



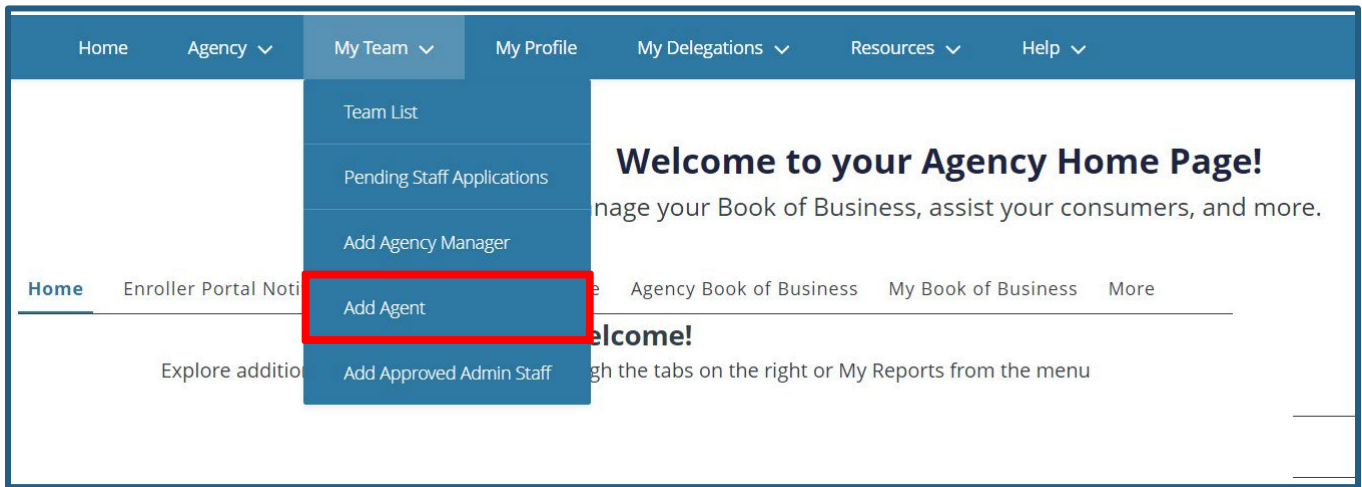
Add New Agent for Agency Managers I and II Quick Guide

Overview

This Quick Guide for Agency Managers I and II covers the process of adding new Agents to their Agency.

Agent Profile Creation in Portal

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



2. On the **Add Agent Information** page, enter the information for the new agent.

The 'Add Agent Information' form contains the following fields and options:

- * Agent Level (dropdown menu, currently set to --None--)
- * First Name (text input)
- * Last Name (text input)
- Legal Business Name (text input, value: AgencyAKK INC)
- FEIN/SSN (text input, value: 569091201)
- * Phone (text input)
- Alternate Phone (text input)
- * Enroller License Number (text input)
- * Enroller License Expiration Date (calendar icon)
- * Individual Email (text input)
- * Confirm Individual Email (text input)
- * Preferred Method of Communication (dropdown menu, currently set to --None--)
- * Select Primary Enroller Location (dropdown menu, currently set to --None--)
- Show Primary Enroller Location Address in Find Local Help
- Select Other Sites Served (Ctrl+Click or Command+Click on Mac, to select multiple sites)

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

The gray information icons indicate helpful hover text.

The red asterisks indicate an answer is required.



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3. Complete the **Business Mailing Address** section for the new Agent, then select **Next**. If the new Agent shares the same address as the Agency Manager, then select the box for **Business Mailing Address is the 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

Website Address [?]

About Yourself [?]

Product Expertise (Select all that apply) [?]

Health

Dental

Vision

Life

Medicare

Workers Compensation

Property/Casualty

Medi-Cal

Public Email [?]

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.

