Agency and Agent Portal Task Guide

This 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.

The Agency Portal assists various Agency personnel in completing Agency- and consumer-related tasks. It also combines and displays an Agency's entire Agent's Book of Business in a manageable format.

Important: Depending on their role, an Agency staff members' access to information on the portal is different. This document is divided into role-specific sections. Each section provides portal access information for a specific role.

Reminder: The Agency Portal accounts contain secure business information that should not be accessed by anyone other than the authorized user.

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Agency Manager Level 2 (AM2) Portal Access

Agency Manager Level 2 (AM2) acts on behalf of the Agency, executes the Agency Agreement (Monetary), and performs other duties related to this Agreement as needed.

An AM2:

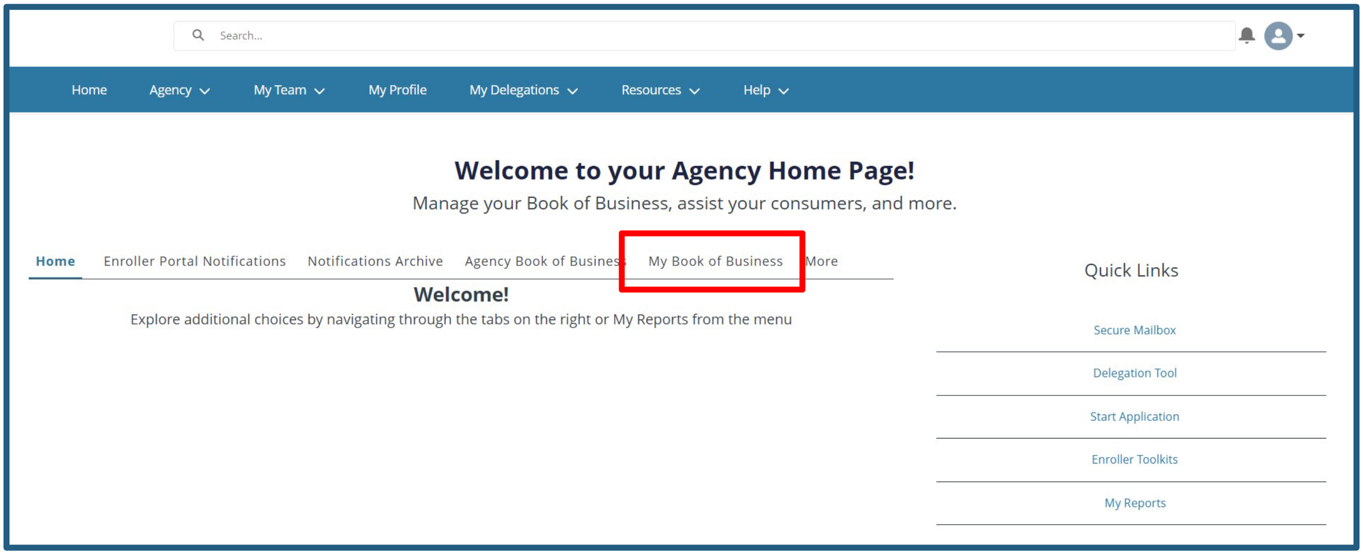
- Completes and submits the Book of Business Transfer form requests for transfers outside of the Agency.
- Is the designated representative to whom all communications may be addressed and who has the authority to act on matters related to this Agreement.
- Is the primary contact person for issues pertaining to this Agreement.
- Is licensed and in good standing under Insurance Code Section 1626 by the California Department of Insurance to transact in Accident and Health or Sickness insurance.

Note: The Agency Manager acts in an administrative and operational role for the Agency, and therefore must have access to the Agency Portal. (An Agency Manager must be a certified and licensed insurance Agent.)

Home Page

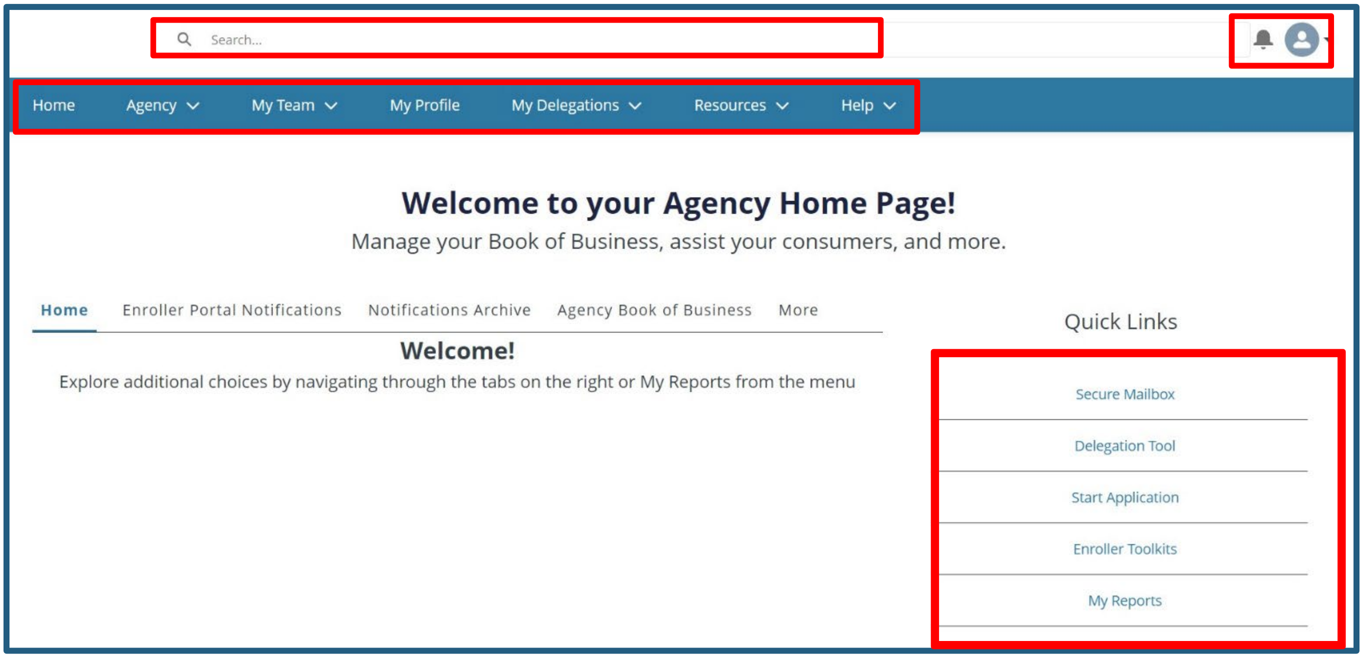
Login to your Enroller Portal to view the Agency portal Home page.

The Home tab is displayed by default. You can access your Book of Business from the *My Book of Business* tab.



All names in the book of business are hyperlinks that will open the consumers contact. From the consumer's contact, you will have access to the link to their application, allowing you to take any action needed on their case or enrollment.

The following areas on the Home page provide information and access to task completion:



- Use the Search bar on top of the page can be used to find consumers within the Agency or the Book of Business.
- Click the bell icon in the top-right corner to read Notifications.
- The profile icon in the top-right corner enables you to view and edit your security profile, change your password, and log out of the Enroller Portal.
- The tabs available on the dashboard are:
    - **Home**: for the Home page
    - **Agency**: to view Agency and delegation details, and view and edit Subsite locations
    - **My Team**: to view the team list, and complete agent- and staff- related tasks
    - **My Profile**: to view your Agent profile
    - **My Delegations**: to view delegation records and history, to complete delegation tasks
    - **Resources**: to access Enroller Toolkits and Reports
    - **Help**: to submit a help request and view open and closed cases

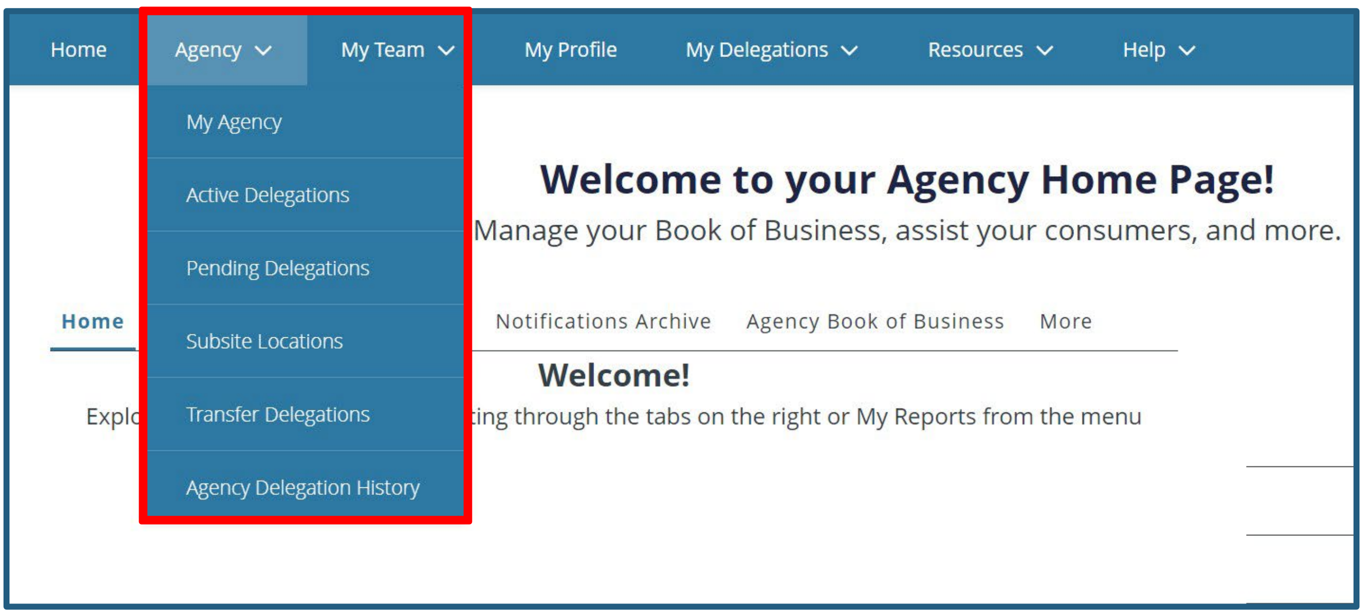
Note: Tabs will vary based on user role.

- The Quick Links on the right side of the Home page are for quick access to the following:
  - *Secure Mailbox*
  - *Delegation tool*
  - *Start Application*
  - *Enroller Toolkits*
  - *My Reports*

Note: Quick Links displayed will vary based on user role.

Agency

The *Agency* tab lists links that will assist in completing various Agency-related tasks.

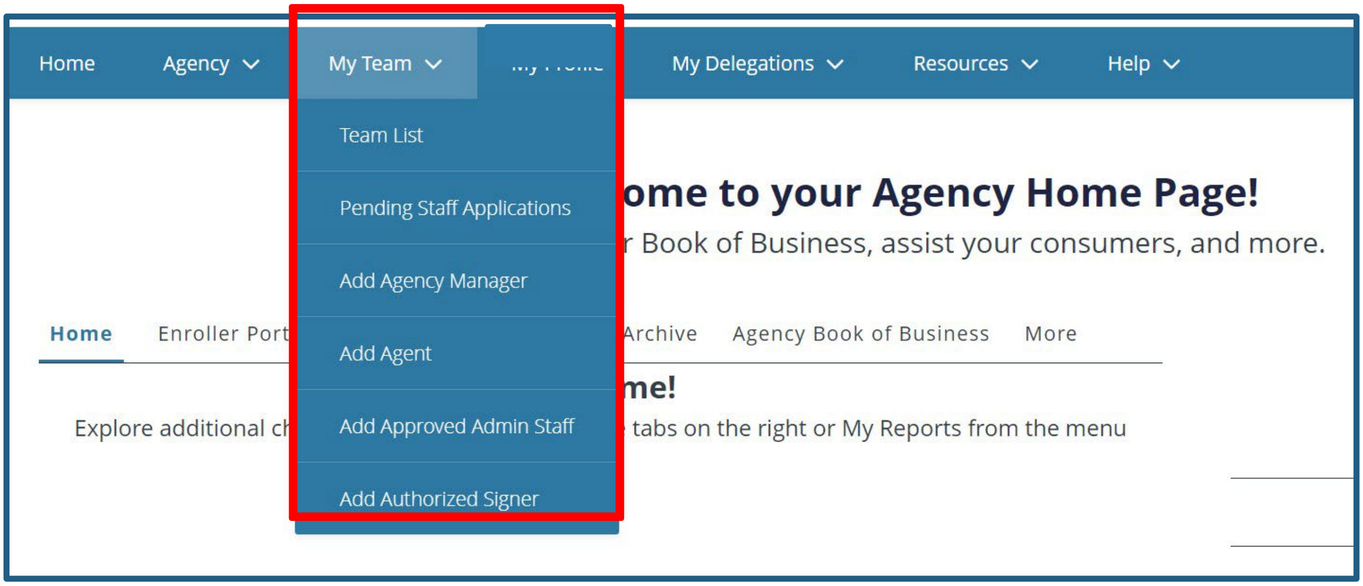


- Select **My Agency** to locate information about your Agency. The View My Agency page displays vital information about your Agency, including the License number, the Federal Tax ID, the Authorized Signer, and the locations.
- Select **Active Delegations** to:
  - View active delegations using the search or the filter function.
  - Transfer delegations for an Agency or Agent.
- Select **Pending Delegations** to accept/decline delegations.
- Select **Subsite Locations** to view, add, update, or remove Subsites.
- Select **Transfer Delegations** to transfer delegations.

- Select **Agency Delegation History** to view a historical list of all previous Agency delegations with delegation start and end dates and reason for end.

My Team

The *My Team* tab lists links that will assist in completing various team-related tasks:



- Select **Team List** to look up names of Agency Managers and other team members. All team members, including Agency Managers, will be listed along with their license numbers, contact information, certification status, contact status, and role.
- Select **Pending Staff Applications** to view staff applications that are awaiting approval.
- Select **Add Agency Manager Level 1** to add an AM1.
- The **Add Agent** option is located under the My Team tab. To add an Agent, the Agency Manager must review and follow the step-by-step instructions in the Add a New Agent to an Agency Job Aid.

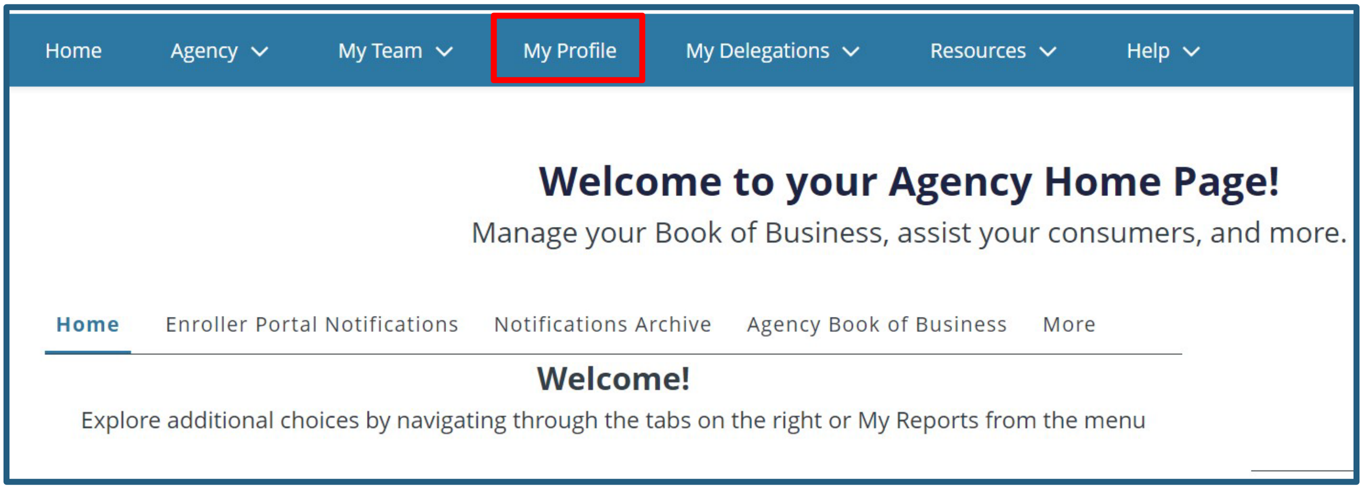
Important: An Agency Manager or an Approved Admin Staff Level 2 is required to create the new Agent profile in the Agency Portal. This begins the certification process for the Individual Agent with Covered California.

- Select **Add Approved Admin Staff** to add an AAS1 or AAS2.

My Profile

Click the **My Profile** tab to view your Agent profile.

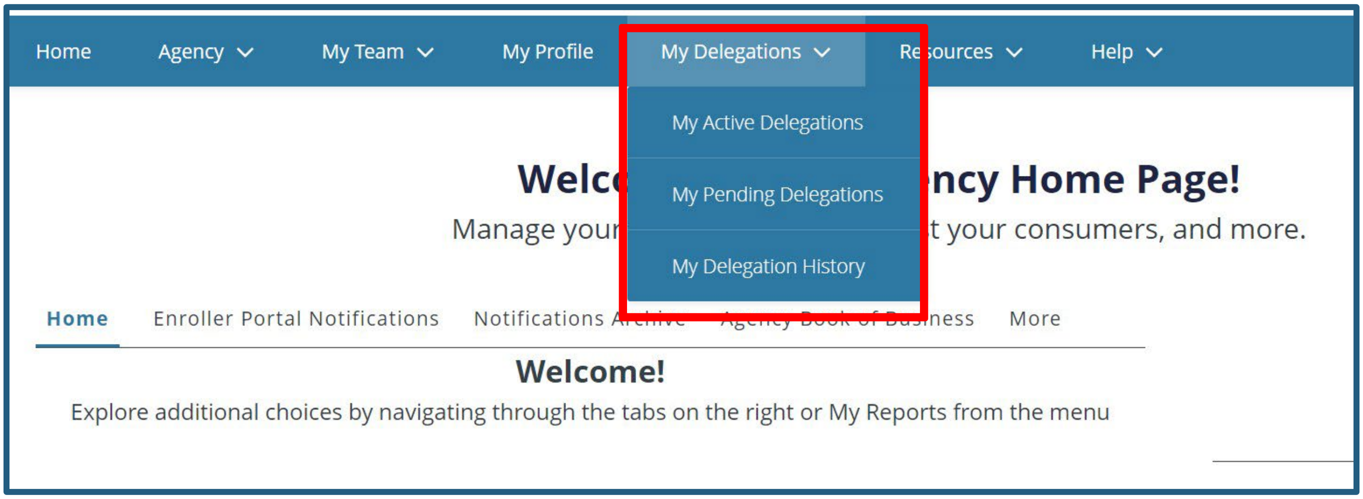
The My Profile page displays an Agent's profile details, including contact information, license number, preferred method of communication and public profile details (for the Find Local Help page), such as clients served, languages spoken, website, public email, and about yourself.



