Add a New Agent to an Agency Job Aid Agency Managers

Overview

This job aid will help guide Agency Managers through the process of adding new Agents to their Agency and provide subsequent steps to guide their new Agent through the CalHEEERS account creation process.

Procedure

Part 1 – Agent Profile Creation in Portal

1. Agency Manager logs into their Agency Portal.

2. The Agency Manager selects "Add a New Agent" from the **Agents** menu. This will advance the Agency Manager to the *Agent Information* page.

3. On the *Agent Information* page, the Agency Manager enters the information for the new Agent.

   - **Business Address**: This is the location the Agent will do business from and where they will show up in "Find Local Help." If the location is not available in the **Select Agency Location** drop down, the Agency Manager needs to add it by navigating to the *Agency Account* menu and selecting the **Location and Hours.**

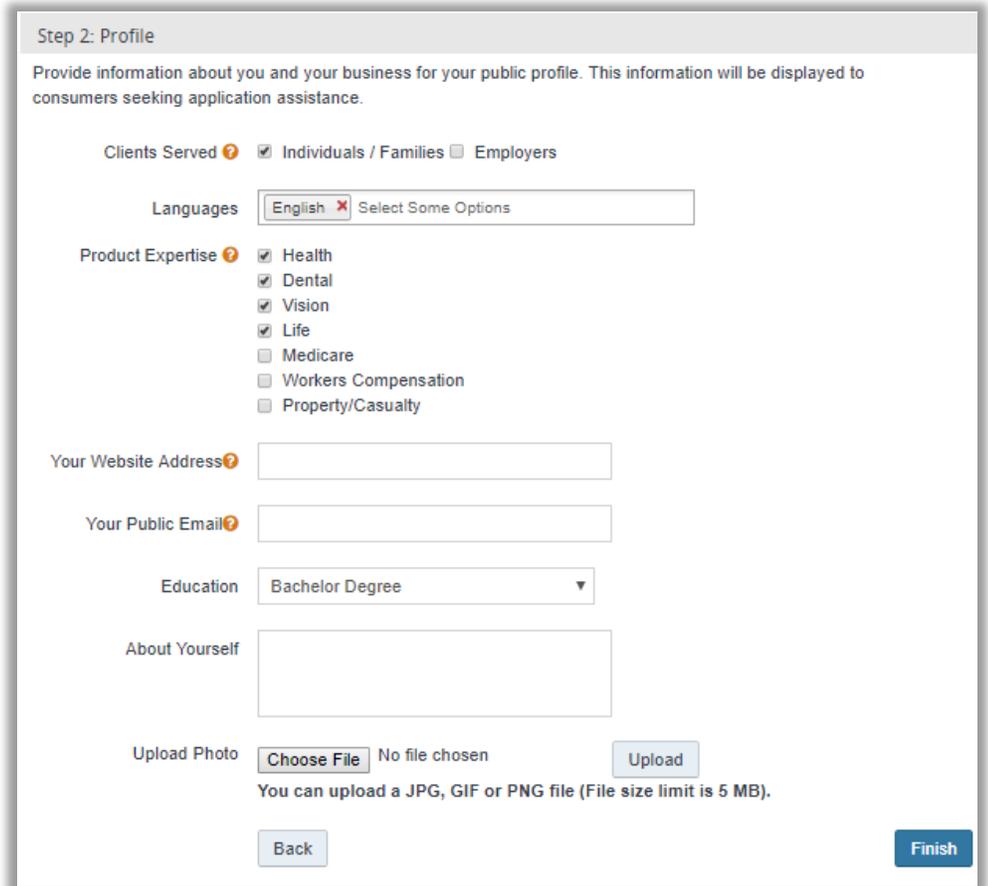   o From the *Location and Hours* page, the Agency Manager will select "Add Sub-Site"

Note: The Agency Manager cannot edit the Legal Business Name or the Federal Tax ID (Tax ID) for the Agency. If there is an issue/error, please contact AgentContracts@covered.ca.gov for additional assistance.

4. Next, the Agency Manager advances to the *Profile* page, where they input the information that will display on the **"Find Local Help"** page for their new Agent. After completion, the Agency Manager will select **Finish**.
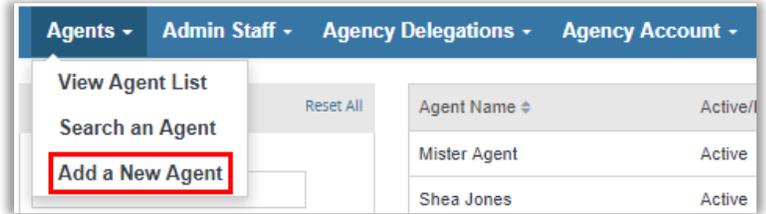
- **Critical:** Enter the agent's email address or Covered California will be unable to send the trainings and exams to the agent for completion.

- **Note**: The information listed here will be managed by the Agency Manager. The Agent will only have the ability to view this information in their own Agent Portal. Any changes/updates must be done via the Agency Manager.

Step 2: Profile

Provide information about you and your business for your public profile. This information will be displayed to consumers seeking application assistance.

