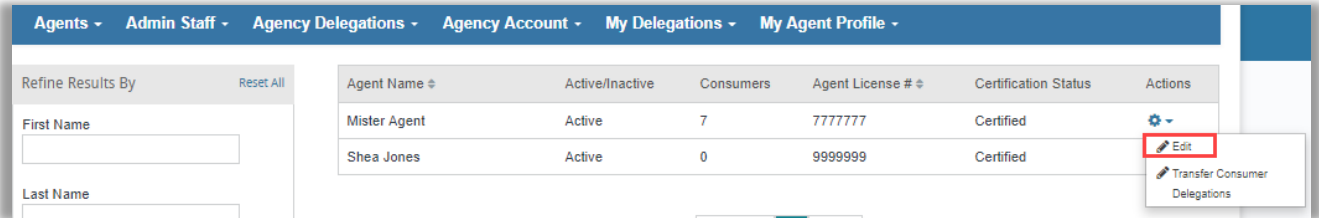


Overview:

Within the CalHEERS Agency Portal, Agency Managers have the ability to edit some of the information for Agents within their Agency.

Edit Information

To edit Agent information within your Agency Roster, the Agency Manager can select the edit link from the “Actions” column for a specific Agent they want to update.

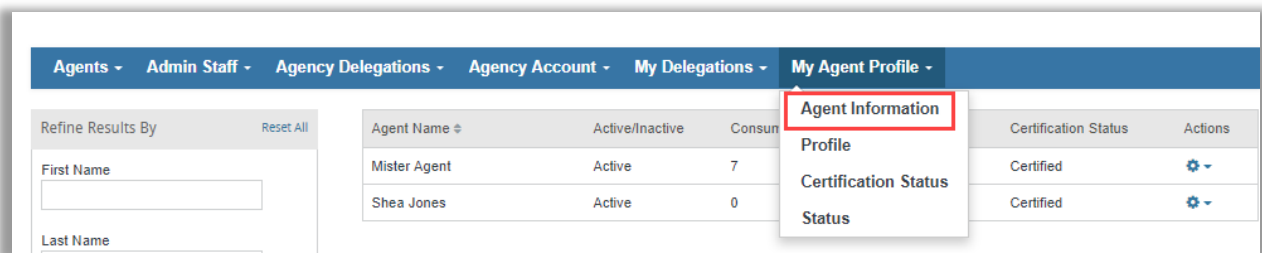


Agent Information Page

For an Agency Manager to update their own Agent Information, they can select the edit option associated with their name, or via the “My Agent Profile” drop-down menu.

From the “My Agent Profile” drop down menu, Agency Managers can view their own:

- **Agent Information**
- **Profile**
- **Certification Status**
- **Status**



Click the “Agent Information” link to navigate to the “Agent Information” page,

Click the edit button to edit the unshaded fields in on the “Agent Information” page.

- You must contact Agent Contracts at agentcontracts@covered.ca.gov to make changes to shaded fields.



