

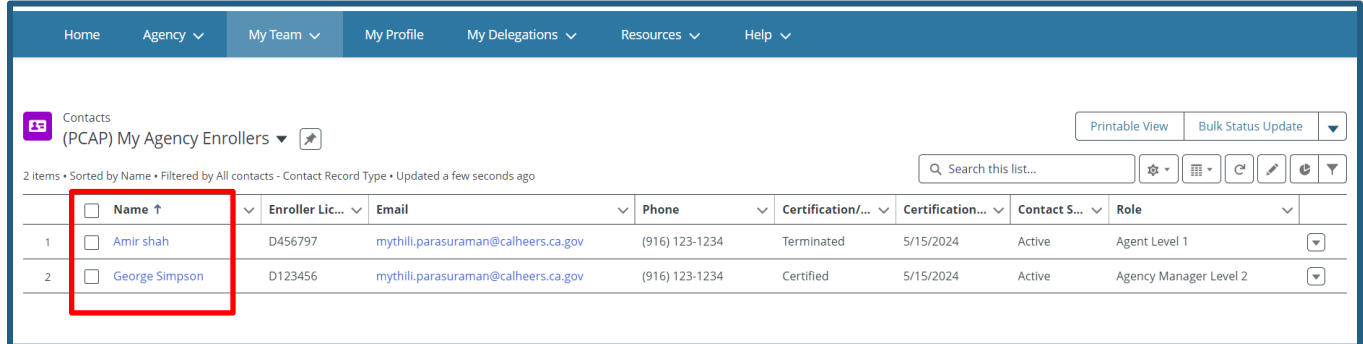
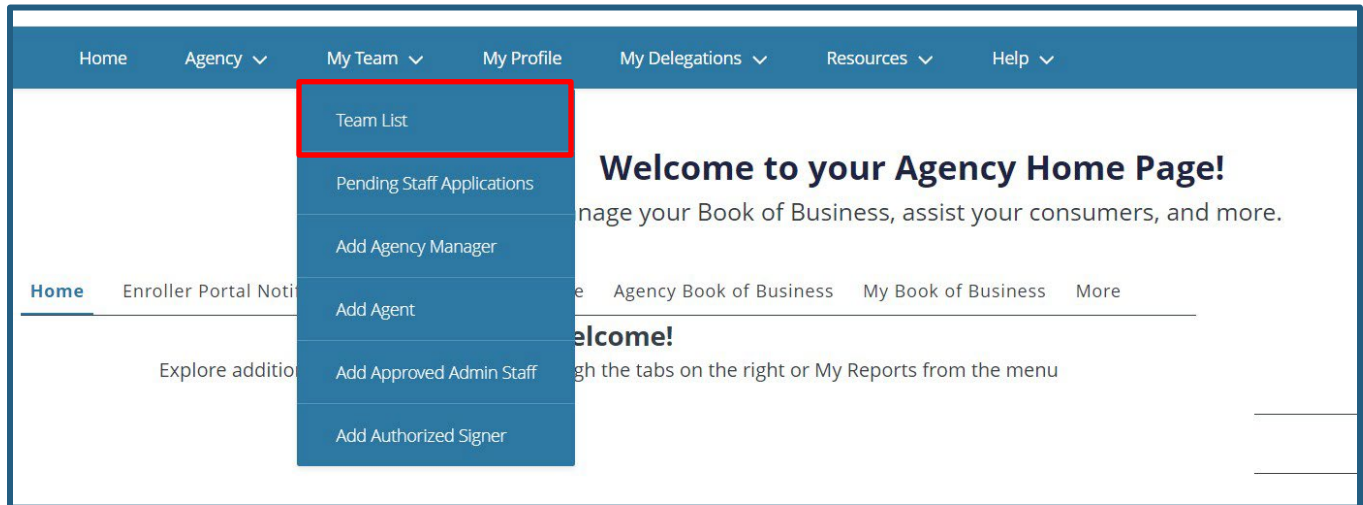



