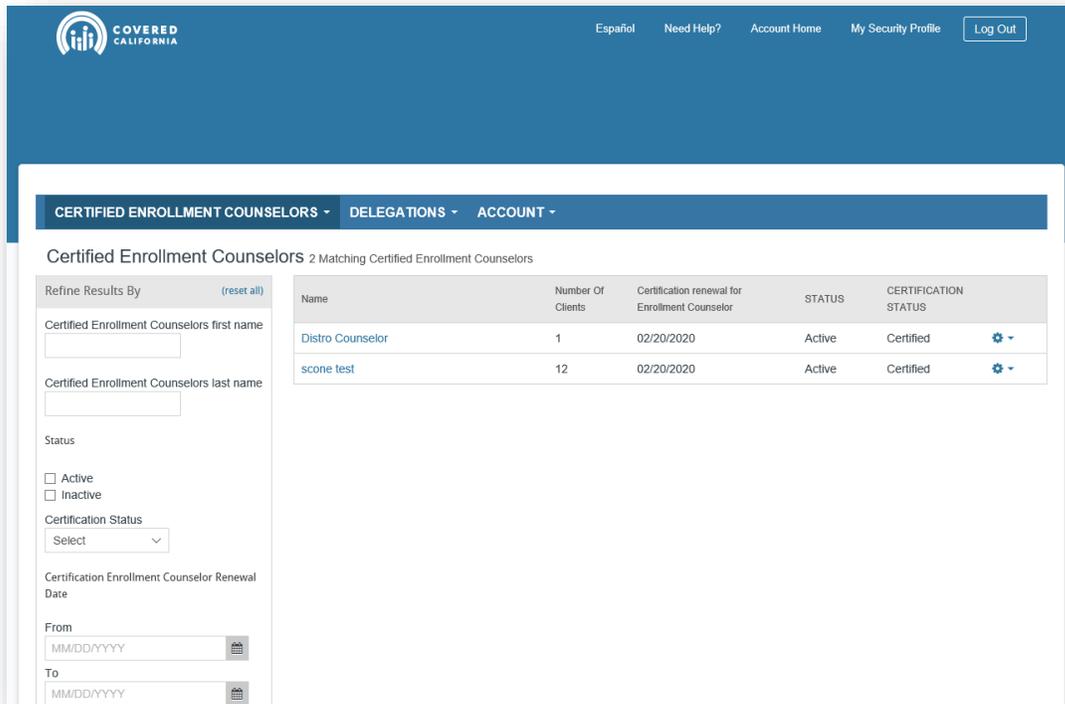


Overview

A designated *Primary Contact* for an Entity will act in an administrative and operational role for that Entity. The Primary Contact must ensure that their Entity is certified with Covered California in order to gain access to the portal. The Entity Portal also combines all of the consumers delegated to the Counselors attached to the Entity into one large Active Consumer list and allows for subsite locations to be managed for all Partners.

What you need to know

Primary Contacts will log into their CalHEERS account and see an Entity Portal landing page, shown below.



