Acting On Behalf of an Agent: Agency Managers and Admin Staff Task Guide

Overview

Agency Managers and Approved Admin Staff can act on behalf of an agent within their agency, enabling them to step into complete tasks or assist consumers in the Agent's Book of Business.

Note: The steps below are from the Agency Manger's perspective, but the functionality is the same for Approved Admin Staff.

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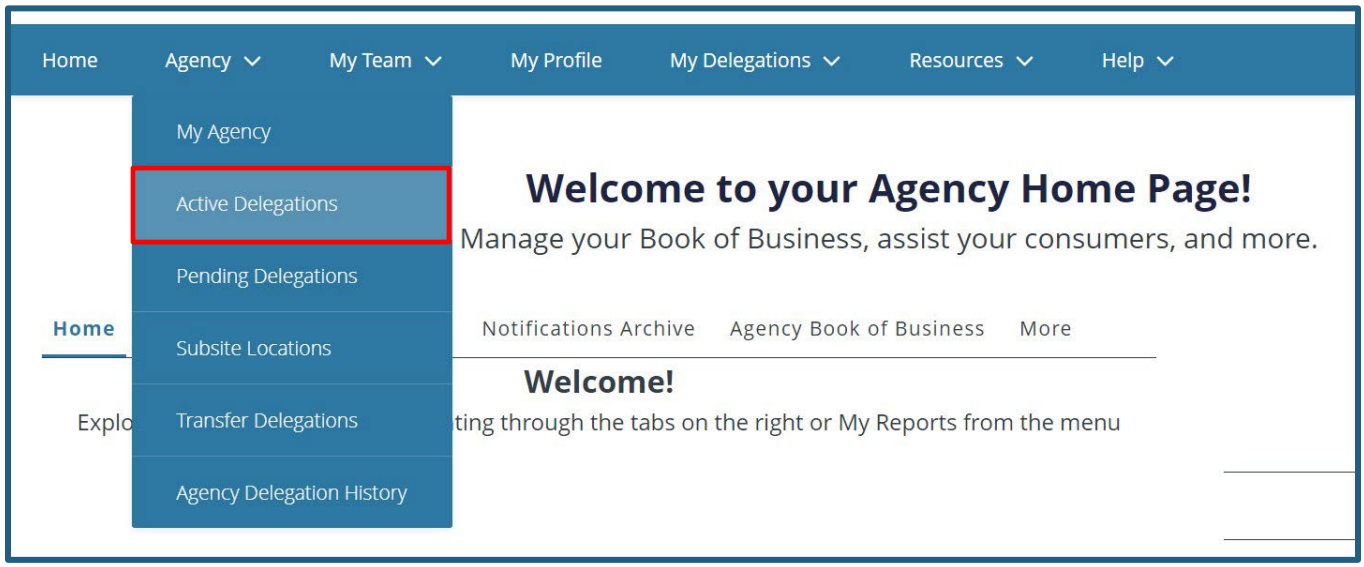
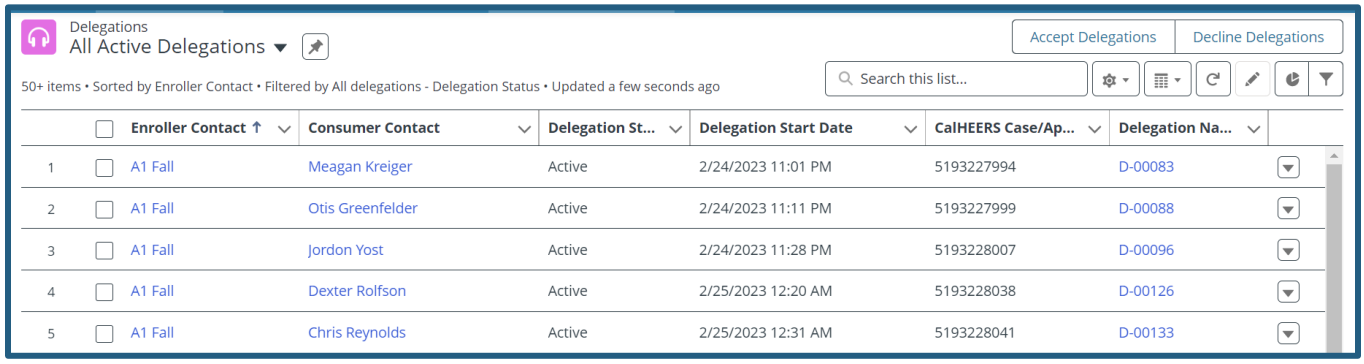
View Consumer Details