My Delegations

Click the **My Delegations** tab, and then:

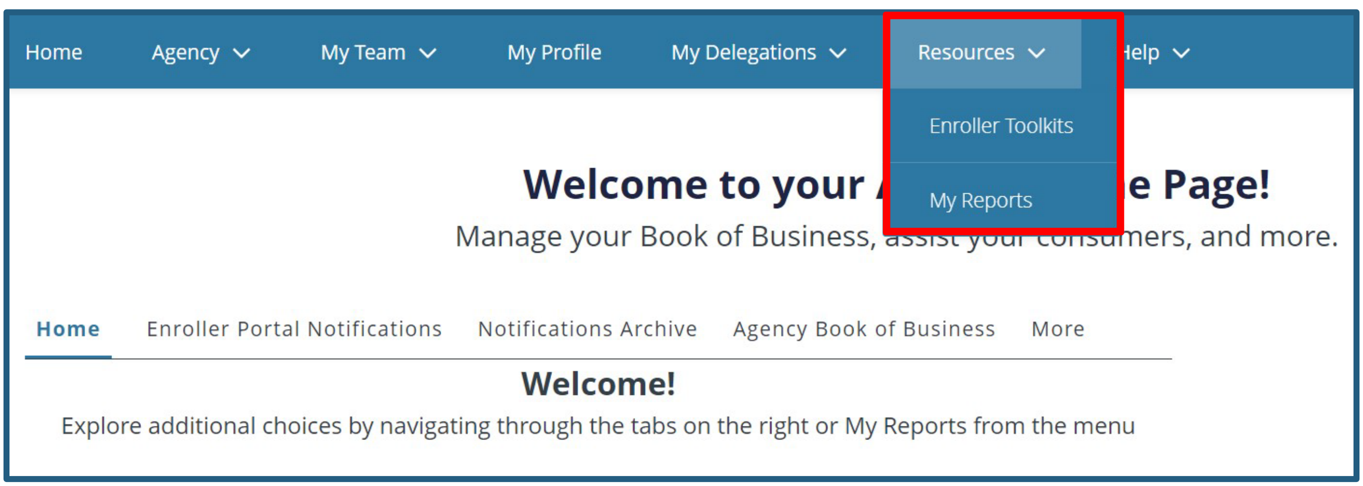
- Select **Active Delegations** to:
  - View active delegations using the search or the filter function.
  - Transfer delegations for an Agency or Agent.
- Select **Pending Delegations** to accept/decline delegations for yourself or on behalf of other Agents within your Agency.
- Select **My Delegation History** to view a historical list of all previous cases delegated to the user with delegation start and end dates and reason for end.



Resources

The *Resources* tab contains the following links:

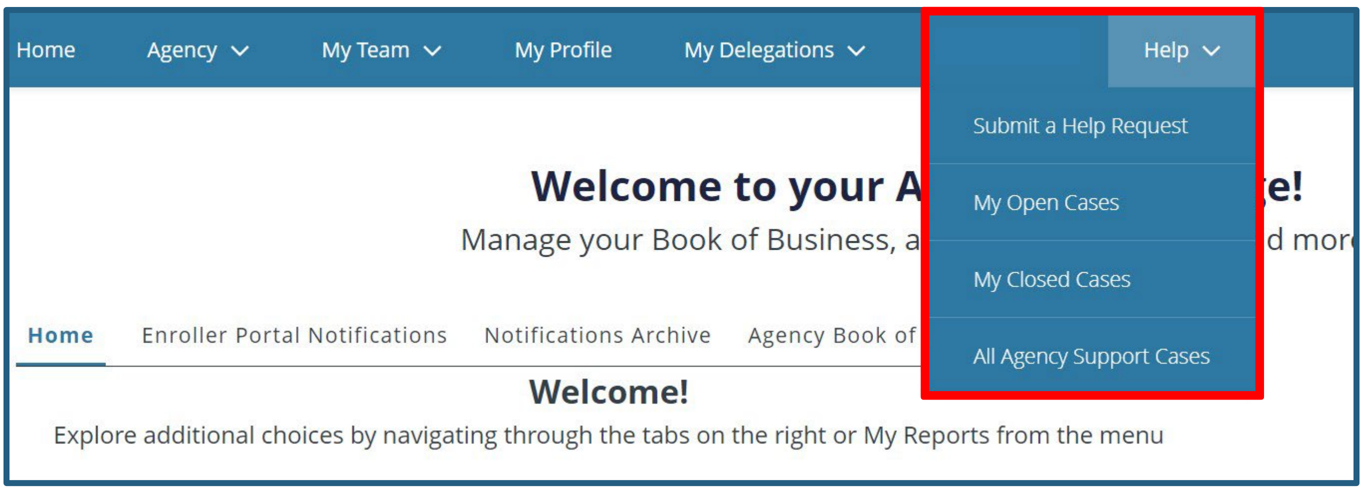
- Select **Enroller Toolkits** to access the Enrollment Partner Toolkit page.
- Select **My Reports** to access the Book of Business for yourself or the Agency, private reports, reports created by you, or shared with you.



Help

The *Help* tab contains the following links:

- Select **Submit a Help Request** to open a case or live chat with an Agency Service Center Representative.
- Select **My Open Cases** to view all open cases.
- Select **My Closed Cases** to view all closed cases.
- Select **All Agency Support Cases** to view all the Agency's cases. This option is available to Agency Managers, Authorized Signers, Agent 2, and Approved Administrative Staff 2).

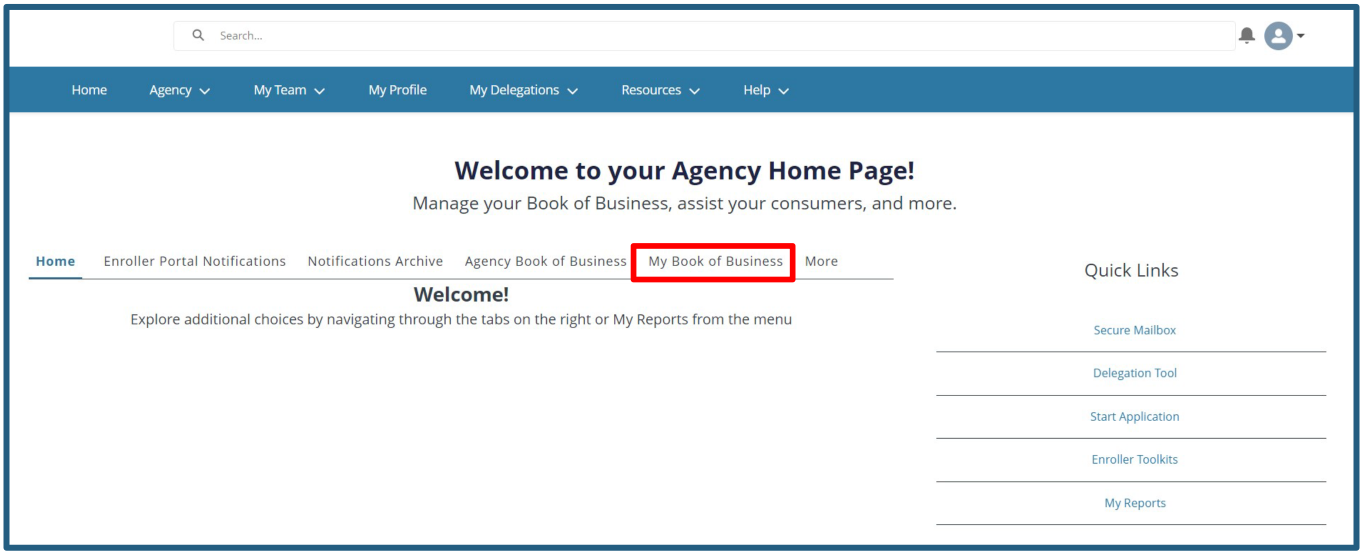


Agency Manager Level 1 (AM1) Portal Access

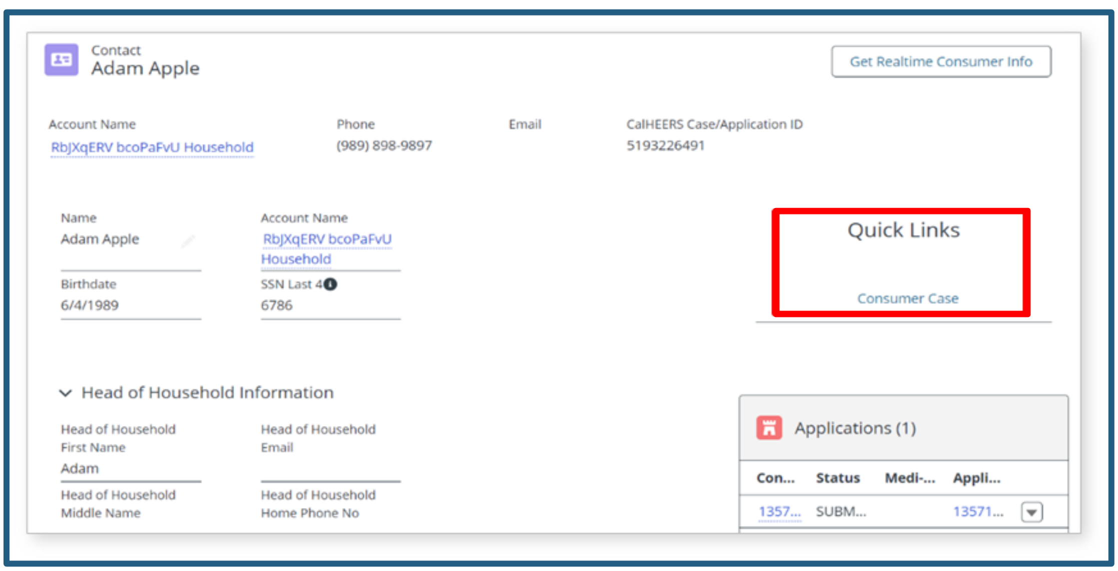
Home Page

Login to your Enroller Portal to view the Agency portal Home page.

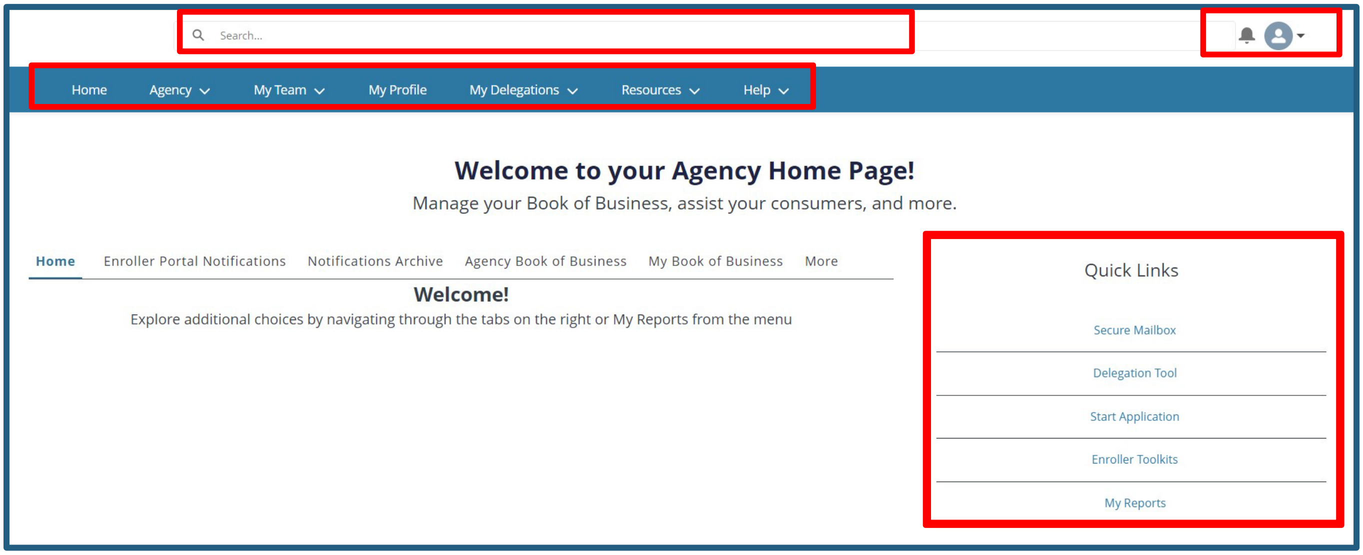
The Home tab is displayed by default. You can also access your Book of Business from the *My Book of Business* tab.



All names in the book of business are hyperlinks that will open the consumers contact. From the consumer's contact, you will have access to the link to their application, allowing you to take any action needed on their case or enrollment.



The following areas on the Home page provide information and access to task completion:



- The Search bar on top of the page can be used to find consumers within the Agency or the Book of Business.
- Click the bell icon in the top-right corner to read Notifications.
- The profile icon in the top-right corner enables you to view and edit your security profile, change your password, and log out of the Enroller Portal.
- The tabs available on the dashboard are:
  - **Home**: for the Home page
  - **Agency**: to view Agency and delegation details, and view and edit Subsite locations
  - **My Team**: to view the team list, and complete agent- and staff- related tasks
  - **My Profile**: to view your Agent profile
  - **My Delegations**: to view delegation records and history, to complete delegation tasks
  - **Resources**: to access *Enroller Toolkits* and *Reports*
  - **Help**: to submit a help request and view open and closed cases

Note: Tabs will vary based on user role.

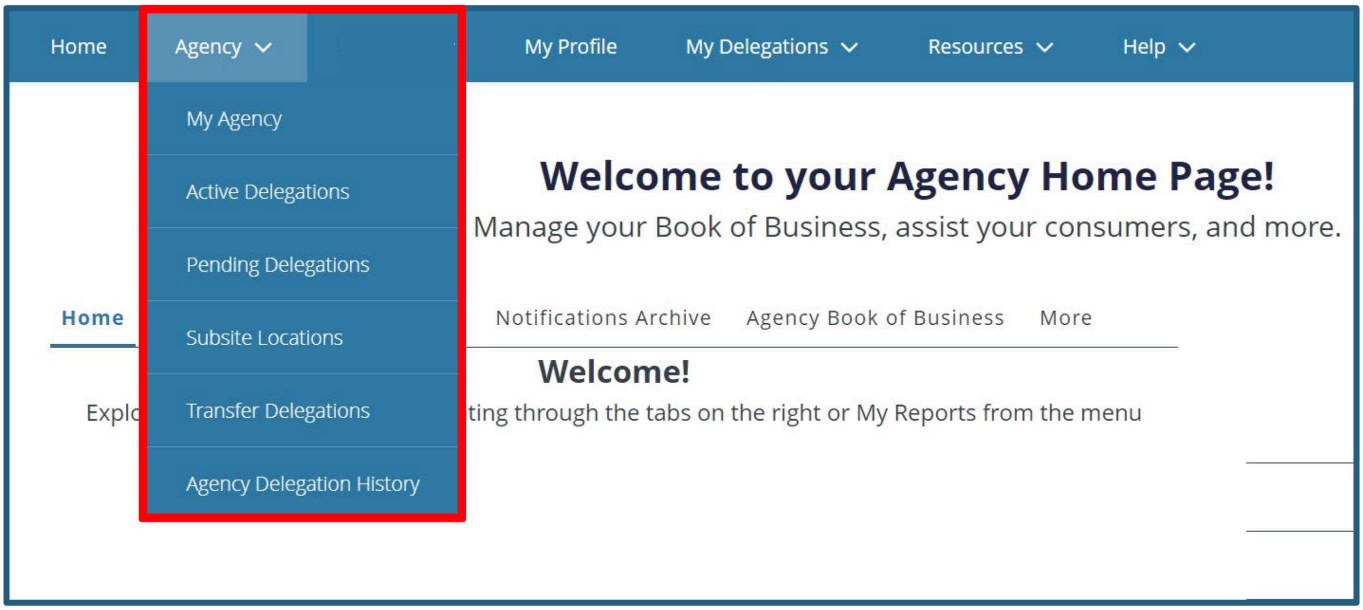
- The Quick Links on the right side of the Home page are for quick access to the following:
  - *Secure Mailbox*
  - *Delegation tool*
  - *Start Application*

- *Enroller Toolkits*
- *My Reports*

Note: Quick Links displayed will vary based on user role.

Agency

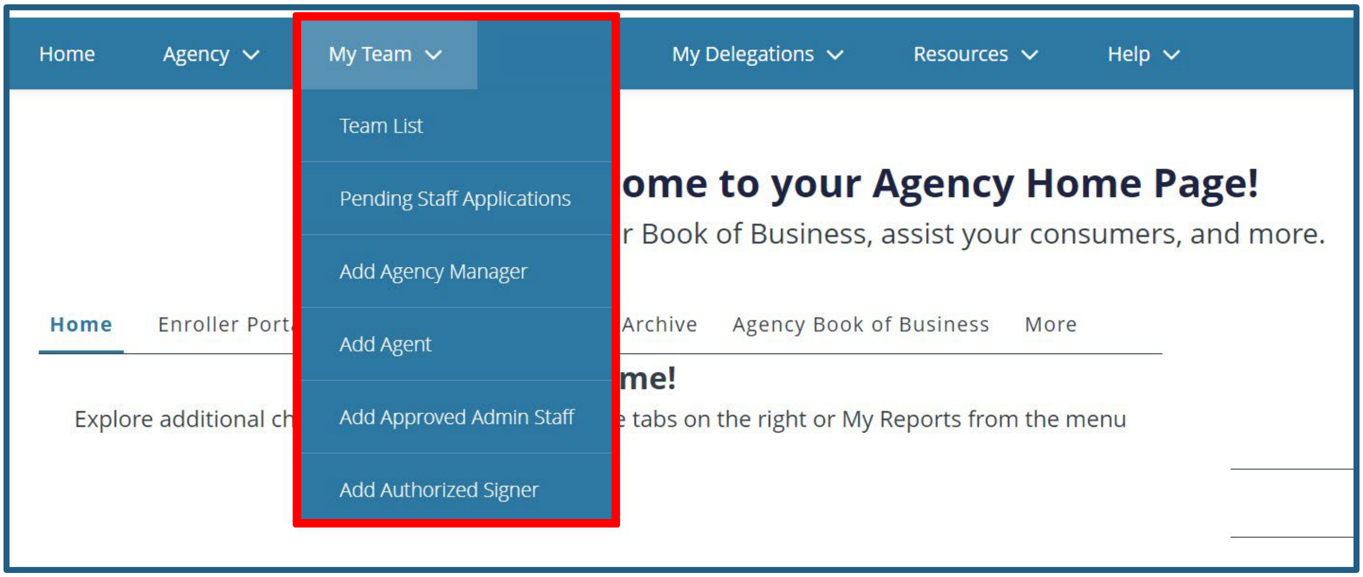
The *Agency* tab lists links that will assist in completing various Agency-related tasks.



