



Overview

To better manage their agency, Agency Managers may add staff to their Agency to assist with consumer support, application entry, and other administrative functions. In the Agency Portal, this new support staff role is referred to as Approved Admin Staff.

Note: The Agency Manger determines the level designation (Level 1 & 2) during the creation of the Approved Admin profile. Both levels do not have access to export an Agent or Agency Book of Business.

Resources include information to assist Approved Admin Staff with online application support, managing Agency delegations (Level 2 only), creating new profiles for Agents (Level 2 only), and much more.

Check back frequently for updates.

Approved Admin Support

Resource	Type	Description	Date Updated
Approved Admin Staff Role Overview for Level 1 & 2	Quick Guide	Overview of Admin Staff Level 1 & 2 access in their CalHEERS portal.	10/10/2018
Acting on Behalf of an Agent for Approved Admin Staff	Job Aid	Instructions for Admin Staff, Level 1 & 2 to assist any consumers delegated to an Agent within the Agency.	10/10/2018
Transferring Consumers within an Agency for Approved Admin Staff – Level 2	Job Aid	Instructions for Admin Staff, Level 2, to transfer consumer delegations between Agents with the Agency.	07/23/2018
Add a New Agent to an Agency for Approved Admin Staff - Level 2	Job Aid	Instructions for Approved Admin Staff, Leve 2, to add new Agents to the Agency. Also, provide steps to guide new Agents through the CalHEERS account creation process.	07/23/2018