

# Certified Enrollment Entity Applications Now Being Accepted!



## 4 steps to becoming a Certified Enrollment Entity

Completed

### 1 Complete Application

- **Access** the application home page at: <https://ipas.ccgrantsandassistors.org/>
- **Download** the Application Checklist found under the “CEE Application Tool Kit” on the application home page
- **Review** checklist for information and documentation required to successfully complete the application and **Gather** necessary information to complete the application fields
- **Create** username and password in the online application
- **Complete** all required fields
- **Download** and complete Certified Enrollment Entity Agreement
- **Contact** insurance carrier to add Covered California as an additional insured on your general liability, with coverage of no less than \$1,000,000 per occurrence and to request an updated insurance certificate
- **Upload** in the application the following documents:
  - Certified Enrollment Entity Agreement
  - Insurance Certificate
  - State of California Payee Data Record (STD204), if required
- **Submit** your application!

### 2 Application Review - by Covered California

- **Covered California** reviews for eligibility and completeness, after the application has been submitted (review process will take 5-7 business days)
- **Receive** notification from Covered California by email and phone regarding missing application information (if applicable)

### 3 Receive approval

- **Receive** notification from Covered California by email regarding application approval or denial based on program requirements
- **Approval** email will also provide directions of next steps for Certified Enrollment Entity training

### 4 Complete Training

- **Receive** email from Covered California to complete the Certified Enrollment Entity Management Training required for the Primary Contact
- **Complete** the Certified Enrollment Entity Management Webinar Training (approximately 1 hour) within 90 days
- **Prepare** to start working with consumers by finalizing a roster of Certified Enrollment Counselors in CEE application (see page two for instructions)

For more information, contact the Covered California  
Enrollment Assistance Program Help Desk via email at :  
[assisterinfo@ccgrantsandassistors.org](mailto:assisterinfo@ccgrantsandassistors.org)  
or call Monday through Friday, 8:00 AM to 5:00 PM

888-402-0737

# Certified Enrollment Counselor Applications Now Being Accepted!



## 4 steps to becoming a Certified Enrollment Counselor

### 1 Affiliate

Completed

- **If not affiliated** with a CEE, the affiliation process includes the following steps:
  - Visit the following web page to locate CEEs in your area: <https://assisters.ccgrantsandassisters.org>
  - Under section C click "Certified Enrollment Entities by County"
  - Search for a CEE in your county
  - Contact the CEE to discuss the affiliation
  - After the individual and CEE agree to affiliate, the CEE will add individual to their Entity application (CEC roster)
  - CEE will provide individual with CEC Agreement that includes:
    - Conflict of Interest standards, as required in accordance with California's Code of Regulations, Title 10, Section 6666
    - Privacy and security standards adopted by Covered California, in accordance with Code of Federal Regulation, Title 45, Section 155.260
  - Individual will complete, sign, and return the agreement to CEE for upload

### 2 Complete Background Screening

- **Receive** a pre-filled Criminal Disclosure form from your entity, complete all information and send to Fax: **916-323-3729** or Mail: **Covered CA, Attn: Disclosure Unit, PO Box 1199, Sacramento, CA 95812**
- **Receive** a pre-populated Live Scan Fingerprinting form from CEE, then go to: [http://www.capitalivescan.com/covered\\_ca\\_home.html](http://www.capitalivescan.com/covered_ca_home.html) to find the nearest Live Scan location to schedule an appointment. **Bring two completed forms to your appointment**
- **Live Scan** services are also available at the training site, but you are encouraged to complete the fingerprinting process right away, as background results may take several weeks to process

### 3 Complete Training

- **Receive** email from the Covered California's Learning Management System (LMS) with login ID and password information to schedule Certified Enrollment Counselor Certification Training (once application is approved)
- **Login** to LMS to access the CEC training sessions that are available and register for a session
- **Attend** a 3-day CEC Training, (all three consecutive days must be attended) - on-site fingerprinting by Live Scan
- OR-
- **Complete** Self-Guided Training (SGT)
- **Score** 80% or better on the Certification Exam to become training certified
- **Receive** email notification including delegation code to register as a Certified Enrollment Counselor on CoveredCA.com, upon receiving background clearance

#### Converting from Certified Educator to Certified Enrollment Counselor

- **Receive** invite to new training assignment from LMS
- **Log** into LMS using your current Username and Password at: <https://learning.coveredca.com/Default.aspx>
- **Select** Educator to Enrollment Conversion Certification Exam online
- **Complete** conversion training modules become a Certified Enrollment Counselor

### 4 Register in CoveredCA.com

- **Register** as a CEC in CoveredCA.com, using delegation code
- **Login** to CoveredCA.com to complete CEC user profile
- **Receive** your official Covered California badge