



Add New Agent for Admin Staff II Quick Guide

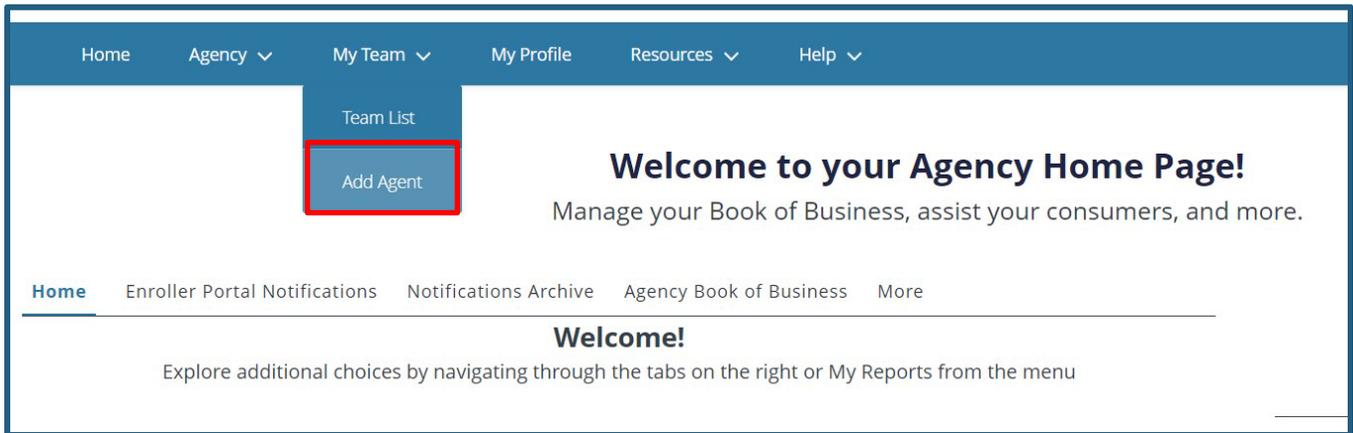
Overview

This Quick Guide for Approved Admin Staff 2 covers the process of adding new Agents to their Agency.

Steps

Agent Profile Creation in Portal

1. Log into the Enroller Portal and select **Add Agent** from the dropdown options under *My Team*.



2. Enter the information for the new Agent located on the Add Agent Information page.

Note: Approved Admin Staff cannot edit the Legal Business Name or the Federal Tax ID (Tax ID) for the Agency. If there is an issue/error, please contact AgentContracts@covered.ca.gov for additional assistance.

- Information icons indicate helpful hover text.
- Red asterisks indicate an answer is required.

3. Complete the *Business Mailing Address* section with the new Agent's information, then select **Next**.



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- If the new Agent shares the same address as the Agency Manager then select the box for **Business Mailing Address is same as Location Address**.

Business Mailing Address

Business Mailing Address is same as Location Address

* Address Line 1

Address Line 2

* City

* State

CA

* ZIP Code

4. Complete the *Public Profile Information* section with the information that will display on the *Find Local Help* page for the new Agent, then select **Next**.

Public Profile Information

The information you provide in this section helps consumers learn more about you when they seek enrollment support on Covered California's "Find Local Help" website pages. Please be thorough in your responses.

Clients Served (Select all that apply)

Individuals / Families
 Employers

Languages (Ctrl+Click or Command+Click on Mac, to select multiple languages)

English
Spanish
African
Amharic
Arabic

Product Expertise (Select all that apply)

Health
 Dental
 Vision
 Life
 Medicare
 Workers Compensation
 Property/Casualty
 Medi-Cal

Public Email

Website Address

About Yourself

Next

5. On the *Review Application Form* page, you can navigate back to the *Add Agent Information* page to make any adjustments by selecting the **Review Agent Application** button. Select **Save and Next** to upload a photo of the new Agent and other documents.

Review Agent Application Form

To review your application before moving forward, click **Review Agent Application**.

If you are ready to move forward to upload your Public Photo and other documentation, please click **Save and Next**.

Review Agent Application **Save and Next**



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- On the **Public Photo and Documentation Upload** page, you are able to upload several types of documents. Select **None** if no documents are available to load

Public Photo and Documentation Upload

Accepted Formats: .JPG, .JPEG, .GIF, .PNG, .BMP, .PDF. Maximum File Size: 5 MB per file

* Document Category

None

You must select the document type for each file uploaded. If you have no files to upload, please select "None."

Next

- Documents may be formatted as JPG, JPEG, PNG, BMP, PDF with a maximum file size of 5 MB per file. Select the Document Category for the file being uploaded.

Public Photo and Documentation Upload

Accepted Formats: .JPG, .JPEG, .GIF, .PNG, .BMP, .PDF. Maximum File Size: 5 MB per file

* Document Category

None

Agreement

Proof of General Liability Insurance

LiveScan

Enroller Photo

Proof of Eligibility (Tax ID on institutional letterhead)

Proof of Valid Business License

Conflict of Interest Prevention Plan

- Select **Next** to advance to the *Application Submitted* page that displays: *You have successfully submitted the application after uploading documents.*

Application Submitted

You have successfully submitted the application to add Test First Name Test Last Name in the role of Agent. The application is being reviewed.

Test First Name Test Last Name will receive two emails with an access code and URL at Testtest@notreal.com. The emails will contain information on how to view and edit their personal details.

Finish

- Select **Finish** to return to the portal home page.
 - The new Agent will now show on the Agency Manager's list of Pending Staff Applications in the portal with Certification/Approval Status of Pending.
 - Note:** The Approved Admin Staff is responsible for advising the new Agent that they are required to take Covered California's Agent certification training. Covered California will email the new Agent with the Certification training within 3-5 business days.
 - Note:** The Agent will receive two emails from Covered California with an access code and URL with information on how to create their CalHEERS account upon completion of certification.