- Select **My Agency** to locate information about your Agency. The View My Agency page displays vital information about your Agency, including the License number, the Federal Tax ID, the Authorized Signer, and the locations.
- Select **Active Delegations** to:
  - View active delegations using the search or the filter function.
  - Transfer delegations for an Agency or Agent.
- Select **Pending Delegations** to accept/decline delegations.
- Select **Subsite Locations** to view, add, update, or remove Subsites.
- Select **Transfer Delegations** to transfer delegations.
- Select **Agency Delegation History** to view a historical list of all previous Agency delegations with delegation start and end dates and reason for end.

My Team

The *My Team* tab lists links that will assist in completing various team-related tasks:



- Select **Team List** to look up names of Agency Managers and other team members. All team members, including Agency Managers, will be listed along with their license numbers, contact information, certification status, contact status, and role.
- Select **Pending Staff Applications** to view staff applications that are awaiting approval.
- Select **Add Agency Manager Level 1** to add an AM1.
- The **Add Agent** option is located under the My Team tab. To add an Agent, the Agency Manager must review and follow the step-by-step instructions in the [Add a New Agent to an Agency Guide].

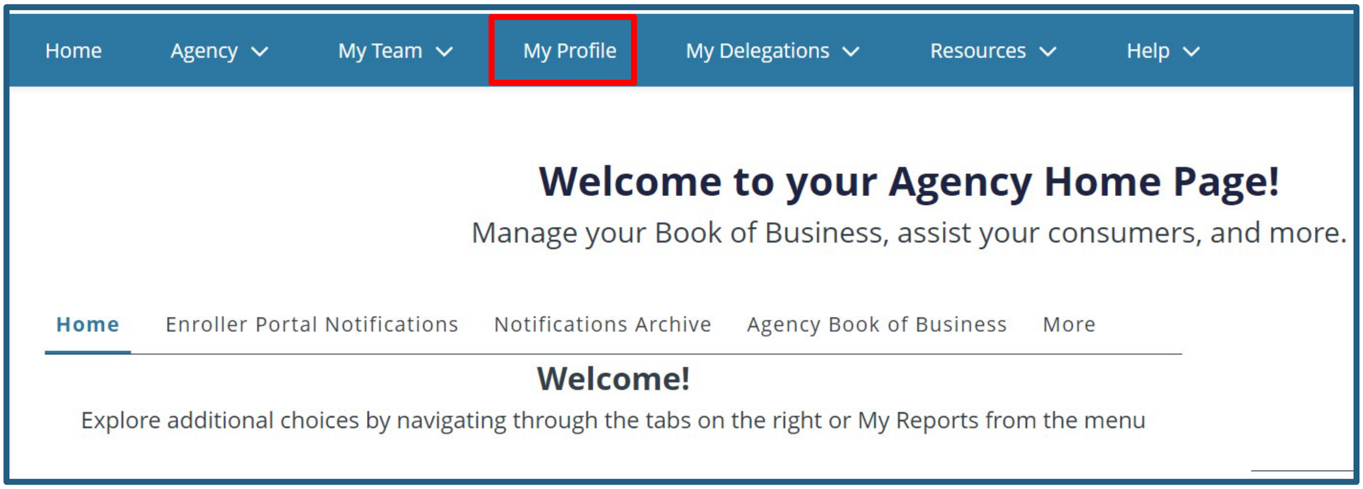
Important: An Agency Manager or an Approved Admin Staff Level 2 is required to create the new Agent profile in the Agency Portal. This begins the certification process for the Individual Agent with Covered California.

- Select **Add Approved Admin Staff** to add an AAS1 or AAS2.

My Profile

Click the **My Profile** tab to view your Agent profile.

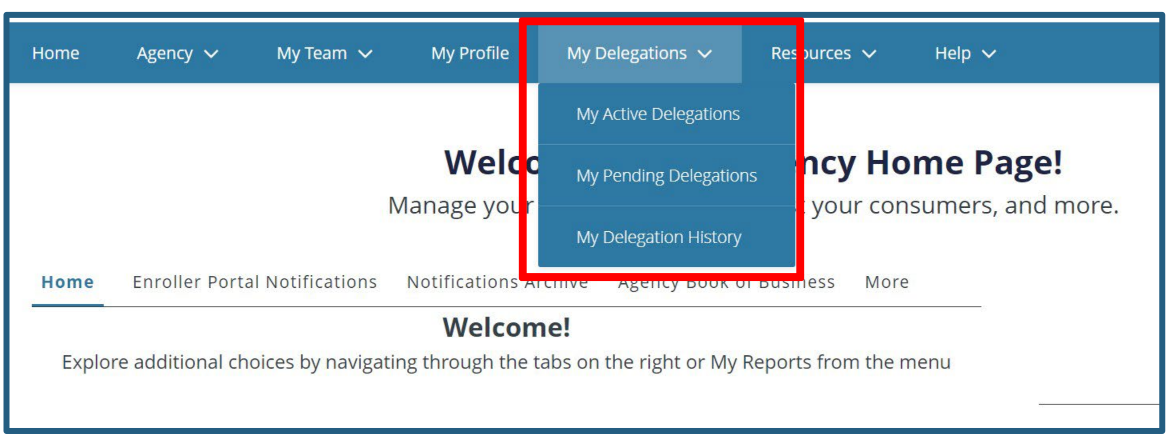
The *My Profile* page displays an Agent's profile details, including contact information, license number, preferred method of communication and public profile details (for the Find Local Help page), such as clients served, languages spoken, website, public email, and about yourself.



My Delegations

Click the **My Delegations** tab, and then:

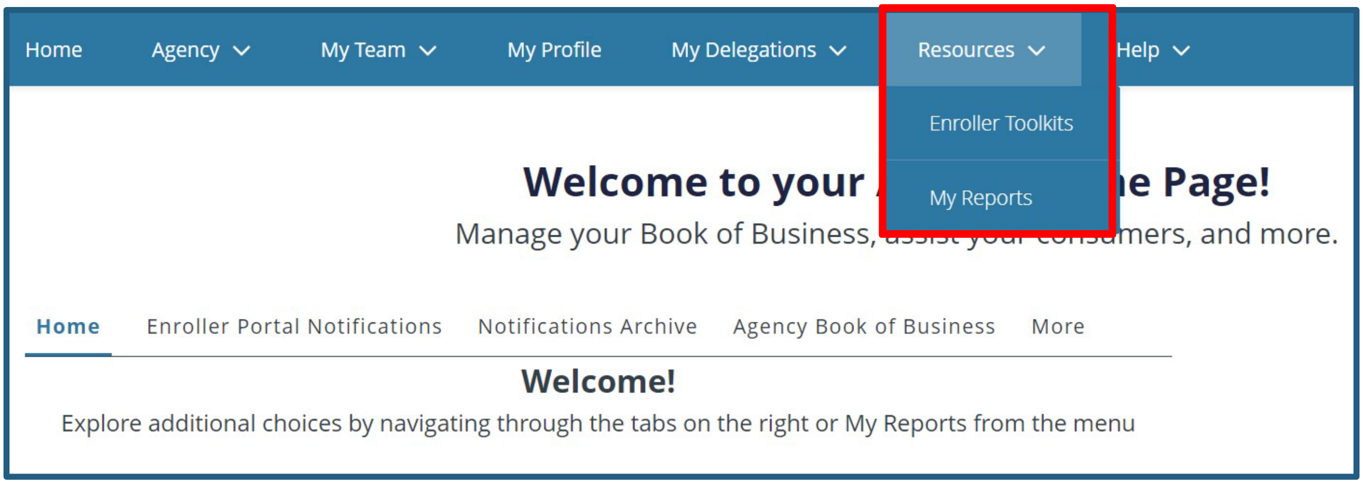
- Select **Active Delegations** to:
    - View your active delegations using the search or the filter function.
    - Transfer delegations for an Agency or Agent.
- Select **Pending Delegations** to accept/decline delegations on behalf of yourself or other Agents within your Agency.
- Select **My Delegation History** to view a historical list of all previous cases delegated to the user with delegation start and end dates and reason for end.



Resources

The *Resources* tab contains the following links:

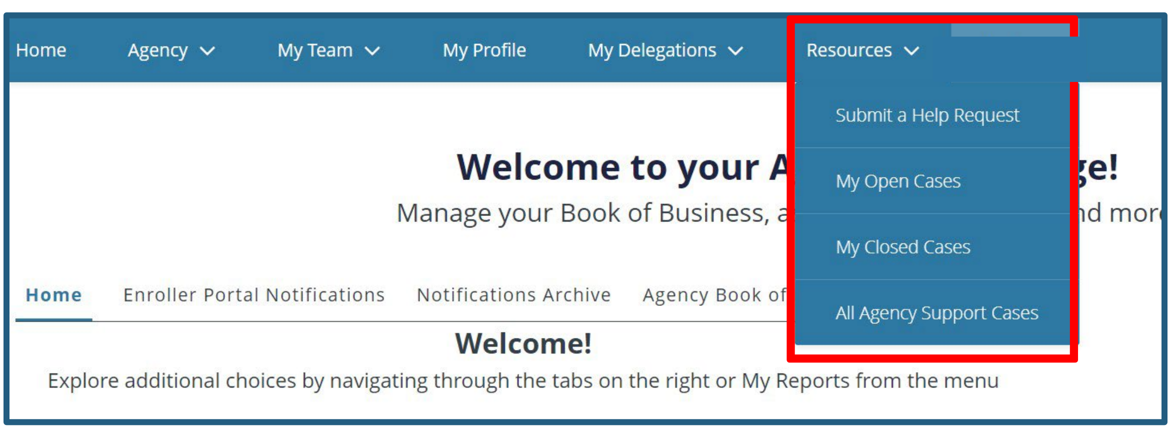
- Select **Enroller Toolkits** to access the Enrollment Partner Toolkit page.
- Select **My Reports** to access the Book of Business for yourself or the Agency, private reports, reports created by you, or shared with you.



Help

The *Help* tab contains the following links:

- Select **Submit a Help Request** to open a case or live chat with an Agency Service Center Representative.
- Select **My Open Cases** to view all open cases.
- Select **My Closed Cases** to view all closed cases.
- Select **All Agency Support Cases** to view all the Agency's cases. This option is available to Agency Managers, Authorized Signers, Agent 2, and Approved Administrative Staff 2).



Authorized Signer (AS) Portal Access

An Authorized Signer (AS) acts on behalf of the Agency, executes the Agency Agreement (Monetary), and performs other duties related to this Agreement as needed.

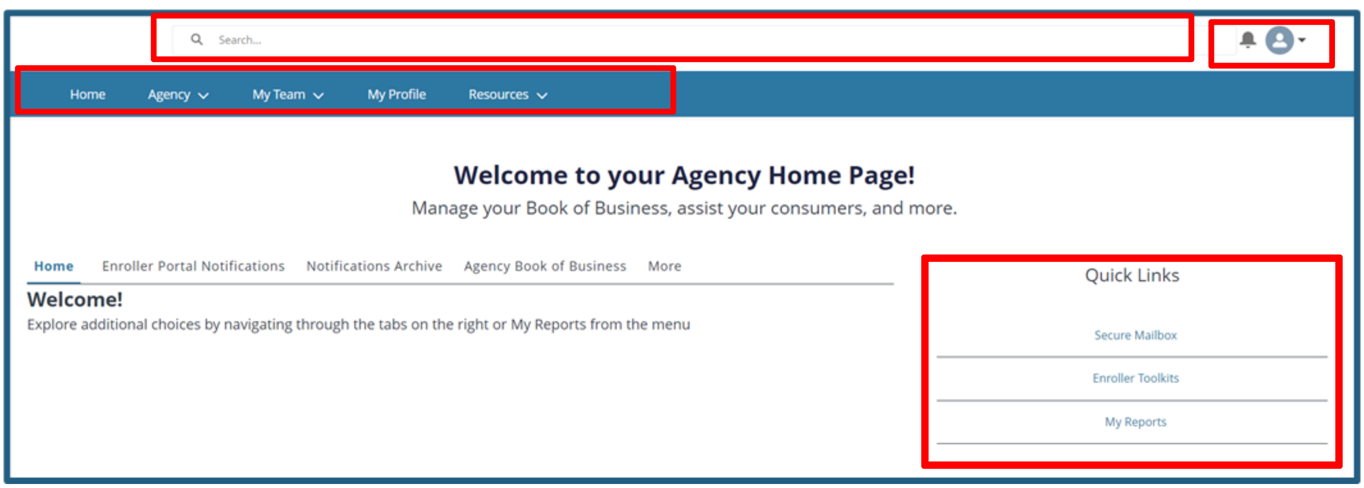
An AS:

- Is not a licensed Agent.
- Cannot access CalHEERS to perform enrollment assistance, or any other duties that require licensure from the California Department of Insurance.
- Is required to complete and submit Book of Business Transfer form requests for transfers outside of the Agency.
- Is required to request changes to the Agency Agreement.
- Can request to add additional Agent Level 2 (A2).
- Can request to add additional Agent Level 1 (A1).
- Can request to add Approved Administrative Staff Level 2 (AAS2).
- Can request to add Approved administrative Staff Level 1 (AAS1).

Important: A licensed Agent that is also authorized to sign on behalf of the Agency will be an Agency Manager Level 2 (AM2) and not considered an AS.

Agency Portal Home Page

Login to your Enroller Portal to view the Agency Portal Home page.



- The Search bar on top of the page can be used to find consumers within the Agency or the Book of Business.
- Click the bell icon in the top-right corner to read Notifications.
- The profile icon in the top-right corner enables you to view and edit your security profile, and to log out of the Enroller Portal.

- The tabs available on the dashboard are:
  - **Home**: for the Home page
  - **Agency**: to view Agency and delegation details, and view and edit Subsite locations
  - **My Team**: to view the team list, and complete agent- and staff- related tasks
  - **My Profile**: to view your profile
  - **Resources**: to access Enroller Toolkits and Reports
  - **Help**: to submit a help request and view open and closed cases

Note: Tabs will vary based on user role.

- The Quick Links on the right side of the Home page are for quick access to the following:
  - *Secure Mailbox*
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Note: Quick Links displayed will vary based on user role.

Agency

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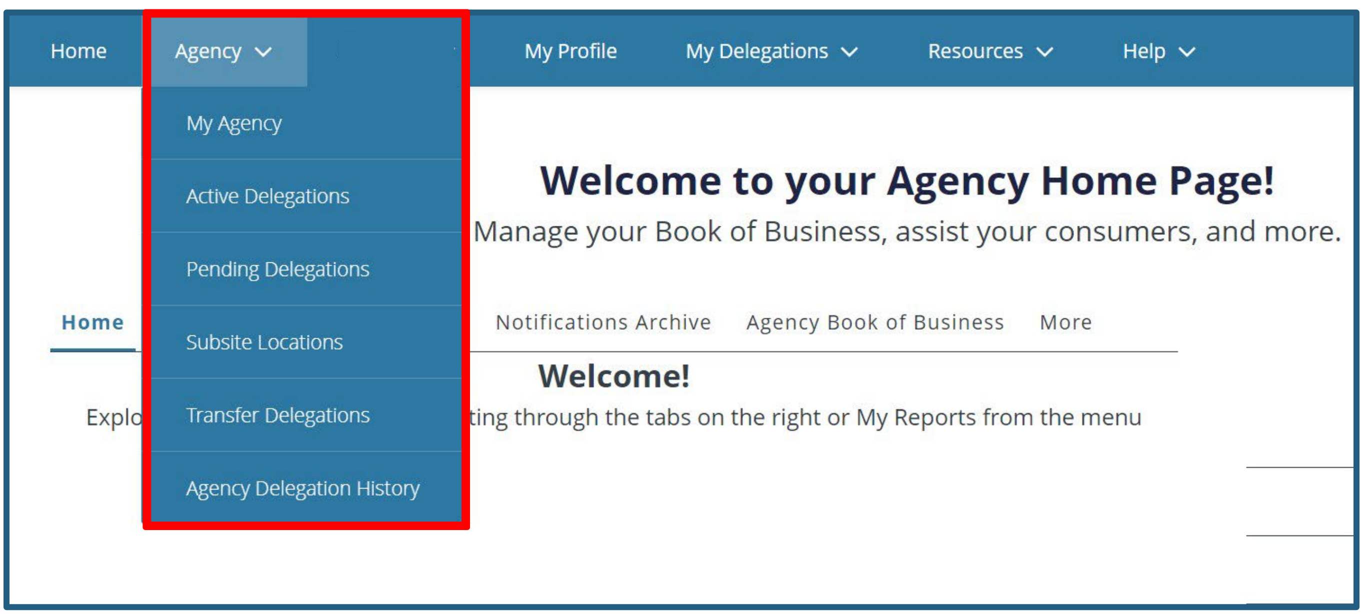
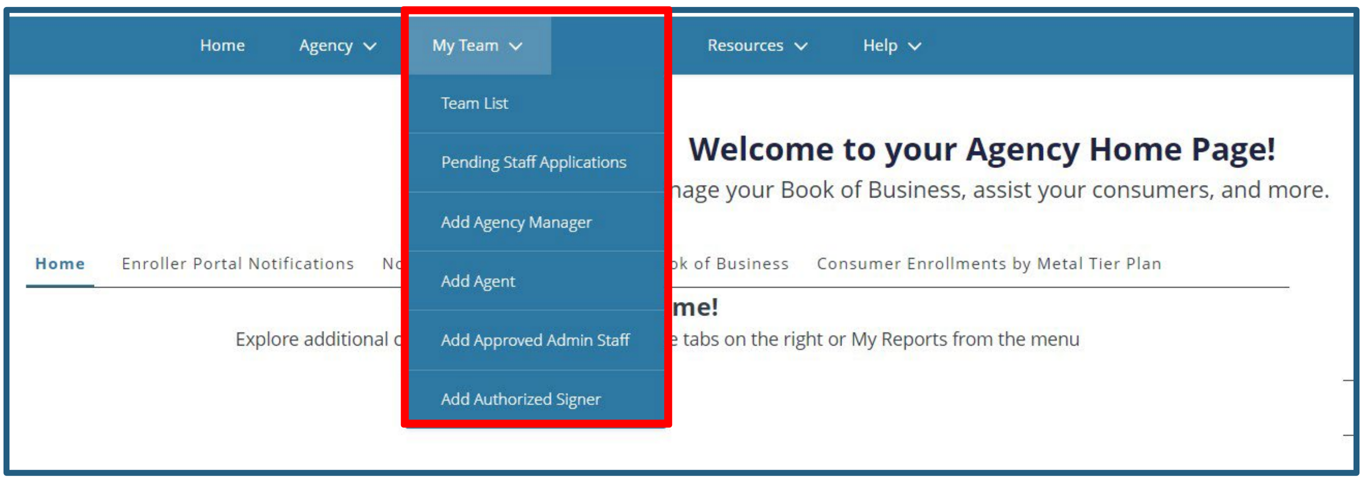


- Select **My Agency** to locate information about your Agency. The View My Agency page displays vital information about your Agency, including the License number, the Federal Tax ID, the Authorized Signer, and the locations.

