Enroller Portal 2026 Enhancements Quick Guide

Overview

This purpose of this Quick Guide is to show major changes to the Enroller Portal home page.

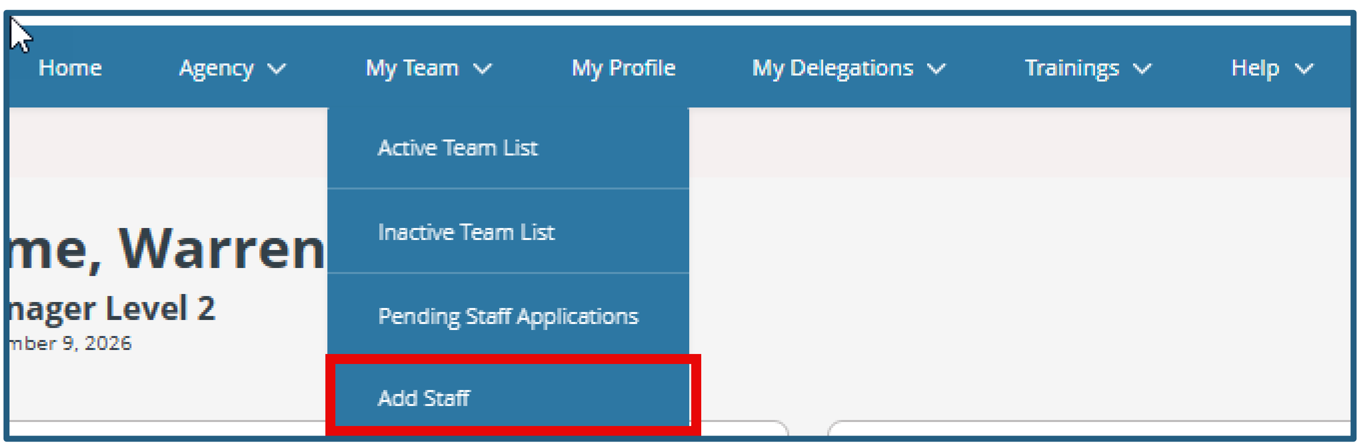
Enhancements to the home page include the following:

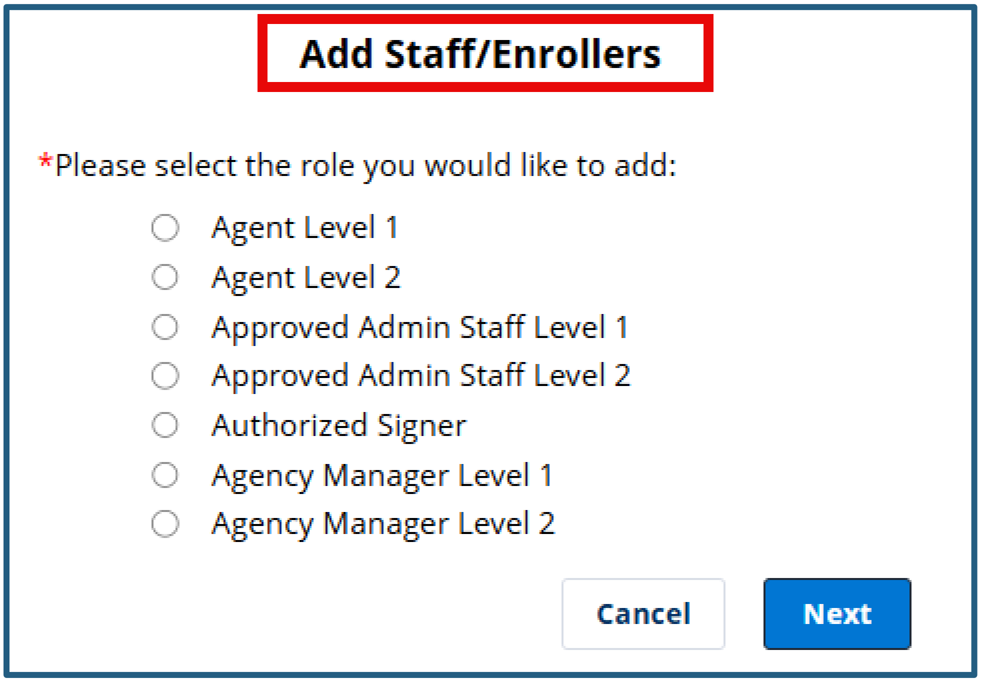
- *My Team* dropdown is updated
- New *Trainings* dropdown added to the tabs at the top
- Seasonal updates
- Announcements
- Book of Business (BoB) with a BoB dashboard
- Current trainings

Note: The *Quick Links* section has been renamed to *Quick Actions*.