Entity Dashboard Navigation

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

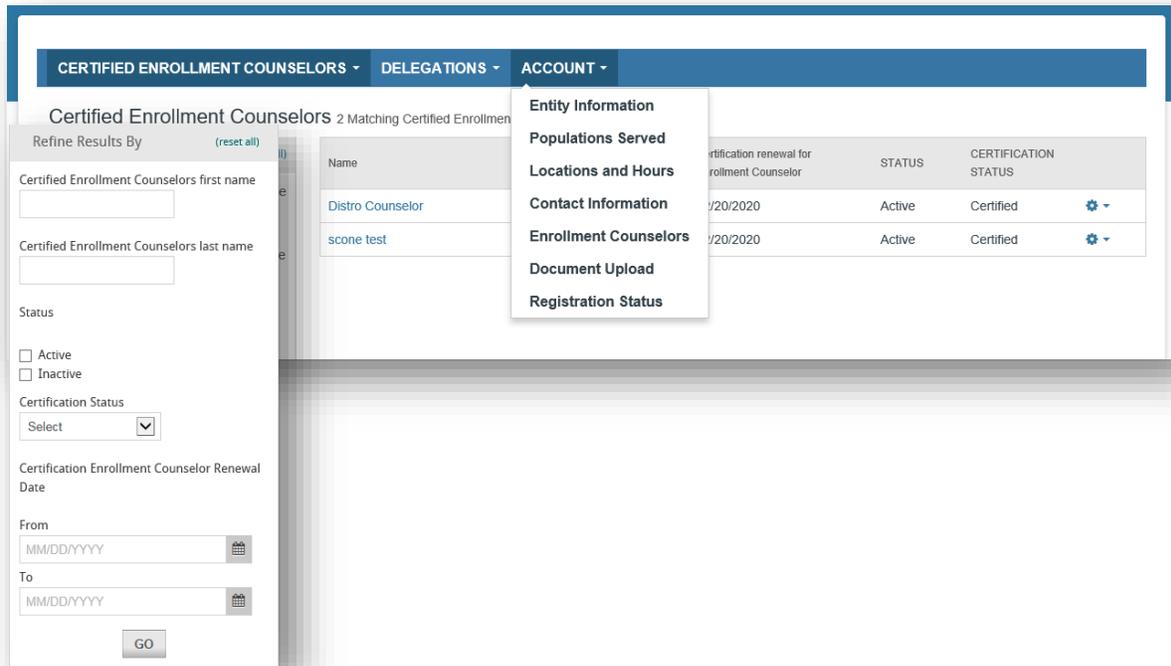
- 1) **Certified Enrollment Counselors**- Where Primary Contacts can go to manage the counselors within their Entity
- 2) **Delegations** – Where Primary Contacts can go to manage their counselor delegations
- 3) **Account** – Where Primary Contacts can go to manage their Entity Account

Primary Contacts 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 a search function, intended to assist Primary Contacts with searching for specific Counselors within their Entity Roster.

They are able to search by:

- **First and Last Name**
- **Status**
- **Certification Status**
- **Renewal Date**



The Entity Dashboard also has a roster of all counselors, new and old, displayed for the Primary Contact. It is important to note that all Counselors will display here, regardless of status. This includes Counselors that have been *Decertified*, are *Inactive*, or who are still *Pending* certification

Name	Number Of Clients	Certification renewal for Enrollment Counselor	STATUS	CERTIFICATION STATUS	
Distro Counselor	1	02/20/2020	Active	Certified	⚙️
scone test	12	02/20/2020	Active	Certified	⚙️

The columns listed in the roster are:

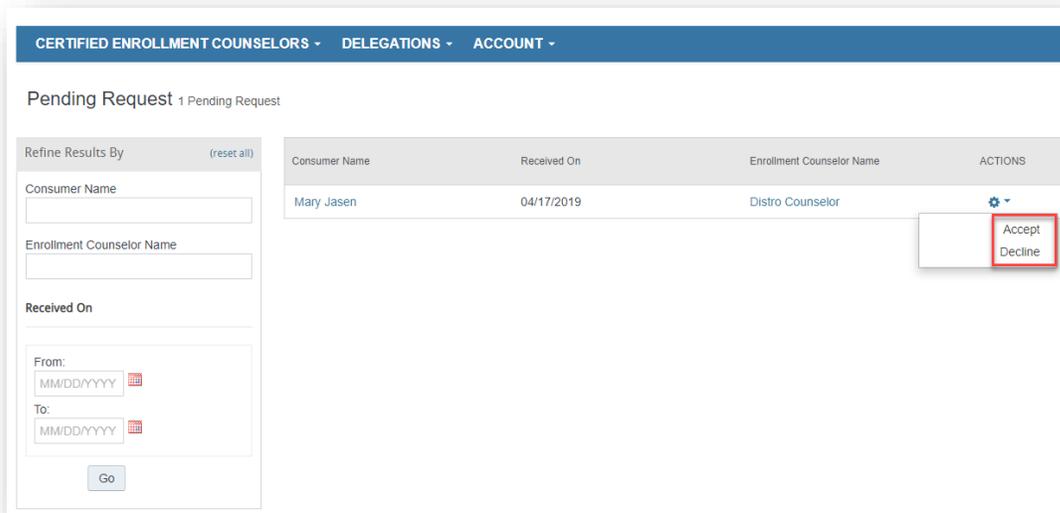
- **Name**
- **Number of Clients** – Total number of consumer cases delegated to the counselor
- **Certification Renewal for Enrollment Counselor** – Date of last certification
- **Status** – Active or Inactive, managed by the Entity Primary Contact
- **Certification Status** – Status of the Counselor’s current certification with Covered California
- **Action Wheel** – Allows the Primary Contact to view more information about the Enrollment Counselor

