

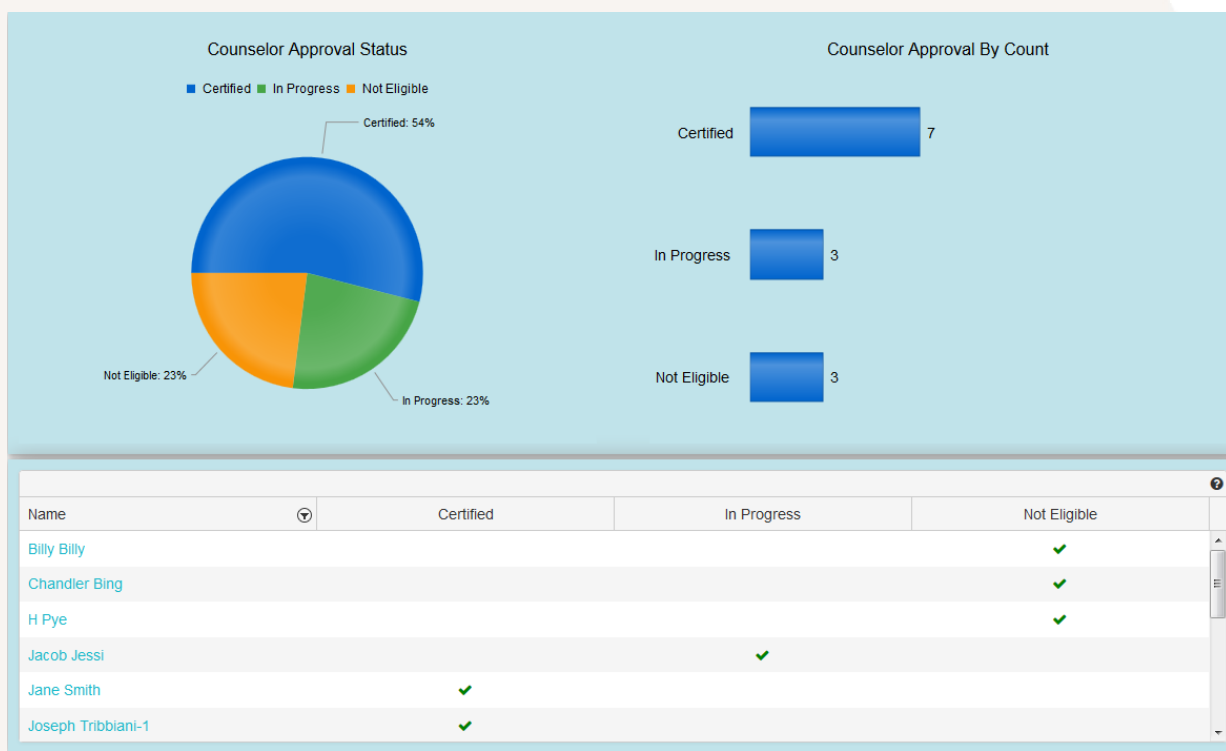
IPAS Entity Status Board Overview

ENTITY STATUS BOARD OVERVIEW

The Entity Status Board is available in IPAS and allows the entity to track the certification process for all individuals included in the entity's Counselor roster.

COUNSELOR OVERVIEW TAB

This page provides a current snapshot of all Counselors on the Entity's counselor roster. The diagram provides a quick view of the percentage and count of Counselors identified as certified, in-progress, or Not Eligible. Definitions provided below.



CERTIFIED:

A checkmark in this section indicates the Counselor has completed all required certification processes, training, and background clearance and is approved to participate in the Enrollment Assistance Program.

IN PROGRESS:

A checkmark in this section indicates the Counselor is **not active** or **available** to assist consumers to enroll into a QHP, but is in the process of completing the certification process.

NOT ELIGIBLE:

A checkmark in this section indicates the Counselor was denied by Covered California and is not eligible to participate in the Enrollment Assistance Program. Generated by a Counselor certification status of "Denied".

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PROGRESS TAB

This page is a detailed overview of a Counselor’s certification progress. Each header represents a requirement in the certification process.

