Approved Admin Staff for Agency Managers Quick Guide

Overview

Agency Managers can add staff to their Agency to assist with consumer support, application entry, and other administrative functions. In the Enroller Portal, this support staff role is referred to as Approved Admin Staff.

Onboarding

Prior to beginning their work for the agency, the Admin Staff must meet specific criteria. Admin staff must:

- Complete their required training and pass a background check – *Agency is responsible for fees associated with background check process*.
    - After initially onboarding your Admin Staff, the Admin Staff will receive four emails within 24-48 hours.
        - **Email 1:** Notification with access information for training in the Learning Management System (LMS).
        - **Emails 2 and 3:** These emails will allow the Admin Staff to edit their application.
        - **Email 4:** Notification with access to the Live Scan (fingerprinting) through DocuSign.
        - **Note:** The Criminal Record Disclosure will be filled out during the editing process.

Once the Admin Staff completes these requirements and Covered California updates their status to Approved, see the Add New Admin Staff Job Aid for step-by-step instructions.

Approved Admin Tasks

Approved Admin Staff can assist their agency in multiple ways. The Admin Staff role has two permission levels. The Agency Manager determines the level during the creation of the profile. They do not have a public profile or carry a license, so they will not be assisting consumers with plan selection, terminations, or APTC adjustments.

Level 1 & 2 Tasks

- Accept pending delegations on behalf of an Agent
- View Agent list/Search for an Agent
- View Active Delegations
- Start a new application or complete an application
- Make updates (Report a Change) to applications
- Upload eligibility documents for the consumer

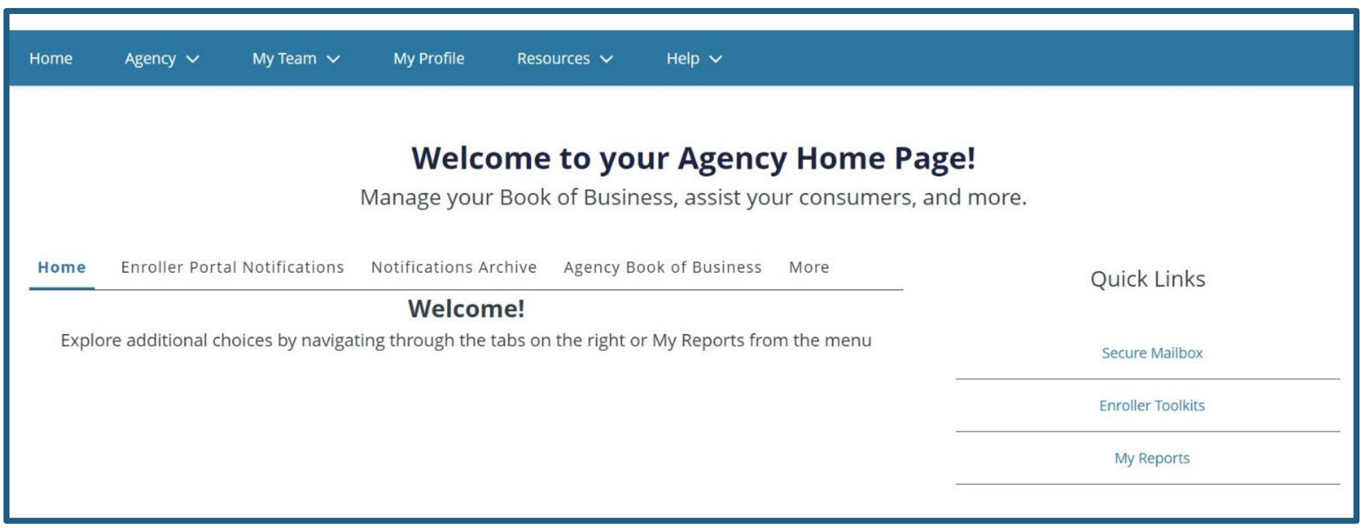
- **Call the Agent Service Center for assistance**

Level 2 Tasks

- Add an Agent
- Transfer Consumer delegations ***within*** an Agency
- Update Agency location and hours
- Document Upload

Approved Admin Staff Dashboard Overview

Below is a screenshot of the Approved Admin Enroller Portal home page.



Below is a description of the functions under each tab:

Agency	My Team	My Profile	Resources/Quick Links
My Agency: View relevant Agency information, including Federal Tax ID, Agency License Number, Agency License Expiration Date, and more. **(Level 1 & 2)**	**Team List:** View a list of agency staff and enrollers. **(Level 1 & 2)**	**My Profile:** View and edit information such as your role, account name, phone number, email, and more. **(Level 1 & 2 only)**	**Enroller Toolkits:** Takes you to the Enrollment Partner Toolkit page on the Covered California website. Includes Toolkits for Enrollers, Resources, and more. **(Level 1 & 2)**
Active Delegations: Consumers who have an active case and are delegated to an agent in the Agency. Look up their plan, eligibility status, household details, plus more. **(Level 1 & 2)**	**Add Agent**: Fill in agent information to agent an agent to the agency. **(Level 1 & 2)**		**My Reports:** View and sort reports by Recent, Created by Me, Private Reports, All Reports, and more. **(Level 1 & 2)**
Pending Delegations: View pending delegation requests by consumers to assist with their applications. **(Level 1 & 2)**			
Subsite Locations: Lists the addresses of all subsite locations. **(Level 2)**			
Transfer Delegations: Transfer all delegations from one enroller to another enroller or transfer one or more specific delegations to transfer to another enroller. **(Level 2)**			
Agency Delegation History: View the agency's previous delegations. (Level 1 & 2)			

Note: A Quick Links section on the righthand side of the Enroller Portal homepage includes *Secure Mailbox, Enroller Toolkits*, and *My Reports*.