A new *Add Staff* option is provided to replace the multiple options for varying roles.

Clicking **Add Staff** takes the user to a list of roles available to select from and the user can complete the information for the staff member to be added.





The *Trainings* dropdown navigates the user to a *Training Dashboard*.

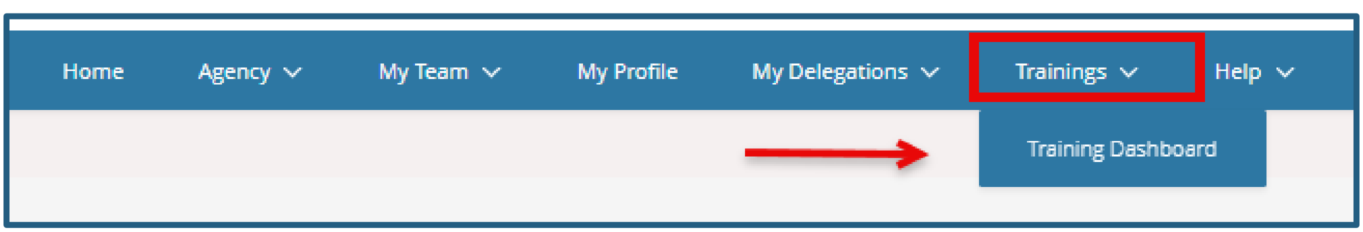
Note: Agent 1 and Counselor roles do not have access to the *Training Dashboard*.

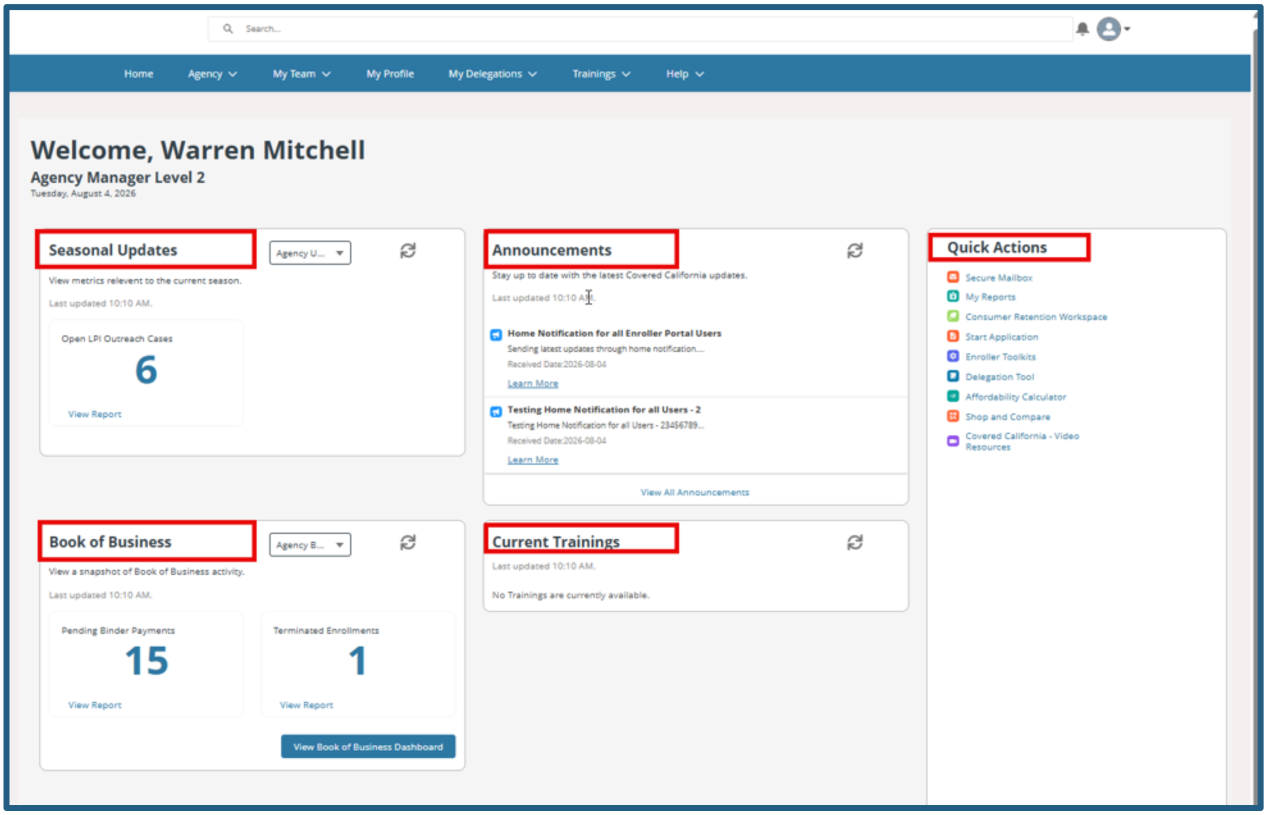
These training include:

- Entity Certification training for onboarding
- Re-certification training
- Agency training for certification of onboarding
- Annual trainings

The dashboard lists due dates and status for each training.

Depending on the user role, the status of other staff will be visible. The *Current Trainings* widget is also available to all roles and includes an SSO LMS link that navigates to the *Training Dashboard*.

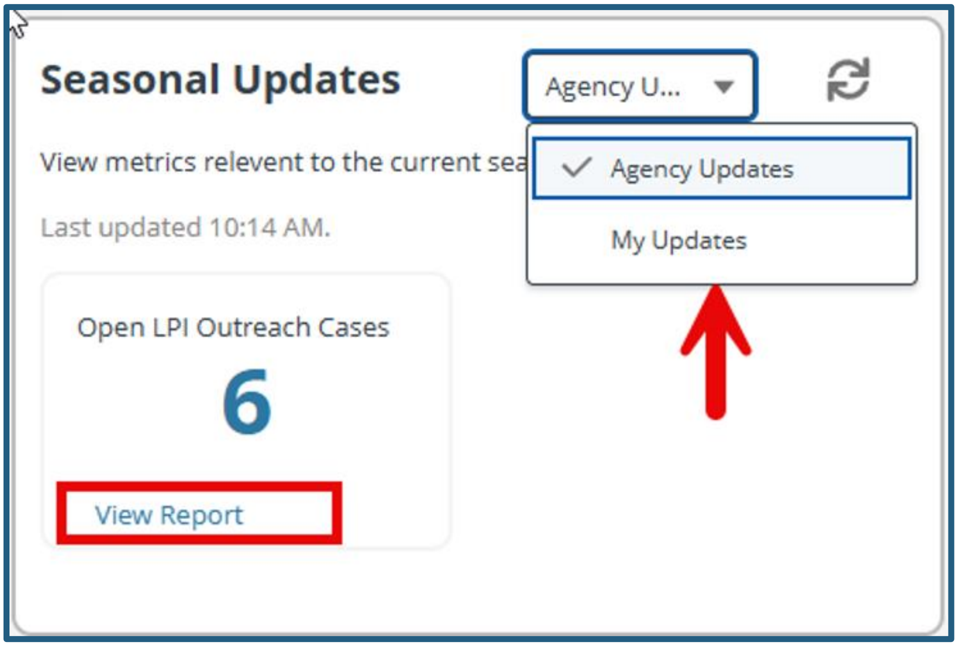