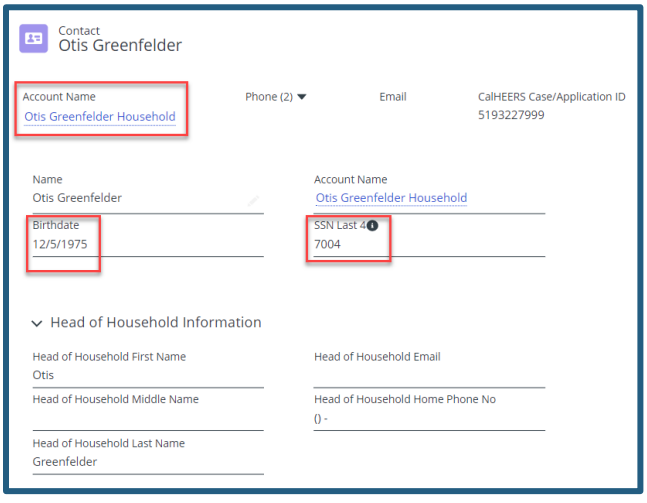
1. Log into the Enroller Portal, click **Agency** and select **Active Delegations** from the dropdown menu.

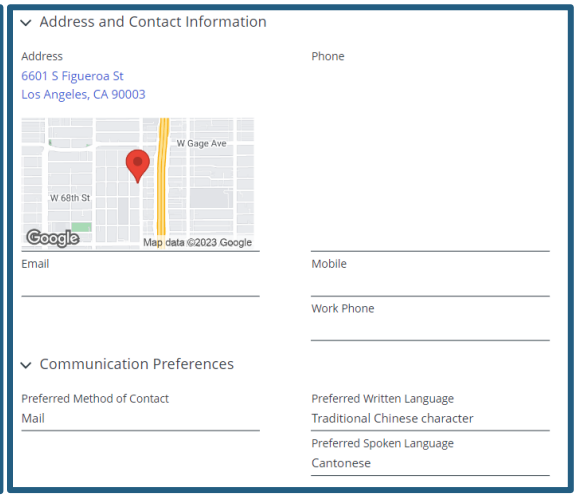


2. The *Delegations* page displays with all active consumers delegated to agents in the agency.

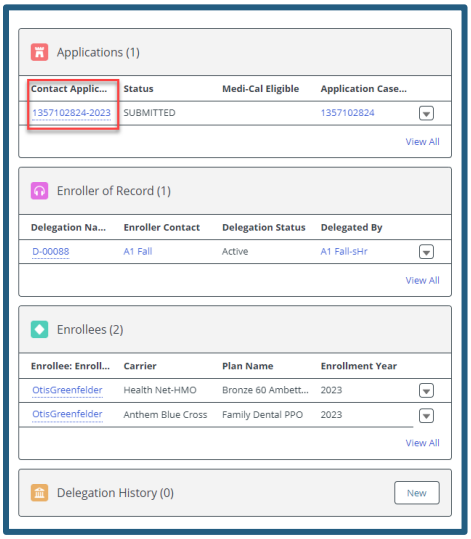


3. From left to right, this section displays:
   - **Enroller Contact**
   - **Consumer Contact**
   - **Delegation Status**
   - **Delegation Start Date**
   - **CalHEERS Case/Application ID**
   - **Delegation Name**
4. Click on a consumer's name under *Consumer Contact* to view the consumer's Contact page, which includes information such as Account Name, the contact's birthdate and SSN, and address.



