



# Change Roles for Agency Managers Quick Guide

## Overview

Agency Managers L1 and L2 can convert to Agent L1 and L2 (and vice versa) via the Enroller Portal.

## Enroller steps

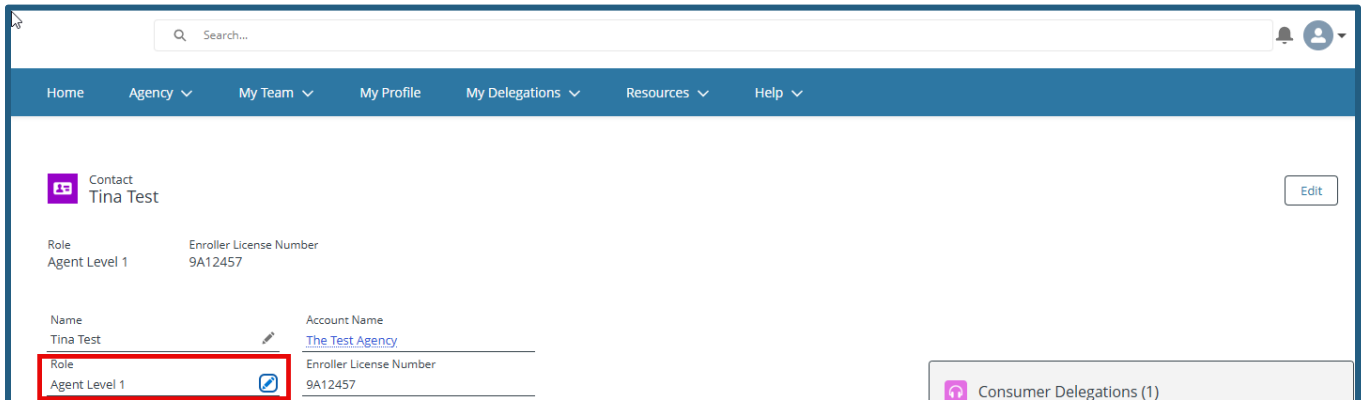
1. From the *My Team* drop down select **Active Team List**.

The screenshot shows the Enroller Portal interface. At the top, there is a search bar and a navigation menu with options: Home, Agency, My Team, My Profile, My Delegations, Resources, and Help. The 'My Team' dropdown menu is open, and the 'Active Team List' option is highlighted with a red box. Other options in the dropdown include Inactive Team List, Pending Staff Applications, Add Agency Manager L1, Add Agent, and Add Approved Admin Staff. The main content area displays a 'Welcome to your Agency Home Page!' message and several tabs: Home, Enroller Portal, Archive, Agency Book of Business, and More.

2. Choose which Agent to change the role.

The screenshot shows the 'Contacts' table in the Enroller Portal. The table has columns: Name, Enroller License, Email, Phone, Certification, Certification/..., Role Formula, and Is Scripted. The 'Name' column header is highlighted with a red box. The table contains one row for 'Polly Rollins' with the following details: Enroller License: 3P12345, Email: ccaenrollerportal+polly@gmail.com, Phone: (916) 355-2468, Certification: Certified, Certification/...: 7/24/2024, Role Formula: Agency Manager Level 1, and Is Scripted: . The table also includes a search bar and various action icons.

3. The Contact card populates. Click the pencil icon to edit the role.



Search...