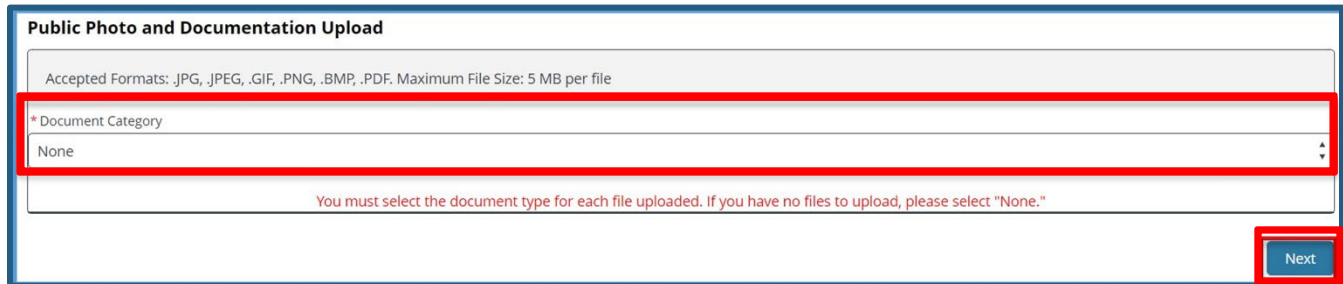
Review Agent Application Form

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**

- The **Public Photo and Documentation Upload** page allows the upload of several types of documents. Select **None** if the no documents are available to load.



Public Photo and Documentation Upload

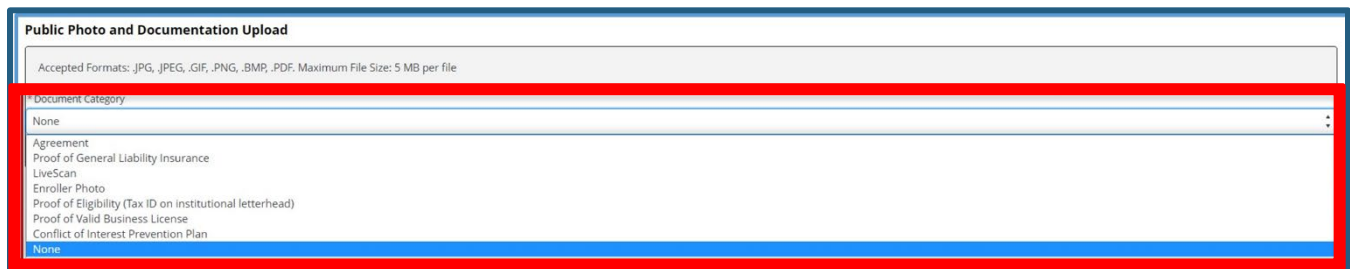
Accepted Formats: .JPG, .JPEG, .GIF, .PNG, .BMP, .PDF. Maximum File Size: 5 MB per file

* 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.



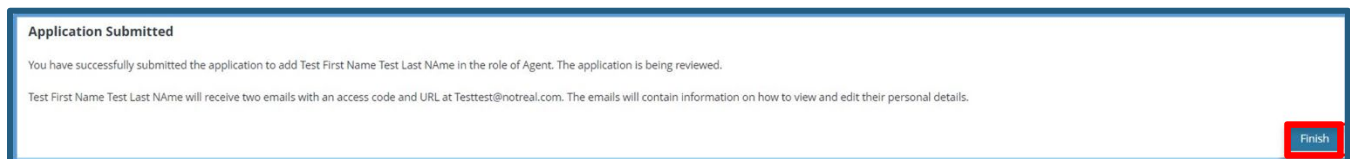
Public Photo and Documentation Upload

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
- None

- After uploading documents, select **Next** to advance to the **Application Submitted** page that displays: *You have successfully submitted the application.* Select **Finish** to return to the portal home page.



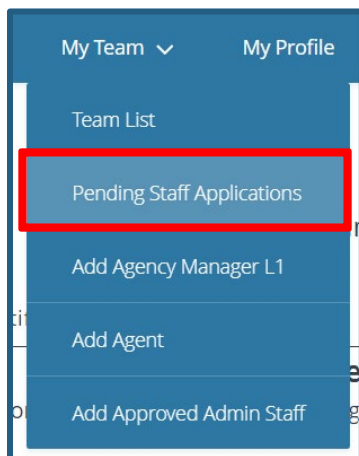
Application Submitted

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

- The Agent will now appear on the **Pending Staff Applications** section from the **My Team** dropdown with Certification/Approval Status of Pending.



My Team ▾ My Profile

- Team List
- Pending Staff Applications
- Add Agency Manager L1
- Add Agent
- Add Approved Admin Staff



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Note: The Agency Manager 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: Once the new Agent completes the entire onboarding process, Covered California updates their Certification/Approval Status to "Approved." Then Covered California sends two emails to the new Agent with an access code and URL along with instructions on creating an account in CalHEERS.