



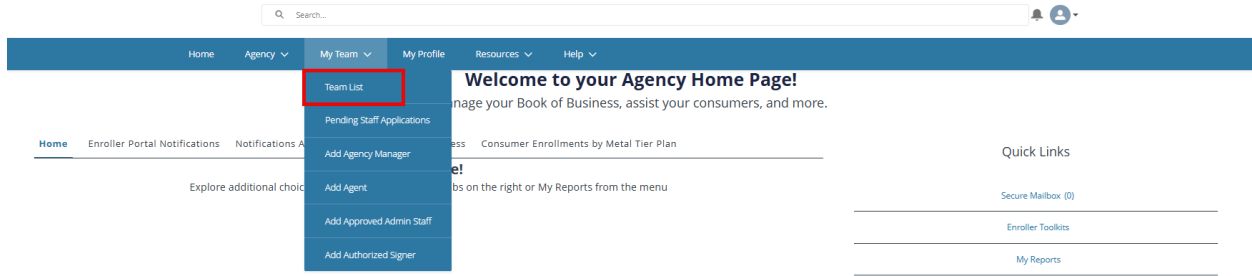
How to Update Site Served Location(s) for Enrollers

Overview

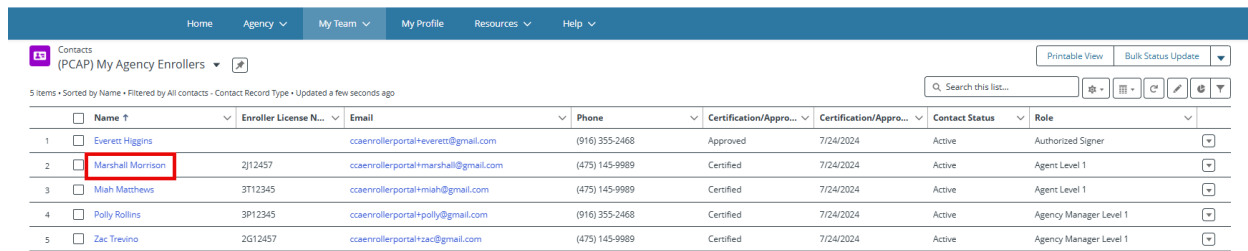
Instructions on how to add, remove, or update the Site Served location for downline enrollers.

Steps

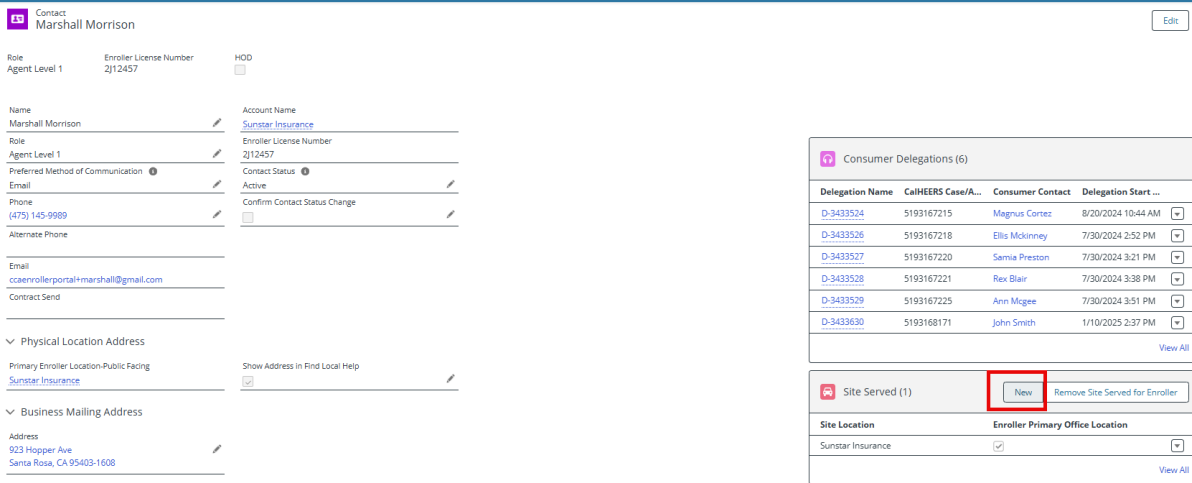
1. From the Home page, select “Team List” from the “My Team” menu.



