to.

It will display:

- **Consumer Name**
- **Inactive Since Date**



HOME DELEGATIONS ACCOUNT

Inactive Consumers 1 Inactive Consumer

Refine Results By (reset all)

Consumer Name  
 Enrollment Counselor Name  
 Inactive Since  
 From: MM/DD/YYYY  
 To: MM/DD/YYYY  
 Go

| Consumer Name | In-Active since | Enrollment Counselor Name |
|---------------|-----------------|---------------------------|
| CCU SP        | 04/08/2019      | Shea CCU                  |

## Account Tab

### Certified Enrollment Counselor Information

The information on the *Certified Enrollment Counselor Information* page displays what was entered by the Certification Services Team at Covered California for the Partner during onboarding.

*Note: Any changes of information made to this section must be made by submitting a change request through the Salesforce Portal or by emailing [CommunityPartnerCertSupport@covered.ca.gov](mailto:CommunityPartnerCertSupport@covered.ca.gov).*

HOME DELEGATIONS ACCOUNT

Amanda Bailey

Steps  
 My Information  
 Profile  
 Certification Status

Certified Enrollment Counselor Information

First name Amanda  
 Last name Bailey  
 Email amanda@amanda.com  
 Phone number (778)789-4645  
 Secondary Phone Number  
 How would you like us to contact you? email  
 Is this Enrollment Counselor Certified? Yes  
 Enrollment Counselor Certification # 5000001398  
 Primary Certified Enrollment Counselor Site Xfinity USA

Mailing Address

Street Address 1 400 Q St  
 Suite  
 City Sacramento  
 State CA  
 Zip Code 95811

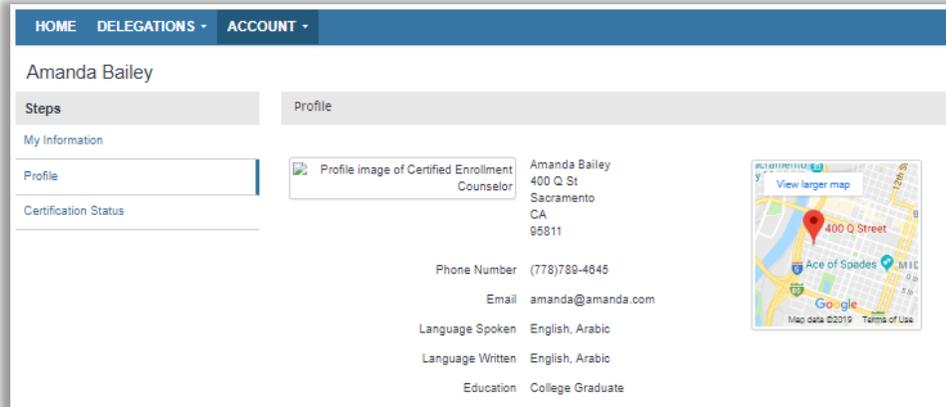
Profile Information

Spoken Languages Supported English, Arabic  
 Written Languages Supported English, Arabic  
 Education College Graduate  
 Photo Profile image of Certified Enrollment Counselor

### My Profile

The Profile page displays the contact information for the Partner.

*Note: Any changes of information made to this section must be made by submitting a change request through the Salesforce Portal or by emailing [CommunityPartnerCertSupport@covered.ca.gov](mailto:CommunityPartnerCertSupport@covered.ca.gov).*



**Please Note:** The information listed in the *Address Field* is not what populates in Find Local Help. The Partner location is set on the *Certified Enrollment Counselor Information* page via the “Primary Certified Enrollment Counselor Site” drop down. If the site desired is not listed, please contact your *Entity Primary Contact* to have the site added to the list.

### Certification Status

The **Certification Status** page displays information regarding the Partner’s status with the Entity and Covered California:

- **Certified Enrollment Counselor Number**
- **Status**
- **Enrollment Counselor Certification Number**
- **Certification Enrollment Counselor Start Date**
- **Registration Renewal Date**
- **Activity Status**
- **Delegation Code**

