



2018 Agency Manager Toolkit Certified Enrollers

Overview

Agency Managers act in an administrative and operational role for an agency and must be a certified and licensed insurance agent. This Tool Kit is a “one-stop shop” for Covered California’s Agency Managers to review resources to assist in navigating the Agency Portal.

Resources include information to assist Agency Managers with viewing and exporting a Book of Business, transferring delegated consumers within the agency, adding new agents and admin staff to the agency, and much more.

Check back frequently for updates.

Agency Support

Resource	Type	Description	Date Updated
Agency Manager Portal Walkthrough	Video	Walkthrough of the Agency Manager Portal.	02/1/2018
Agency Portal	Quick Guide	Agency Portal navigation overview.	07/31/2017
Add a New Agent to an Agency	Job Aid	Instructions for Agency Managers to add new Agents in their Agency Portal.	07/28/2017
Edit Agent Within Agency	Job Aid	Instructions for Agency Managers to edit profile information for Agents within their Agency.	02/07/2018
Acting on Behalf of an Agent within the Agency	Job Aid	Instructions for Agency Managers to assist any consumers delegated to an Agent within the Agency.	02/07/2018

Book of Business

Resource	Type	Description	Date Updated
Transferring Consumers Within an Agency	Job Aid	Instructions to transfer consumer delegations between Agents within the Agency.	02/07/2018
Book of Business Export	Job Aid	Instructions for Agency Managers to access an aggregate Agency Book of Business (BOB) or a BOB for any Agent within the Agency.	05/04/2018
Book of Business Export Individual Agency Within an Agency	Job Aid	Instructions for Individual Agents within an Agency to extract their Book of Business from their CalHEERS portal.	05/04/2018

Approved Admin Staff

Resource	Type	Description	Date Updated
Approved Admin Staff Portal	Quick Guide	Information for Agency Managers on the Admin Staff Role in the Agency Portal.	10/10/2018
Add a New Admin Staff to an Agency	Video	Walkthrough of adding a new Admin Staff to the Agency Portal.	7/23/2018
Add a New Admin Staff to an Agency	Job Aid	Instructions for an Agency Manger to add an Admin Staff to the Agency Portal.	07/23/2018

For resources to support Admin Staff after they are approved by Covered California, review the [Approved Admin Staff Tool Kit found here](#) >>