Edit Agent within Agency Quick Guide

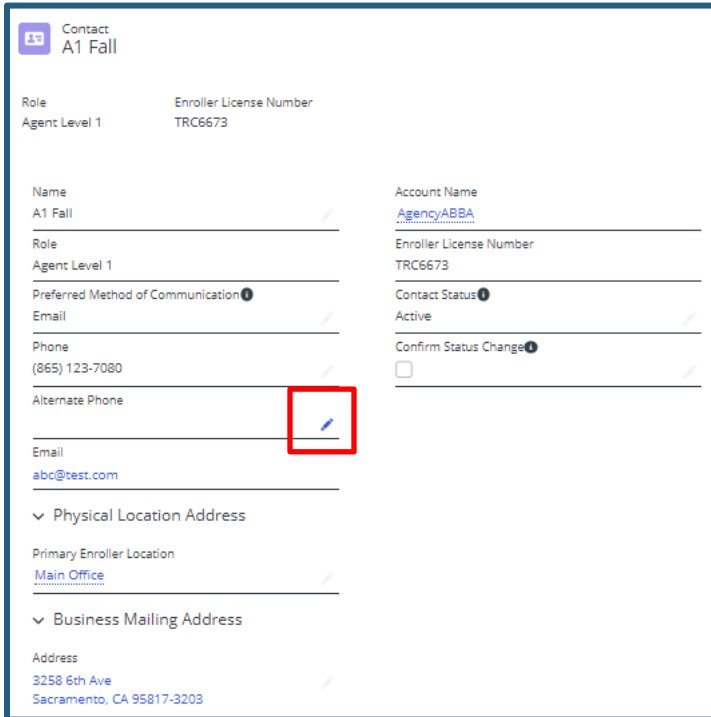
Within the Agency Portal, Agency Managers can edit some information for themselves and other staff within their Agency.

Edit Information My Team

1. Select **Team List** under *My Team* to view staff under *Contacts (PCAP) My Agency Enrollers*.



- Select the hyperlinked staff member's name to make edits to specific information using the pencil icon. 



Contact
A1 Fall

Role Agent Level 1	Enroller License Number TRC6673
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Name A1 Fall	Account Name AgencyABBA
Role Agent Level 1	Enroller License Number TRC6673
Preferred Method of Communication ⓘ	Contact Status ⓘ Active
Email	Confirm Status Change ⓘ <input type="checkbox"/>
Phone (865) 123-7080	
Alternate Phone	
Email abc@test.com	


Physical Location Address

Primary Enroller Location
[Main Office](#)

