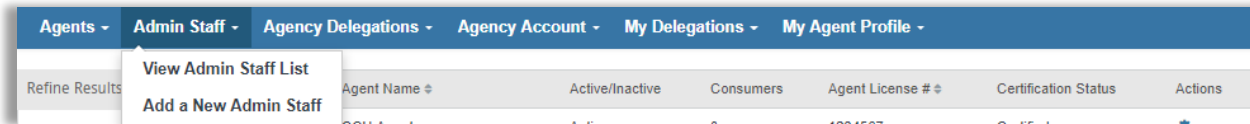


## Background

This Job Aid will help guide Agency Managers through the process of adding new Administrative Staff (Admin Staff) to their Agency and provide subsequent steps to guide their new Admin Staff through the account creation process.


The Agency Manager has the unique ability to add new Admin Staff to the agency. The Portal Dashboard has been enhanced with a new “Admin Staff” tab to initiate the onboarding of a new staff role to their agency.




## Procedure

### Part 1

1. Agency Manager logs into their CalHEERS Agency Portal.
2. The Agency Manager selects “Add a New Admin Staff” from the Admin Staff menu. This will advance the Agency Manager to the Admin Staff Information page.
3. On the *Admin Staff Information* page, the Agency Manager enters the information for the new Admin Staff.

 Orange question marks indicate helpful hover text.

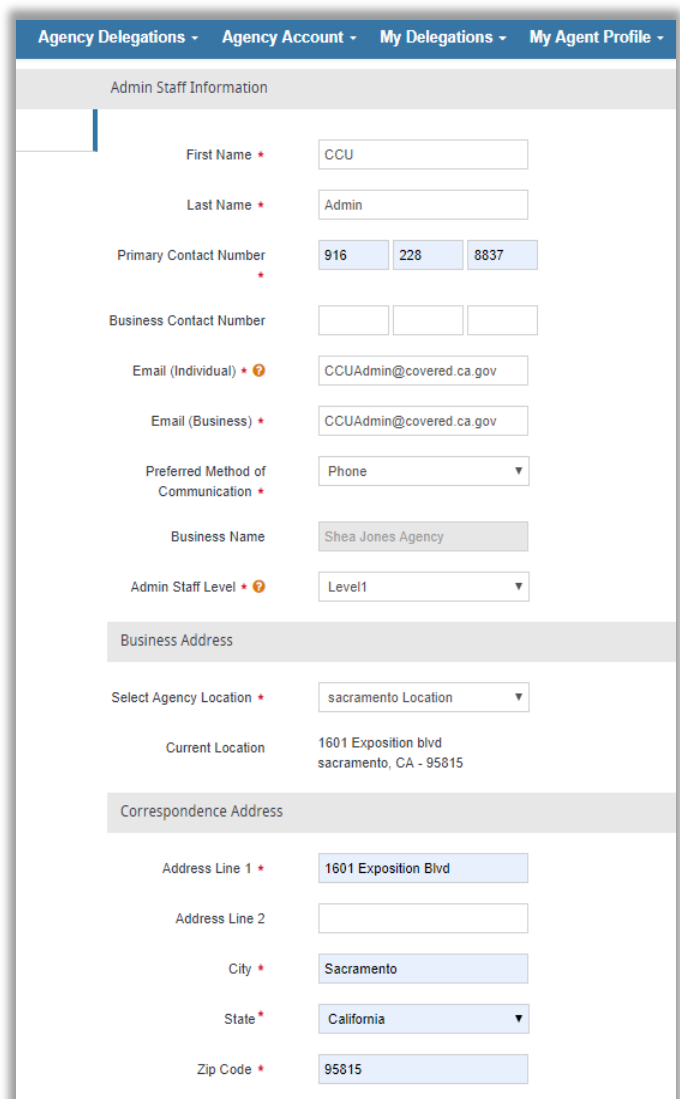
 Red asterisks indicate an answer is required.

**Email (Individual):** Make sure this email is unique to the new staff. This is the address where they will receive their training materials. This address is also required for account creation with CalHEERS.

**Admin Staff Level:** Select the appropriate level of permissions you would like for your staff member to have: Level 1 or Level 2. If you are unsure, hover over the orange question mark icon for information on these two roles.