- Select **Active Delegations** to:
  - View active delegations using the Search or the filter function.
  - Transfer delegations for an Agency or Agent.
- Select **Pending Delegations** to accept/decline delegations.
- Select **Subsite Locations** to view, add, update, or remove Subsites.
- Select **Transfer Delegations** to transfer delegations.
- Select **Agency Delegation History** to view a historical list of all previous Agency delegations with delegation start and end dates and reason for end.

My Team

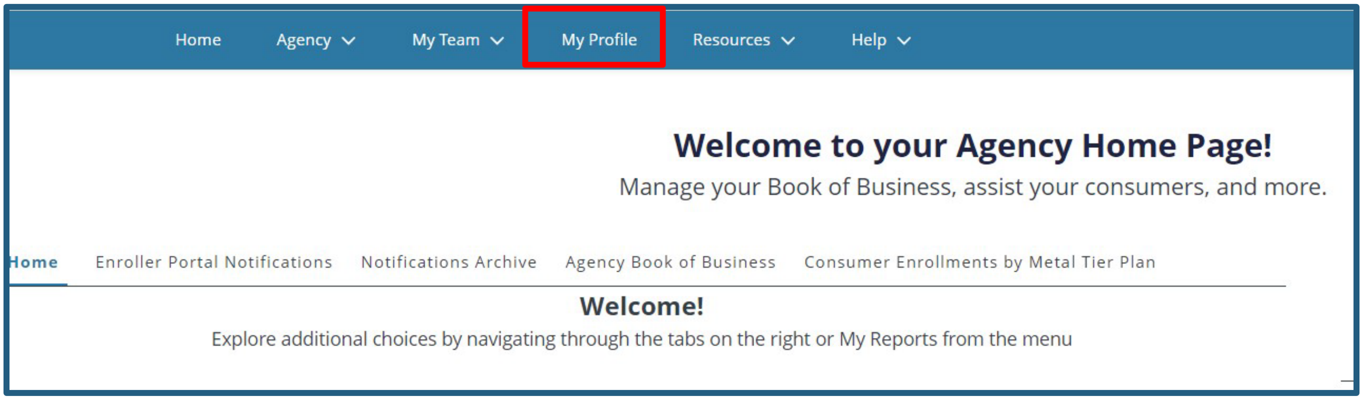
The *My Team* tab lists links that will assist in completing various team-related tasks:



- Select **Team List** to look up names of Agency Managers and other team members. All team members, including Agency Managers, will be listed along with their license numbers, contact information, certification status, contact status, and role.
- Select **Pending Staff Applications** to view staff applications that are awaiting approval.
- Select **Add Agency Manager Level 1** to add an AM1.
- The **Add Agent** option is located under the My Team tab. An AS can request to add an Agent. See the instructions in the Add a New Agent to an Agency Job Aid.
- Select **Add Approved Admin Staff** to add an AAS1 or AAS2.

My Profile

Click the **My Profile** tab to view your profile. The *My Profile* page displays your profile details, including contact information, license number, and preferred method of communication.



Resources

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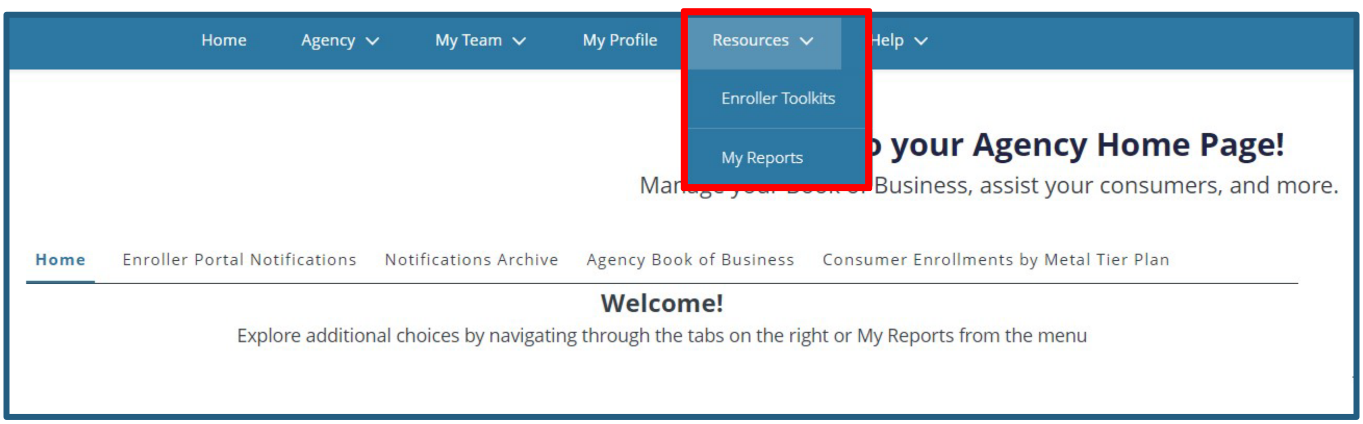

Help

The *Help* tab contains the following links:

- Select **Submit a Help Request** to open a case or live chat with an Agency Service Center Representative.
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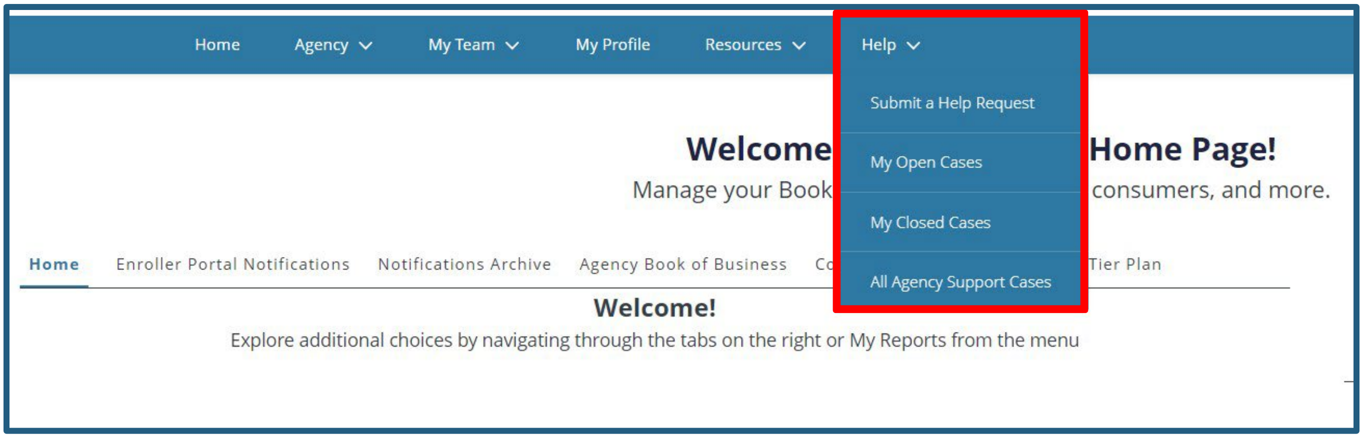
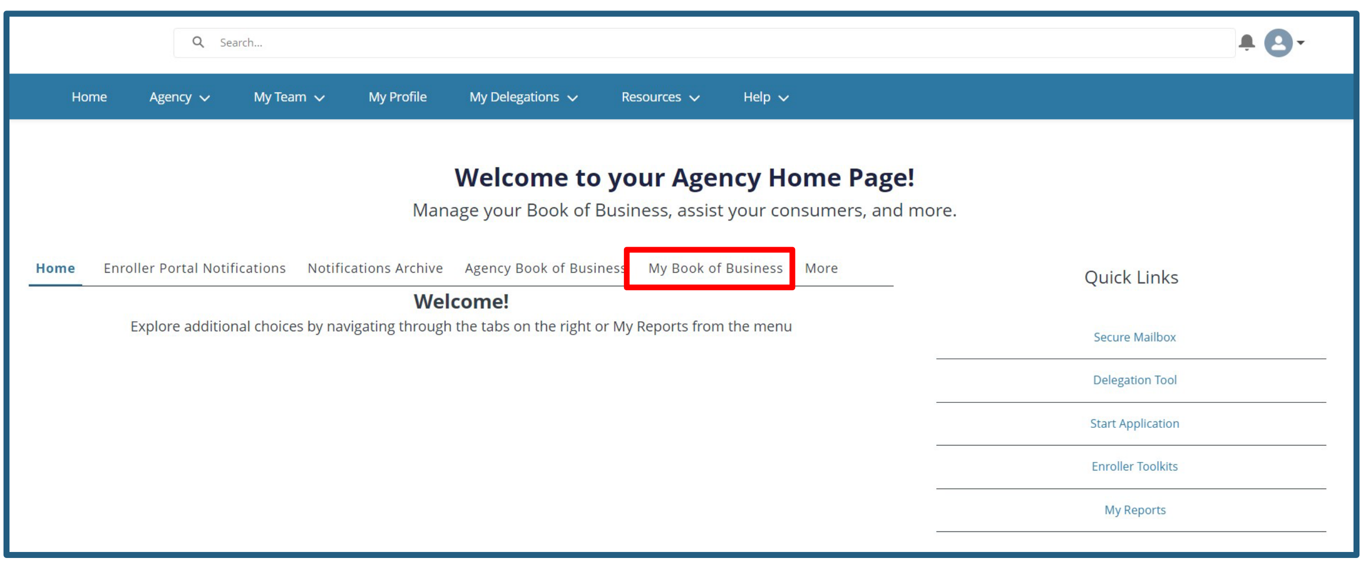


Agent Level 2 (A2) Portal Access

An Agent Level 2 (A2) can see and serve all consumers in the Agency. An A2 can view and update records of consumers who are delegated to any Agent associated with that Agency (compared to an A1, who may view, and update records of consumers delegated to only that Agent). An A2 cannot transfer delegations.

Home Page

Login to your Enroller Portal to view the Agency portal Home page. You can access your Book of Business from the *My Book of Business* tab.



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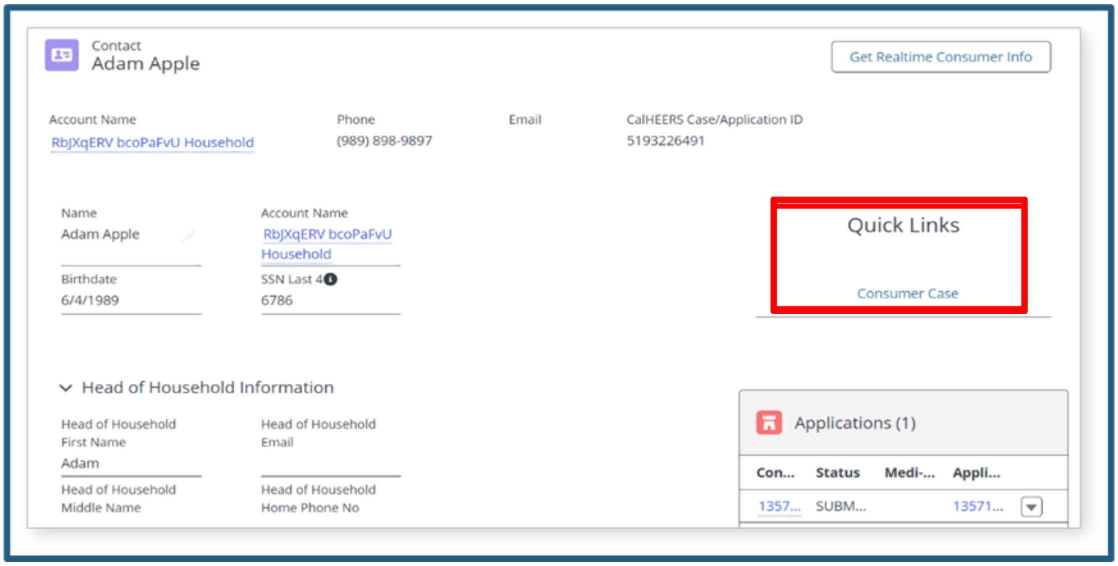

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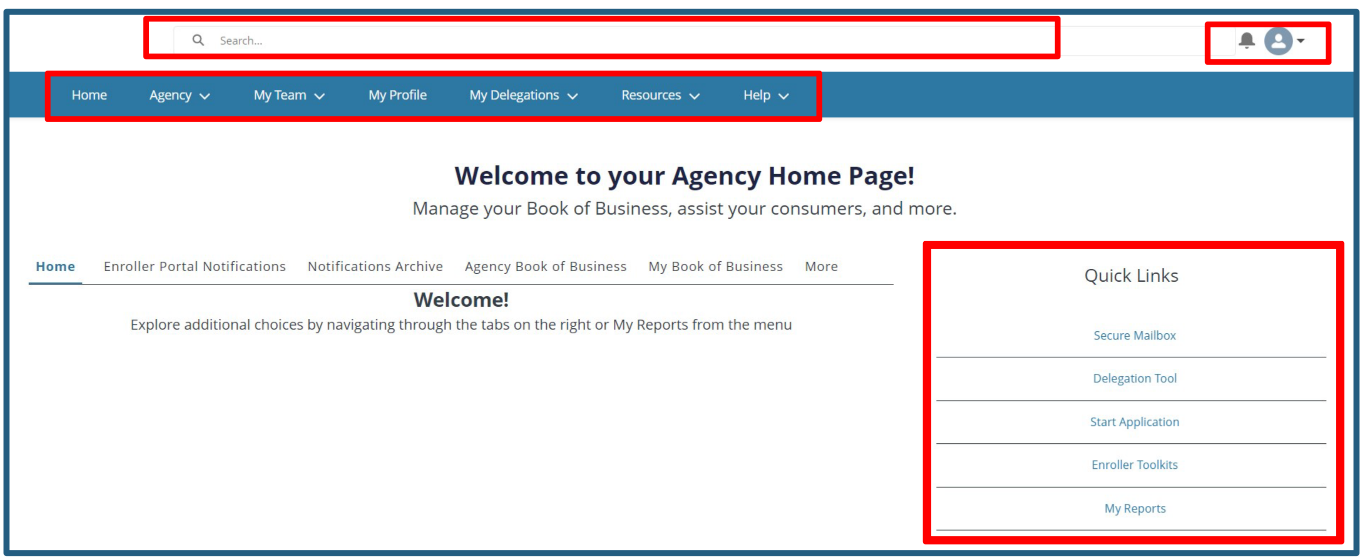

- The Search bar on top of the page can be used to find consumers within the Agency or the Book of Business.
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- ○ **My Profile**: to view your profile
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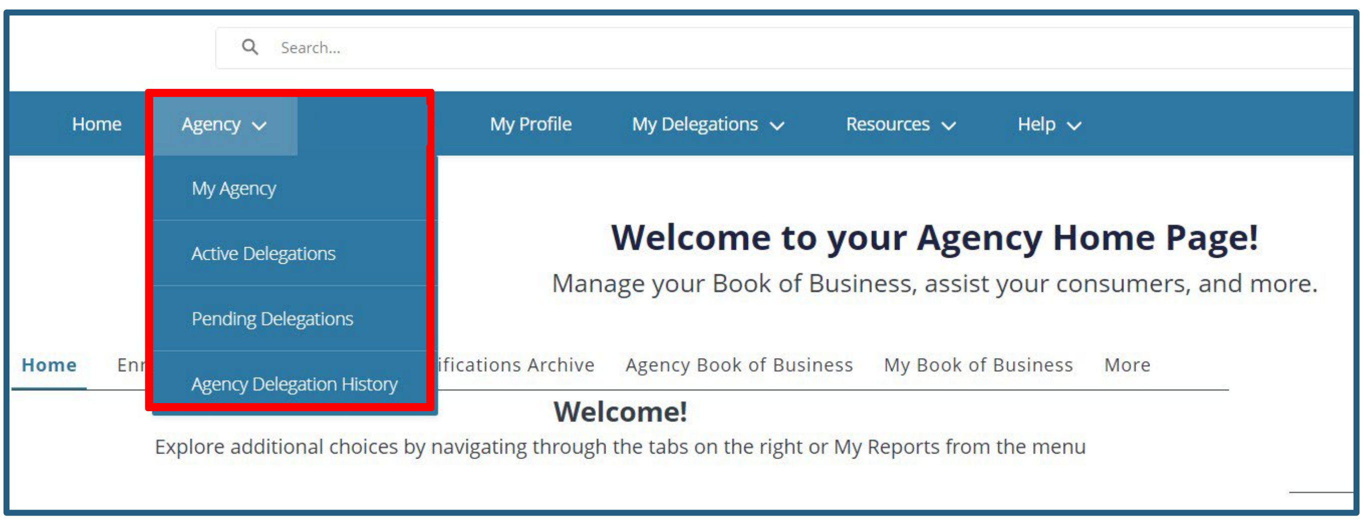
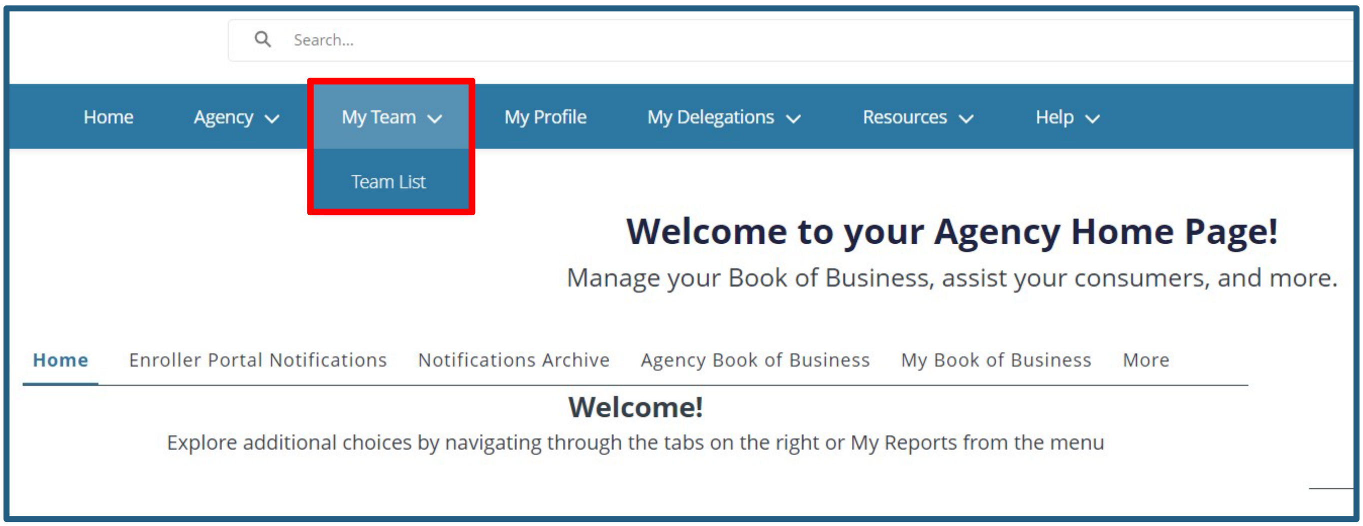


Select **My Agency** to locate information about your Agency. The View My Agency page displays vital information about your Agency, including the License number, the Federal Tax ID, the Authorized Signer, and the locations.