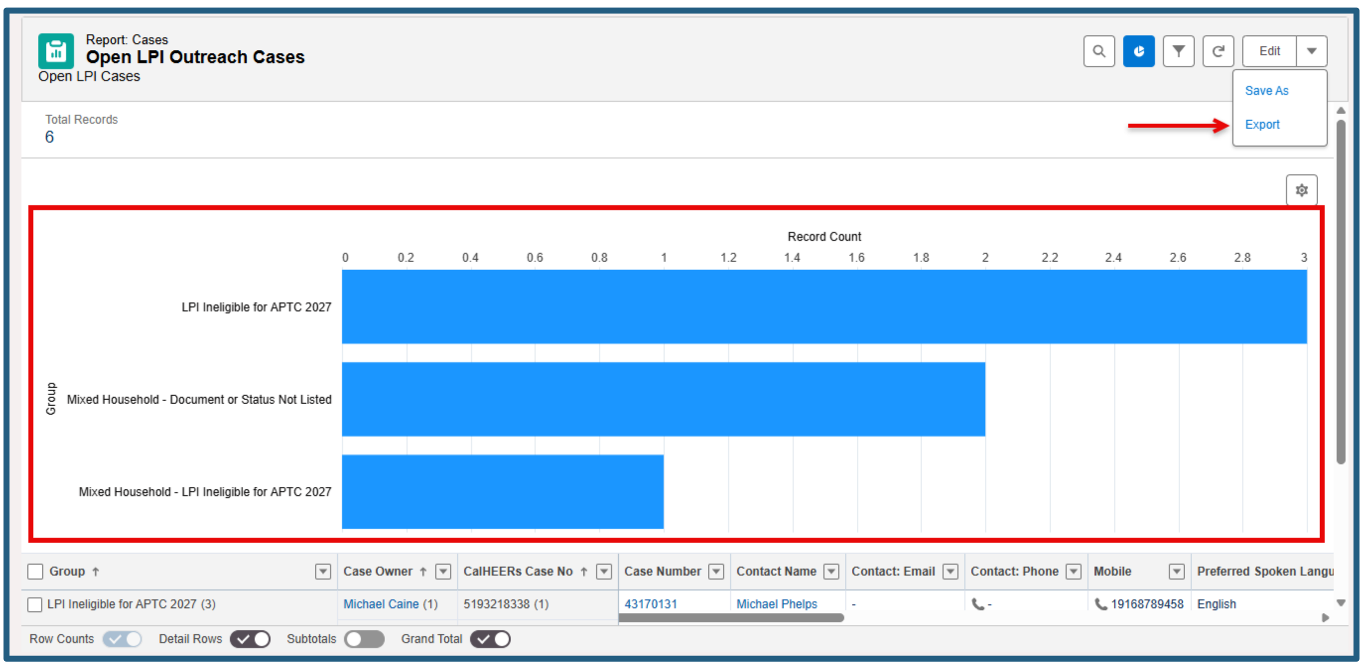


Seasonal Updates

This section provides a dropdown depending on the user role to view reports. The dropdown is available to Agency Managers to view all Agency updates and use the *My Updates* feature to provide cases delegated to them. Other roles will only see *My Updates*.

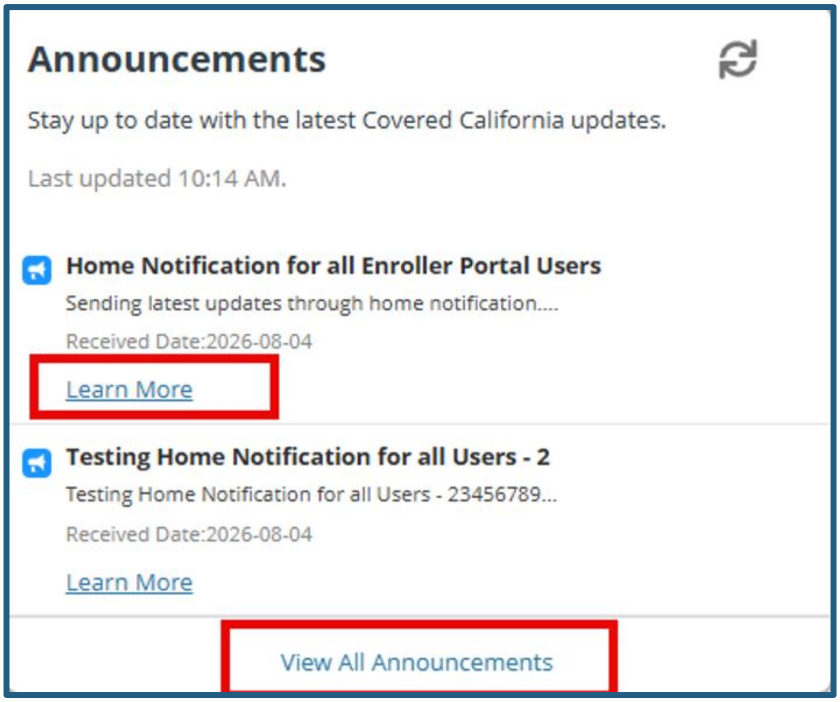
Clicking the **View Report** link provides a graph of groups and the report can be exported.


