Online Agent Portal (Employer / Employee Online Application)
Frequently Asked Questions

How can I access the online agent portal?

The link is available through your General Agency, a Covered California for Small Business Sales Representative and as part of the agent resources available at CoveredCA.com/ForSmallBusiness. You will need to register before you login to the online portal for the first time.

How do I register to use the online agent portal?

Visit the link to the online portal and choose "Agent" as the Account Type from the drop-down menu. An option to register will appear at the bottom right of the page. You will need your insurance license number and email address associated with your Covered California certification status to register. You will also create a password. Your license number and password will be your login information to access the online portal once your registration is complete.

What if I can't remember the email I used for Covered California or need to update to a current email address?

To verify the email address you have on record or to update your email address, contact our Customer Service Department at (877) 453-9198 for assistance.

If I delegate a General Agency, can I have the General Agency finish the case I already started entering into the online portal?

Once you have delegated the General Agency you are working with on the group application, they will be able to view and edit that application in the online portal.

What if the General Agency starts the case and I want to finish it?

You will both have access to the group application in the online portal. Please communicate with your General Agency regarding who should be processing the application using the online portal. Do not start a duplicate application. If there is a duplicate application in the system, it will be withdrawn.

What happens if I send the General Agency my submission using a paper application? Will I be able to see the progress online?

Once the General Agency delegates you as the Agent of Record on a group application, that application will appear and be accessible to both you and the General Agency from the online portal.

What if I write business through different General Agencies? Will the system reflect this?

Yes, the agent dashboard will show you all of the cases that list you as the delegated Agent of Record, regardless of the General Agency you choose. However, the General Agency will only see the cases specific to their agency in the online portal.

If I complete an application in the portal and forget to delegate the General Agency, how can I go back and change this?

Once an application has been completed in our system, a General Agency can only be delegated by contacting our internal support team. You will need to submit this request to our Eligibility & Enrollment Department at shopelig@pinnacletpa.com or via fax at (949) 809-3264.

If I exit the system without completing all of the employee applications for a group, will I be able to return and begin where I left off?

The system automatically saves entries after every completed section in the online application and after every completed employee application. If you have five employees but only complete three employee applications before exiting the system, you will be able to enter the remaining applications at a later time.

Will I get a missing items notification if the General Agency entered my case?

The notification of missing items will be sent to the user who entered the application into the online web portal. If the General Agency entered in the group application, they will receive the notification of missing items; however, the agent will be able to monitor the status of the group through the online portal.

What if the General Agency and I are both submitting missing information?

In order to avoid confusion, all correspondence should take place within the Notes and Attachments sections of a group's online application. These sections will show all the notes from the Enrollment Specialist, General Agency, and Agent and provide all the attachments in one place so you can review what information is missing and what still needs to be submitted for a group to be approved.

What if I start entering an application but the group changes their mind and decides they don't want to enroll? How can I cancel the application?

Per Covered California regulation, if a group has been sitting inactively in the online portal, the agent will be contacted after 30 days. If the group no longer wants to apply for Covered California for Small

Business coverage, the group will be denied for failure to provide documentation.

Will I be able to enter Special Enrollment Period groups through the agent online enrollment portal?

Yes, you will be able to enter small business special enrollment groups through the agent online portal beginning November 15, 2015 through December 15, 2015. During this period <u>only</u>, agents will be able to enroll small businesses that have not previously met participation or contribution requirements into the enrollment portal for January 2016 effective date.