

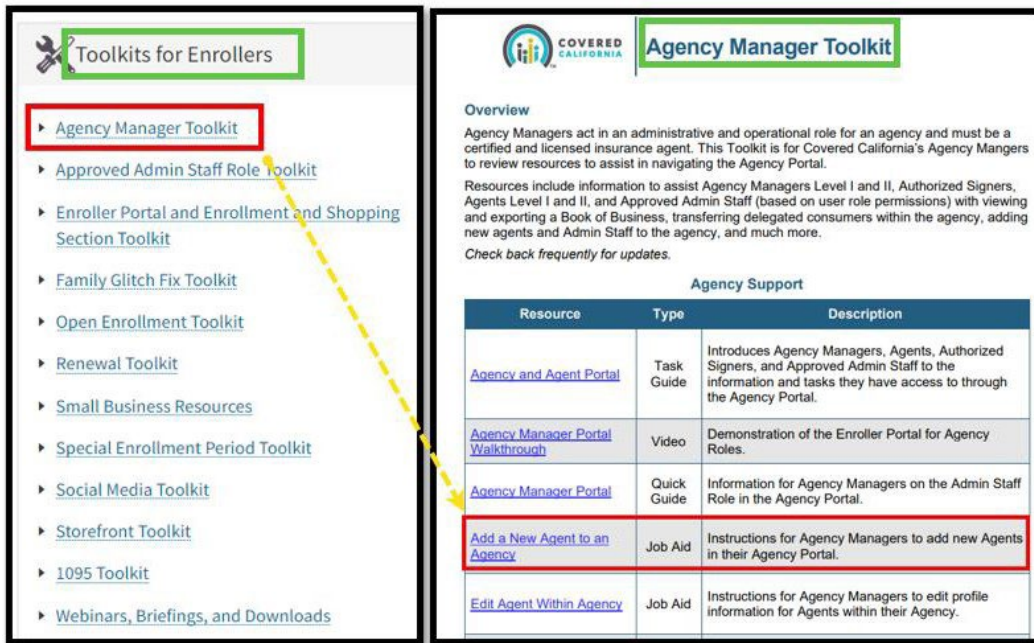
Overview

This Quick Guide provides 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.

Covered California has a wide range of [Enrollment Partner toolkits](#) to assist with onboarding downline Agents.

To get started:

1. Go to the [Enrollment Partner toolkits](#) page.
2. Click the [Agency Manager Toolkit](#).
3. Click [Add a New Agent to an Agency Job Aid](#).



Toolkits for Enrollers

- ▶ [Agency Manager Toolkit](#)
- ▶ [Approved Admin Staff Role Toolkit](#)
- ▶ [Enroller Portal and Enrollment and Shopping Section Toolkit](#)
- ▶ [Family Glitch Fix Toolkit](#)
- ▶ [Open Enrollment Toolkit](#)
- ▶ [Renewal Toolkit](#)
- ▶ [Small Business Resources](#)
- ▶ [Special Enrollment Period Toolkit](#)
- ▶ [Social Media Toolkit](#)
- ▶ [Storefront Toolkit](#)
- ▶ [1095 Toolkit](#)
- ▶ [Webinars, Briefings, and Downloads](#)

Agency Manager Toolkit

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.

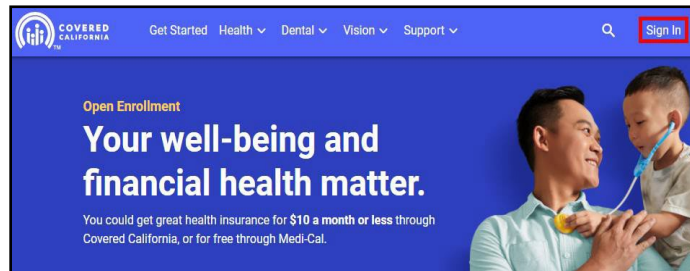
Agency Support

| 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. |
| Edit Agent Within Agency | Job Aid | Instructions for Agency Managers to edit profile information for Agents within their Agency. |

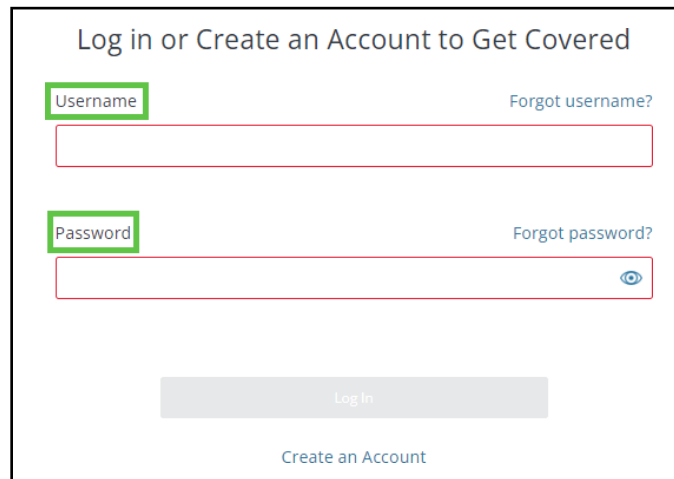
Step 1: Agency Creates an Application Account for the Downline Agent

The Authorized Signer and Agency Manager possess the credentials to initiate the application for a downline Agent.

- A. The Authorized Signer or Agency Manager will log in from the [Coveredca.com landing page](https://coveredca.com), and "Sign In" (upper right corner.)



- B. From the [Log in or Create an Account to Get Covered](#) page, enter the username and password.