Seasonal Updates
Agency U...
View metrics relevent to the current sea
Last updated 10:14 AM.
Agency Updates
My Updates
Open LPI Outreach Cases
6
View Report


Report: Cases
Open LPI Outreach Cases
Open LPI Cases
Edit
Save As
Export
Total Records
6
Record Count
LPI Ineligible for APTC 2027
Mixed Household - Document or Status Not Listed
Mixed Household - LPI Ineligible for APTC 2027
Group
Group
Case Owner
CalHEERs Case No
Case Number
Contact Name
Contact: Email
Contact: Phone
Mobile
Preferred Spoken Langu
LPI Ineligible for APTC 2027 (3)
Michael Caine (1)
5193218338 (1)
43170131
Michael Phelps
19168789458
English
Row Counts
Detail Rows
Subtotals
Grand Total

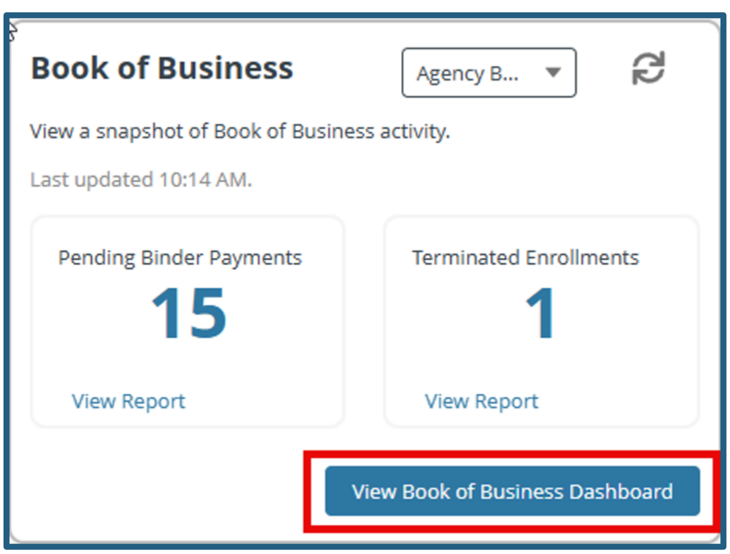
Announcements

This section provides the most recent notification which includes a **Learn More** link in addition to a link to **View All Announcements**.



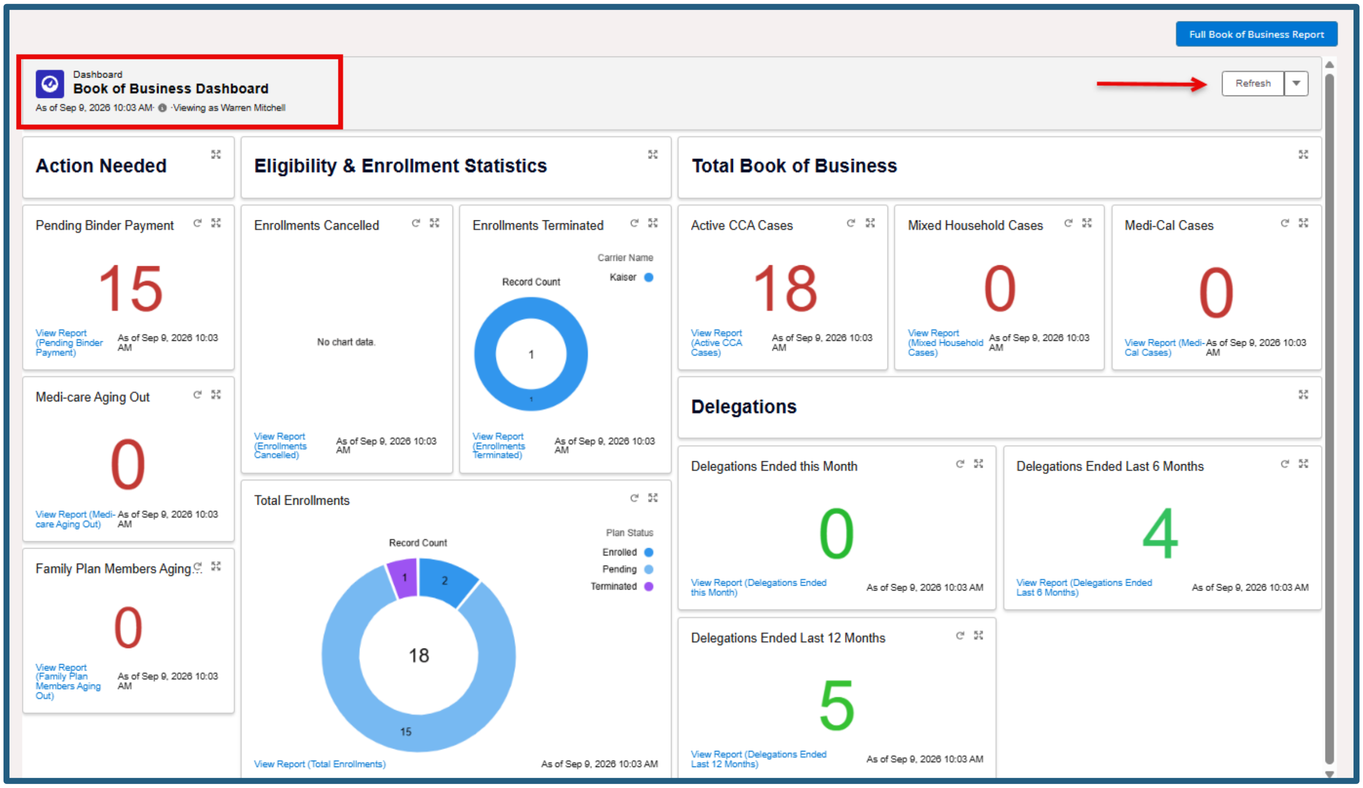
Book of Business (BoB)