Delegations Tab

Pending Delegations

The Primary Contact 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 delegation will not transfer to another counselor within the Entity



Active Consumer List

The Active Consumer list contains a comprehensive list of all consumers delegated to a Counselor within the Entity. The list contains:

- **Consumer Name**
- **Active Since**
- **Enrollment Counselor Name**
- **Enrollment Status**
- **Current Status**
- **Action Wheel** – Where the Primary Contact can mark the consumer delegation “Inactive” and view consumer details.

The Primary Contact can also utilize the search function on the left to locate a specific consumer by:

- **Name**
- **Enrollment Status**
- **Current Status**
- **Active Date**



CERTIFIED ENROLLMENT COUNSELORS - DELEGATIONS - ACCOUNT -

Active Delegations 13 Active Delegations(s)

To simultaneously change the delegations of more than one consumer from one Enrollment Counselor to another, click on the checkbox by the consumer's name, click on the **Change Delegation** button that appears and select the **Change Delegation** option. A pop-up will appear where you can search for the new enrollment counselor to whom the selected consumers should be re-delegated.

(0 Items Selected)

Refine Results By (reset all)

Consumer Name

Enrollment Counselor Name

Enrollment Status

Select Enrollment Status

Current Status

Select Current Status

Active Since

From: MM/DD/YYYY

To: MM/DD/YYYY

Go

Consumer Name	Active Since	Enrollment Counselor Name	Enrollment Status	Current Status	Action
<input type="checkbox"/> Benjamin Rodriguez	03/06/2019	Pinnacle Counselor			⚙️
<input type="checkbox"/> Bryn Forbes	03/22/2019	Pinnacle Counselor	PENDING		⚙️
<input type="checkbox"/> Davis Bertans	02/26/2019	Pinnacle Counselor			⚙️
<input type="checkbox"/> Derrick White	02/26/2019	Pinnacle Counselor	ENROLLED		⚙️
<input type="checkbox"/> Gregg Popovich	02/26/2019	Pinnacle Counselor			⚙️
<input type="checkbox"/> Hamilton Porter	03/06/2019	Pinnacle Counselor	PENDING		⚙️
<input type="checkbox"/> Jesse Hall	03/06/2019	Pinnacle Counselor			⚙️
<input type="checkbox"/> Lebron James	02/26/2019	Pinnacle Counselor			⚙️
<input type="checkbox"/> Patty Mills	02/26/2019	Pinnacle Counselor	PENDING		⚙️
<input type="checkbox"/> Pinnacle Will	03/11/2019	Distro Counselor		Application Withdrawn	⚙️

1 2

Inactive Delegations

The Inactive Consumers page will display any consumer delegation that has been marked inactive for any Counselor within the Entity.

It will display:

- **Consumer Name**
- **Inactive Since Date**
- **Enrollment Counselor Name**

CERTIFIED ENROLLMENT COUNSELORS - 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
Pinnacle Will	04/17/2019	Distro Counselor

