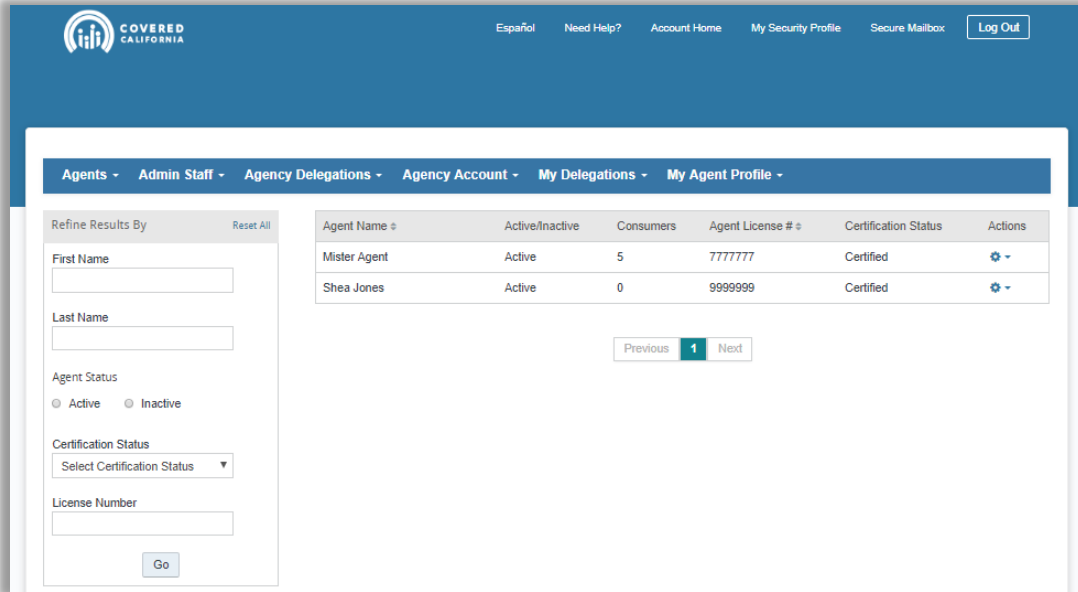


Overview

An Agent who is designated as an Agency Manager for an Agency will act in an administrative and operational role for that Agency. The Agency Manager must be a certified and licensed insurance Agent. The Agency Portal combines all of the Agency’s Agent’s Books of Business into one manageable Agency Book of Business displayed in the portal, and in a downloadable report.

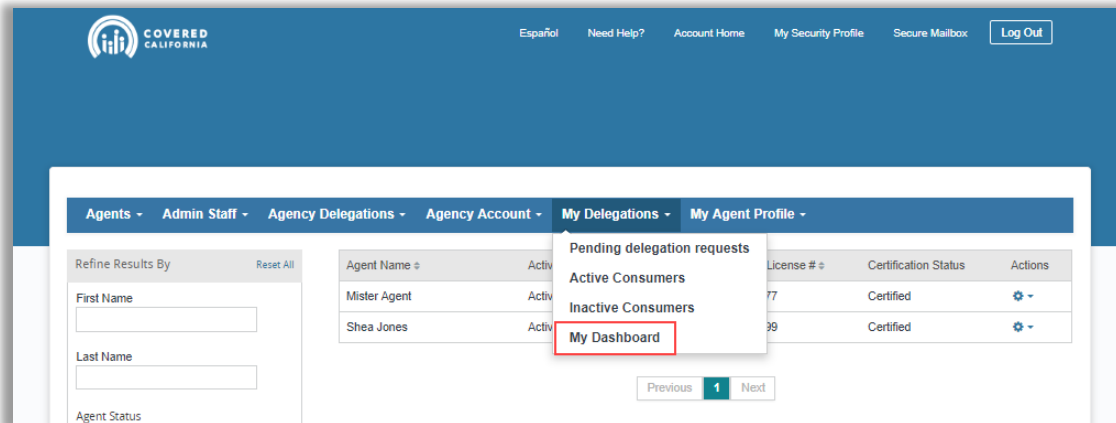
What you need to know

Agency Managers will log into their CalHEERS account and see an Agency Portal landing page, shown below.



How to Access your Agent Dashboard

Agency Managers can enroll consumers. Agency Managers can click on the “My Delegations” tab in the header, shown below. This is where an Agency Manager **can access their own Agent dashboard to write new business**. Agency Managers can also make changes to their Agent profile by clicking on the “My Agent Profile” link.





CalHEERS Agency Portal Quick Guide Agency of One (Sole Proprietor) or More

Agency Managers can add new Agents to their roster

An Agency Manager is required to create the new Agent profile in the Agency Portal. This begins the certification process for the Individual Agent with Covered California. **If an Agent is already certified with Covered California, we will review their certification status and update their status to “Certified” for the Agency.** Review our [Add a New Agent to an Agency Job Aid](#) for step-by-step instructions.

REMINDER: The Agency Manager username and password should only be used by the authorized Agency Manager. Agency Portal accounts contain secure business information that should not be accessed by anyone other than the authorized user. Individual Agents can refer to our [CalHEERS Password Reset Job Aid](#) for step-by-step instructions on resetting their CalHEERS password.

Agency Manager Name

All Agency Managers will now be listed on the Agency Information page. This page is available for Agency Managers and Approved Admin Staff Level 2.

Steps	Agency Information
Agency Information	Agency Name (Public Facing) SheaYCCU Agency
Location and Hours	Legal Business Name SheaYCCU
Document Upload	Federal Tax Id 990099009
Certification Status	Agency License Number 1234567
	Agency Managers Shea CCU Bridget John Allen Green