

Overview

Agency Managers act in an administrative and operational role for an agency and must be a certified and licensed insurance agent. This Toolkit is for Covered California's Agency Managers to review resources to assist in navigating the Agency Portal.

Resources include information to assist Agency Managers Level I and II, Authorized Signers, Agents Level I and II, and Approved Admin Staff (based on user role permissions) 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
Agency and Agent Portal	Task Guide	Introduces Agency Managers, Agents, Authorized Signers, and Approved Admin Staff to the information and tasks they have access to through the Agency Portal.
Agency Manager Portal Walkthrough	Video	Demonstration of the Enroller Portal for Agency Roles.
Agency Manager Portal	Quick Guide	Information for Agency Managers on the Admin Staff Role in the Agency Portal.
Add a New Agent to an Agency	Job Aid	Instructions for Agency Managers to add new Agents in their Agency Portal.
Agency Certification Onboarding	Quick Guide	Onboarding instructions for Sole Proprietors, Corporations, and Partnerships that want to become Certified Insurance Agents with Covered California.
Downline Agent Onboarding	Quick Guide	Instructions for Agency Managers and Authorized Signers to complete the process of adding a downline Agent to their Agency and outlines the steps that the Downline Agent must take to become Certified.
Edit Agent Within Agency	Job Aid	Instructions for Agency Managers to edit profile information for Agents within their Agency.

Resource	Type	Description
Add a New Admin Staff to an Agency	Job Aid	Instructions for an Agency Manager to add an Admin Staff to the Agency Portal.
Acting on Behalf of an Agent within the Agency	Job Aid	Instructions for Agency Managers and Admin Staff to assist any consumers delegated to an Agent within the Agency.
Health Care Sharing Ministries Policy and Procedures	Policy	Outline of general policies, definitions of roles, and responsibilities of Covered California and Certified Insurance Agents.
Health Care Sharing Ministry Consumer Acknowledgement and Full Disclosure Form	Form	Consumer Informed Consent and Acknowledgement form; side-by-side chart comparing Covered California Marketplace Plans and Health Care Sharing Ministries.

Book of Business

Resource	Type	Description
Transferring Consumers Within an Agency	Job Aid	Instructions to transfer consumer delegations between Agents within the Agency.
Book of Business Export	Job Aid	Instructions for Agency users to access an aggregate Agency Book of Business (BOB) or a BOB for any Agent within the Agency.

Approved Admin Staff

Resource	Type	Description
Approved Admin Staff Portal	Quick Guide	Information for Agency Managers on the Admin Staff Role in the Agency Portal.
Add New Agent for Admin Staff	Quick Guide	Guide for Approved Admin Staff 2 to add new Agents to their Agency.