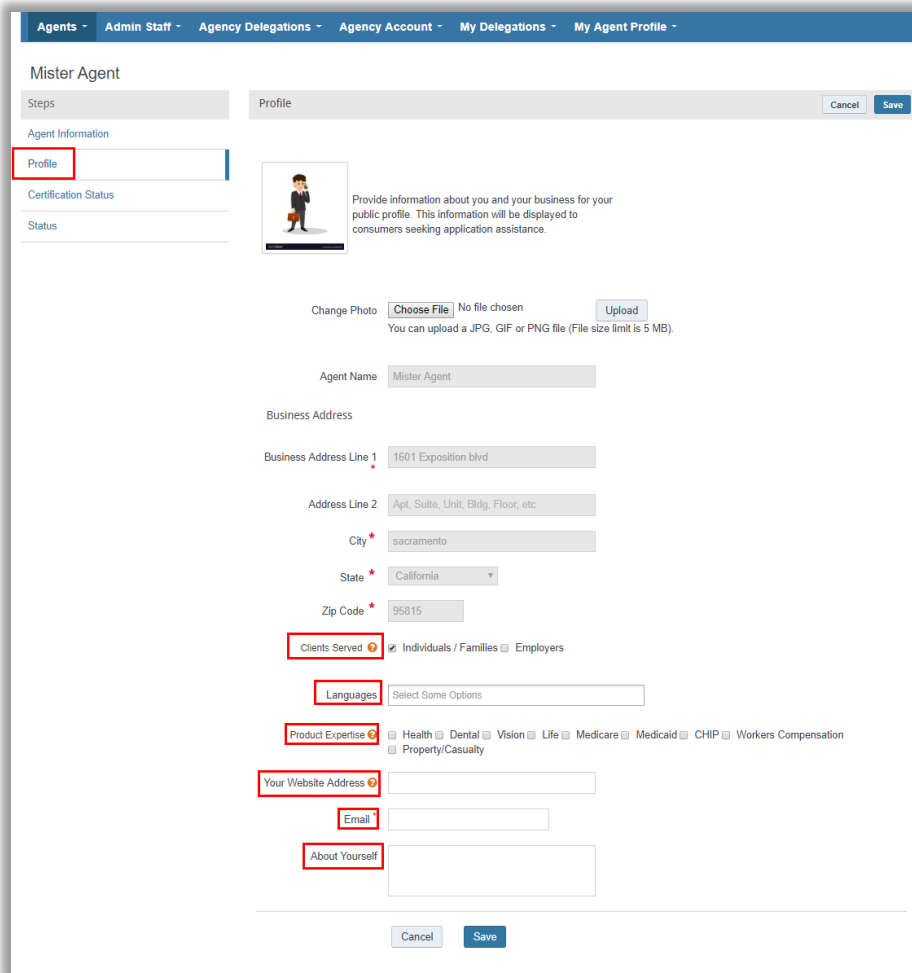
Edit Agent Within Agency Job Aid Agency Managers

Please Note: Only **Agency Managers** have the ability to edit portions of their information within this tab. Agents within the agency must contact the Agency Manager to edit this information.

On the “Agent Information” page Agency Managers can edit:

- License Renewal Date
- Contact Numbers
- Preferred Method of Communication
- Business Address/Location

When you have completed your edits, select “Save and Continue” to save your changes.



Agent Profile Page

To update the information that displays on **Find Local Help**, select the “Profile” link from the menu on the left of the page. When the “Profile” page loads, select the “Edit” button to update the information.

Agency Managers can edit the following information in their Agent Profile:

- Client’s Served Population
- Languages
- Website
- Email Address (must be unique)
- About Yourself Information

Please Note: Only **Agency Managers** have the ability to edit portions of their Profile page. Agents within the agency must contact the Agency Manager to edit this information.

Agent Status Page

The Agency Manager can edit the status of an Agent within the Agency, enabling or disabling the ability for the Agent to do business under the Agency. The Agency Manager can also edit their own status.

- **Active:** Able to access all available user portal screens, edit Agent, Agency and Individual Agent information, perform all Agency Manager functions
- **Inactive:** Able to login to the CalHEERS portal, with view only access, except for changing the Agency Manager’s own Status from Inactive to Active.

Edit Agent Within Agency Job Aid Agency Managers

Agents - Admin Staff - Agency Delegations - Agency Account - My Delegations - My Agent Profile							
Refine Results By		Agent Name	Active/Inactive	Consumers	Agent License #	Certification Status	Actions
First Name	<input type="text"/>	Mister Agent	Active	7	7777777	Certified	<ul style="list-style-type: none"> Edit Transfer Consumer Delegations
Last Name	<input type="text"/>	Shea Jones	Active	0	9999999	Certified	

Agency Managers can select the “Edit” button from the Status page and update the status of any agent within the Agency from “Active” to “Inactive” or “Inactive” to “Active.”

Agents - Admin Staff - Agency Delegations - Agency Account - My Delegations - My Agent Profile

Mister Agent

Steps

Agent Information

Profile

Certification Status

Status

Status Active

Status

Comment

Date	Previous Status	New Status	View Comment
Mar 18, 2019	InActive	Active	No Comments