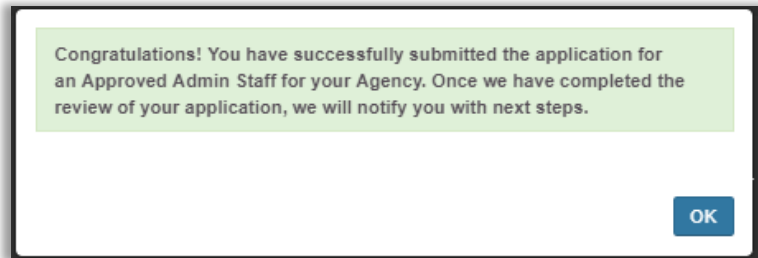
**Select Agency Location:** Make sure you select the location the staff will be working

4. When you have completed all the fields select the “Finish” button.



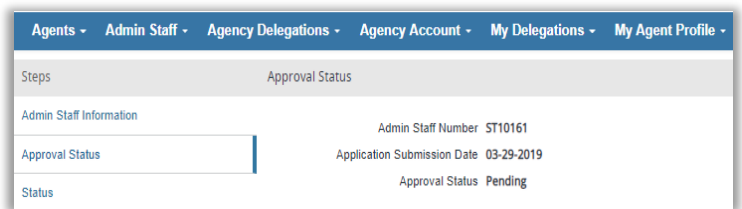
- If you need to update any of the information that you have entered into the portal for the new staff member, you will need to email the Agent Admin Team at [agentcontracts@covered.ca.gov](mailto:agentcontracts@covered.ca.gov) to make a correction.

- You may be asked to select or confirm the address you selected from a list of addresses that are found. Once you select the correct address, select, "OK."

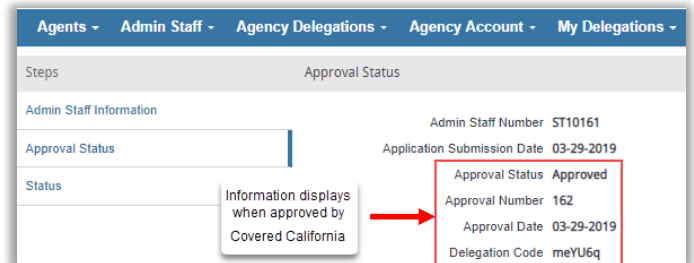


5. When you are successful in adding a new administrative staff member you will get a Congratulations message. Select "OK" to continue.

6. The Approval Status page shows the system generated Admin Staff Number, the Application Submission Date and the current Approval Status. At this point, the status will show "Pending."



- The status will be updated by Covered California staff. The delegation code will be viewable via the "Approval Status" page.
- 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.
- California will email the training within 3-5 business days.
- Once the Approved Admin Staff completes the entire onboarding process Covered California updates their status in CalHEERS to "Approved."

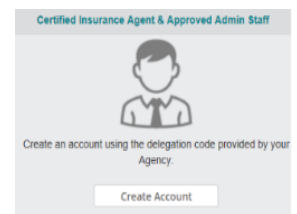
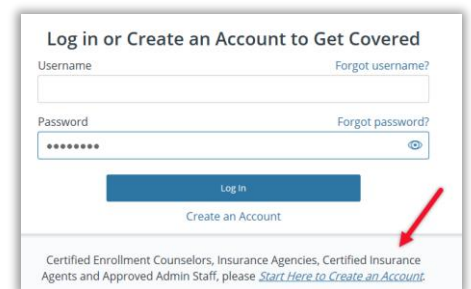


## Part 2

### Account Creation Steps for Approved Admin Staff

The new Approved Admin Staff will take the information received from the Agency Manager and create their own individual Approved Admin Staff account in CalHEERS. The Agency Manager should guide them through the process.

- The new Approved Admin Staff will navigate to the CalHEERS login page: [www.coveredca.com](http://www.coveredca.com) and click **Login**.
- Then select the link for Approved Admin Staff: [Start Here to Create an Account](#).
- Select the **Create Account** option under the *Certified Insurance Agent & Approved Admin Staff* box.



4. After accepting the Terms and Conditions the Approved Staff Admin will arrive on a new “Create an Account” page.

5. This page requires three pieces of information to be entered so the Approved Admin Staff is associated with the correct agency:

- Delegation code
- Agency’s Legal Business Name
- Individual Email

6. Next, the Approved Admin Staff advances to the *User Information* page and provides:

- First and Last Name
- Date of Birth, and
- Preferred Method of Communication

7. After completing, the Approved Admin Staff will complete the *Contact Information* page. The Approved Admin Staff will provide:

- Street Address
- Phone and/or email
  - Consent for text message notifications is only an option if preferred method of contact is phone.

8. Next, the Approved Admin Staff completes the *Username & Password* page by creating and entering:

- Username
- Password
- Completes Captcha
- 4-digit Signature Pin

**CREATE AN ACCOUNT - WITH YOUR PROVIDED DELEGATION CODE**

Enter your delegation code and required information here:

\* Indicates a required field.