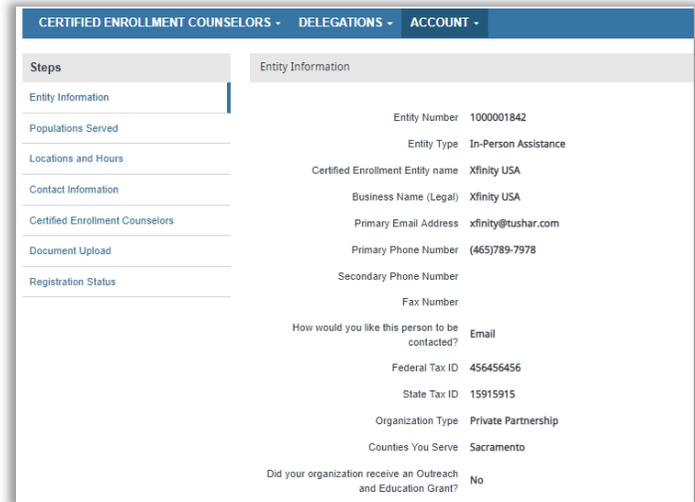
Account Tab

Entity Information

The information on the Entity Information page displays what was entered by the Certification Services Team at Covered California for the Entity 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

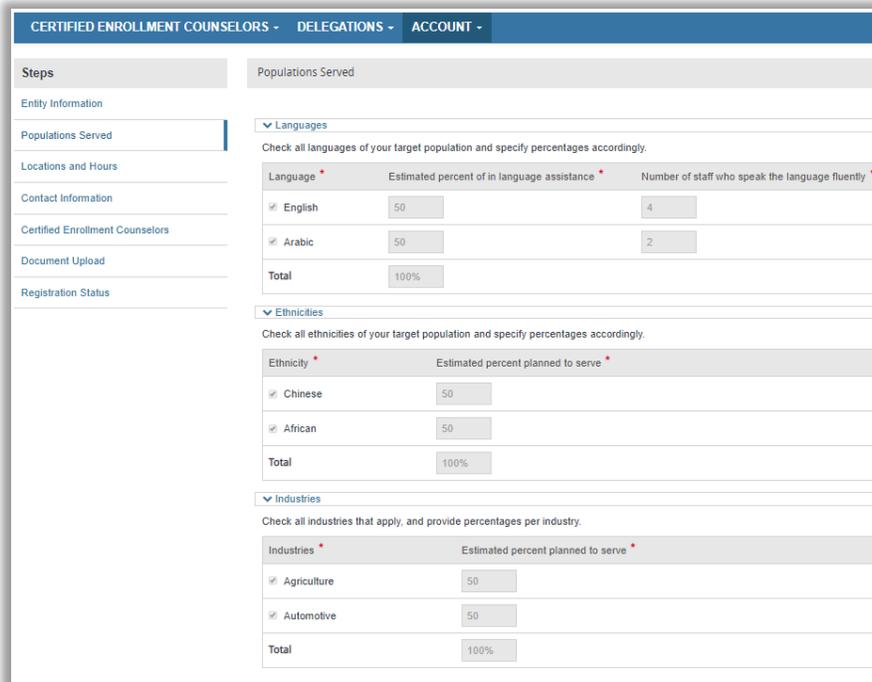


Steps	Entity Information
Entity Information	Entity Number 100001842
Populations Served	Entity Type In-Person Assistance
Locations and Hours	Certified Enrollment Entity name Xfinity USA
Contact Information	Business Name (Legal) Xfinity USA
Certified Enrollment Counselors	Primary Email Address xfinity@tushar.com
Document Upload	Primary Phone Number (465)789-7978
Registration Status	Secondary Phone Number
	Fax Number
	How would you like this person to be contacted? Email
	Federal Tax ID 456456456
	State Tax ID 15915915
	Organization Type Private Partnership
	Counties You Serve Sacramento
	Did your organization receive an Outreach and Education Grant? No

Population Served

The Population Served page displays the Languages, Ethnicities, and Industries serviced by the Entity. It shows a total of all Counselors within the Entity that speak a certain language, the percentage that services a certain ethnic group, and the percentage of counselors that are within a certain industry.