- Select **Active Delegations** to view active delegations using the Search or the filter function.
- Select **Pending Delegations** to accept/decline delegations.
- Select **Agency Delegation History** to view a historical list of all previous Agency delegations with delegation start and end dates and reason for end.

My Team

Under the *My Team* tab, select **Teams List** to look up names of Agency Managers and other team members. All team members, including Agency Managers, will be listed along with their license numbers, contact information, certification status, contact status, and role.



My Profile

Click the **My Profile** tab to view your profile.

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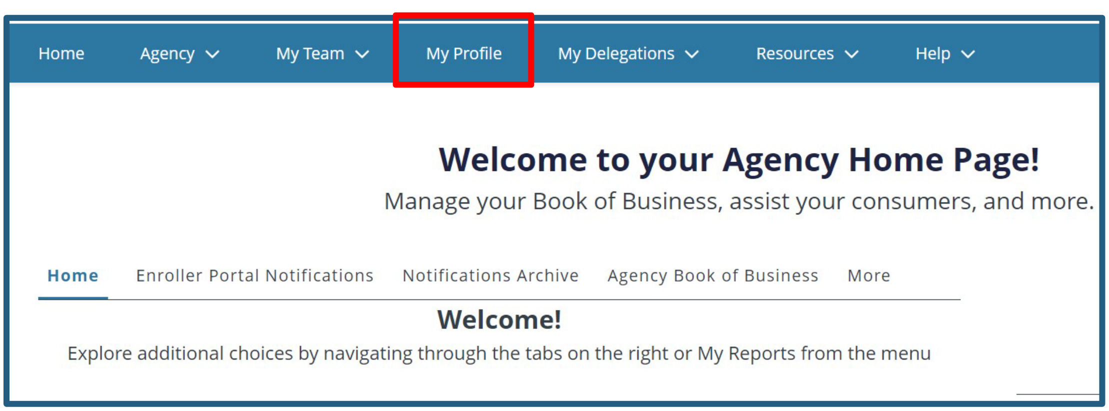

My Delegations

Click the **My Delegations** tab, and then:

- Select **Active Delegations** to:
  - View active delegations using the Search or the filter function.
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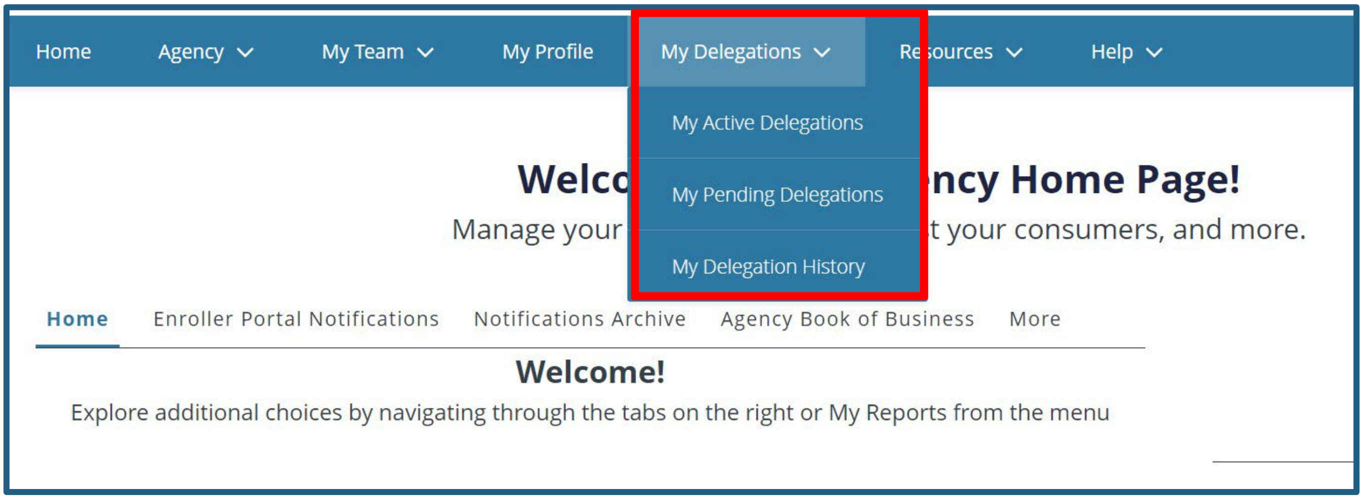

Resources

The *Resources* tab contains the following links:

- Select **Enroller Toolkits** to access the Enrollment Partner Toolkit page.
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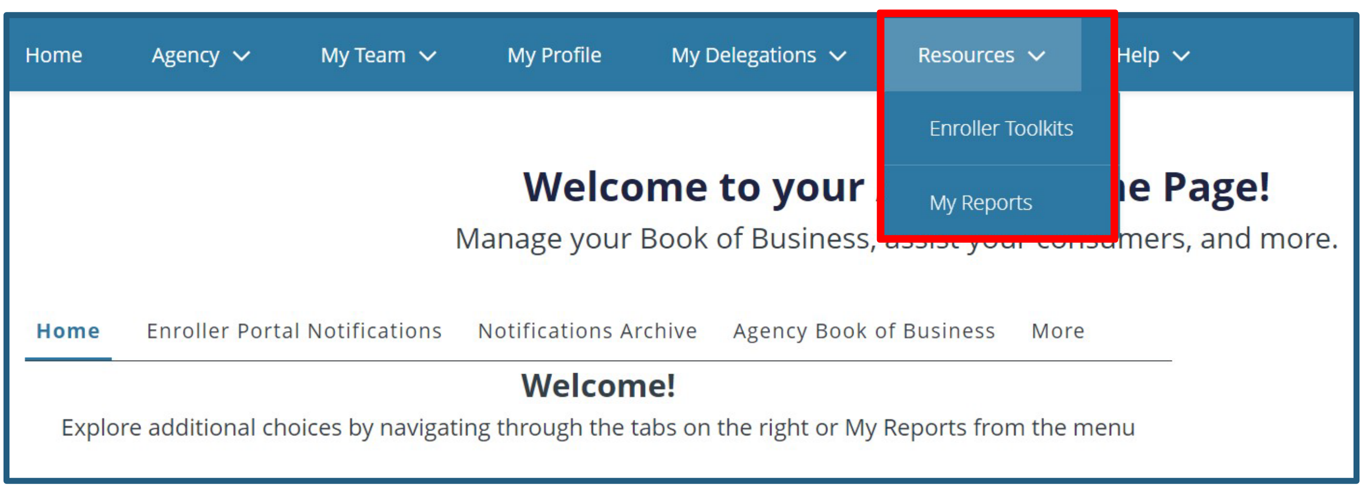
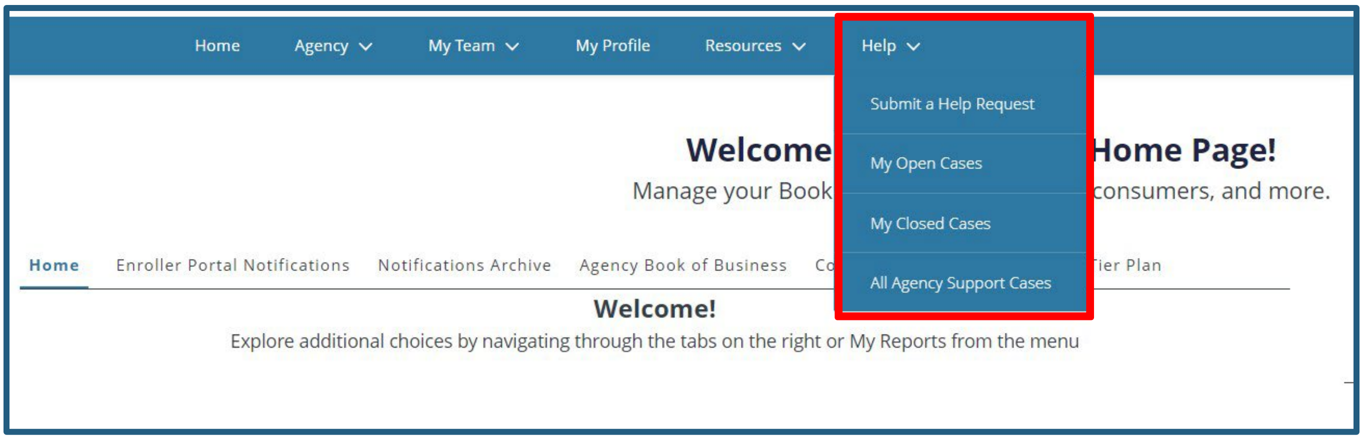


Help

The *Help* tab contains the following links:

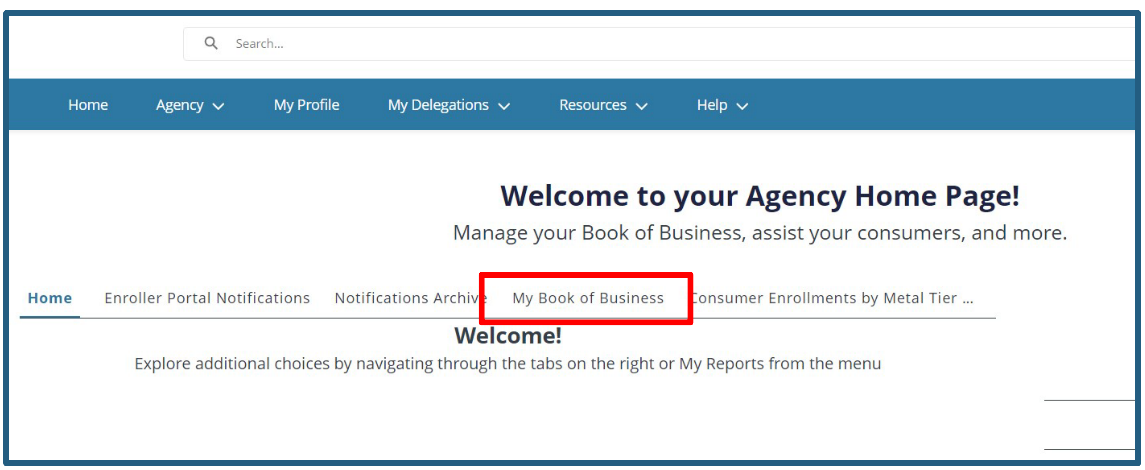
- Select **Submit a Help Request** to open a case or live chat with an Agency Service Center Representative.
- Select **My Open Cases** to view all open cases.
- Select **My Closed Cases** to view all closed cases.
- Select **All Agency Support Cases** to view all the Agency's cases. This option is available to Agency Managers, Authorized Signers, Agent 2, and Approved Administrative Staff 2).



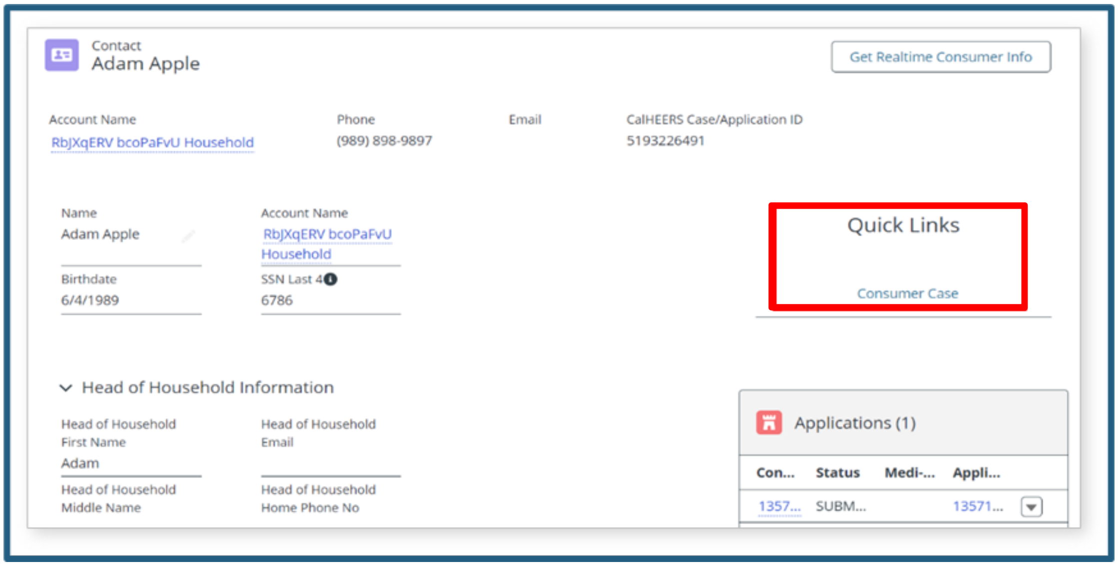
Agent Level 1 (A1) Portal Access

Home Page

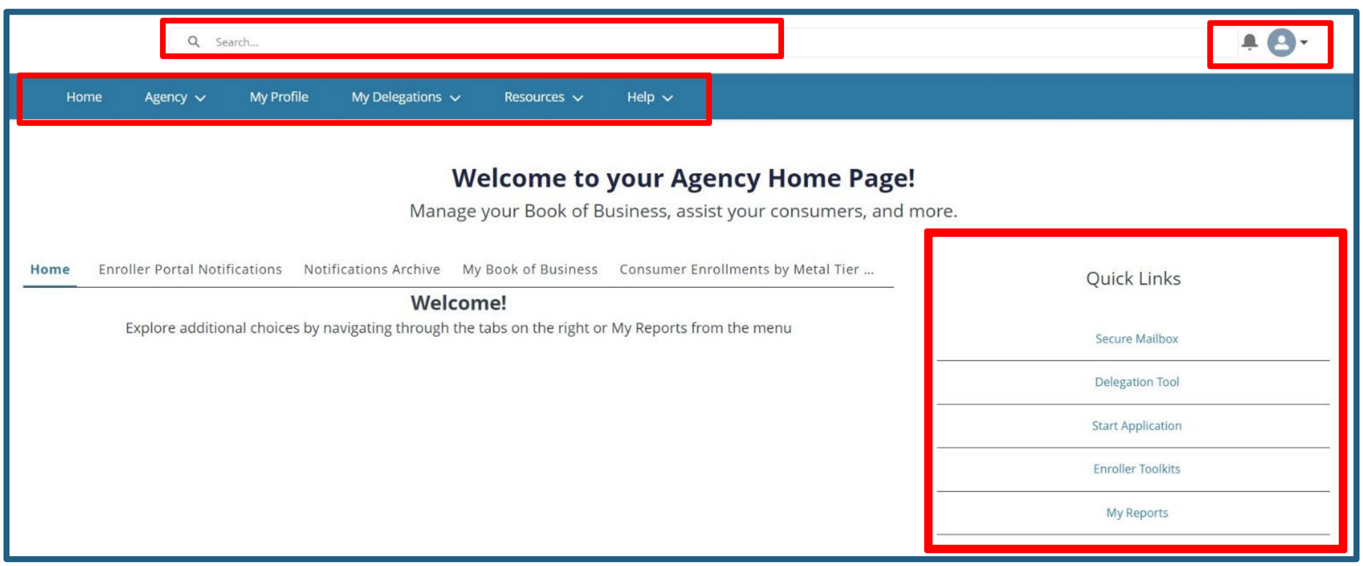
Login to your Enroller Portal to view the Agency portal Home page. *My Book of Business* is displayed as a tab on the Home page



All names in the book of business are hyperlinks that will open the consumers contact. From the consumer’s contact, you will have access to the link to their application, allowing you to take any action needed on their case or enrollment.