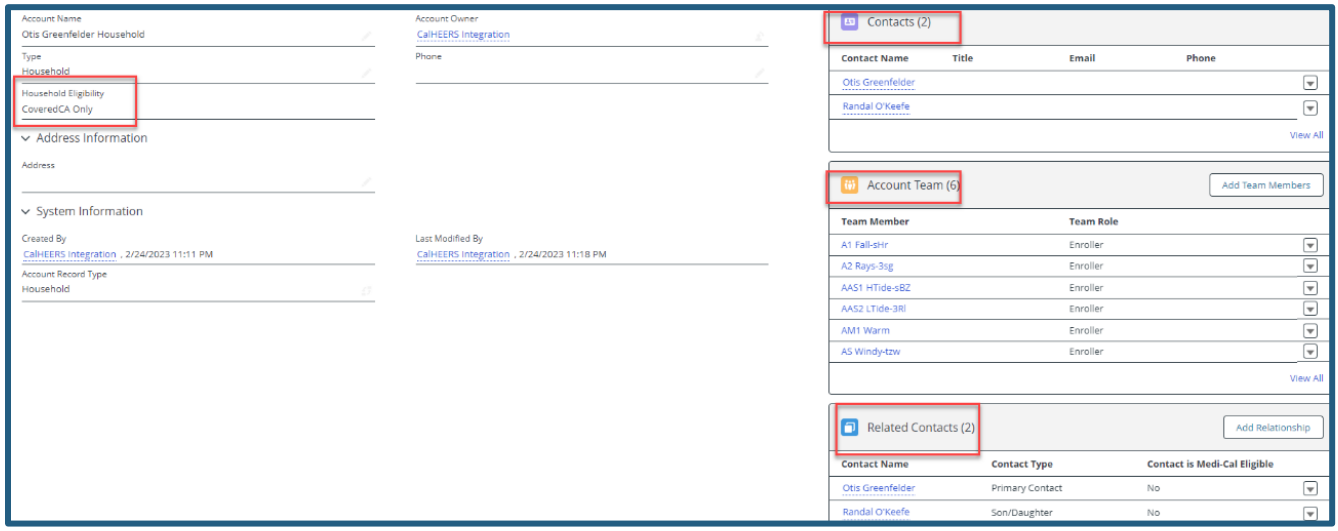


5. On the righthand side of the page, click on **Contact Application: Contact Name** under *Applications*.



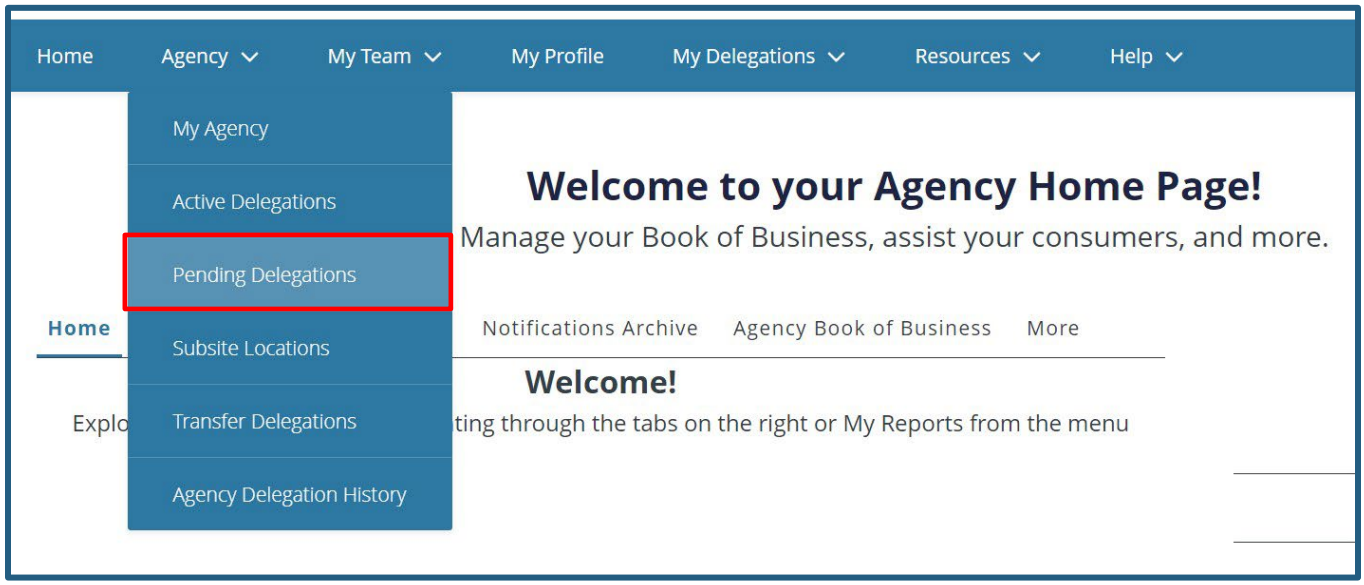
6. This displays the following statuses, such as:
   - **CSR Eligibility**
   - **APTC Eligibility**
   - **Covered California Premium**
   - **Medi-Cal Eligibility**
   - **CCP Eligibility**