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



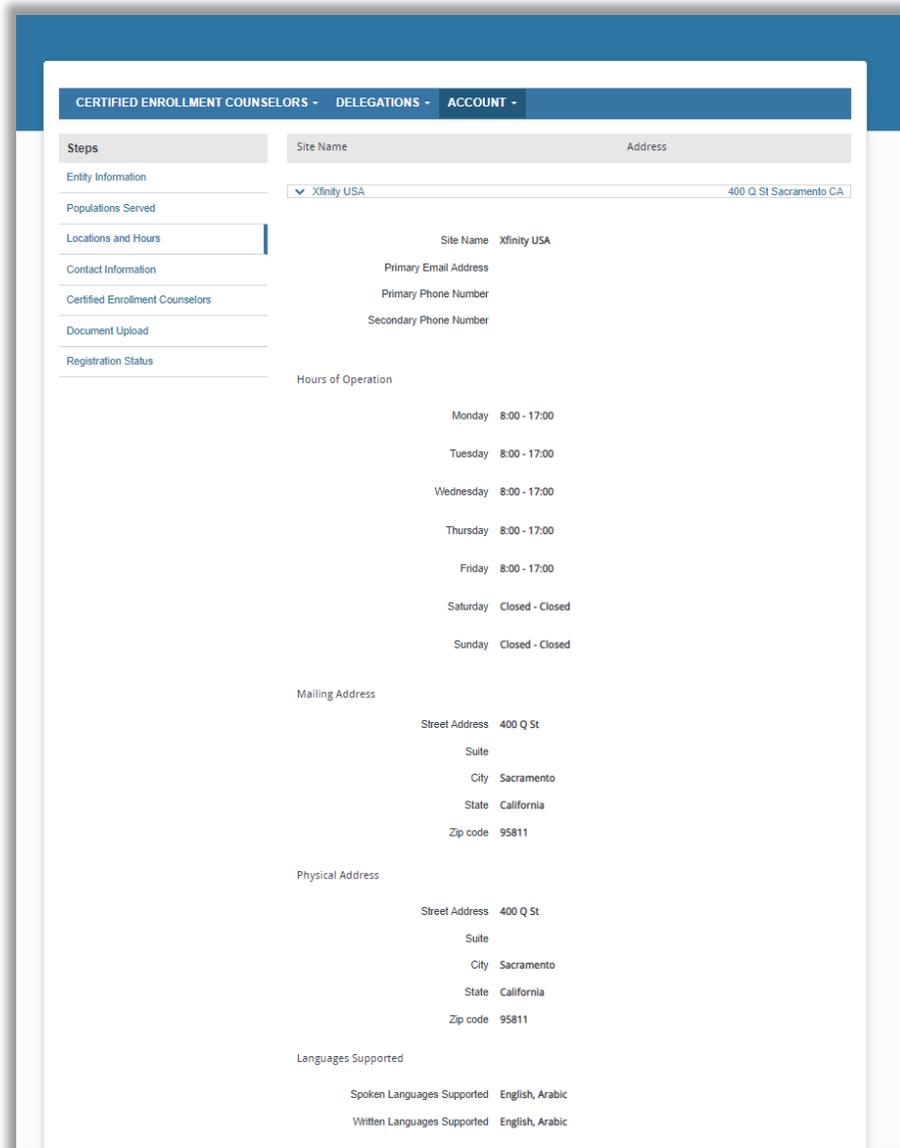
Steps	Populations Served												
Entity Information	<p>Languages</p> <p>Check all languages of your target population and specify percentages accordingly.</p> <table border="1"> <thead> <tr> <th>Language</th> <th>Estimated percent of in language assistance</th> <th>Number of staff who speak the language fluently</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> English</td> <td>50</td> <td>4</td> </tr> <tr> <td><input checked="" type="checkbox"/> Arabic</td> <td>50</td> <td>2</td> </tr> <tr> <td>Total</td> <td>100%</td> <td></td> </tr> </tbody> </table>	Language	Estimated percent of in language assistance	Number of staff who speak the language fluently	<input checked="" type="checkbox"/> English	50	4	<input checked="" type="checkbox"/> Arabic	50	2	Total	100%	
Language	Estimated percent of in language assistance	Number of staff who speak the language fluently											
<input checked="" type="checkbox"/> English	50	4											
<input checked="" type="checkbox"/> Arabic	50	2											
Total	100%												
Populations Served	<p>Ethnicities</p> <p>Check all ethnicities of your target population and specify percentages accordingly.</p> <table border="1"> <thead> <tr> <th>Ethnicity</th> <th>Estimated percent planned to serve</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Chinese</td> <td>50</td> </tr> <tr> <td><input checked="" type="checkbox"/> African</td> <td>50</td> </tr> <tr> <td>Total</td> <td>100%</td> </tr> </tbody> </table>	Ethnicity	Estimated percent planned to serve	<input checked="" type="checkbox"/> Chinese	50	<input checked="" type="checkbox"/> African	50	Total	100%				
Ethnicity	Estimated percent planned to serve												
<input checked="" type="checkbox"/> Chinese	50												
<input checked="" type="checkbox"/> African	50												
Total	100%												
Locations and Hours	<p>Industries</p> <p>Check all industries that apply, and provide percentages per industry.</p> <table border="1"> <thead> <tr> <th>Industries</th> <th>Estimated percent planned to serve</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Agriculture</td> <td>50</td> </tr> <tr> <td><input checked="" type="checkbox"/> Automotive</td> <td>50</td> </tr> <tr> <td>Total</td> <td>100%</td> </tr> </tbody> </table>	Industries	Estimated percent planned to serve	<input checked="" type="checkbox"/> Agriculture	50	<input checked="" type="checkbox"/> Automotive	50	Total	100%				
Industries	Estimated percent planned to serve												
<input checked="" type="checkbox"/> Agriculture	50												
<input checked="" type="checkbox"/> Automotive	50												
Total	100%												
Contact Information													
Certified Enrollment Counselors													
Document Upload													
Registration Status													

