

How to Certify with OneCare

Log into the Enthrive Portal

Welcome Brokers

Our easy-to-use secure site gives you the tools and access needed to manage your clients anytime.

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 !
- View and track a prospect lead through completion

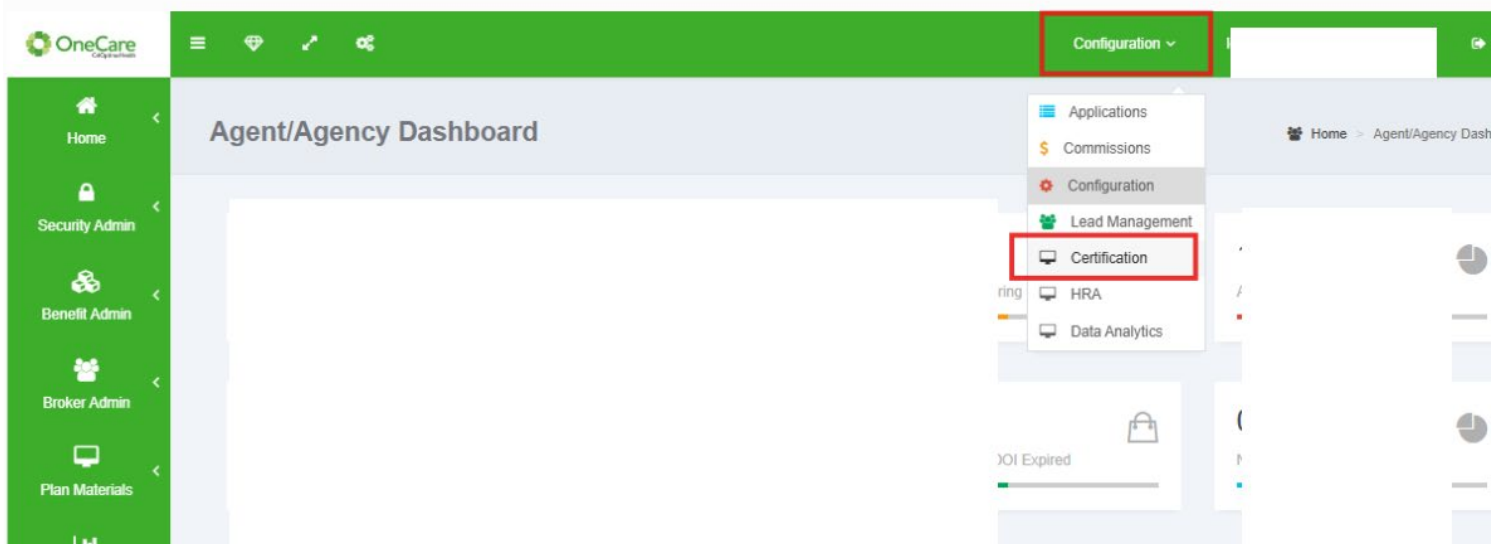
Want to get Contract? Call Us



Login

Login [Forgot password?](#)

1. Click on the Configuration tab, click the drop-down tab, and select certification.



2. Click on Continue to Certification

OneCare
CalOptima Health

Welcome to CalOptima Health's Sales Portal

Agent Portal

Certification My Account Search...

Welcome to the CalOptima Health Broker Certification

First time brokers
In the ensuing pages, you will be directed to:

- Confirm your DOI License Nbr and NPN Nbr
- Verify your profile
- Answer some compliance questions
- View and sign a compensation agreement
- Upload certain required documents
- Review training materials
- Take a test

Returning Brokers
In the ensuing pages, you will be directed to:

- Confirm your DOI License Nbr and NPN Nbr
- Verify your profile
- Review training materials
- Take a test
- Update your Profile & Provide updated documents

Continue to Certification

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

OneCare
CalOptima Health

Welcome to CalOptima Health's Sales Portal

Agent Portal

Certification My Account Search...

Please enter DOI and NPN

License Number NPN # Selling Market

California

Lookup NPN

Next

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

OneCare
CalOptima Health

Welcome to CalOptima Health's Sales Portal

Agent Portal

Certification My Account Search...

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

CA

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.
- Select document type, then enter expiration date, then select file and click upload.
 - One call documents are uploaded, Click Next.

Welcome to CalOptima Health's Sales Portal

Agent Portal
Certification
My Account

Step 2 - Upload Documents

Document Uploaded Successfully

Please upload the following documents. Please Note the following.