7. To view household eligibility, **Contacts**, **Account Team**, and **Related Contacts**, return to the customer's *Contact* page and click **[Consumer's Name] Household** under *Account Name*.



Accept Pending Delegations on Behalf of an Agent

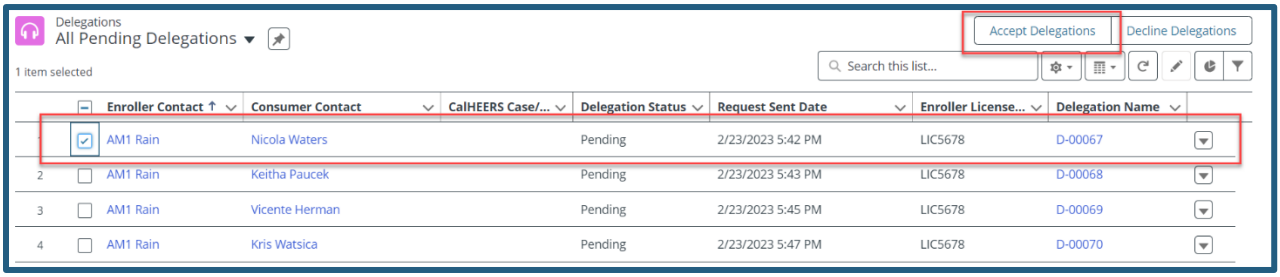
1. Click **Agency** and select **Pending Delegations** from the dropdown menu.



2. A list of all pending delegations within the agency displays on the *Delegations* page.

The page displays:

- **Enroller Contact**
- **Consumer Contact**
- **CalHEERS Case/Application ID**
- **Delegation Status**
- **Request Sent Date**
- **Enroller License Number**
- **Delegation Name**



3. Checkmark the row with the relevant *Enroller* and *Consumer*, then click **Accept Delegations**.
4. Click **Save** on the *Accept Delegations* pop-up, after which you'll receive a confirmation popup at the top of the page that reads "*Delegations Accepted Successfully*."

Note: The confirmation popup is temporary and closes on its own.