The following areas on the Home page provide information and access to task completion:



- The Search bar on top of the page can be used to find consumers within the Agency or the Book of Business.
- Click the bell icon in the top-right corner to read Notifications.
- The profile icon in the top-right corner enables you to view and edit your security profile, and to log out of the Enroller Portal.
- The tabs available on the dashboard are:

- ○ **Home**: for the Home page
- ○ **Agency**: to view Agency details
- ○ **My Team**: to view the team list
- ○ **My Profile**: to view your profile
- ○ **My Delegations**: to view delegation records and history, to complete delegation tasks
- ○ **Resources**: to access Enroller Toolkits and Reports
- ○ **Help**: to submit a help request and view open and closed cases

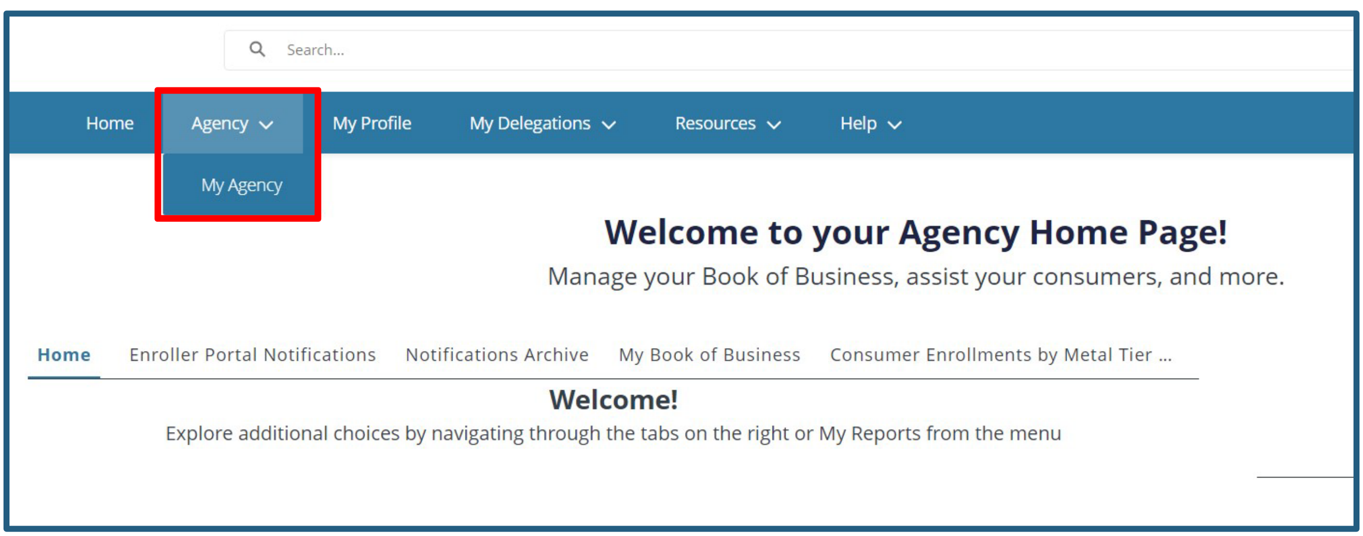
Note: Tabs will vary based on user role.

- The Quick Links on the right side of the Home page are for quick access to the following:
  - *Secure Mailbox*
  - *Delegation tool*
  - *Start Application*
  - *Enroller Toolkits*
  - *My Reports*

Note: Quick Links displayed will vary based on user role.

Agency

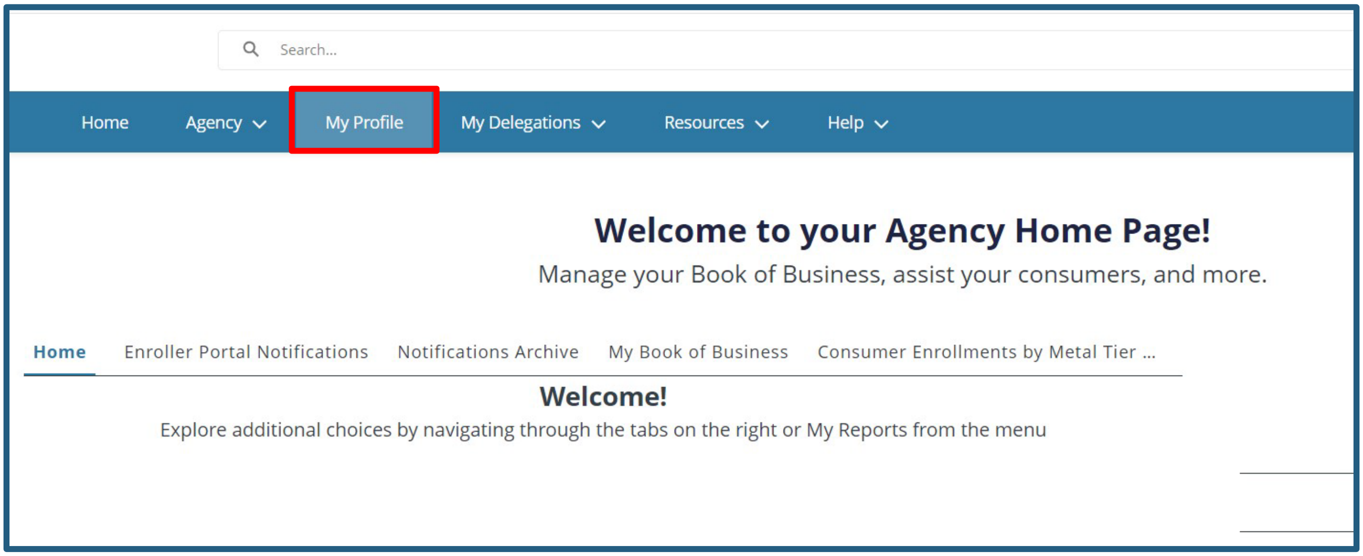
Under the *Agency* tab, select **My Agency** to locate information about your Agency. The View My Agency page displays vital information about your Agency, including the License number, the Federal Tax ID, the Authorized Signer, and the locations.



My Profile

Click the **My Profile** tab to view your profile.

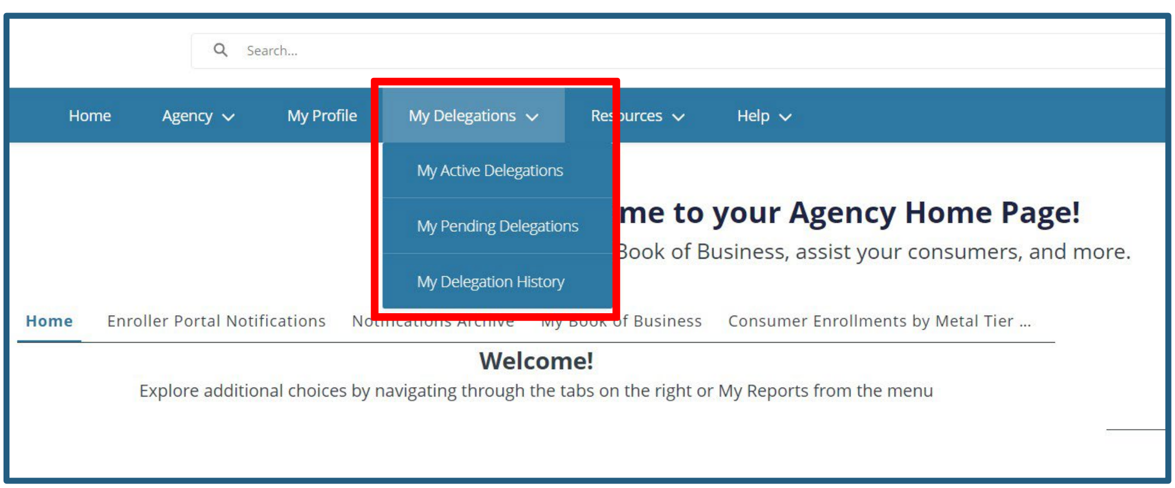
The *My Profile* page displays an Agent's profile details, including contact information, license number, preferred method of communication and public profile details (for the Find Local Help page) such as clients served, languages spoken, website, public email, and about yourself.



My Delegations

Click the **My Delegations** tab, and then:

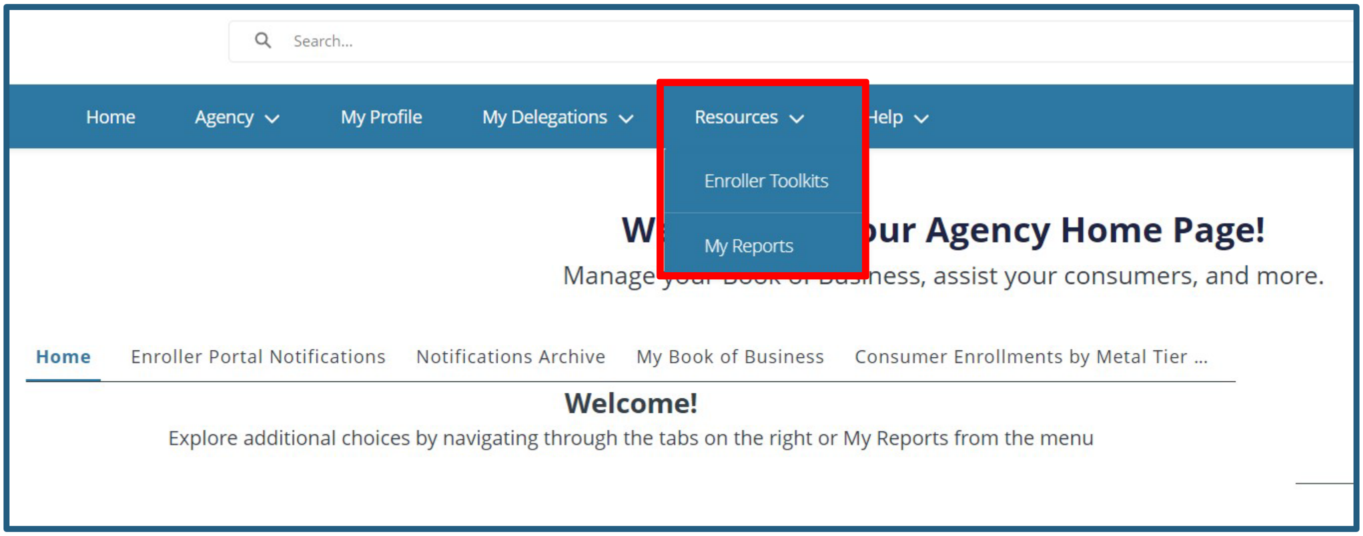
- Select **Active Delegations** to view active delegations using the Search or the filter function.
- Select **Pending Delegations** to accept/decline delegations.
- Select **My Delegation History** to view a historical list of all previous cases delegated to the user with delegation start and end dates and reason for end.



Resources

The *Resources* tab contains the following links:

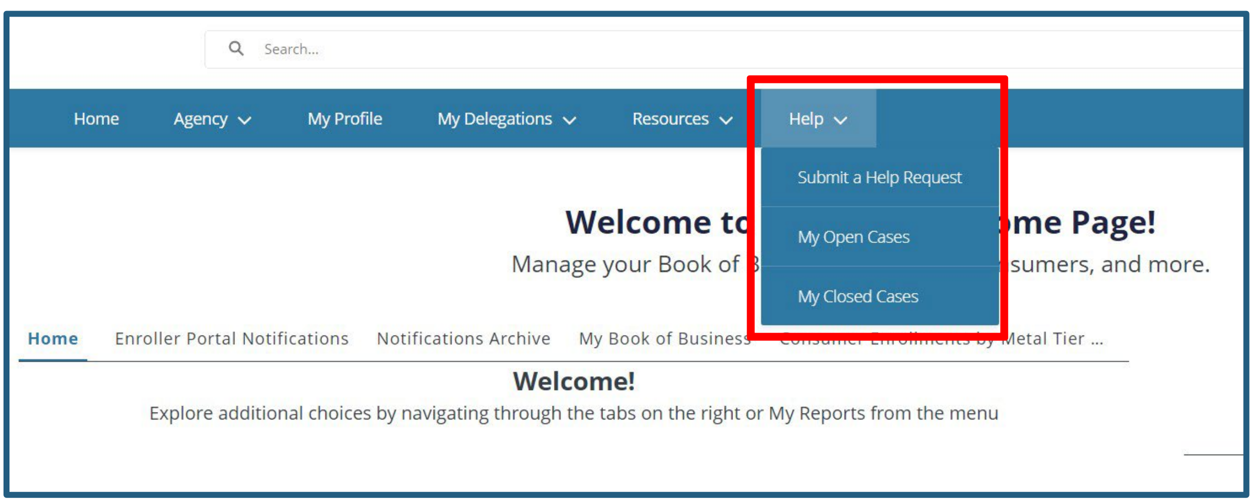
- Select **Enroller Toolkits** to access the Enrollment Partner Toolkit page.
- Select **My Reports** to access the Book of Business for yourself or the Agency, private reports, reports created by you, or shared with you.



Help

The *Help* tab contains the following links:

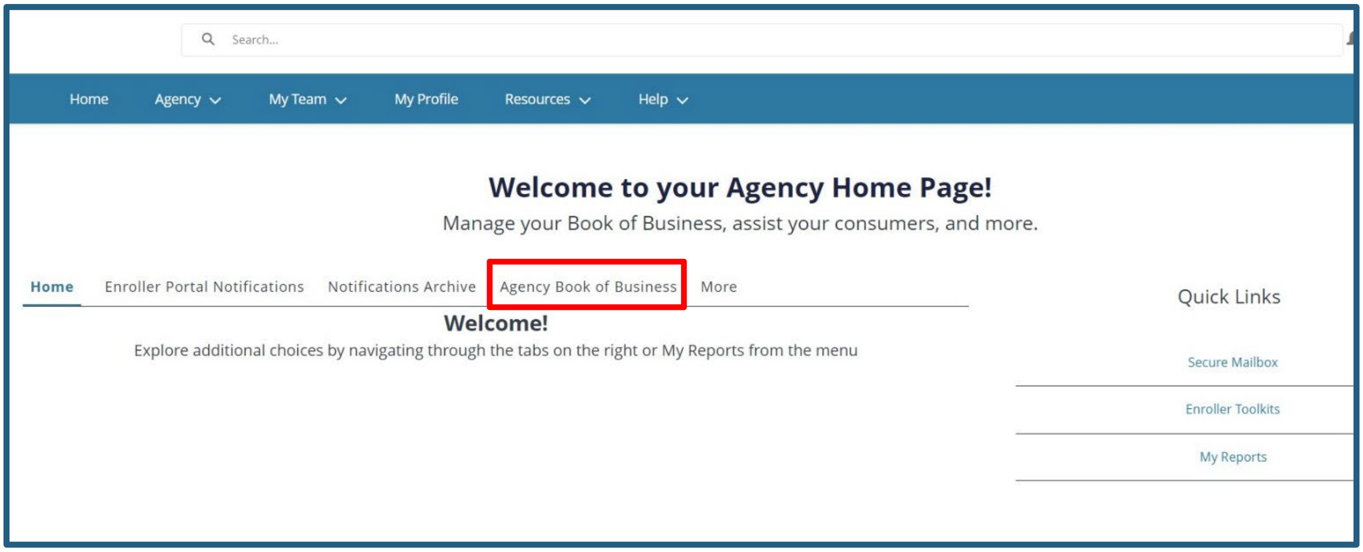
- Select **Submit a Help Request** to open a case or live chat with an Agency Service Center Representative.
- Select **My Open Cases** to view all open cases.
- Select **My Closed Cases** to view all closed cases.



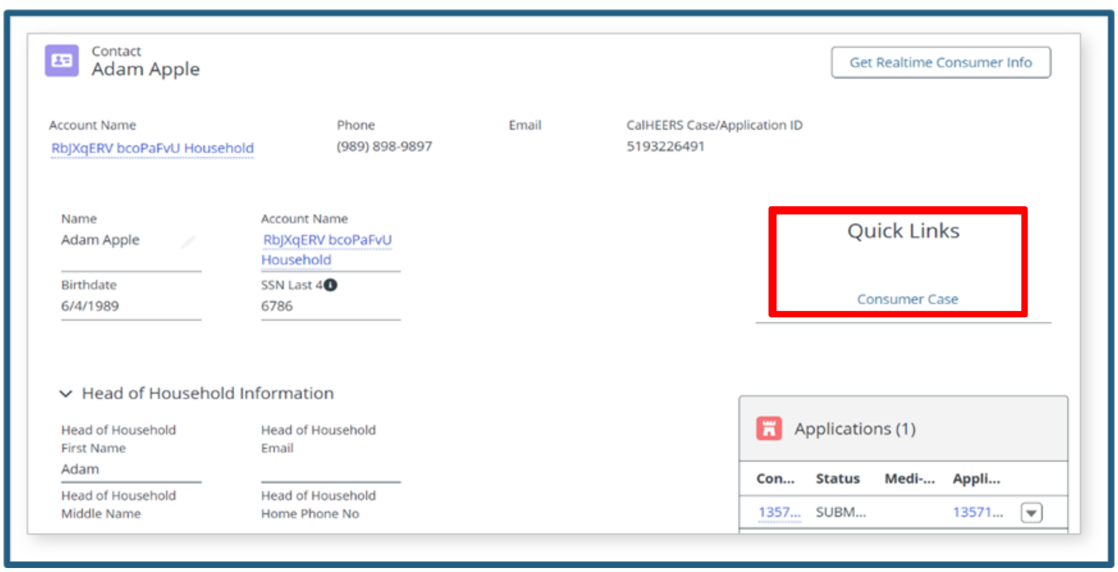
Approved Admin Staff Level 2 (AAS2) Portal Access

Agency Portal Home Page

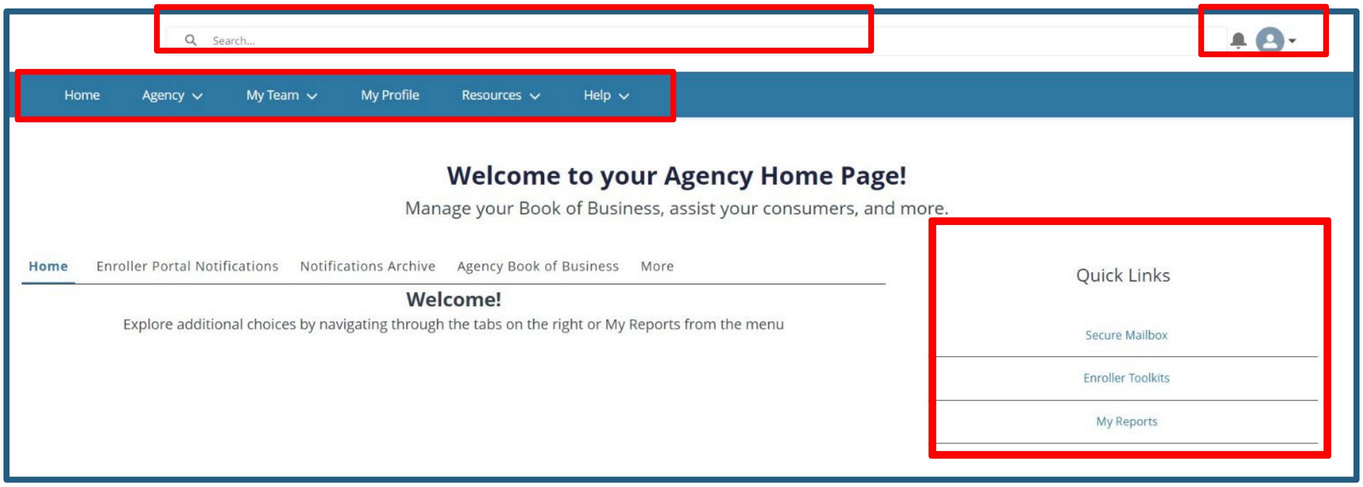
Login to your Enroller Portal to view the Agency Portal Home page. The *Agency Book of Business* is displayed as a tab on the Home page.



