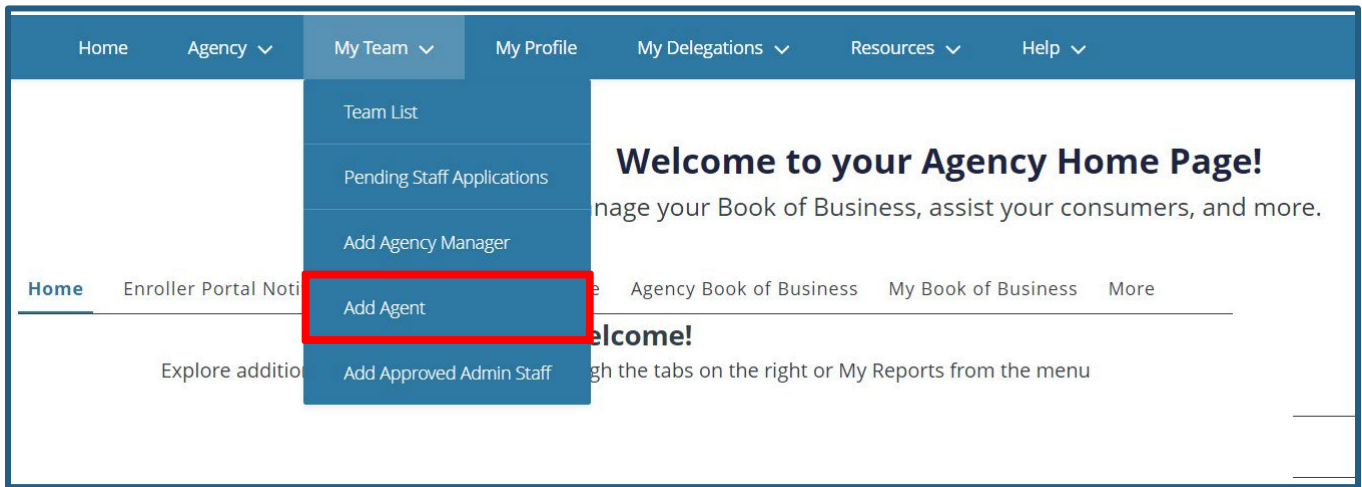# Add New Agent for Agency Managers I and II Quick Guide

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.

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.

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 ad Location Address**.

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**.

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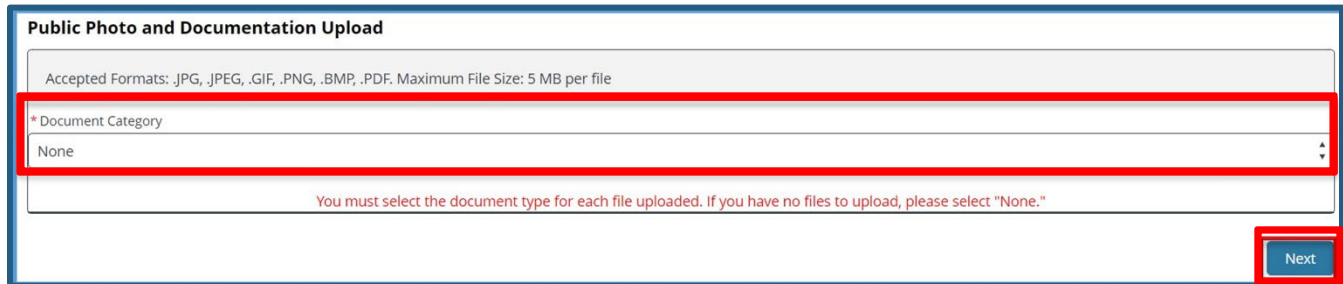
6. The **Public Photo and Documentation Upload** page allows the upload of several types of documents. Select **None** if the no documents are available to load.

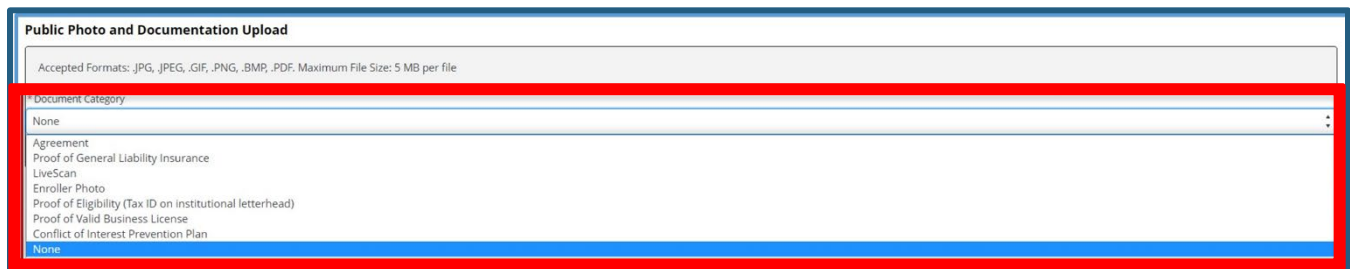**Public Photo and Documentation Upload**

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.
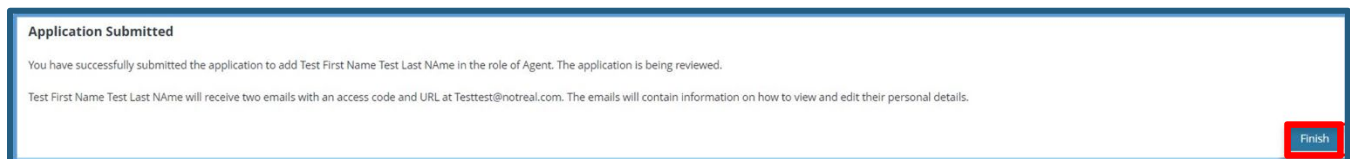
Public Photo and Documentation Upload

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

7. 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.
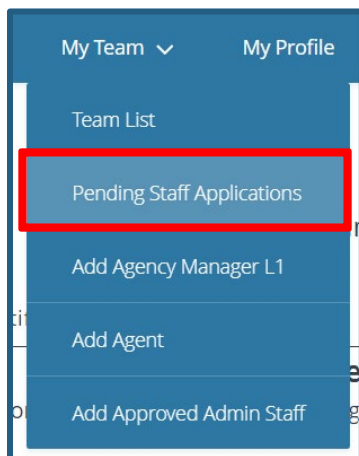
Application Submitted

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

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.