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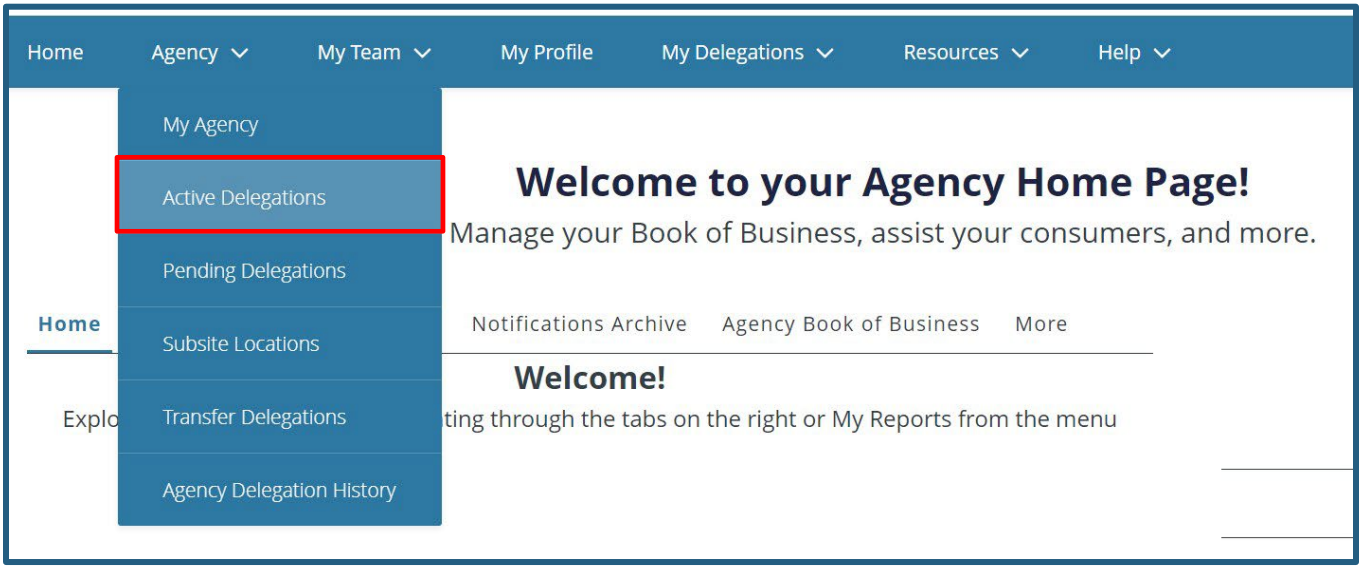
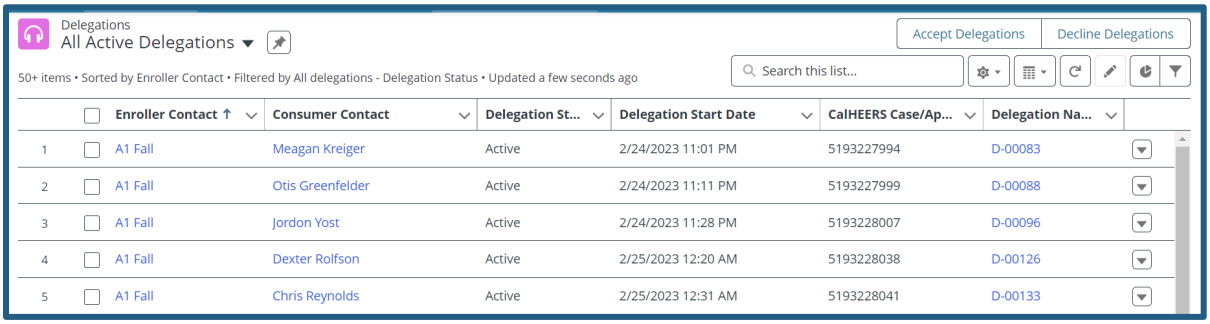
Complete and Submit an Application on Behalf of an Agent for an Already Delegated Consumer

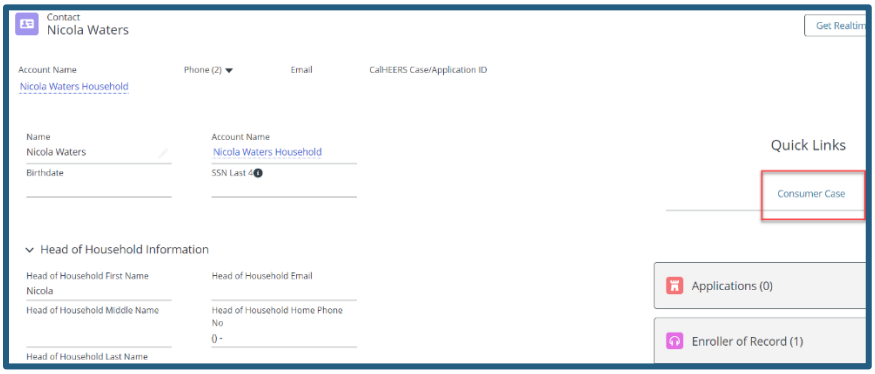
1. In the *Agency* dropdown menu, select **Active Delegations**.