All names in the book of business are hyperlinks that will open the consumers contact. From the consumer's contact, you will have access to the link to their application, allowing you to take any action needed on their case or enrollment.



The following areas on the Home page provide information and access to task completion:



- The Search bar on top of the page can be used to find consumers within the Agency or the Book of Business.
- Click the bell icon in the top-right corner to read Notifications.
- The profile icon in the top-right corner enables you to view and edit your security profile, and to log out of the Enroller Portal.
- The tabs available on the dashboard are:
  - **Home**: for the Home page
  - **Agency**: to view Agency and delegation details, and view and edit Subsite locations
  - **My Team**: to view the team list and access team information, to add an Agent
  - **My Profile**: to view your profile
  - **Resources**: to access Enroller Toolkits and Reports
  - **Help**: to submit a help request and view open and closed cases

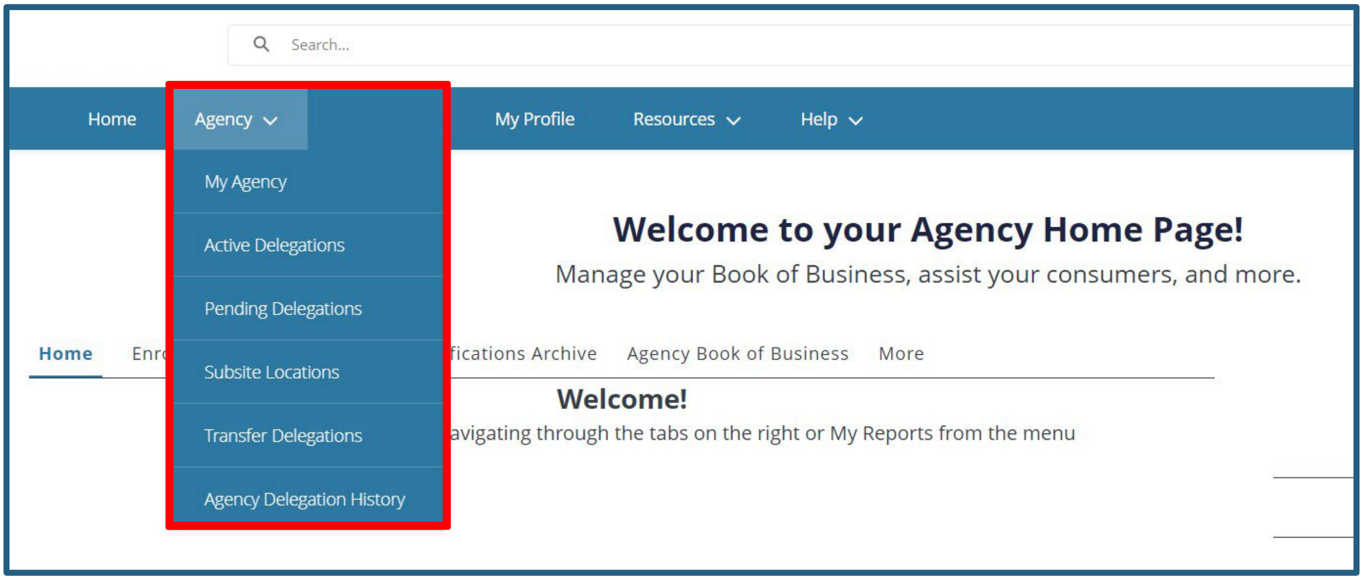
Note: Tabs will vary based on user role.

- The Quick Links on the right side of the Home page are for quick access to the following:
  - *Secure Mailbox*
  - *Enroller Toolkits*
  - *My Reports*

Note: Quick Links displayed will vary based on user role

Agency

The *Agency* tab lists links that will assist in completing various Agency-related tasks.



- Select **My Agency** to locate information about your Agency. The View My Agency page displays vital information about your Agency, including the License number, the Federal Tax ID, the Authorized Signer, and the locations.

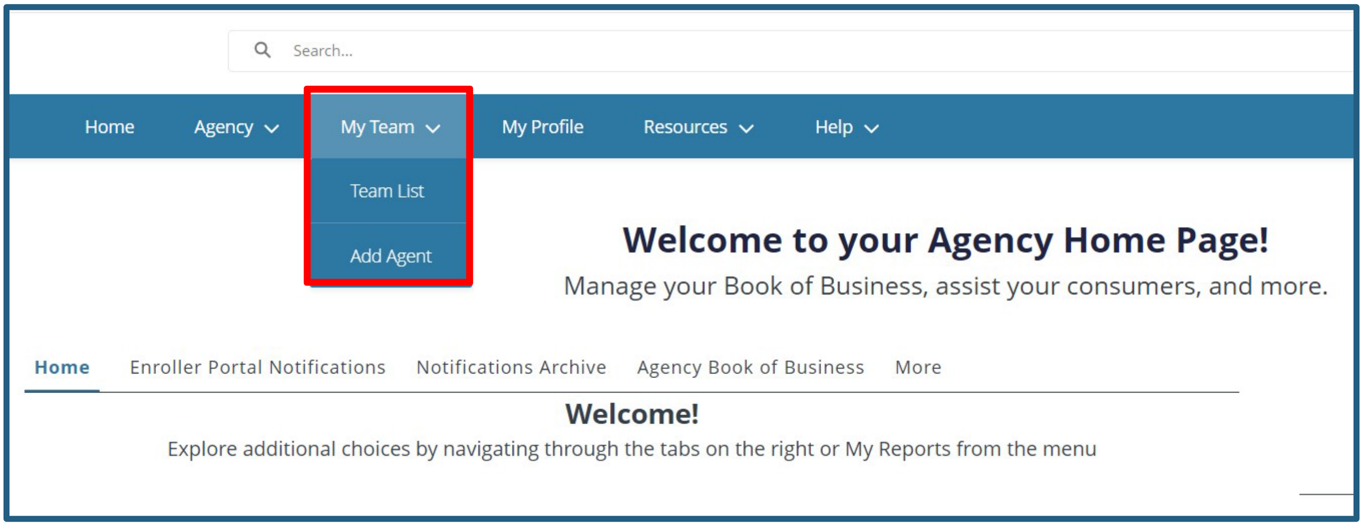
Note: An AAS2 can update agency location and hours.

- Select **Active Delegations** to view active delegations using the Search or the filter function.
- Select **Pending Delegations** to accept/decline delegations.
- Select **Subsite Locations** to view, add, update, or remove Subsites.
- Select **Transfer Delegations** to transfer delegations.
- Select **Agency Delegation History** to view a historical list of all previous Agency delegations with delegation start and end dates and reason for end.

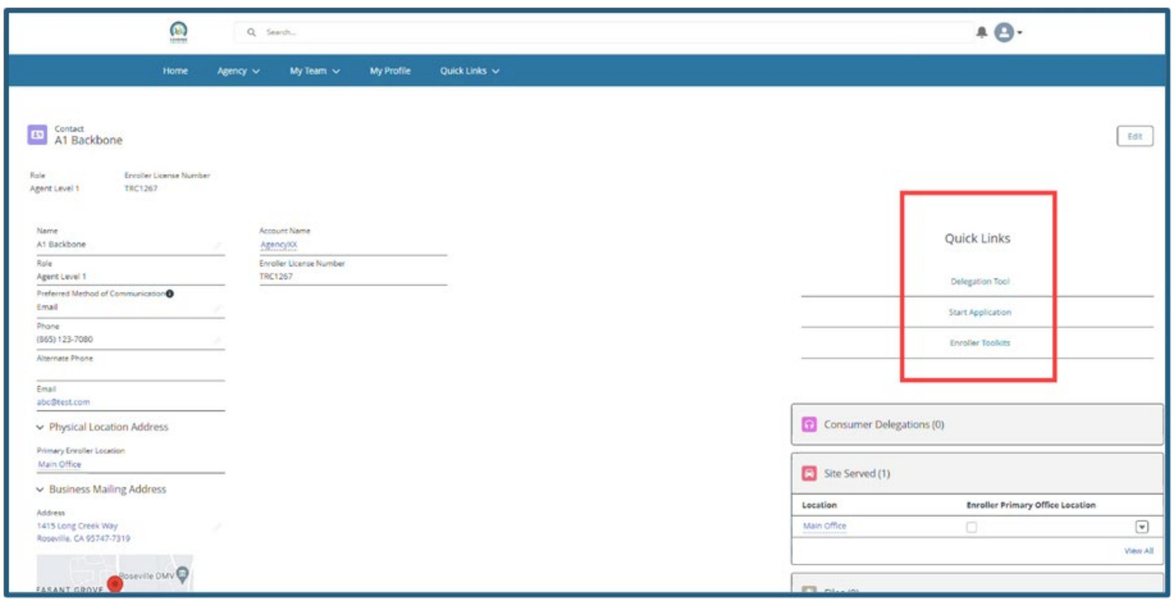
My Team

The *My Team* tab lists links that will assist in completing various team-related tasks:

- Select **Team List** to look up names of Agency Managers and other team members. All team members, including Agency Managers, will be listed along with their license numbers, contact information, certification status, contact status, and role.
  - To start an application or to access the delegation tool for a contact, under the Name column, select a contact name.



- On the *Contact* page, the Quick Links on the right will help access the **Delegation Tool** or **Start Application**.



- The **Add Agent** option is located under the My Team tab. An AAS2 can submit a New Agent application in the Agency Portal. The Approved Admin Staff Level 2 must review and follow the step-by-step instructions in the [Add a New Agent to an Agency Job Aid](#).

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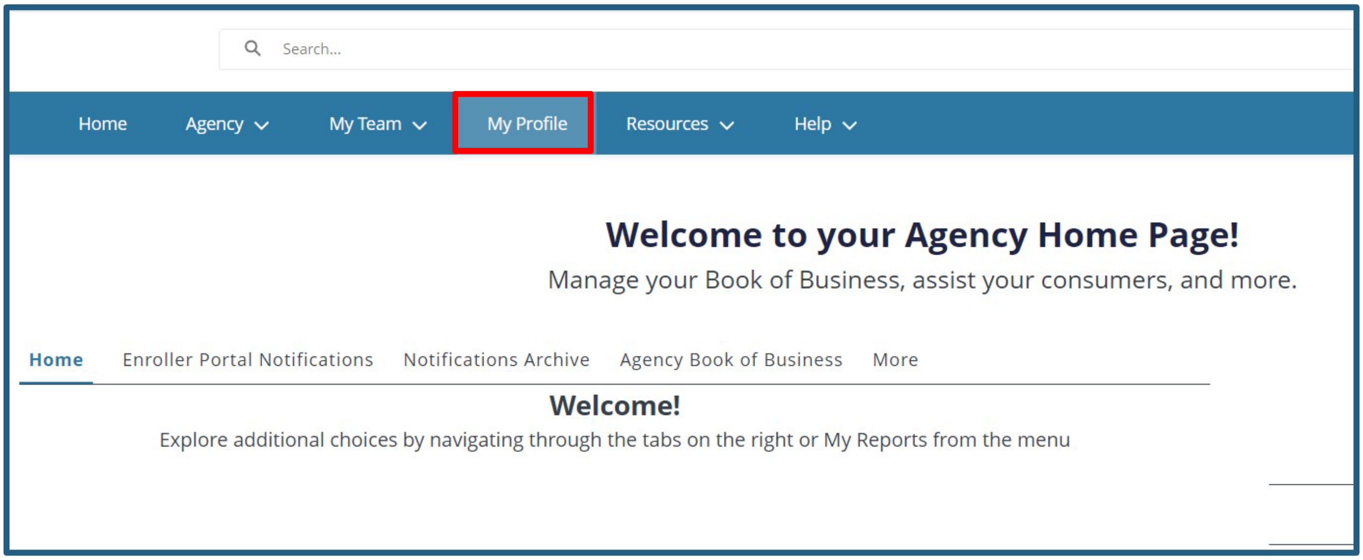
My Profile

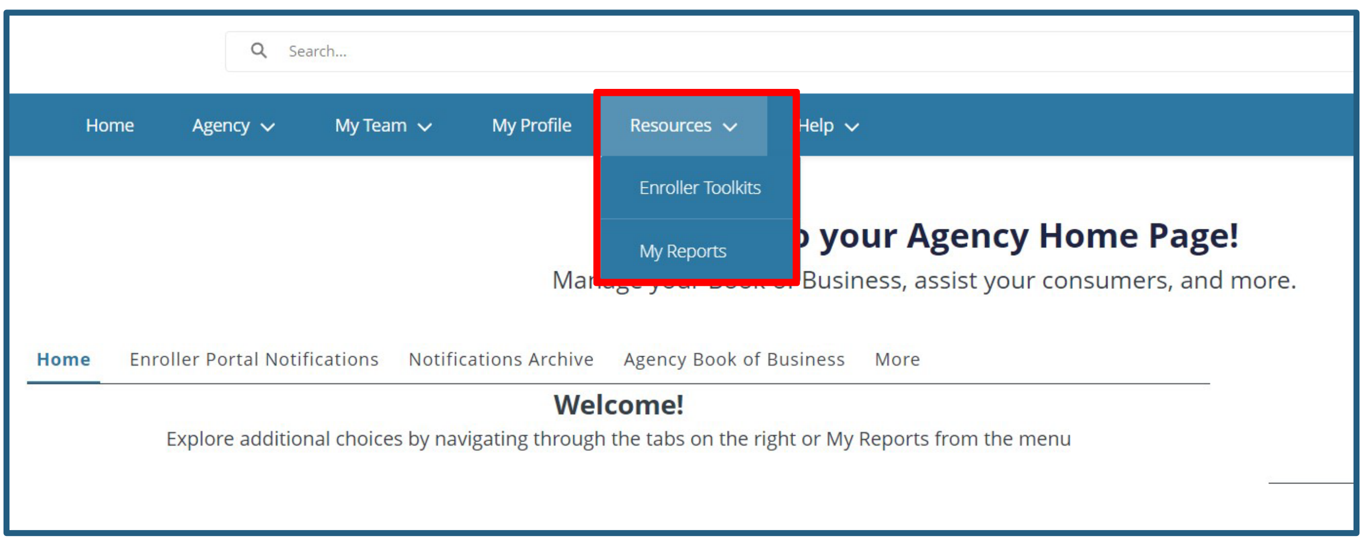
Click the **My Profile** tab to view your profile.



Resources

The *Resources* tab contains the following links:

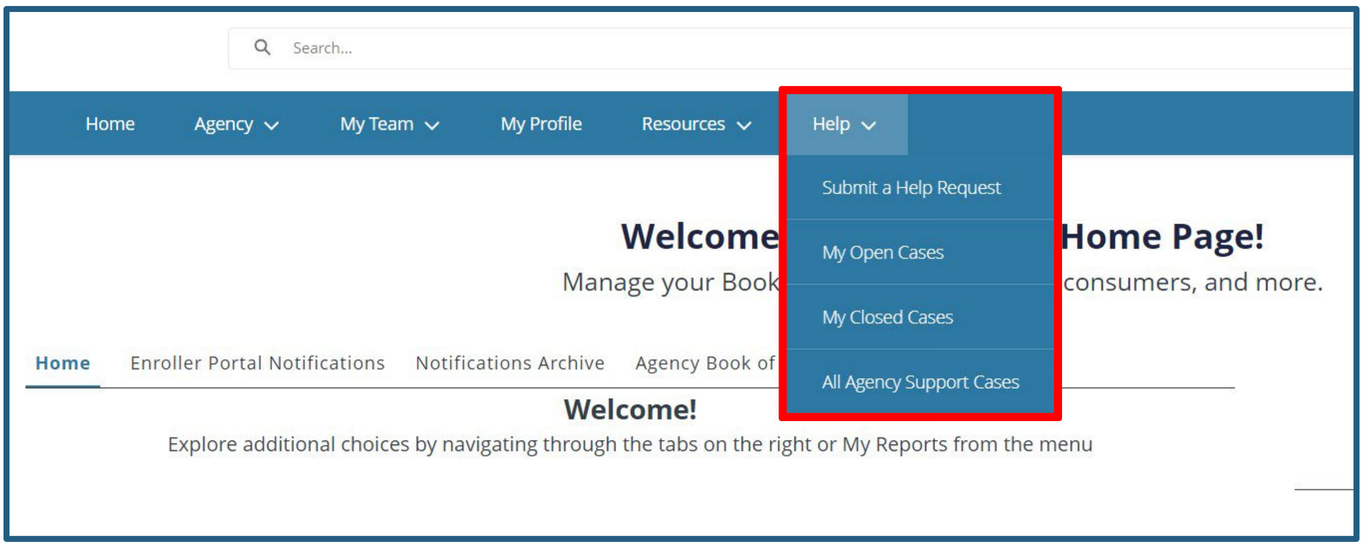
- Select **Enroller Toolkits** to access the Enrollment Partner Toolkit page.
- Select **My Reports** to access the Book of Business, private reports, reports created by you, or shared with you.



Help

The *Help* tab contains the following links:

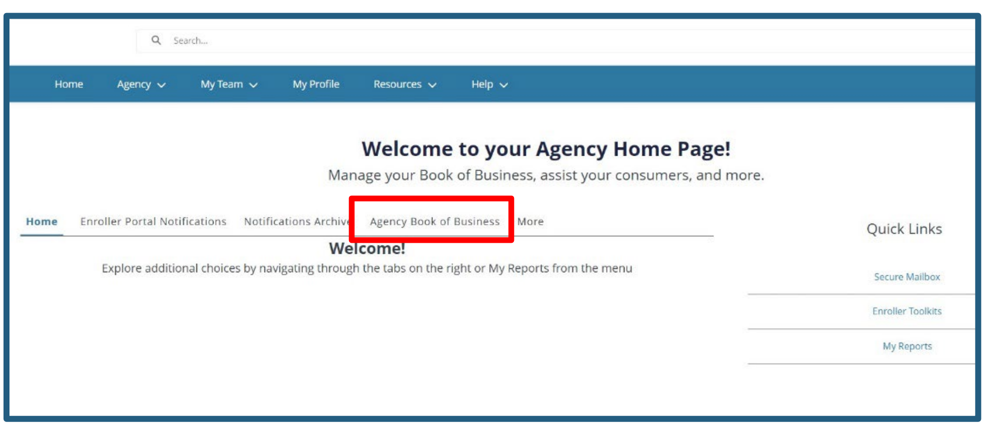
- Select **Submit a Help Request** to open a case or live chat with an Agency Service Center Representative.
- Select **My Open Cases** to view all open cases.
- Select **My Closed Cases** to view all closed cases.
- Select **All Agency Support Cases** to view all the Agency's cases. This option is available to Agency Managers, Authorized Signers, Agent 2, and Approved Administrative Staff 2).