Business Mailing Address

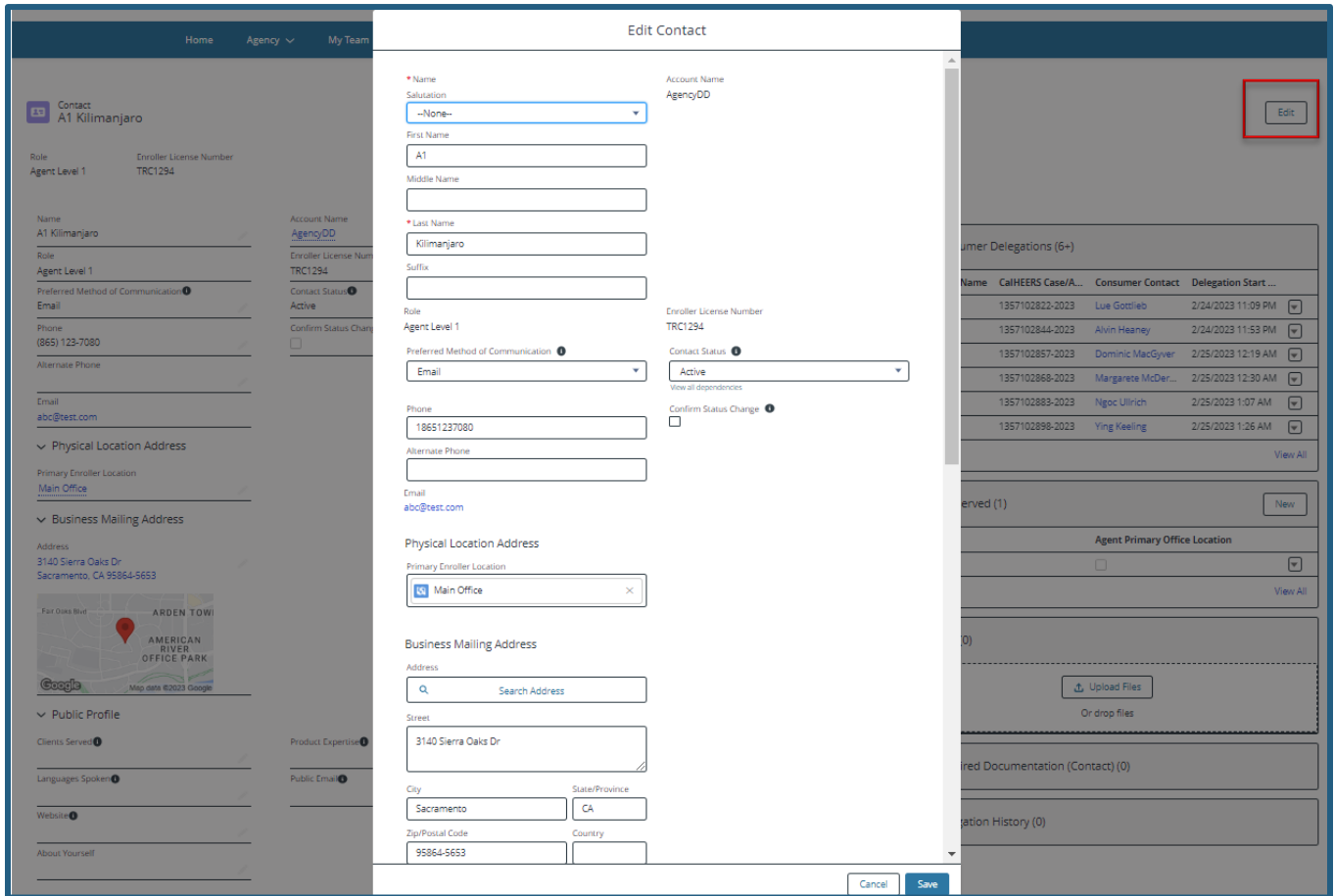
Address
3258 6th Ave
Sacramento, CA 95817-3203

The pencil icon in the 'Alternate Phone' field is highlighted with a red box.

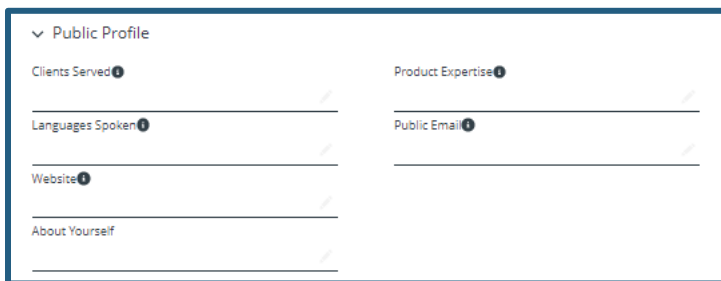
-  Information icons indicate helpful hover text.

Note: You must contact Agent Contracts at agentcontracts@covered.ca.gov to make changes to locked fields that do not have an editing pencil icon.

- An alternative to using the pencil icon is to select the **Edit** button which will pop out the Contact for editing.



- Edits made in the *Public Profile* section will update the information that displays on Find Local Help.