Counselor Progress						
★ Completed			☆ Not Completed			
Name	Counselor Agreement	Training	Background Clearance	Badge	Delegation Code	
dfjahdjhfadk	☆	☆	☆	☆	☆	☆
Ha So	☆	☆	☆	☆	☆	☆
Han Solo	☆	☆	☆	☆	☆	☆
Han Solo2	☆	☆	☆	☆	☆	☆
Wedge Antilles	☆	★	☆	☆	☆	☆

COMPLETED: ★

The **solid filled star** icon indicates the respective Counselor has successfully completed this requirement of the certification process. Once all certification requirements are complete, the Counselor can provide enrollment assistance to consumers.

- A solid filled star will continue to appear if a Counselor has ever completed the requirement, even if the Counselor has a status of “Withdrawn”

NOT COMPLETED: ☆

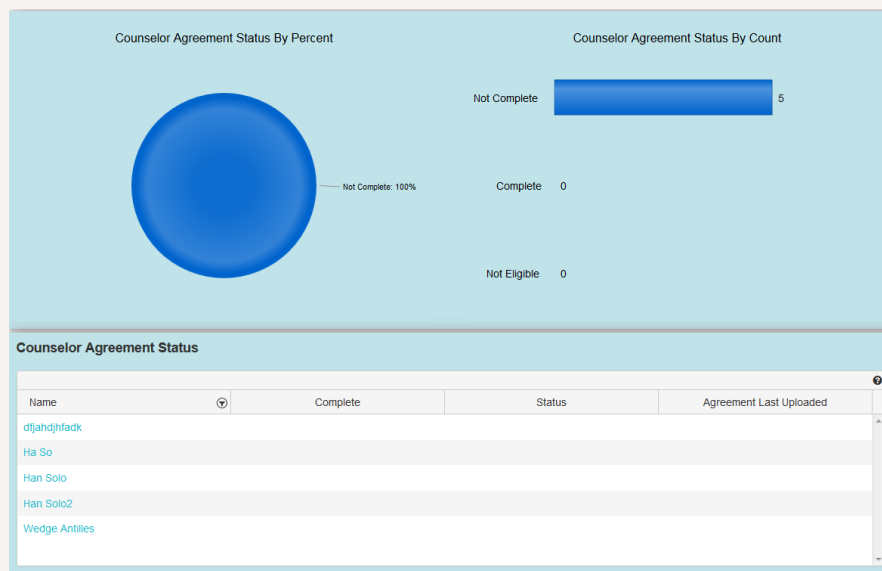
The **out lined star** icon indicates the respective Counselor has not successfully completed the corresponding certification requirement related to the certification process. For a fully certified Counselor who has not completed the recertification training, this star will be outlined and not solid. If training is outlined, but background, badge, delegation code are solid, this is a sure sign the Counselor is certified but did not complete recertification training.

- An out lined star under the Recertified column means the Counselor has not completed recertification or has completed the most current certification training and does not need to complete recertification

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AGREEMENT STATUS TAB

This page depicts an overview of the Counselor Agreement status tied to Counselor profiles. The agreement is reviewed by the authentication team and is determined to be complete or not complete. Covered California determines if the Counselor is ineligible.



COMPLETE:

A checkmark in this section indicates the document was filled out completely and correctly and the agreement was reviewed and accepted by Covered California. Generated by a Counselor certification status of "Counselor ready for training" and will remain "Complete" regardless of any new certification status received thereafter, with the exception of "Denied".

No checkmark in this section indicates that the agreement is under review or that the document was not filled out correctly and additional edits are needed by the Counselor to be deemed complete. Generated by a Counselor certification status of "Incomplete Agreement" or "None". A checkmark will not show in this section until the agreement has been reviewed and approved.

STATUS:

An agreement status will show in this section depicting the most current status of the counselor agreement. The Counselor agreement status will show one of the following:

- Agreement Correction Request Not Returned by Entity
- Agreement Not Returned by Entity
- Not Applicable
- Reviewed and Approved
- Submitted by Entity for RHA Review