Clients Served ❓ ☑ Individuals / Families ☐ Employers

Languages [English ✖ | Select Some Options]

Product Expertise ❓ ☑ Health
☑ Dental
☑ Vision
☑ Life
☐ Medicare
☐ Workers Compensation
☐ Property/Casualty

Your Website Address❓ [ ]

Your Public Email❓ [ ]

Education [Bachelor Degree ▼]

About Yourself [ ]

Upload Photo [Choose File] No file chosen [Upload]
You can upload a JPG, GIF or PNG file (File size limit is 5 MB).

[Back] [Finish]

5. After the Agency Manager adds the new Agent to the Agency, the Agency Manager will receive an *Application Complete* message and the new Agent will now show on their Agency roster with a certification status of "**Pending**."

- The Agency Manager is responsible for advising the new Agent that they are required to take Covered California's Agent certification training. Covered California will email the new Agent with the Certification training within 3-5 business days.

Part 2 – Create CalHEERS Account

Once the Agent completes the entire certification process (training, passes their exam with 80% or greater, pays their endorsement fee, and signs their Agreement), Covered California updates their certification status in CalHEERS to "Certified." If an Agent is already certified with Covered California, we will review their certification status and update their status to "Certified" for the Agency.

6. Once the Agent is certified, there are two pieces of information required to set up a CalHEERS account and start assisting consumers: the Agency Legal Business Name and Delegation Code. There are two options for looking up this information.

- Agency Managers can look up Agent status in the Portal. Select the **Agents** drop down and choose "Certification Status". There you will find the status and delegation code.


- The Agency Manager will also receive an email notification to their **Secured Mailbox**

when Covered California updates their new agent from "**Pending**" to "**Certified**." The Agency Manager will need to access their **Secure Mailbox** to retrieve the notice, which contains important next steps for their new Agent. Note: There is no indication that a new message has been delivered to the Agency Manager's Secure Mailbox. They will need to check this regularly to ensure they retrieve it.
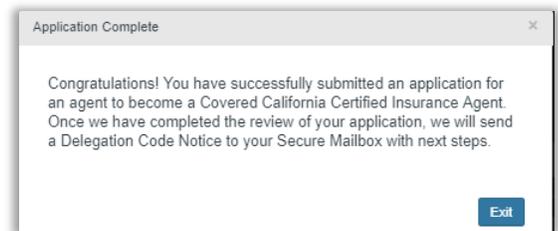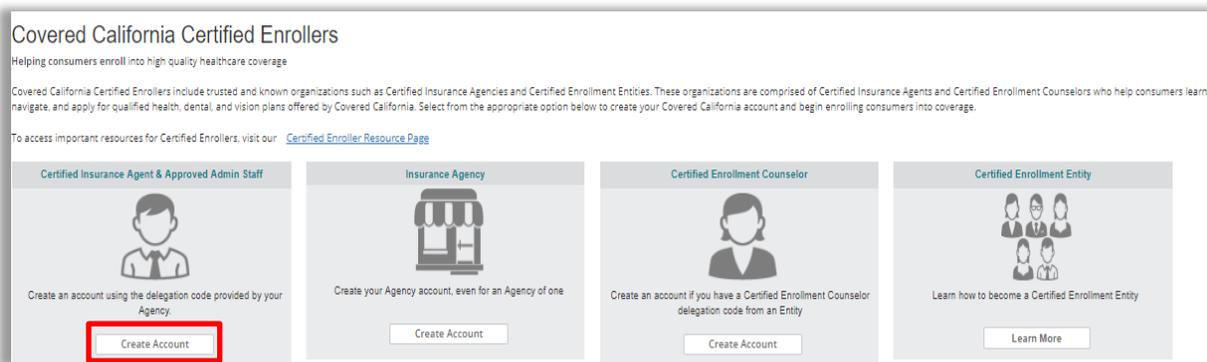

7. The new Agent will take the information received from the Agency Manager and create their own individual Agent Account in CalHEERS. The Agency Manager should guide them through the process. The new agent will use these two identifiers, along with their own personal Agent license number to create their new Agent account.

8. The new Agent will navigate to the CalHEERS login page: www.coveredca.com and click **Login**.

9. The agent then selects **Certified Enrollment Counselors and Certified Insurance Agents, please Start Here to Create an Account** link.

10. The new agent is then navigated to the *Covered California Certified Enrollers* page and select the **Create Account** option under the **Certified Insurance Agent** role.

11. After accepting the Terms and Conditional the Agent will arrive on a new "Delegation Code" page.

12. This page requires three pieces of information for the agent to enter. This information associates the Agent with the agency.

    - Agency's Legal Business Name

    - The delegation code, and

    - The Agent's license number

13. Next, the Agent advances to the *User Information* page and provides:

    - First and Last Name

    - Date of Birth, and

    - Preferred Method of Communication

14. After completing, the Agent will complete the *Contact Information* page. The agent will provide:

    - Street Address

    - Phone and/or email

        o Consent for text message notifications is only an option if preferred method of contact is phone.

15. Next, the Agent completes the *Username & Password* page by creating and entering:

    - Username

    - Password

    - Completes Captcha

- 4-digit Signature Pin

16. After completing, the Agent will confirm the information entered on the *Account Summary* page. Once finalized, CalHEERS will display a *Create Account* **Confirmation** popup, and the **agent must select Login in order to activate their account and make themselves searchable in** *Find Local Help.*

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