

## **Overview**

Instructions on how to add, remove, or update the Site Served location for downline enrollers.

## **Steps**

1. From the Home page, select "Team List" from the "My Team" menu.

Q S	earch		<b>≜ (2</b> ) -
Home Agency V	My Team 🗸 🛛 My Profile	Resources 🗸 Help 🗸	
		Welcome to your Agency Home Page!	
	Pending Staff Applications	ninge your book of business, ussist your consumers, and more.	
Home Enroller Portal Notifications Notifications A	Add Agency Manager	ess Consumer Enrollments by Metal Tier Plan	Quick Links
Explore additional choir	Add Agent	<b>e!</b> bs on the right or My Reports from the menu	Secure Mailbox (0)
	Add Approved Admin Staff		Enroller Toolkits
	Add Authorized Signer		My Reports

2. Select the Enroller Contact to be updated:

		Home	Agency 🗸	My Team 🗸	My Profile	Resources 🗸	He	elp 🗸					
Ei Contacts (PCAP) My Agency Enrollers 🔻 🖈											ulk Status Update 🛛 👻		
S tens + Sorted by Name + Ritered by All contacts - Contact Record Type + Updated a few seconds ago									- C / C T				
	Name ↑	~	Enroller License	e N V Email			~	Phone ~	Certification/Appro $\vee$	Certification/Appro $\lor$	Contact Status 🔍	Role	~
C	Everett Higgins			ccaenr	ollerportal+everett@g	mail.com		(916) 355-2468	Approved	7/24/2024	Active	Authorized Signer	Ţ
C	Marshall Morrison		2J12457	ccaenr	ollerportal+marshall@	gmail.com		(475) 145-9989	Certified	7/24/2024	Active	Agent Level 1	T
C	Miah Matthews		3T12345	ccaenr	ollerportal+miah@gm	ail.com		(475) 145-9989	Certified	7/24/2024	Active	Agent Level 1	
C	Polly Rollins		3P12345	ccaenr	ollerportal+polly@gma	ail.com		(916) 355-2468	Certified	7/24/2024	Active	Agency Manager Level 1	
	Zac Trevino		2G12457	ccaenr	ollerportal+zac@gmail	.com		(475) 145-9989	Certified	7/24/2024	Active	Agency Manager Level 1	
	Conta (PC/ rs • Sort	Contacts (PCAP) My Agency Enro is - Sored by Name - Ritered by Ait of Name 1 Everett Higgins Mah Marshall Morrison Mah Machavia Poly Rolins Zac Trevino	Contacts (PCAP) My Agency Enrollers (PCAP) My Agency Enrollers (PCAP) My Agency Enrollers Second by Hame + Ritered by Al contacts - Cont  Name t  Kerett Higgins  Multi Marshall Marrison  Multi Matcheva Poly faolins  Zac Trevino	Home         Agency            Contacts (PCAP) My Agency Enrollers          *           s-Sorted by Name - Filtered by All contacts - Contact. Record Type - Up Name †         *           Name †         *           Marshall Morrison         21/2457           Markhetwas         371/2345           Polty Rollins         3P1/2345           Zac/Tree/no         2G1/2457	Home         Agency         My Team           Contacts (PCAP) My Agency Enrollers         *         *           Is -Sored by Name - Filtered by All contacts - Contact Record Type - Updated a tex second Image - Contact Record Type - Updated a tex second Exercise Higgins         Email           Everest Higgins         Calerry         Email           Mashall Morrison         2/12457         ccaerry           Maily Machelus         3/122455         ccaerry           Polity Follinis         3/12245         ccaerry           Zac Trevino         2G12457         ccaerry	Home         Agency         My Tsam         My Profile           Contacts (PCAP) My Agency Enrollers                    Mare - Filtered by All contacts - Contact Record Type - Updates a few seconds approximation of the second se	Home         Agency         My Tisam         My Profile         Resources >           Contacts (PCAP)         My Agency Enrollers         *	Home     Agency     My Team     My Profile     Resources >     He       Contacts (PCAP)     (PCAP)     My Agency Enrollers     *	Home         Agency         My Team         My Profile         Resources         Help           Contacts (PCAP)         My Agency Enrollers         Image: Contacts         Imag	Home         Agency         My Team          My Profile         Resources          Help            Contacts (PCAP) My Agency Enrollers	Home     Agency     My Yeam     My Profile     Resources ×     Help ×       Contacts (PCAP)     (PCAP)     My Agency Enrollers     *       Image: Stand by Name - Filtered by All contacts - Contact Record Type - Updated a few seconds approximation     Panee *     Certification/Appro V       Image: Name *     Envertel Higgins     Envertel Filtered by All contacts - Contact Record Type - Updated a few seconds approximation     (P16) 355-2468     Approved     7/24/2024       Image: Machine Machines     2/12457     ccaerrollerportal+marchall@gmail.com     (475) 145-9989     Certified     7/24/2024       Image: Machine Machines     3P12455     ccaerrollerportal+marchall@gmail.com     (475) 145-9989     Certified     7/24/2024       Image: Agency Contact Contact Contact Contact Contact Contact Contact Contact Record Table Contact Co	Indem       Agency       My Team       My Profile       Resources        Help          Contacts (PCAP) My Agency Enrollers       - <td>Yome     Agency     My Team     My Profile     Resources      Help       Contacts (PCAP)     Image: Contact Second Type + Updated a few second Second Type + Updated Segond Condition (Second Second Type + Updated Second Type + Up</td>	Yome     Agency     My Team     My Profile     Resources      Help       Contacts (PCAP)     Image: Contact Second Type + Updated a few second Second Type + Updated Segond Condition (Second Second Type + Updated Second Type + Up