Location and Hours

The **Location and Hours** page displays:

- Site Name
- Hours of Operation
- Mailing Address
- Physical Address
- Languages Supported

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



The screenshot shows the 'Locations and Hours' page for 'Xfinity USA'. The page is divided into several sections:

- Entity Information:** Site Name: Xfinity USA, Address: 400 Q St Sacramento CA
- Populations Served:** (Empty field)
- Locations and Hours:**
 - Site Name: Xfinity USA
 - Primary Email Address: (Empty)
 - Primary Phone Number: (Empty)
 - Secondary Phone Number: (Empty)
 - Hours of Operation:

Monday	8:00 - 17:00
Tuesday	8:00 - 17:00
Wednesday	8:00 - 17:00
Thursday	8:00 - 17:00
Friday	8:00 - 17:00
Saturday	Closed - Closed
Sunday	Closed - Closed
- Contact Information:** (Empty)
- Certified Enrollment Counselors:** (Empty)
- Document Upload:** (Empty)
- Registration Status:** (Empty)
- Mailing Address:**
 - Street Address: 400 Q St
 - Suite: (Empty)
 - City: Sacramento
 - State: California
 - Zip code: 95811
- Physical Address:**
 - Street Address: 400 Q St
 - Suite: (Empty)
 - City: Sacramento
 - State: California
 - Zip code: 95811
- Languages Supported:**
 - Spoken Languages Supported: English, Arabic
 - Written Languages Supported: English, Arabic

Contact Information

The **Contact Information** page lists the contact information for the Entity. It will list the Primary Contact and the Financial Contact for the Entity.

Note: Although CalHEERS uses the term "Financial Contact," the individual entered here will be the Authorized Contact for the entity as shown in the Portal.

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

Certified Enrollment Counselors

The **Certified Enrollment Counselor** page displays a list of counselors within the Entity and their Primary Site Location. The *Primary Contact* can click the name of the Counselor to view their Counselor information.