Log in or Create an Account to Get Covered

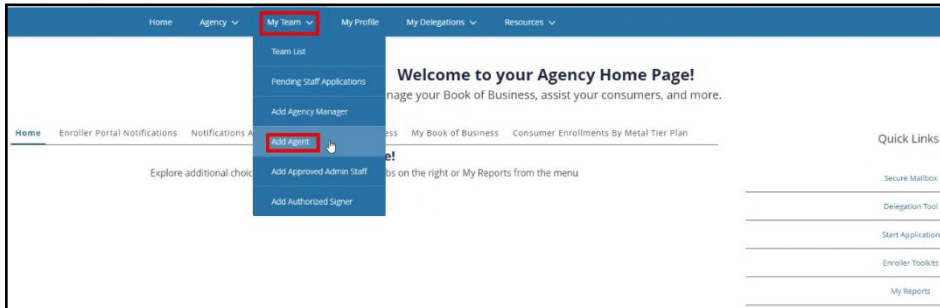
Username [Forgot username?](#)

Password [Forgot password?](#)

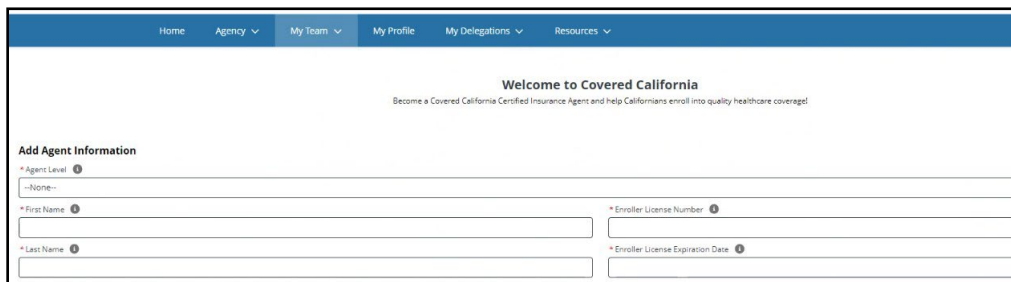
Log In

Create an Account

- C. From the “Welcome to your Agency Home Page”, select the “My Team” tab and click the “Add Agent” option.



- D. Complete the application fields for the Downline Agent.


 A screenshot of the 'Add Agent Information' form. The form is titled 'Add Agent Information' and includes the following fields:

- * Agent Level (dropdown menu, currently set to '--None--')
- * First Name (text input field)
- * Last Name (text input field)
- * Enrollor License Number (text input field)
- * Enrollor License Expiration Date (text input field)

- E. The Agent will now appear as a Pending Staff Applicant.
- F. Allow 3-5 business days for the Covered California Team to review the application and verify the Agent license with the California Department of Insurance for the Accident & Health or Sickness license.
- G. After all verifications are completed, the Covered California team will change the status from “Pending” to “Eligible”.

Step 2: Downline Agent Completes Online Training Through Covered California Learning Management System (LMS)

- A. You will receive an email from Covered California’s [Learning Management System \(LMS\)](#) with login information to access the Certified Insurance Agent Training Certification.
- B. Log in to the [LMS](#) and select the Certified Insurance Agent Certification training located under “My Courses” within the “Certification/Recertification” folder. Complete all training courses within the curriculum.



Downline Agent Onboarding Quick Guide

Notes:

- Your email address is your LMS username.
- We strongly recommend that you use the Mozilla Firefox or Google Chrome browser.
- Once you complete the online courses, select the " Certified Insurance Agent Certification Exam" and take the exam. After completing the exam, you will be notified immediately whether you passed or failed. A passing score of 80 percent or greater is required to move forward in the certification process.
- You have 3 attempts to take the exam. The exam is open book, and we encourage you to use the Study Guides provided in the [Learning Management System \(LMS\)](#).

Step 3: Submits Payment

Within 3-5 business days after you pass the Certification Exam, the Agent will receive an email from DocuSign® containing an envelope to pay the California Department of Insurance Endorsement Fee. **Payments received are non-refundable.**

Step 4: Downline Agent Signs and Submits the Non-Monetary Agreement DocuSign® Forms to Covered California

- A. In 3-5 business days after the payment has been submitted, the Agent will receive their Non-Monetary Agent Agreement via DocuSign®. Within the Non-Monetary Agreement, the Agent must review and sign the Exhibits A-E and complete the Voter Registration Training.
- B. Allow 7 to 10 business days for the final paperwork to be processed. You will be notified of your certification status, provided there is no missing information or errors in your paperwork. Once your Agreement has been approved, your profile status will be moved to "Certified."

Step 5: Downline Agent Must Complete the Account Creation Process Once the Agent Status is Changed to "Certified"

- A. You will receive 2 separate emails with an account creation access code and a link to set up your new log in credentials. Use the link and access code for initial login to the Covered California Enroller Portal.
- B. You will be prompted to create a username and password, PIN, and create security questions. **YOU MUST CREATE YOUR CREDENTIALS TO COMPLETE THE CERTIFICATION PROCESS.**



Downline Agent Onboarding Quick Guide

Note: A “Certified” status for an Agent allows the public to view the Agent profile on the Covered California website. The Agent is now permitted to assist and enroll employers (if your Agency signed an STD 204 in their Agency Agreement), individuals, and families seeking health insurance through Covered California.

Important: The Agent must contact each Qualified Health Plans (QHPs) directly if they are *not* currently appointed and begin the appointment process to ensure the Agency receives commissions payments. Otherwise, they will encounter commission issues. Use the link below to contact the QHPs affiliated with Covered California: [Covered California Health, Dental and Vision Insurance companies](#).

Need Assistance?

If you have any questions or need assistance with this process, send an email to AgentContracts@covered.ca.gov.