2. Select the Enroller Contact to be updated:

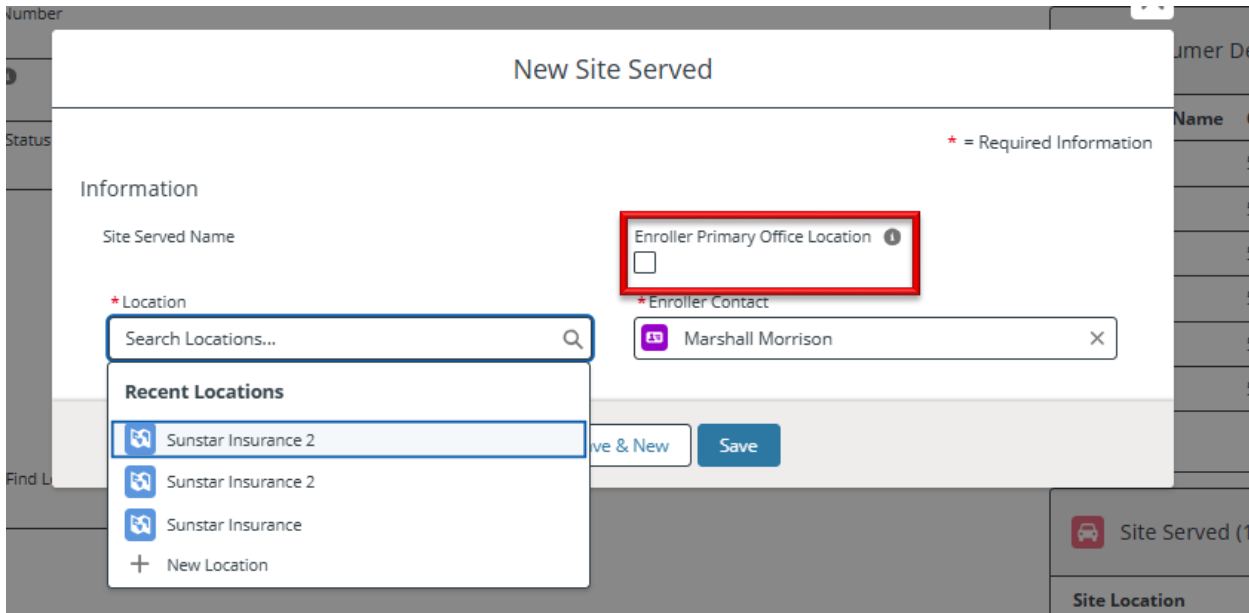


3. Click “New” to add a different Site Served for the Enroller:

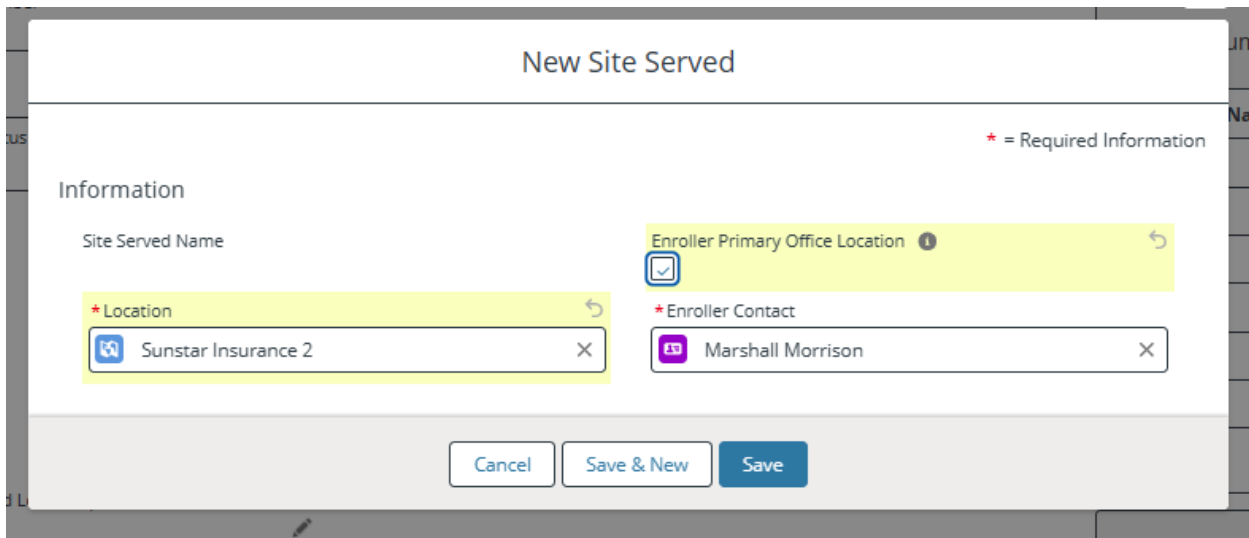


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4. Find a different Subsite Location associated with your Agency/Entity and click “Enroller Primary Office Location”.



The screenshot shows the 'New Site Served' form. The 'Enroller Primary Office Location' field is highlighted with a red box. Below it, the 'Enroller Contact' field is populated with 'Marshall Morrison'. A dropdown menu for 'Location' is open, showing 'Sunstar Insurance 2' as the selected option. The 'Save' button is visible at the bottom right.



The screenshot shows the 'New Site Served' form with the 'Enroller Primary Office Location' field checked. The 'Location' field is also highlighted with a yellow box and contains 'Sunstar Insurance 2'. The 'Enroller Contact' field remains 'Marshall Morrison'. The 'Save' button is visible at the bottom right.

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: Agent Level 1 Enroller License Number: 2J12457 HOD:

Name: Marshall Morrison Account Name: Sunstar Insurance
Role: Agent Level 1 Enroller License Number: 2J12457
Preferred Method of Communication: Contact Status: Active
Email: Confirm Contact Status Change:
Phone: (475) 145-9989
Alternate Phone: Contract Send:

Email: ccaenrollerportal+marshall@gmail.com
Contract Send:

Physical Location Address
Primary Enroller Location-Public Facing: Sunstar Insurance Show Address in Find Local Help:

Business Mailing Address
Address: 923 Hopper Ave, Santa Rosa, CA 95403-1608

Consumer Delegations (6)

Delegation Name	CalHEERS Case/A...	Consumer Contact	Delegation Start ...
D-3433524	5193167215	Magnus Cortez	8/20/2024 10:44 AM
D-3433526	5193167218	Ellis Mokinney	7/30/2024 2:52 PM
D-3433527	5193167220	Samia Preston	7/30/2024 3:21 PM
D-3433528	5193167221	Rex Blair	7/30/2024 3:38 PM
D-3433529	5193167225	Ann Mcgee	7/30/2024 3:51 PM
D-3433630	5193168171	John Smith	1/10/2025 2:37 PM

Site Served (1) New Remove Site Served for Enroller

Site Location	Enroller Primary Office Location
Sunstar Insurance	<input checked="" type="checkbox"/>