

Overview

To 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 Manager determines the level designation (Level 1 & 2) during the creation of the Approved Admin profile.

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
Approved Admin Staff Role Overview for Level 1 & 2	Quick Guide	Overview of Admin Staff Level 1 & 2 access in their CalHEERS portal.
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.
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.
Add a New Agent to an Agency for Approved Admin Staff - Level 2	Job Aid	Instructions for Admin Staff, Level 2, to add new Agents to the Agency. Also, provide steps to guide new Agents through the CalHEERS account creation process.