Enroller Portal Frequently Asked Questions for Agency Users

Overview

This document contains questions and answers for the Enroller Portal webinars specifically for Agency users.

Frequently Asked Questions (FAQs) and Answers

When adding additional agents or staff to an existing Covered California account, are there appointment fees? If so, what is the fee schedule?

The new onboarding agents, such as the Agency Manager 1 & 2, and Agent 1 & 2, must pay an endorsement fee prior to becoming certified.

Can we view the Household section that shows everyone in the household, date of birth and full SSN?

Yes. You will have the ability to view the household in one section. The only change to this is that only the last 4 of the SSN will be populated.

I believe that training was mentioned as being tracked. How detailed is that tracking?

Training must be completed to become certified. Training must be completed within 45 days from the day that you first log in to the Learning Management System (LMS). Training is only tracked on the progress bar during onboarding.

Will the system allow us to select by insurance carrier?

Yes. The ability to select plans by carrier is still available.

Will duplicate clients be eliminated with the new system?

Covered California is constantly working to reduce duplicates. Enrollers can help reduce duplicate cases by using the Delegation Tool to become delegated. This tool will identify possible duplicates in CalHEERS so enrollers know if there is already a consumer case that they can call the service center about.

Are there any changes to how we enroll members of employer groups? These changes seem to be for individual members only.

Covered California for Small Business enrollment processes are still current.

Can you explain the difference between Manager 1 and Manager 2 as well as Agent 1 and Agent 2?

Agency Manager 2 owns the business. The Agency Manager 1 is allowed to take and perform the business on behalf of the agency.

Both Agency Manager 1 and 2 are able to:

- Add new agents to the Agency
- Manage the new and existing agents
- Work on consumer cases on behalf of agents within the Agency
- Accept the delegations on behalf of Agents
- Perform transfer book of business from one agent to another agent within the Agency
- Update the internal status of the agents (Active/Inactive)

An Agency Manager Level 1 or Level 2 can have their own Book of Business as they are licensed agents. They also assist consumers who are delegated to them or to any agent in their Agency.

Agent 2 is able to work on consumer cases on behalf of agents within the agency. Agent 2 is also able to accept delegations on behalf of agents.

Agent 1 can only work on cases delegated to them. They can only accept their delegations.

If a broker has others under them process employee enrollments for clients, are they able to have their own log in for all clients under the Agency? Or must we still log in under each broker.

Enrollments for small business will continue the same process. The Enroller portal is for Individual/Family Plans (IFP) enrollments.

Will there still be multiple displays of clients that applied and accepted the company or plan and then "changed their mind" and changed plans or companies?

The new portal is for IFP enrollments. The Small Business Portal has not been touched.

Is there a way to email my whole client list from the system with updates and information?

Yes. Under the Quick Links section on the Enroller Portal home page, select My Reports. There is an option to export a Book of Business detailed report which includes a customer email column.

Will I be able to filter Book of Business by when the Reasonable Opportunity (ROP) is expiring?

Yes. You can filter by selecting **CCP Eligibility Status**.

Can we view Enrollment details and see the premium history?

You will have the ability to view enrollments and premium history. This is done by clicking on the consumer. From there you will be taken to the consumer's contact where you will be able to view the enrollment.

Is there a way to see if there are service items for each client or not, on the front login page? For example, if a consumer needs to provide a "Proof of Income" or something else is urgently needed?

CalHEERS sends out a daily summary notification alert and an Excel file to Enrollers on the *Secure Mailbox* page. Enroller Portal Notifications serve as an important tool to help identify and assist any consumers in your Book of Business who need to take action on their CalHEERS case. Additionally, the CalHEERS account home for consumer case displays *Household Summary* and includes links to review actions and alerts.

Are we able to print the quote for a client in PDF?

This will not be a functionality available at this time. This may be possible with future enhancements.

I recently became certified and need assistance signing into my portal. Who do I contact?

- Agent Service Center: (877) 453-9198
- CEC/PBE Help Line: (855) 324-3147

How can you download active or inactive consumer list in Excel?

Exporting lists and reports can be found in the [Book of Business Export for Agency and Agency Managers Quick Guide].

How do we know what role we will have? The description or breakdown of Agency roles was a little confusing. Is this up to our Agency or is this dependent on the license and certifications we have completed?

An Agent 1 or Agent 2 will be decided by the Agency Manager.

When a family with children are already enrolled has a new baby, how do I enroll the child?

. You can access the consumer's application and click **Report a Change**. From there, you will continue the process of adding the newborn.

Are we able to print a quote of one plan or a plan comparison or save it as a pdf file that we can email?

Currently this is not an option. The enroller will have to use the *Print Screen* option on their keyboard.

Will we be able to group clients in the quoting tool?

This will not be a functionality available at this time. This may be possible with future enhancements.

Will there be a sandbox mode to work with the new changes?

This will not be available when this portal goes live. This may be an enhancement that becomes available in the future.