Home Agency My Team My Profile My Delegations Resources Help

Contact Tina Test Edit

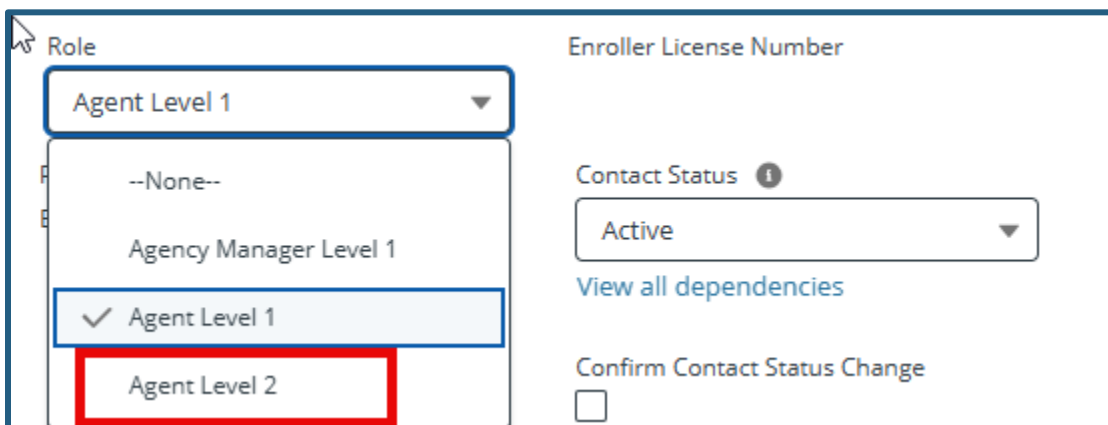
Role Agent Level 1 Enroller License Number 9A12457

Name Tina Test Account Name The Test Agency

Role Agent Level 1 Enroller License Number 9A12457

Consumer Delegations (1)

- The dropdown displays a checkmark next to the current role and displays the other roles that can be changed to.



Role

Enroller License Number

Agent Level 1

--None--

Agency Manager Level 1

✓ Agent Level 1

Agent Level 2

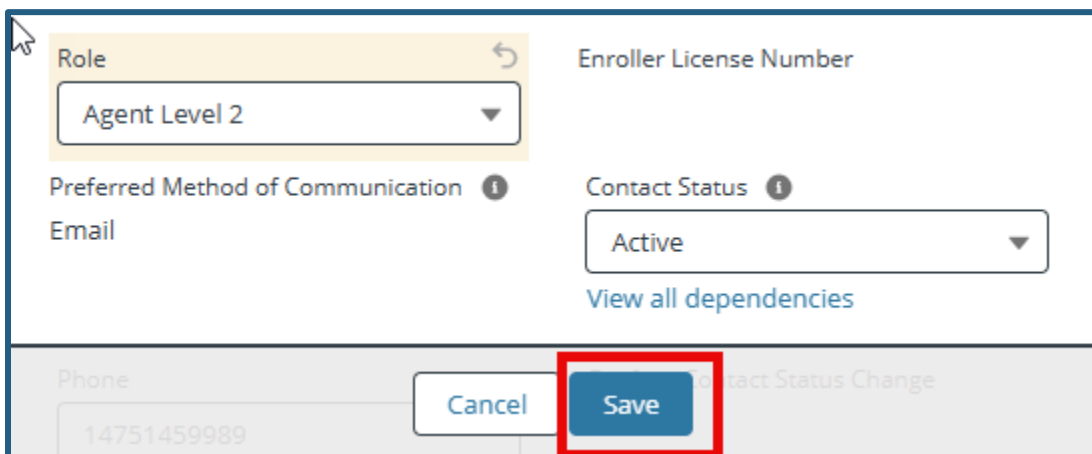
Contact Status i

Active

[View all dependencies](#)