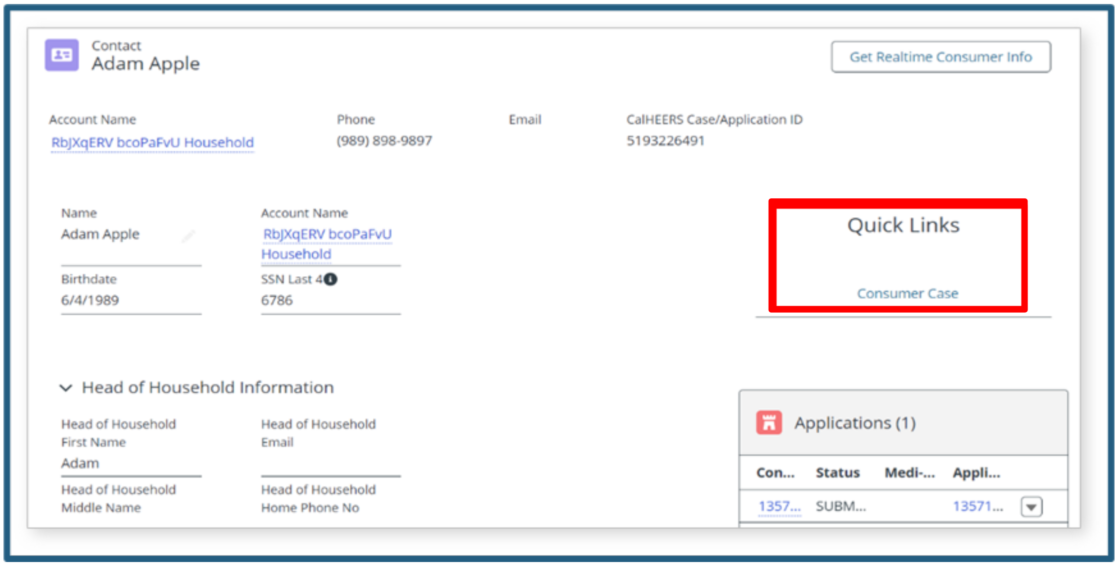
Approved Admin Staff Level 1 (AAS1) Portal Access

Agency Portal Home Page

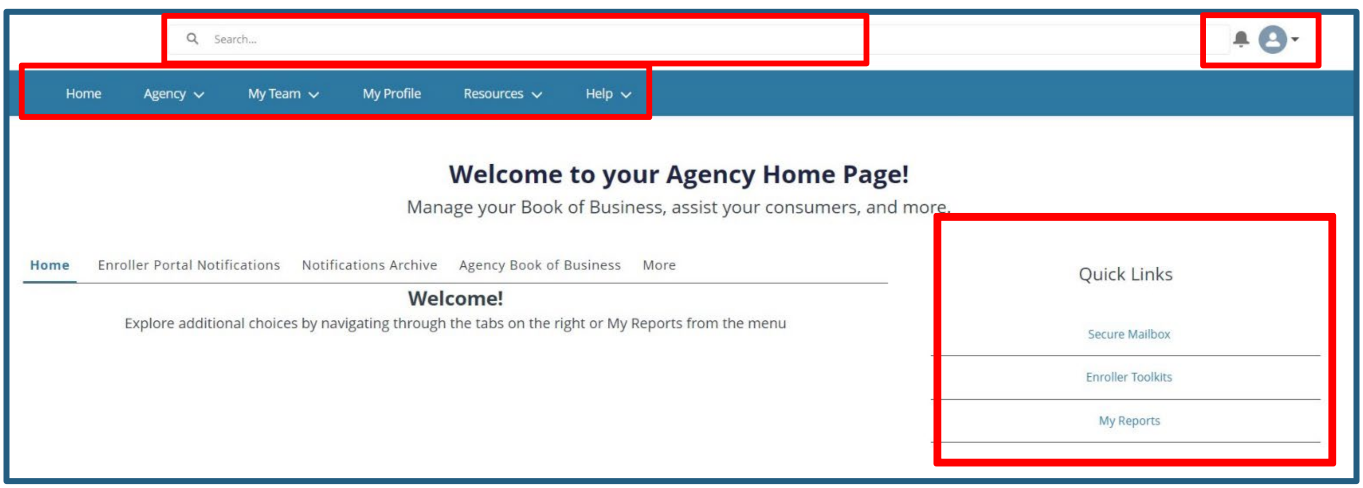
Login to your Enroller Portal to view the Agency Portal Home page. The *Agency Book of Business* is displayed as a tab on the Home page.



All names in the book of business are hyperlinks that will open the consumers contact. From the consumer's contact, you will have access to the link to their application, allowing you to take any action needed on their case or enrollment.



The following areas on the Home page provide information and access to task completion:



- The Search bar on top of the page can be used to find consumers within the Agency or the Book of Business.
- Click the bell icon in the top-right corner to read Notifications.
- The profile icon in the top-right corner enables you to view and edit your security profile, and to log out of the Enroller Portal.
- The tabs available on the dashboard are:
  - **Home**: for the Home page
  - **Agency**: to view Agency and delegation details, and complete delegation tasks

   - **My Team**: to view the team list and access team information
   - **My Profile**: to view your profile
   - **Resources**: to access Enroller Toolkits and Reports
   - **Help**: to submit a help request and view open and closed cases

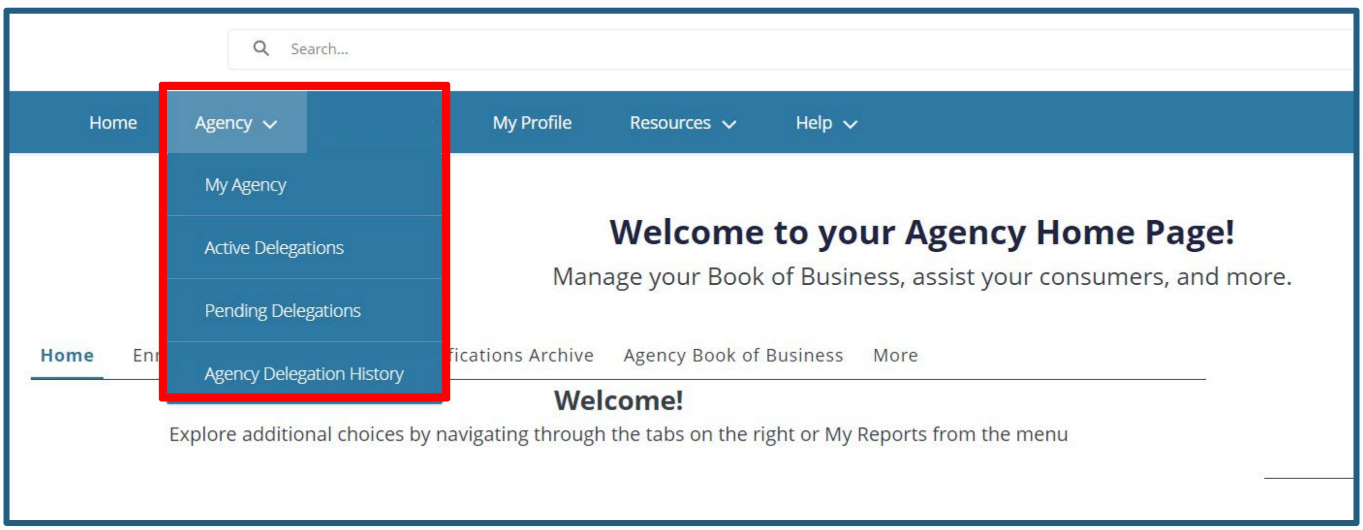
Note: Tabs will vary based on user role.

- The Quick Links on the right side of the Home page are for quick access to the following:
   - *Secure Mailbox*
   - *Enroller Toolkits*
   - *My Reports*

Note: Quick Links displayed will vary based on user role.

Agency

The **Agency** tab lists links that will assist in completing various Agency-related tasks.



- Select **My Agency** to locate information about your Agency. The View My Agency page displays vital information about your Agency, including the License number, the Federal Tax ID, the Authorized Signer, and the locations.

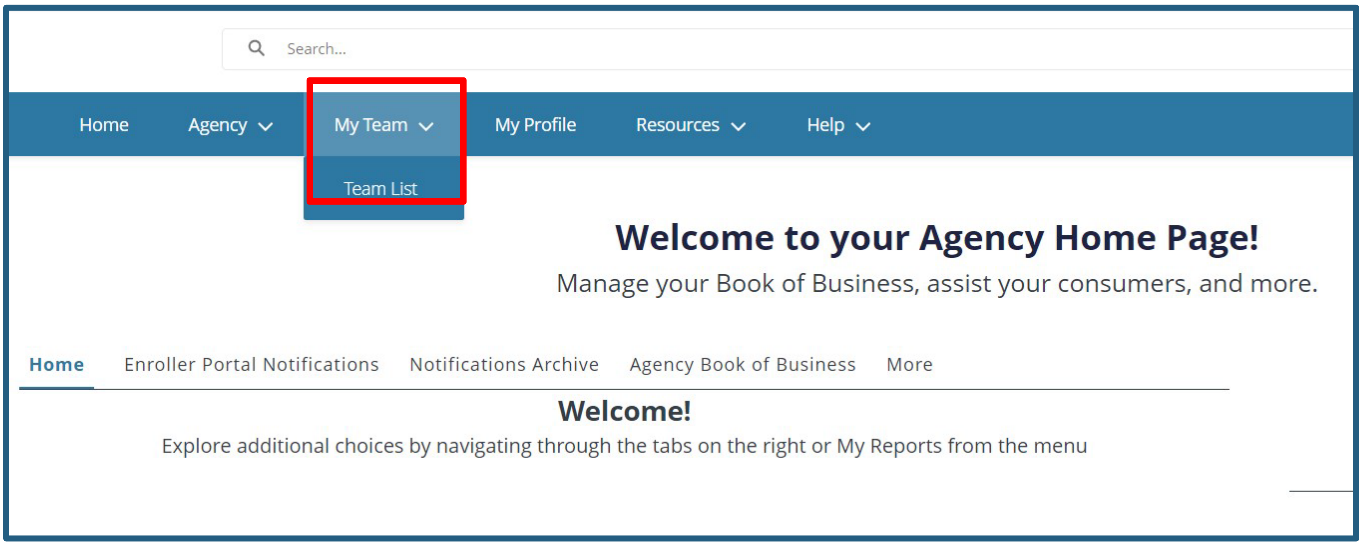
Important: An AAS1 will not update Agency location and hours.

- Select **Active Delegations** to view active delegations using the Search or the filter function.
- Select **Pending Delegations** to accept/decline delegations.
- Select **Agency Delegation History** to view a historical list of all previous Agency delegations with delegation start and end dates and reason for end.

My Team

The *My Team* tab lists links that will assist in completing various team-related tasks:

- Select **Team List** to look up names of Agency Managers and other team members. All team members, including Agency Managers, will be listed along with their license numbers, contact information, certification status, contact status, and role.
    - To start an application or to access the delegation tool for a contact, under the **Name** column, select a contact name.



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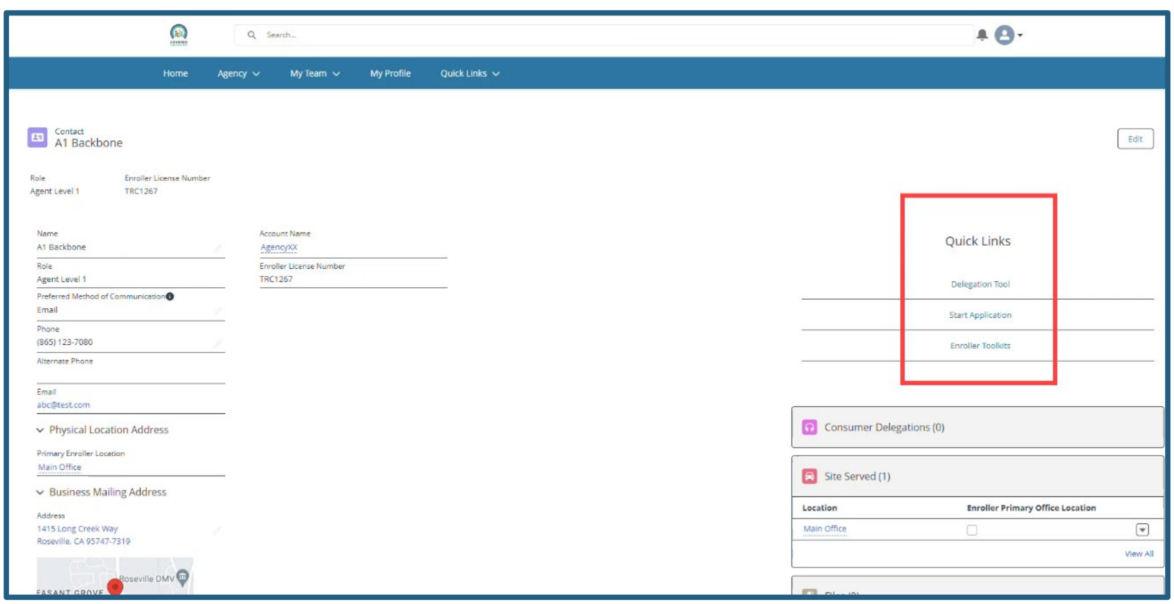
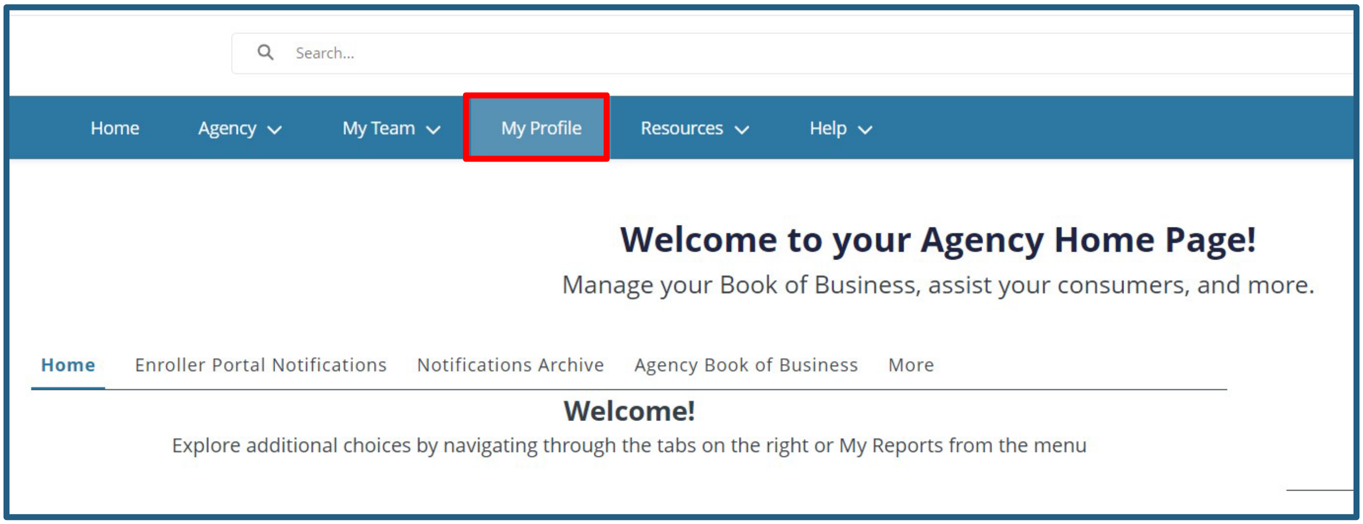
    - On the *Contact* page, the Quick Links on the right will help access the **Delegation Tool** or **Start Application**.



My Profile

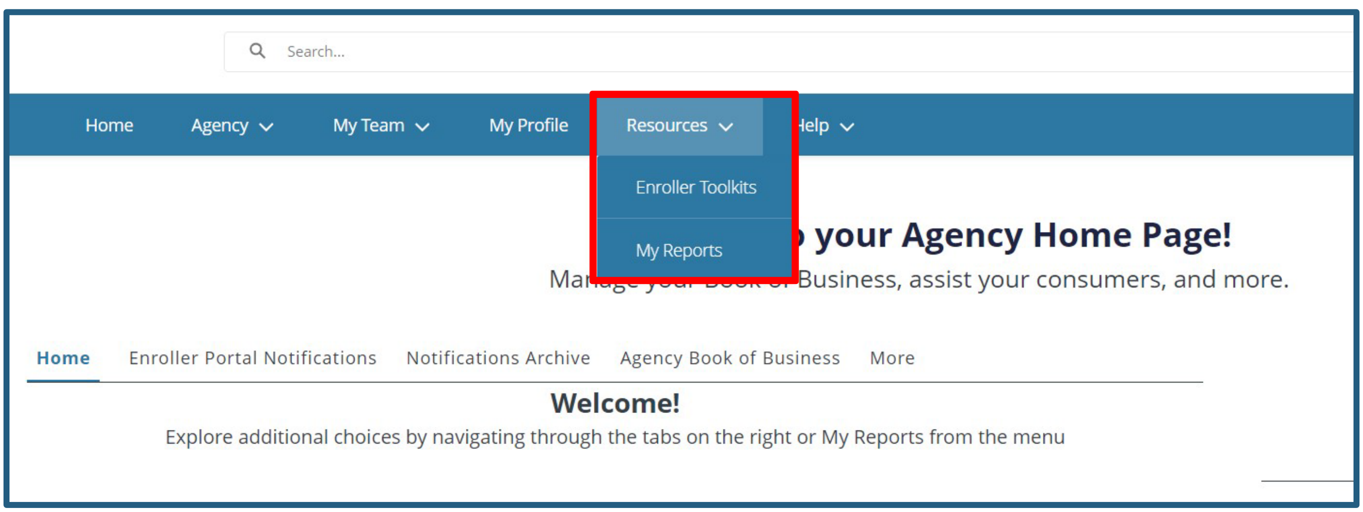
Click the **My Profile** tab to view your profile.



Resources

The *Resources* tab contains the following links:

- Select **Enroller Toolkits** to access the Enrollment Partner Toolkit page.
- Select **My Reports** to access the Book of Business, private reports, reports created by you, or shared with you.



Help

The *Help* tab contains the following links:

- Select **Submit a Help Request** to open a case or live chat with an Agency Service Center Representative.

- Select **My Open Cases** to view all open cases.
- Select **My Closed Cases** to view all closed cases.