Note: Any changes of information made to this section must be made by submitting a change request through the Salesforce Portal or by emailing

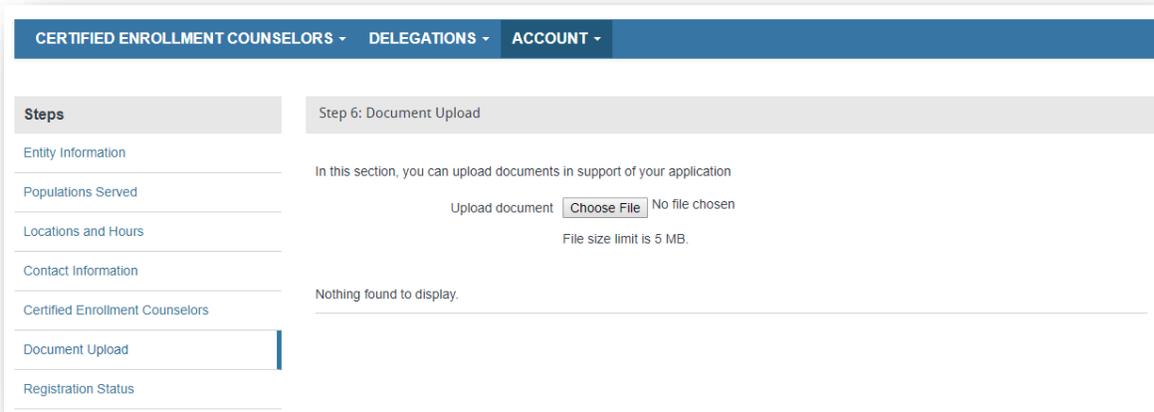
CommunityPartnerCertSupport@covered.ca.gov

Name	Site
George Bailey	Xfinity USA
Emma Bailey	Xfinity USA
Tom Bailey	Xfinity USA
Kate Bailey	Xfinity USA
Amanda Bailey	Xfinity USA
Chris Hoods	Xfinity USA

Document Upload

The document upload page is available for Entities to upload documents requested by Covered California.

Note: Currently this function is not used and all Primary Contacts should follow normal procedures for submitting documents to Covered California.



CERTIFIED ENROLLMENT COUNSELORS - DELEGATIONS - ACCOUNT

Steps

- Entity Information
- Populations Served
- Locations and Hours
- Contact Information
- Certified Enrollment Counselors
- Document Upload**
- Registration Status

Step 6: Document Upload

In this section, you can upload documents in support of your application

Upload document No file chosen

File size limit is 5 MB.

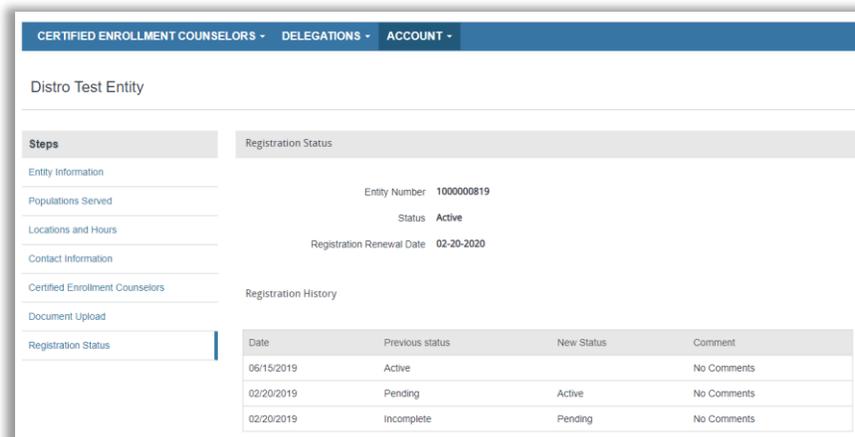
Nothing found to display.

Registration Status

The **Registration Status** page displays:

- **Entity Number** (Assigned by the Covered California Certification Services Team)
- **Status**
- **Registration Renewal Date**

The page also displays a Registration History section that displays a list of all registration changes that have happened for the Entity since its CalHEERS creation.



CERTIFIED ENROLLMENT COUNSELORS - DELEGATIONS - ACCOUNT

Distro Test Entity

Steps

- Entity Information
- Populations Served
- Locations and Hours
- Contact Information
- Certified Enrollment Counselors
- Document Upload
- Registration Status**

Registration Status

Entity Number **100000819**

Status **Active**

Registration Renewal Date **02-20-2020**

Registration History

Date	Previous status	New Status	Comment
06/15/2019	Active		No Comments
02/20/2019	Pending	Active	No Comments
02/20/2019	Incomplete	Pending	No Comments