Confirm Contact Status Change

4. Click the **Save** button.



Role

Enroller License Number

Agent Level 2

Preferred Method of Communication i

Email

Contact Status i

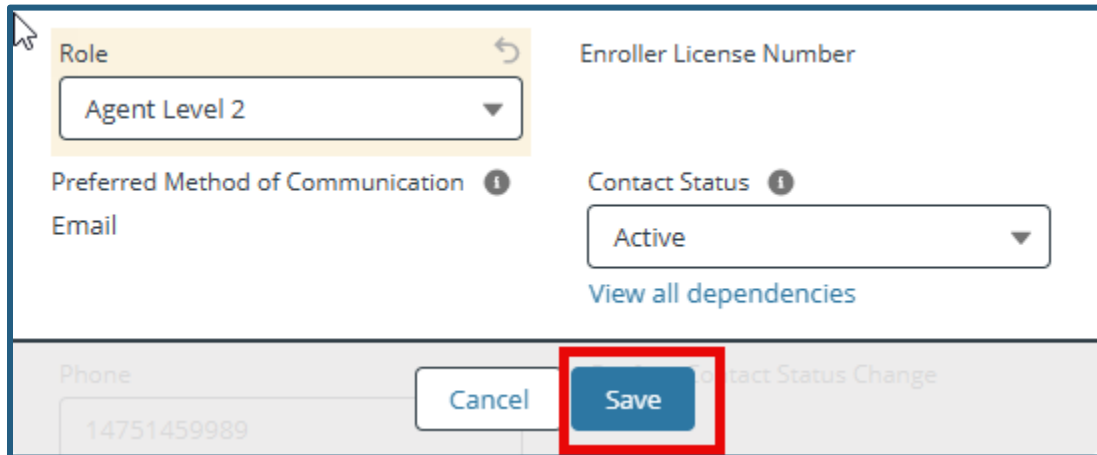
Active

[View all dependencies](#)

Phone 14751459989



Cancel Save

Contact Status Change

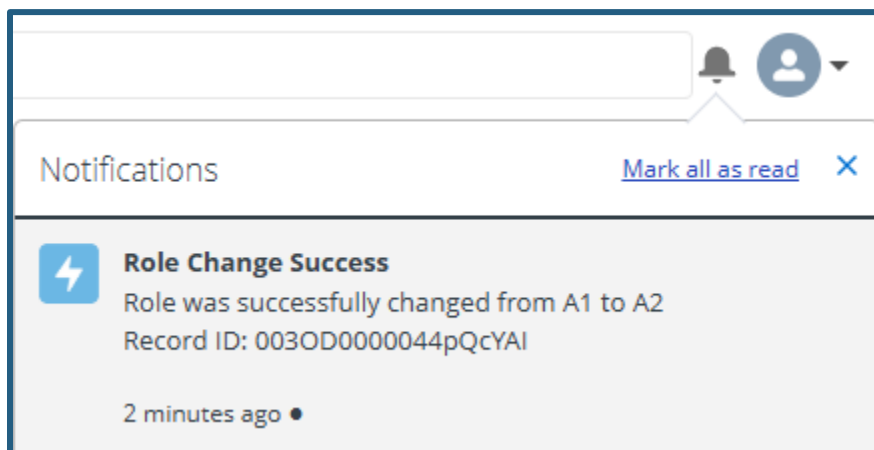


The screenshot shows a form for changing an agent's role. The 'Role' dropdown is set to 'Agent Level 2'. The 'Contact Status' dropdown is set to 'Active'. The 'Enroller License Number' field is empty. The 'Preferred Method of Communication' is set to 'Email'. The 'Phone' field contains '14751459989'. At the bottom, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red rectangle.



- A brief message banner displays.

 Please notify the Agent Contracts if you wish to enroll this person in training 

- When the message banner is clicked, a Bell notification populates.



The screenshot shows a notification banner with the following content:

- Notifications** [Mark all as read](#) 
-  **Role Change Success**
- Role was successfully changed from A1 to A2
- Record ID: 003OD0000044pQcYAI
- 2 minutes ago •



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- The **Active Team List** under the *My Team* dropdown shows the role change for the Agent.

Contacts (PCAP) My Active Agency Enrollers

3 items • Sorted by Name • Filtered by All contacts - Certification/Approval Status, Contact Record Type • Updated a few seconds ago

	Name ↑	Enroller Lice...	Email ↑	Phone	Certification...	Certification...	Role Formula	Is Scripted ...
1	Tim Test	B111111	ccaepuat-timtest@gmail.com	(111) 111-1111	Certified	5/4/2026	Agency Manager Level 2	<input type="checkbox"/>
2	Timmy Test	D111111	ccaepuat-timmytest@gmail.com	(111) 111-1111	Certified	5/4/2026	Agent Level 1	<input type="checkbox"/>
3	Tina Test	C111111	ccaepuat-tinatest@gmail.com	(111) 111-1111	Certified	5/4/2026	Agent Level 2	<input type="checkbox"/>