2. When you have completed your edits, select **Save** to save your changes.



Edit Agent within Agency Quick Guide

Contact
A1 Kilimanjaro

Role Agent Level 1	Enroller License Number TRC1294
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Name A1 Kilimanjaro	Account Name AgencyDD
Role Agent Level 1	Enroller License Number TRC1294
Preferred Method of Communication Email	Contact Status Active
Phone (865) 123-7080	Confirm Status Change <input type="checkbox"/>
Alternate Phone	
Email abc@test.com	

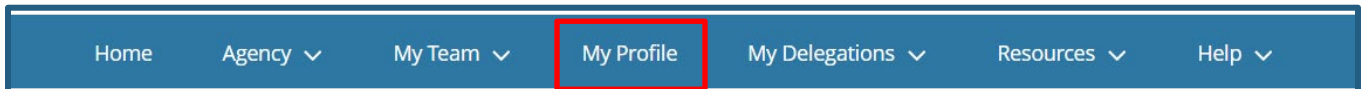
Physical Location Address


Primary Enroller Location
Main Office

Cancel Save

Edit Information My Profile

1. Agency Managers may select **My Profile** to update their own information.




- Select the pencil icon  to make edits to specific information.



Edit Agent within Agency Quick Guide

Role: Agent Level 1 Enroller License Number: TRC6673

Name: A1 Fall  Account Name: AgencyABBA

Role: Agent Level 1 Enroller License Number: TRC6673

Preferred Method of Communication: Email

Phone: (865) 123-7080

Alternate Phone:

Email: abc@test.com

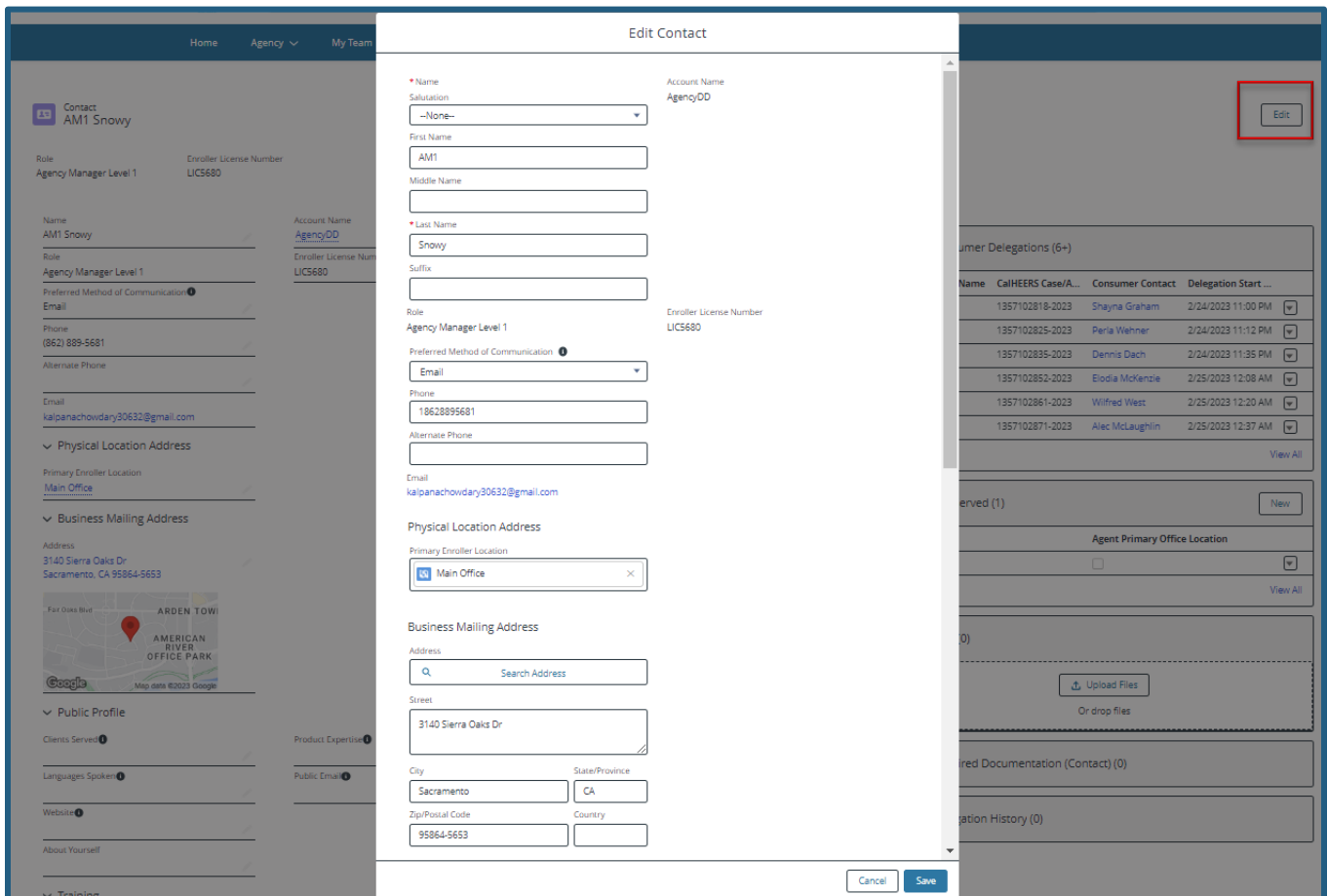
Physical Location Address

Primary Enroller Location: Main Office

Business Mailing Address

Address: 3258 6th Ave, Sacramento, CA 95817-3203

- An alternative to using the pencil icon is to select the **Edit** button which will pop out the Contact for editing.



Home Agency My Team

Contact: AM1 Snowy

Role: Agency Manager Level 1 Enroller License Number: LIC5680

Name: AM1 Snowy Account Name: AgencyDD

Role: Agency Manager Level 1 Enroller License Number: LIC5680

Preferred Method of Communication: Email

Phone: (862) 889-5681

Alternate Phone:

Email: kalpanachowdary30632@gmail.com

Physical Location Address

Primary Enroller Location: Main Office

Business Mailing Address

Address: 3140 Sierra Oaks Dr, Sacramento, CA 95864-5653

City: Sacramento State/Province: CA

Zip/Postal Code: 95864-5653

Account Name: AgencyDD

Enroller License Number: LIC5680

Role: Agency Manager Level 1

Enroller License Number: LIC5680

Preferred Method of Communication: Email

Phone: 18628095681

Alternate Phone:

Email: kalpanachowdary30632@gmail.com

Physical Location Address

Primary Enroller Location: Main Office

Business Mailing Address

Address: 3140 Sierra Oaks Dr

City: Sacramento State/Province: CA

Zip/Postal Code: 95864-5653

Account Name: AgencyDD

Enroller License Number: LIC5680

Role: Agency Manager Level 1

Enroller License Number: LIC5680

Preferred Method of Communication: Email

Phone: 18628095681

Alternate Phone:

Email: kalpanachowdary30632@gmail.com

Physical Location Address

Primary Enroller Location: Main Office

Business Mailing Address

Address: 3140 Sierra Oaks Dr

City: Sacramento State/Province: CA

Zip/Postal Code: 95864-5653

Cancel Save



Edit Agent within Agency Quick Guide

- Edits made in the *Public Profile* section will update the information that displays on Find Local Help.

A screenshot of a web form titled "Public Profile" with a dropdown arrow. The form contains several input fields: "Clients Served", "Product Expertise", "Languages Spoken", "Public Email", "Website", and "About Yourself". Each field has a small circular icon with an exclamation mark to its right and a pencil icon to its left, indicating that the field is required and can be edited.

2. When you have completed your edits, select **Save** to save your changes.

Two buttons are shown side-by-side: "Cancel" and "Save". The "Save" button is highlighted with a red border.

Note: The Agency Manager can edit the status of an Agent within the Agency, enabling or disabling the Agent's ability to do business under the Agency. The Agency Manager can also edit their own status.

- **Active:** Able to access all available user portal screens, edit Agent, Agency and Individual Agent information, perform all Agency Manager functions
- **Inactive:** Able to login to the Enroller portal, with view only access, except for changing the Agency Manager's own Status from Inactive to Active.

A screenshot of a web form for editing a contact's status. A dark blue callout box at the top contains the text: "• Marking a Contact 'Inactive' disables their access to CalHEERS and Enroller Portal. • Marking a Contact 'Active' grants their access to CalHEERS and Enroller Portal." Below the callout, the form has a "Contact Status" dropdown menu currently set to "Active", and a "Confirm Status Change" checkbox which is currently unchecked. Both fields have a pencil icon to their right.