2. The *Delegations* page displays with all active consumers delegated to agents in the agency.

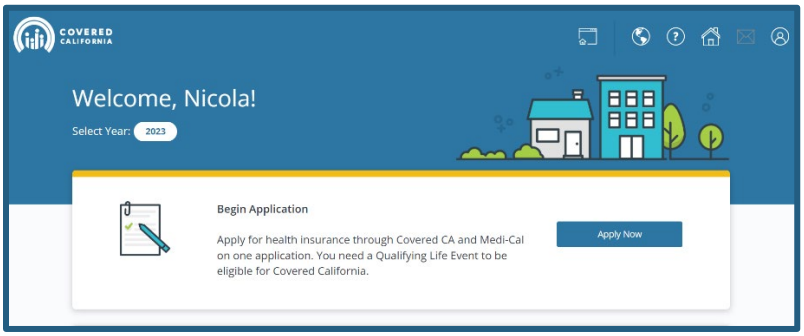


3. Click on the consumer's name under **Consumer Contact**. Once on the *Contact* page, click **Consumer Case** under **Quick Links** on the righthand side.



4. You'll now be directed to the consumer's homepage to begin or continue their application.

Note: Approved Admin Staff cannot enroll consumers into a plan due to not being a licensed Agent.



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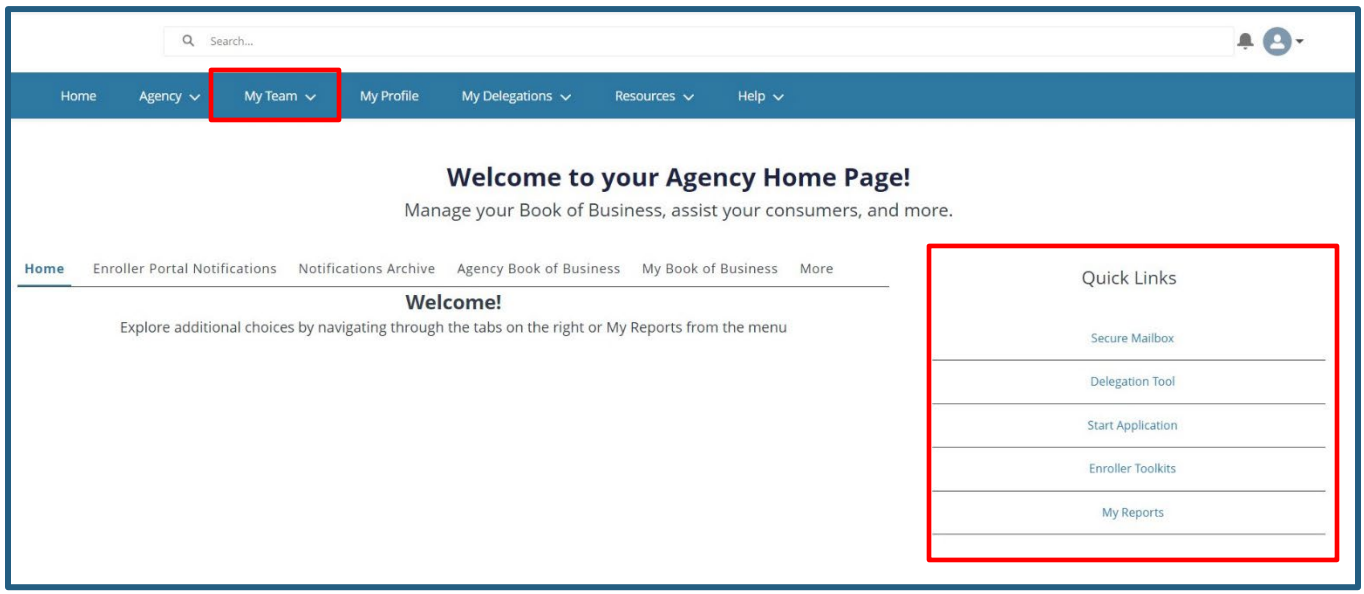
How to Submit a New Application or Use Delegation Tool as an Approved Admin Staff

1. Navigate to *My Team* located at the top menu bar.
2. Select the **Agent** name.
3. Access the **Delegation Tool** in quick links or access **Start Application** in quick links.

Note: If you attempt to do this from your own home page, the two quick links will be missing.



Contact the Agent Service Center

Agency Managers and Approved Admin Staff, both levels 1 & 2, can contact the Agent Service Center when in need of assistance.

Contact via:

- Phone: (877) 453-9198
- Email: agents@covered.ca.gov

View the Hours of Operation for a full list of availability.