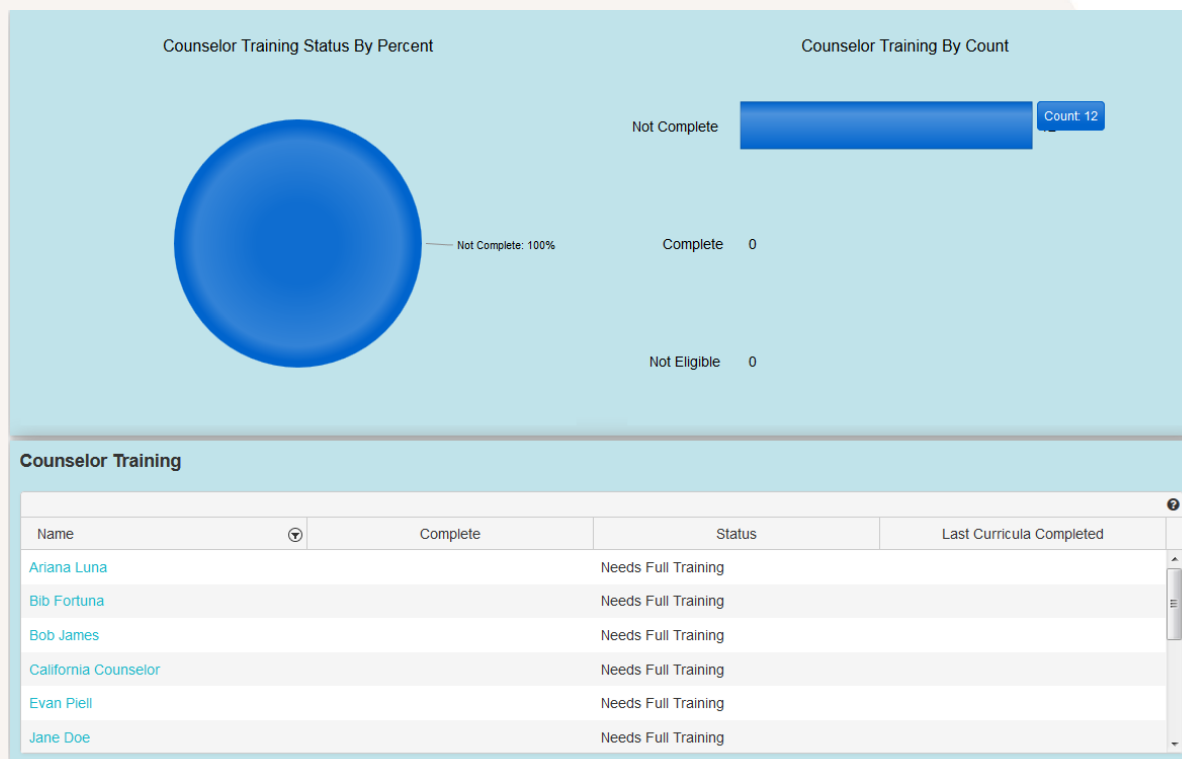
AGREEMENT LAST UPDATED:

This section displays the last date the counselor agreement was last uploaded by the entity.

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TRAINING TAB

This page depicts the training certification status of the Counselor, currently related to both the applicable training modules and exam in the Learning Management System (LMS). These screens represent the status of the counselor's Certification Training.



COMPLETE:

A checkmark in this section indicates Counselor has completed all training modules and passed the exam assigned to the individual's profile in LMS and their certification training is Up-to-date.

No checkmark in this section indicates Counselor has not completed all the training modules or has not passed the exam assigned to the individual's profile in LMS.

STATUS:

The counselor's training status will be displayed in this section. The Counselor training status will show one of the following:

- Needs Full Training
- Needs Recertification
- Training Up-To-Date

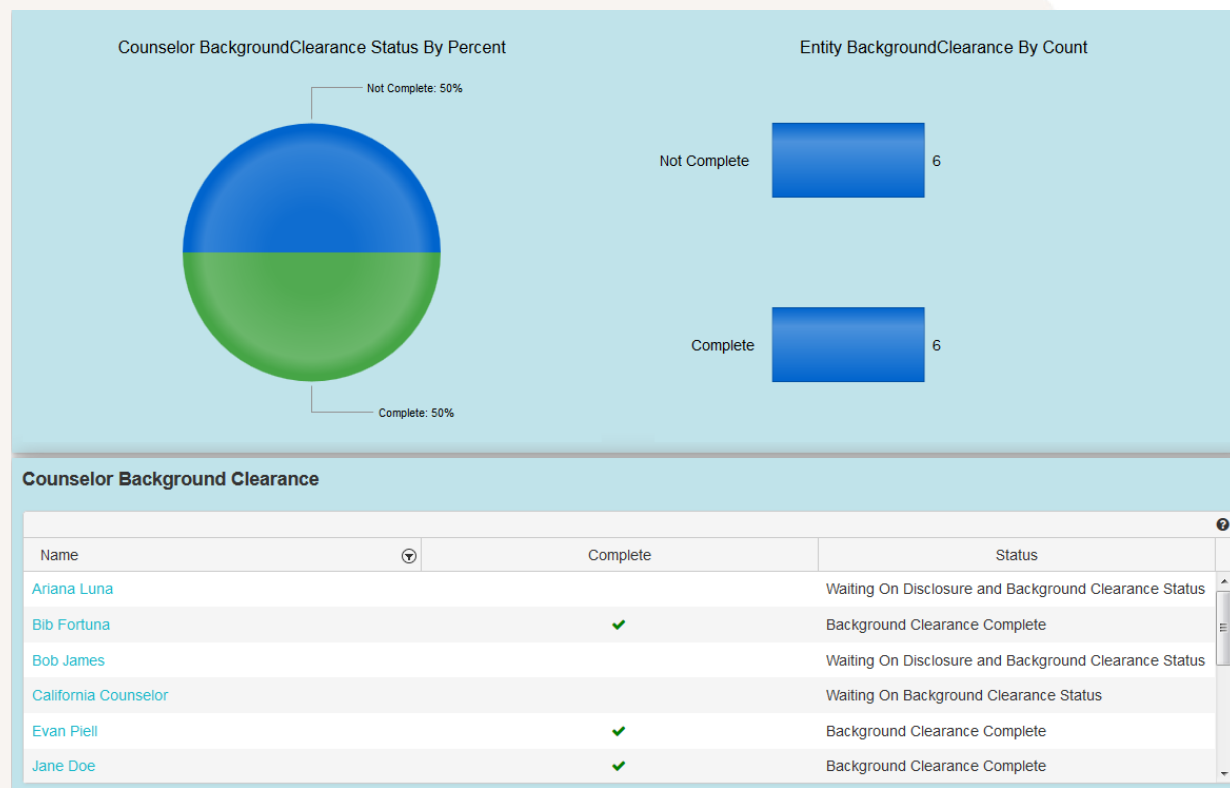
LAST CURRICULA COMPLETED:

This section displays training completion by the counselor such as 2014-2015.

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BACKGROUND CLEARANCE TAB

This page depicts the clearance status of the Counselor's background check.



COMPLETE:

A checkmark in this section indicates that the Counselor's background check was cleared.

- A checkmark will continue to appear in this section if a Counselor has ever completed this requirement, regardless of any new certification status received thereafter, with the exception of "Denied"

No checkmark in this section indicates: 1) the Counselor's background check is in process, or 2) the Counselor's background check was not cleared.

STATUS:

This section will show what is still outstanding if anything for the Background Clearance to be complete.

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NAME BADGE TAB

This page depicts the processing status of the Counselor’s name badge, which is generated after the Counselor completes all certification requirements and is marked as “Certified” in IPAS.

- Once marked as “Certified” in IPAS, it takes 7-10 business days for the Counselor to receive his/her name badge

