How to Certify with OneCare

Log into the Enthrive Portal

Welcome to CalOntima Health's Agent	Agent Portal
Portal!	User ID Enter Your User ID
Our easy-to-use secure site gives you the tools and access needed to manage your clients anytime.	Password
Features • Check the eligibility of the client • View your client's application status through to completion • View your book of business • View your commission statements • Communicate with us through secure messaging • Control website access for your office and more 1 • View and track a prospect lead through completion	Login Forgot Password? Need help logging in ? Please contact Broker Support at AgentSupportOC Sales@caloptima.org or \$57:400-1222 D

1. Click on Application and click the down tab and select certification.

			Welco	ome to CalOptima Health		-			
Agent Portal		=						Applications -	l ly Account ▼ Search Q
# Home	۲.	Applications Dash	hboard					Applications	🚯 Home > Dashboard
E-SOA	۲	A	0	1.	0	•		\$ Commissions	0
View Application	۲		Total App Entered	••••	No. of Duplicate App		No. of App	Configuration	No. of INCOMPLETE App
 Add Application 	۲	•.	3	1.	0	A		Certification	0
Book of Business	۲	<u></u>	Max No. of Apps by an Agent	.111	No. of App entered today		No. or Applenter at		No. of App entered Last Month
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2. Click on Continue to Certification

		Welcome to CalOptima Health's Sales	s Portal			
Agent Portal	=		Certification v	My Account 🗸	Search	Q
	Welcome to the CalOptima Health	Broker Certification				
	First time brokers In the ensuing pages, you will be directed to:	Returnir In the en	ng Brokers nsuing pages, you will be directed to:			
	Confirm your DOI License Nbr and NPN Nbr	• Confirm	n your DOI License Nbr and NPN Nbr			
	Verify your profile	Verify y	your profile			
	 Answer some compliance questions 	Review	v training materials			
	 View and sign a compensation agreement 	• Take a	test			
	 Upload certain required documents 	Update	e your Profile & Provide updated documents			
	 Review training materials 					
	Take a test	Continu	ue to Certification			

3. Review your License Number and NPN# ensuring it is accurate. Click Next.

	Welcome to CalOptima Health's Sales Portal	
Agent Portal ≡	Certification * My Account * S	Search Q
	Please enter DOI and NPN License Number NPN # Selling Market	
	Lookup NPN	
	Next	

4. Enter or update your profile information. Click Next.

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Agent Portal ≡					Certification - My Acco	unt - Search Q
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	Step 1 - Please enter	or confirm your Profile				
	First Name	Middle Initial	Last Name	Email		
	DOB	NPN	DOI	TAX ID		
	Address 1	Address 2	City	State		
	Zip	Phone Number	Contracted Agency	I'm an Independent Agent		
					Previous Next	

5. It will be required to upload individual documents of current E&O, DOI, and AHIP documents. Click Next.

CalOptima Health			Welc	ome to CalOptima	Health's Sales Port	al			
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	Step 2 - Upload Docume	nSteps2pJilipiasdsDatum	entalth Plan						
	Document Uploaded Succes	isfully.							×
	AHIP *			🕹 Choose a	file Upload	-			
	Document Type	Expiry Date	Status	File Name		View	Download	Previous	Next
	Document Type E&O	Expiry Date 08/29/2024	Status Pending	File Name		View	Download Download	Previous	Next
	Document Type E&O DOI	Expiry Date 08/29/2024 08/31/2024	Status Pending Pending	File Name		View View View	Download Download Download	Previous	Next

6. On the Agent/Agency Compensation Page, you must review your personal information, click yes in agreeance, enter I agree in the boxes, click on the Statements of Understanding page and review, click on the required I certify and I hereby acknowledgement statements and enter your signature. Click Next.

	Welcome to CalOptima Health's Sales Portal	
gent Portal ≡		Certification 🗸 My Acco
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	Step 3 - Review and sign Agent/Agency Compensation Agreement between CalOptima Health And	
	Agent Name: Ins Lic #: NPN#:	
	Address:	
	City: State: Zip Code:	
	Phone: Email:	
	Compliance History:	
	Please answer each Question with YES or NO	
	1. I certify that my DOI is valid for California and is valid for enrollment into Medicare. e Please explain in Detail	
	i agree	
	2. I certify that I will maintain my AHIP certification annually.	
	Please explain in Detail I agree	
	3. I certify that my E&O policy is current. Bease explain in Detail	
	I agree	
	4. I certify that I successfully completed the OneCare training and have received my certificate	
	Please explain in Detail	
	5. I certify that I will follow CMS/DHCS marketing guidelines.	
	Please explain in Detail	
	Statements of Understanding	
	I certify that the foregoing answers, including attachments, are TRUE and CORRECT to the best of my knowledge and belief.	
	I hereby acknowledge that I have read through the "Statements of Understanding" attached to the link above and I agree to the statements.	ate:
	Agency: Environmenteann	18/16/2023
	ENTERYOUR	
	SIGNATURE	
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7. Statements of Understanding Page:



8. Click on test year 2024 and plan CalOptima Health OneCare (HMO-DSNP). Click on View Training Content.

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s	tep 4 - Select the Training	you wish to review	<u> </u>					
	Passing this test will qualify you	to sell D-SNP Benefit Package of	r CalOptima Health					
	2024 *	Annual * CalOpti	na Health OneCare (HMO D-SNP)					
	Previous Take T	View Training Content						
	Agent Name	Test Date	Test ID	Total Questions	Total Correct Answers	Total Percentage	Result	
		001-0000-0044-0044	2022 Calorima Haalih OracCara (HMO D SND)	cc.	64	06.07.%	Dees	

9. The training module will appear, and you will be required to complete all 130 slides to take the test. If you time out of the system, you will be required to complete the training from the beginning.



10. Once you have completed the training, you will be required to take the test and pass with a 90%. You can download the Training Material to save the training documents, however once the test has passed you will not be able to go back to the training documents to download. Click on Start Test to begin the test.

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Agent Portal	=		Certification -	My Account - Se	earch	Q

11. You will see the below screen once you have completed the test with a score of 90% or higher.

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Agent Portal	=							Certification -	My Account - Search	Q
	Einal Sten - Your	a Test Results								
Final Step - Your Test Results										
								Retake Test		

12. CalOptima Health Sales Support team will review the agent's documents and test score and approve the agent to sell. Once approved, **the agent will receive an email confirming certification approval**.