- Document Size cannot be greater than 5 MB
- Only documents of type JPG, JPEG, PNG, PDF, XLS, XLSX, DOC, DOCX and TIFF are accepted

Document Type

AHIP

Expiration Date

Document Location

Choose a file...

Upload

Previous

Next

Document Type	Expiry Date	Status	File Name	View	Download	
E&O	08/29/2024	Pending		View	Download	
DOI	08/31/2024	Pending		View	Download	
AHIP	08/31/2024	Pending		View	Download	

- 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.



Step 3 - Review and sign Agent/Agency Compensation Agreement between CalOptima Health

And

Agent Name:	Ins Lic #:	NPN#:
Address:		
City:	State:	Zip Code:
CA		
Phone:	Email:	

Compliance History:

Please answer each Question with YES or NO

	Yes	No
1. I certify that my DOI is valid for California and is valid for enrollment into Medicare. 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. Please explain in Detail I agree	☒	☐
4. I certify that I successfully completed the OneCare training and have received my certificate Please explain in Detail I agree	☒	☐
5. I certify that I will follow CMS/DHCS marketing guidelines. Please explain in Detail I agree	☒	☐

[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.

Agency: ENR CalOptima Health

Date:
08/16/2023

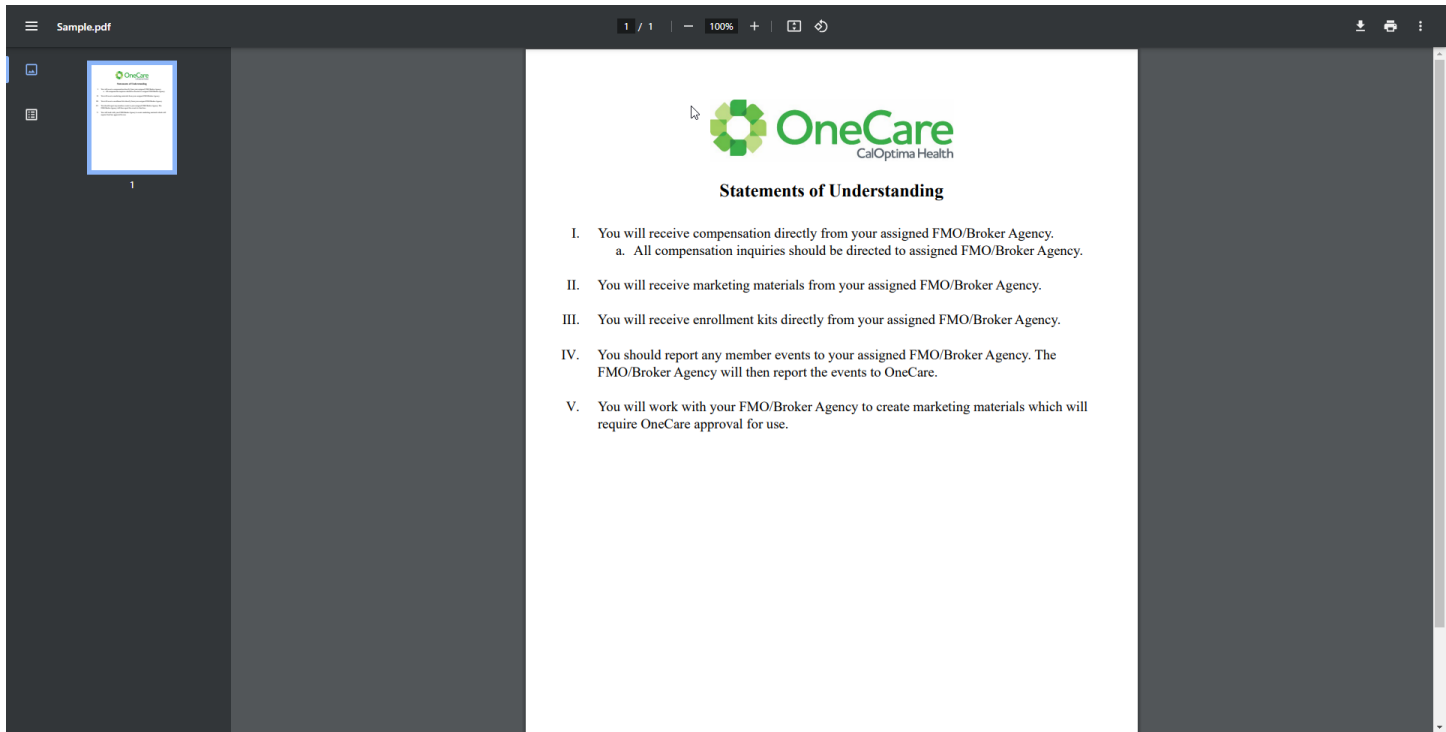
Agent Signature

ENTER YOUR SIGNATURE

[Clear Signature](#)

