Add Admin Staff to Agency Job Aid
Agency Managers

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.
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- 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.

- 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.

1. The new Approved Admin Staff will navigate to the CalHEERS login page: www.coveredca.com and click Login.

2. Then select the link for Approved Admin Staff: Start Here to Create an Account.

3. Select the Create Account option under the Certified Insurance Agent & Approved Admin Staff box.
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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
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.