3. Click "New" to add a different Site Served for the Enroller:

Contact Marshall Morris	son					Ec
ole Enri gent Level 1 2J1:	oller License Number 2457		HOD			
lame Marshall Morrison		/	Account Name Sunstar Insurance			
ole gent Level 1		/	Enroller License Number 2J12457		Consumer Delegations (6)	
eferred Method of Commun mail	nication 🚯	/	Contact Status	/	Delegation Name CalHEERS Case/A Consumer Contact Delegation Sta	t
ine 5) 145-9989		/	Confirm Contact Status Change	/	D:3433524 5193167215 Megnus Cortez 8/20/2024 10:44	AM
nate Phone					D-3433526 5193167218 Ellis Mckinney 7/30/2024 2:52	M
					D-3433527 5193167220 Samia Preston 7/30/2024 3:21	M
ollerportal+marshall(	@gmail.com				D-3433528 5193167221 Rex Blair 7/30/2024 3:38	M
act Send					D-3433529 5193167225 Ann Mcgee 7/30/2024 3:51	M
					D-3433630 5193168171 John Smith 1/10/2025 2:37	M
hysical Location Ad	ldress					Vi
ary Enroller Location-Pub	lic Facing		Show Address in Find Local Help			
nstar Insurance		_			Site Served (1) New Remove Site Served for	Enro
Business Mailing Ad	dress				Site Location Enroller Primary Office Location	_
lress						
23 Hopper Ave anta Rosa, CA 95403-1608		/			Sunsian insurance	
						V



## How to Update Site Served Location(s) for Enrollers

4. Find a different Subsite Location associated with your Agency/Entity and click "Enroller Primary Office Location".

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>	New Site Served		umer	De
Status	* = Required	Information	Name	(
	Information			-
				-
				5
	* Location * Enroller Contact			5
	Search Locations Q 🖾 Marshall Morrison	×		5
	Recent Locations			5
	Sunstar Insurance 2 ve & New Save			
Find L	Sunstar Insurance 2			
	Sunstar Insurance	😞 Site S	Served	(1
	+ New Location			
		Site Locatio	on	
	New Site Served			
				Na
.us	* = Ked	uired Informa	ation	
	Information			
	Site Served Name Enroller Primary Office Location	5		
	*Location 5 *Enroller Contact			
	Sunstar Insurance 2 X Marshall Morrison	×		
	Cancel Save & New Save			
1 L				

5. Save changes to make the updates.



## How to Update Site Served Location(s) for Enrollers

To remove a Site Served location, click the "Remove Site Served for Enrollers" button on the enroller contact page:

Contact Marshall Morrison									Edit
Role Enroller License Number Agent Level 1 2/12457		HOD							
Name Marshall Morrison	/	Account Name Sunstar Insurance							
Role Agent Level 1	/	Enroller License Number 2/12457			Consumer	Delegations (6)			
Email	/	Active	/		Delegation Name	CalHEERS Case/A	Consumer Contact	Delegation Start	
Phone (475) 145-9989	/	Confirm Contact Status Change	/		D-3433524	5193167215	Magnus Cortez	8/20/2024 10:44 AM	-
Alternate Phone					D-3433526	5193167218	Ellis Mckinney	7/30/2024 2:52 PM	-
Fmail					D-3433527	5193167220	Samia Preston	7/30/2024 3:21 PM	
ccaenrollerportal+marshall@gmail.com					D-3433528	5193167221	Rex Blair	7/30/2024 3:38 PM	V
Contract Send					D-3433529	5193167225	Ann Mcgee	7/30/2024 3:51 PM	
					D-3433630	5193168171	John Smith	1/10/2025 2:37 PM	-
✓ Physical Location Address								V	/iew All
Primary Enroller Location-Public Facing		Show Address in Find Local Help		r					
Sunstar Insurance		<u>v</u>			Site Served	(1)	New Remo	ove Site Served for Enro	oller
✓ Business Mailing Address					Site Location		Enroller Primary Of	fice Location	
Address 923 Hopper Ave	/				Sunstar Insurance		<ul> <li>Image: A set of the set of the</li></ul>		-
Santa Rosa, CA 95403-1608	_							V	/iew All