[Previous](#) [Next](#)

7. Statements of Understanding Page:



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

Agent Portal

1 2 3 4 5 6

Step 4 - Select the Training you wish to review

Passing this test will qualify you to sell D-SNP Benefit Package of CalOptima Health

Year: 2024 Test Type: Annual Plan: CalOptima Health OneCare (HMO D-SNP)

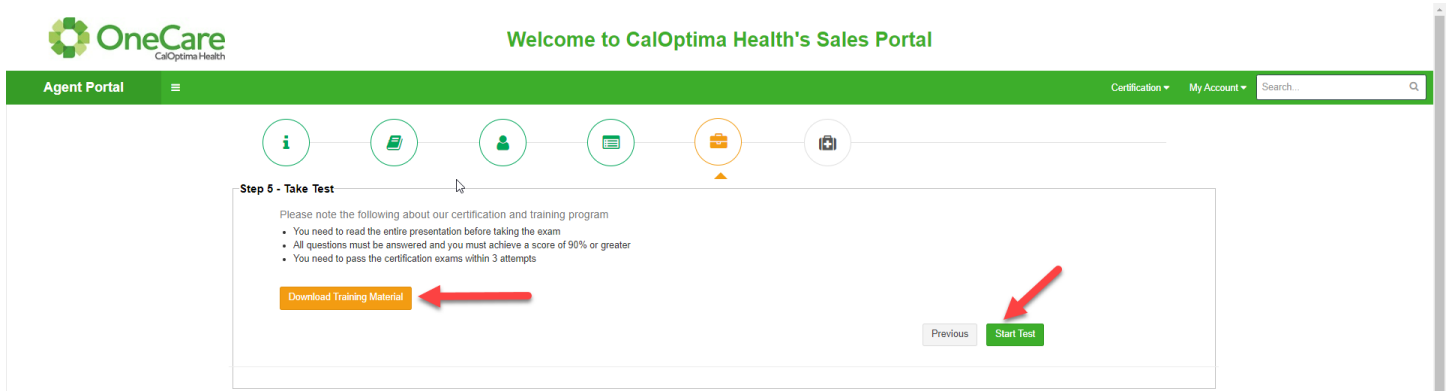
Previous Take Test **View Training Content**

Agent Name	Test Date	Test ID	Total Questions	Total Correct Answers	Total Percentage	Result
	06 Jun 2023, 10:44:58 AM	2023 - CalOptima Health OneCare (HMO D-SNP)	66	64	96.97 %	Pass

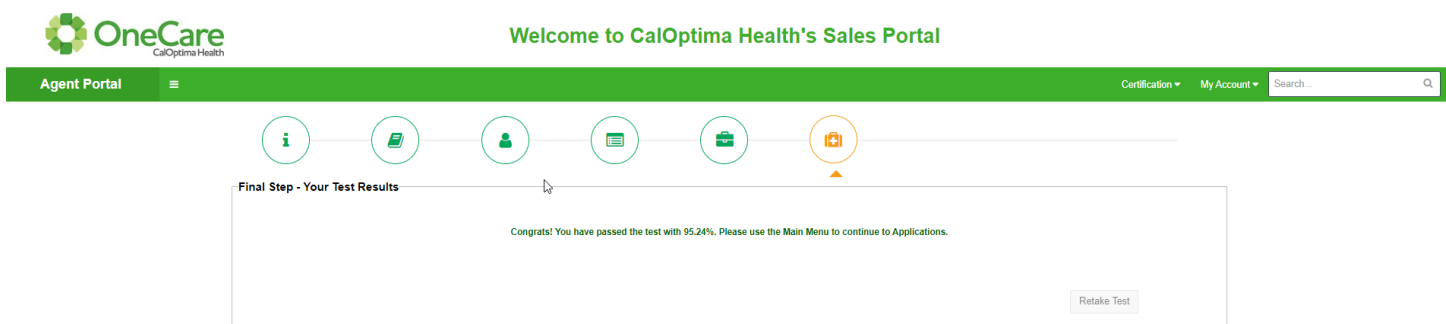
9. The training module will appear, and you will be required to complete all slides to take the test. If you log out of the system, you will be required to complete the training from the beginning.
- The system does not allow you to stop and save your place in the presentation.



10. Once you have completed the training, you will be required to take the test and pass with a 85%. 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.



11. You will see the below screen once you have completed the test with a score of 85% or higher.



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.**