Delegation code : \*

Legal Business Name : \*

Select your Role : \*  Certified Insurance Agent  
 **Approved Admin Staff**  
A certified Insurance Agent is licensed with California Department of Insurance and has completed Covered California's certification process.  
 An Approved Admin Staff has completed a background check, has been fingerprinted and completed Covered California's approval process.

Individual Email : \*

**USER INFORMATION**

\* Indicates a required field.

First Name : \*

Last Name : \*

Date of Birth : \*

Preferred method of communication : \*

**CONTACT INFORMATION**

\* Indicates a required field.

Street Address 1 :

Street Address 2 :

City :

State :

Zip Code :

Email :

Phone Number :

Click Yes to receive text messages and calls about your health care coverage:  Yes  No

By clicking Yes, I consent to receive autodialed and pre-recorded calls and/or text/SMS messages at the telephone number I provided (including my cell phone number). I understand this is not a condition of purchase, and that message and data rates may apply.

**USERNAME & PASSWORD**


\* Indicates a required field.

Your Username must have 8 or more characters.

Username : \*

Password : \*

Re-enter Password : \*

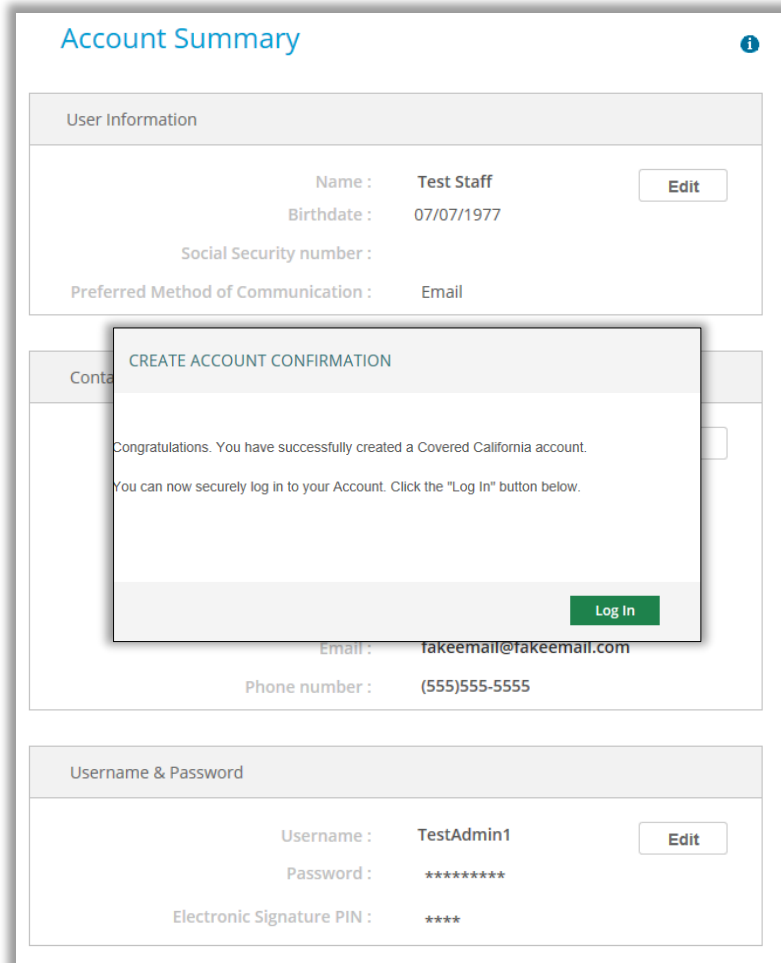
I'm not a robot 

Please create a four-digit Electronic Signature Personal Identification Number (PIN). You will need this number to log in.

Electronic Signature PIN : \*

Re-enter PIN : \*

9. After completing, the Approved Admin Staff will confirm the information entered on the *Account Summary* page. Once finalized, CalHEERS will display a *Create Account Confirmation* popup, and the **Approved Admin Staff must select Login in order to activate their account.**



The screenshot shows the 'Account Summary' page with a 'CREATE ACCOUNT CONFIRMATION' popup. The popup contains the following text:

CREATE ACCOUNT CONFIRMATION

Congratulations. You have successfully created a Covered California account.

You can now securely log in to your Account. Click the "Log In" button below.

Log In

The background page shows the following information:

### Account Summary

**User Information**

Name : Test Staff

Birthdate : 07/07/1977

Social Security number :

Preferred Method of Communication : Email

**Contact Information**

Email : fakeemail@fakeemail.com

Phone number : (555)555-5555

**Username & Password**

Username : TestAdmin1

Password : \*\*\*\*\*

Electronic Signature PIN : \*\*\*\*