



# Agency Manager Toolkit

## Overview

Agency Managers act in an administrative and operational role for an agency and must be a certified and licensed insurance agent. This Toolkit is for Covered California's Agency Managers to review resources to assist in navigating the Agency Portal.

Resources include information to assist Agency Managers Level I and II, Authorized Signers, Agents Level I and II, and Approved Admin Staff (based on user role permissions) with viewing and exporting a Book of Business, transferring delegated consumers within the agency, adding new agents and Admin Staff to the agency, and much more.

*Check back frequently for updates.*

## Agency Support

Resource	Type	Description
<a href="#">Enroller Portal for Agency Users</a>	Task Guide	Introduces Agency Managers, Agents, Authorized Signers, and Approved Admin Staff to the information and tasks they have access to through the Agency Portal.
<a href="#">Agency Manager Portal Walkthrough</a>	Video	Demonstration of the Enroller Portal for Agency Roles.
<a href="#">Agency Manager Portal</a>	Quick Guide	Information for Agency Managers on the Admin Staff Role in the Agency Portal.
<a href="#">Add a New Agent to an Agency</a>	Job Aid	Instructions for Agency Managers to add new Agents in their Agency Portal.
<a href="#">Agency Certification Onboarding</a>	Quick Guide	Onboarding instructions for Sole Proprietors, Corporations, and Partnerships that want to become Certified Insurance Agents with Covered California.
<a href="#">Downline Agent Onboarding</a>	Quick Guide	Instructions for Agency Managers and Authorized Signers to complete the process of adding a downline Agent to their Agency and outlines the steps that the Downline Agent must take to become Certified.
<a href="#">Edit Agent Within Agency</a>	Quick Guide	Instructions for Agency Managers to edit profile information for Agents within their Agency.



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<a href="#">Add a New Admin Staff to an Agency</a>	Quick Guide	Instructions for an Agency Manager to add an Admin Staff to the Agency Portal.
<a href="#">Acting on Behalf of an Agent within the Agency</a>	Job Aid	Instructions for Agency Managers and Admin Staff to assist any consumers delegated to an Agent within the Agency.
<a href="#">Health Care Sharing Ministries Policy and Procedures</a>	Policy	Outline of general policies, definitions of roles, and responsibilities of Covered California and Certified Insurance Agents.
<a href="#">Health Care Sharing Ministry Consumer Acknowledgement and Full Disclosure Form</a>	Form	Consumer Informed Consent and Acknowledgement form; side-by-side chart comparing Covered California Marketplace Plans and Health Care Sharing Ministries.

## Book of Business

Resource	Type	Description
<a href="#">Transferring Delegations Within an Agency or Entity</a>	Quick Guide	Instructions for how to transfer consumer delegations between Agents within the Agency.
<a href="#">Enroller Portal My Reports</a>	Task Guide	Steps to access the Agency or Entity Book of Business and the My Book of Business for Agency and Entity users.



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## Approved Admin Staff

Resource	Type	Description
<a href="#">Approved Admin Staff</a>	Quick Guide	Information for Agency Managers on the Admin Staff Role in the Agency Portal.
<a href="#">Add New Agent for Admin Staff</a>	Quick Guide	Guide for Approved Admin Staff 2 to add new Agents to their Agency.