



## EZ Enroll On-Boarding and Certification

Before you can access our online broker portal (EZ Enroll), your account must first be validated. If you are not sure if your account has been validated, please contact our Broker Support team.

### Step 1: Initial Login

- Open your internet browser and go to <https://ezenroll.clevercarehealthplan.com>
- Your User ID is the email address provided during account validation
- Your temporary password id Password123! (You will be prompted to create a new password on first log-in)
- Click the **"Continue to Certification"** button
- You will be guided through a series of questions to complete your account profile.

### Step 2: Upload Documents

As part of the on-boarding process, you will be asked to upload the following documents:

- AHIP2022 Certification, Errors & Omissions Policy, California DOI License
- Signed Agreement (Producer Agreement, Business Associate Agreement, W9, Clever Care Code of Conduct)

### Step 3: Take Exam

- **You must get a score of 85% or more to pass**
- You are allowed 5 attempts to pass the exam

**Note: Once you have successfully completed/passed ALL certification requirements, you will receive a ready-to-sell email indicating you can market/sell Clever Care Medicare Advantage Plans.**

If you are affiliated with an agency, you are responsible for providing evidence of contract to your agency's contracting department.

If you have any questions, please email Broker Support Team at [broker@cmapd.com](mailto:broker@cmapd.com) or call us at 714-650- 8688.