Add New Admin Staff for Agency Managers Quick Guide
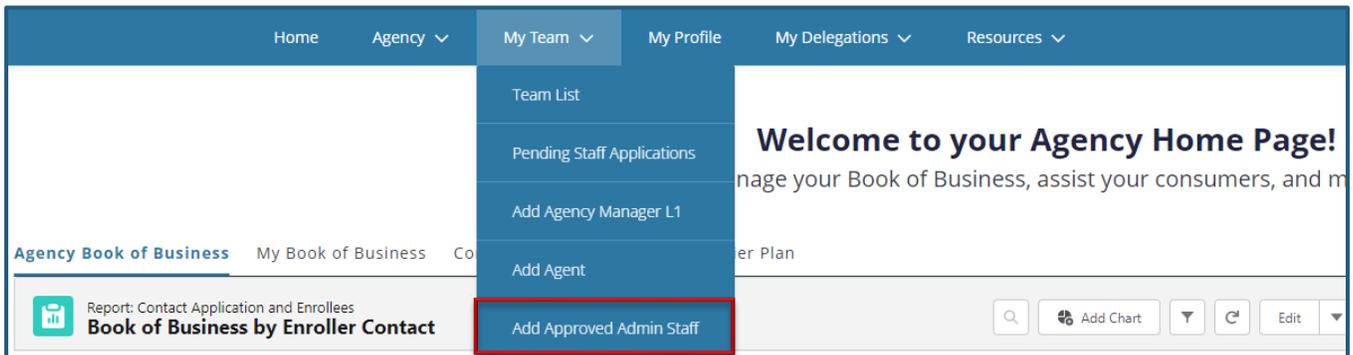
Overview

This Quick Guide for Agency Managers covers the process of adding new Administrative Staff (Admin Staff) to their Agency.

Steps

The Agency Manager can add new Admin Staff to the agency in the Portal Dashboard.

1. Log into the Enroller Portal.
2. Select **Add Approved Admin Staff** from the dropdown menu under **My team**.

3. On the **Add Approved Admin Staff Information** page, enter the information for the new Admin Staff.

Business Mailing Address

☐ Business Mailing Address is same as Location Address

*Address Line 1 ⓘ

Address Line 2 ⓘ

*City ⓘ

*State

CA

*ZIP Code ⓘ

[Next]

- ⓘ Information icons indicate helpful hover text.
- ★ Red asterisks indicate an answer is required.
- **Approved Admin Staff Level**: Select Level 1 or Level 2 role for the new Admin member. Hover over the information icon for information on these two roles.
- **Select Agency Location**: Make sure you select the location the staff member will be working.

4. Select the **Next** button to advance to **Review Approved Admin Staff Application**. Select **Review Application** to make adjustments to the information entered or select **Save and Next** to move forward to uploading documentation.

Review Approved Admin Staff Application

To review your application before moving forward, please click **Review Application**.

If you are ready to move forward to upload your Public Photo and other documentation, please click **Save and Next**.

[Review Application] [Save and Next]

- If you need to update any of the information that you have entered into the portal for the new staff member, you will need to email the Agent Admin Team at agentcontracts@covered.ca.gov to make a correction.

5. On the **Public Photo and Documentation Upload** page, you can upload several types of documents using the dropdown under **Document Category**. Select None if no documents are available to load then select the **Next** button.

Public Photo and Documentation Upload

Accepted Formats: .JPG, .JPEG, .GIF, .PNG, .BMP, .PDF. Maximum File Size: 5 MB per file

*Document Category

None

You must select the document type for each file uploaded. If you have no files to upload, please select "None."

[Next]

Public Photo and Documentation Upload

Accepted Formats: .JPG, .JPEG, .GIF, .PNG, .BMP, .PDF. Maximum File Size: 5 MB per file

*Document Category

None

Agreement
Proof of General Liability Insurance
LiveScan
Enroller Photo
Proof of Eligibility (Tax ID on institutional letterhead)
Proof of Valid Business License
Conflict of Interest Prevention Plan
None

6. The **Application Submitted** page displays the message, "You have successfully submitted the application to add Admin Staff [name] in the role of Approved Admin Staff level 1 or 2. Admin Staff [name] will receive two emails with an access code and URL at [email address]." Select **Finish** to return to your portal home page.

Application Submitted

You have successfully submitted the application to add Admin Staff First Name Admin Staff Last Nave in the role of Approved Admin Staff Level 1. The application is being reviewed.

Admin Staff First Name Admin Staff Last Nave will receive two emails with an access code and URL at admin@notvalid.com. The emails will contain information on how to view and edit their personal details.

Finish

- The new Admin Staff member will appear under My Team / Pending Staff Applications.
- The Agency Manager is responsible for notifying the new Admin Staff that they are required to take Covered California's Approved Admin Staff Role training and initiate the Background and Fingerprinting.
- Covered California will email the training within 3-5 business days.
- Once the Approved Admin Staff completes the entire onboarding process, Covered California updates their Certification/Approval Status in the agency Portal to "Approved." Then Covered California will generate two emails to the new Admin Staff with an access code and URL along with instruction on creating an account in CalHEERS.