



Agent Alert

BREAKING NEWS FROM COVERED CALIFORNIA

February 9, 2018

Enhanced Agency Manager Functionality

Covered California is excited to announce expanded Agency Portal functionality will be released on **Monday, February 12 with CalHEERS Release 18.2**. The enhanced functionality allows the Agency Manager to manage all business written by the Agents of the Agency, act on behalf of all consumers in their book of business, and view and export an aggregate Agency Book of Business. The Agency Manager will also have access to view and export their own Book of Business, as well as a Book of Business for an individual Agent in the Agency roster.

Review the following resources to stay up-to-date on the important changes in CalHEERS Release 18.2:

- [Release Notes](#) - overview of what is changing in the Agency Portal, as well as the online application
- [Video Walkthrough](#) - watch this video to review the enhanced functionality of the Agency Portal
- [Book of Business Export Job Aid](#) - step-by-step instructions to export an Agency, individual Agent, and/or Agency Manager Book of Business
- [Edit Agent Within Agency Job Aid](#) - step-by-step instructions on updating an Agent's profile and changing the status of an Agent within the Agency to "Active" or "Inactive"
- [Acting on Behalf of An Agent Job Aid](#) - step-by-step instructions to enable an Agency Manager to complete tasks or assist consumers on behalf of an Agent within the Agency

- [Transfer Delegations Between Agents Job Aid](#) - step-by-step instructions on how to transfer consumers from one Agent to another Agent within the Agency

Reminder: Individual Agents are associated with their Agencies through an Agency Agreement. As such, Agency Managers act in an administrative and operational role for an Agency. It is the role and responsibility of the Agency Manager to adhere to the guidelines outlined in our Agency Manager Roles and Responsibilities.

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. Have your Individual Agents refer to our [CalHEERS Password Reset Job Aid](#) for step-by-step instructions on resetting their CalHEERS password.

Service Center Hours of Operation

Agent Service Center
Phone: 877-453-9198

Monday - Friday, 8:00 a.m. to 6:00 p.m.
Saturdays and Sundays, Closed

Covered California for Small Business (CCSB) Support Line
Phone: 855-777-6782

Monday - Friday, 8:00 a.m. to 5:00 p.m.
Saturdays and Sundays, Closed

Review the [Agent Service Center schedule](#) for a full list of hours of operation and holiday closures.

CalHEERS Outages*

- Saturday, February 10 at 6:30 p.m. through Monday, February 12 at 6:00 a.m.
- Saturday, February 17 at 6:30 p.m. through Monday, February 19 at 6:00 a.m.

*Outage dates and times is subject to change

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