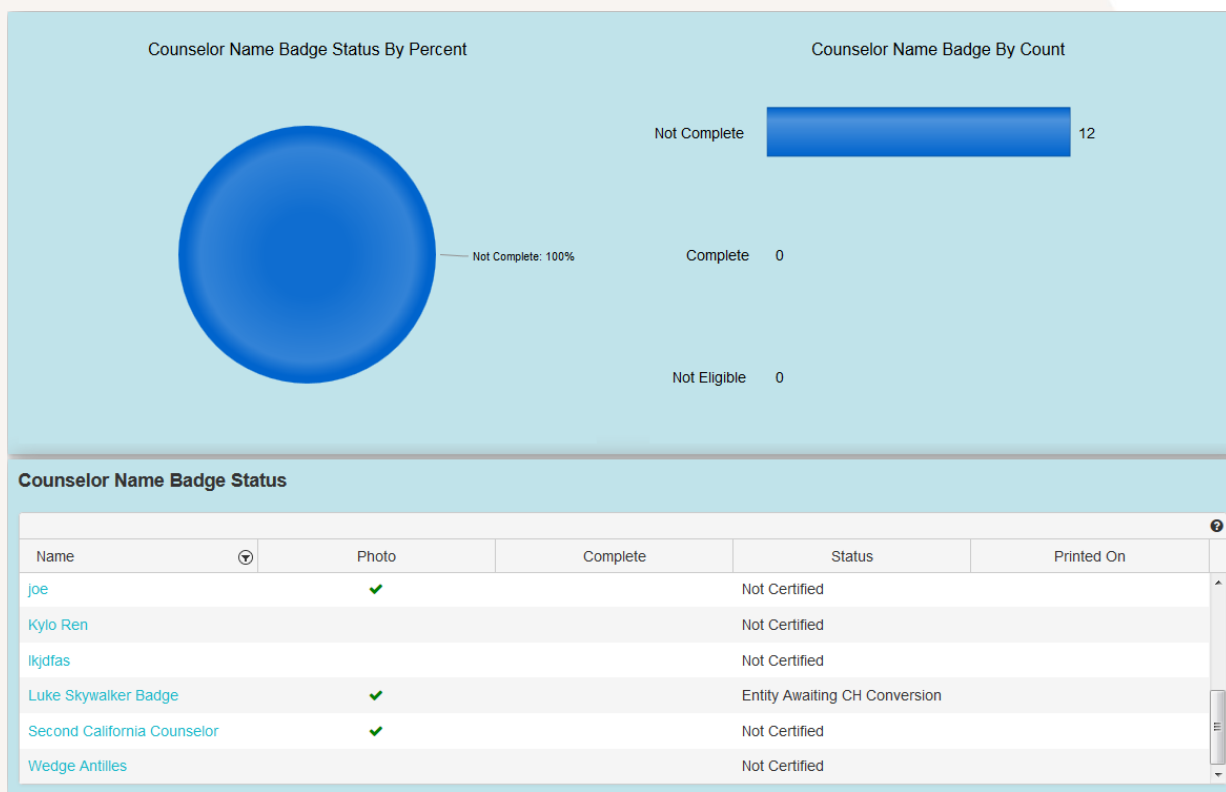


PHOTO:

A checkmark in this section indicates the Counselor’s photo has been uploaded into IPAS. This checkmark does not indicate that the photo has been approved, simply that it has been uploaded.

COMPLETE:

A checkmark in this section indicates the Counselor’s photo has been approved and his/her name badge has been printed and mailed out.

- A checkmark will continue to appear in this section if a Counselor has ever completed this requirement, regardless of any new certification status received thereafter, with the exception of “Denied”

No check in this section indicates the Counselor’s badge has not been reviewed and approved for printing and has not been mailed out.

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STATUS:

The Status section depicts the standing of the Name Badge and will display one of the following:

- Awaiting Print
- Badge Printed
- Entity Awaiting CalHEERS(CH) Conversion
- Not Certified
- Reprint Request Pending

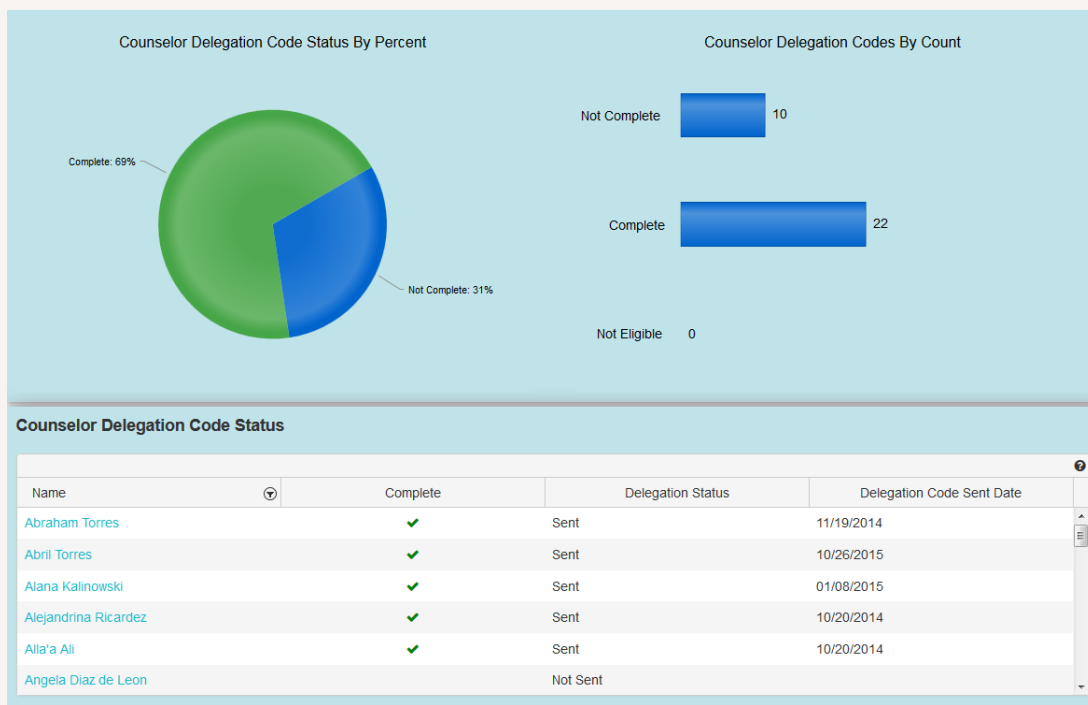
PRINTED ON:

A date in this section depicts the day the badge was printed. If no date is displayed then the badge has not been printed and mailed to the counselor.

DELEGATION CODE TAB

This page depicts the status of the Counselor's delegation code.

- Delegation codes are delivered to Counselors once they have completed all certification requirements and are marked as "Certified" in IPAS
- Once marked as "Certified" in IPAS, it takes 7-10 business days for a Counselor to receive the delegation code
- A Counselor must receive a delegation code to create a user account in CoveredCA.com



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COMPLETE:

A checkmark in this section indicates the Counselor completed all certification requirements and that a delegation code has been sent to the Counselor via e-mail.

- A checkmark will continue to appear in this section if a Counselor has ever completed this requirement, regardless of any new certification status received thereafter, with the exception of “Denied”

DELEGATION STATUS:

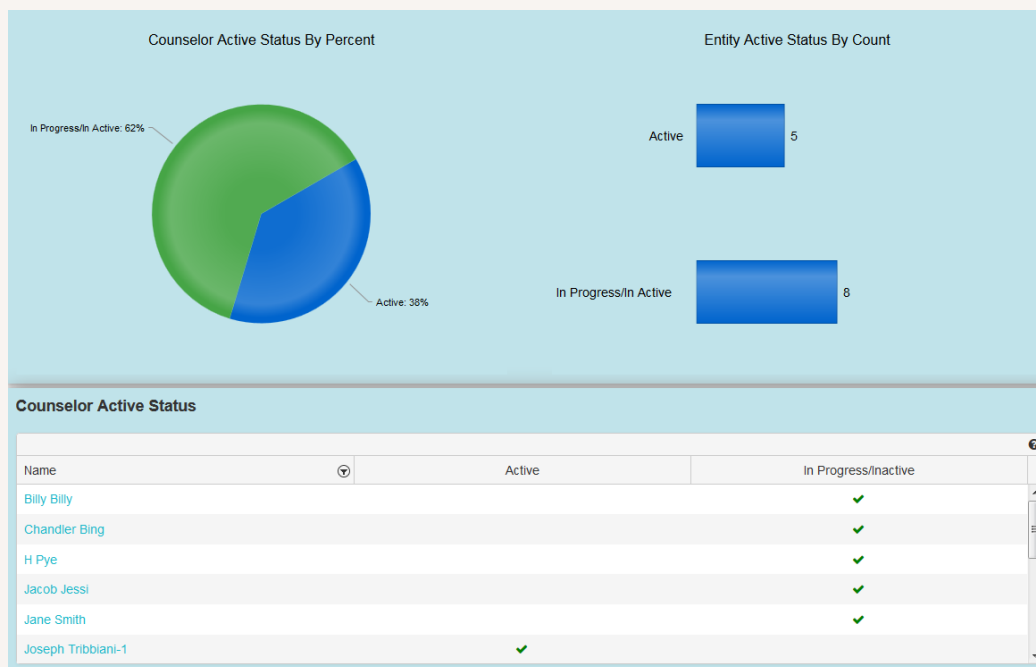
The Delegation Status section depicts if the delegation code was sent to the counselor.

DELEGATION CODE SENT DATE:

The date the delegation code was sent to the counselor will be displayed in this section.

ACTIVE COUNSELORS TAB

This page depicts the Counselor status in IPAS and CoveredCA.com and indicates whether the Counselor is currently able to assist consumers.



ACTIVE:

A checkmark in this section indicates the Counselor was approved and certified to participate in the Enrollment Assistance Program and is available to assist consumers enroll into a Qualified Health Plan and Medi-Cal.

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IN PROGRESS/INACTIVE:

A checkmark in this section indicates the Counselor is not certified to participate in the Enrollment Assistance Program and is not available to assist consumers.

- The Counselor could still be in the process of becoming certified or could have been deemed ineligible to participate in the program