This section provides a snapshot of BoB activities and includes a **View Book of Business Dashboard** link.



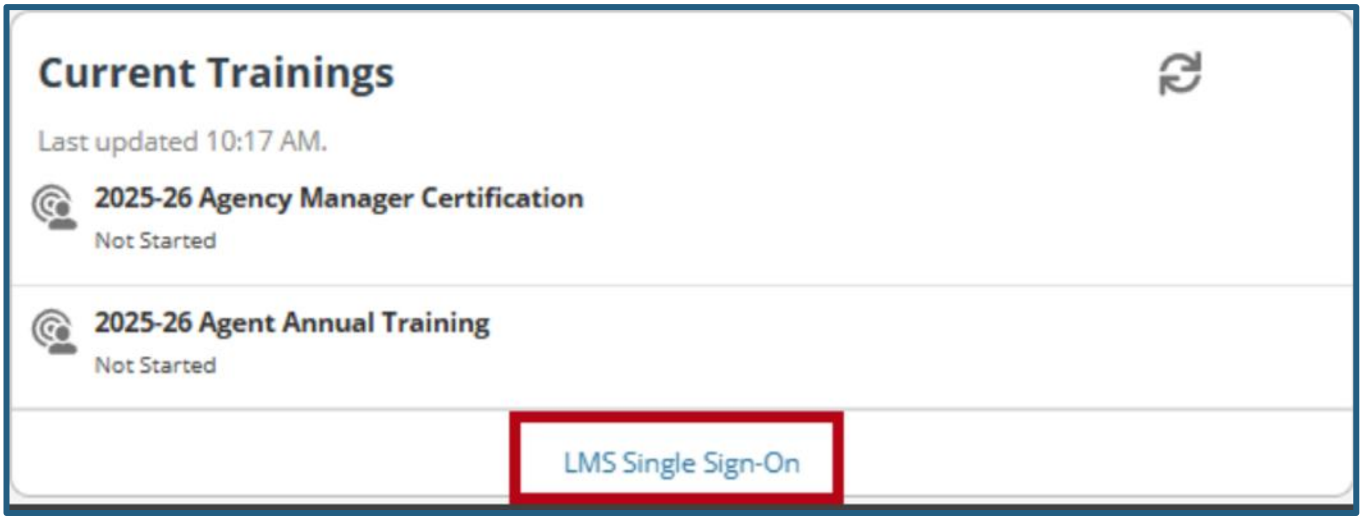
The BoB dashboard provides access to multiple customized reports created from the BoB. The dashboard provides a quick glance for cases needing action, eligibility and enrollments statistics, active Covered California cases, Mixed Household Cases and Medi-Cal only cases. Other report links include *Delegations ended this month*, *last 6 months* and the *past year*.

Click the **Refresh** button for up-to-date information. The Full BoB report is available for any customized reports Enrollers may need that are not included in the BoB dashboard.



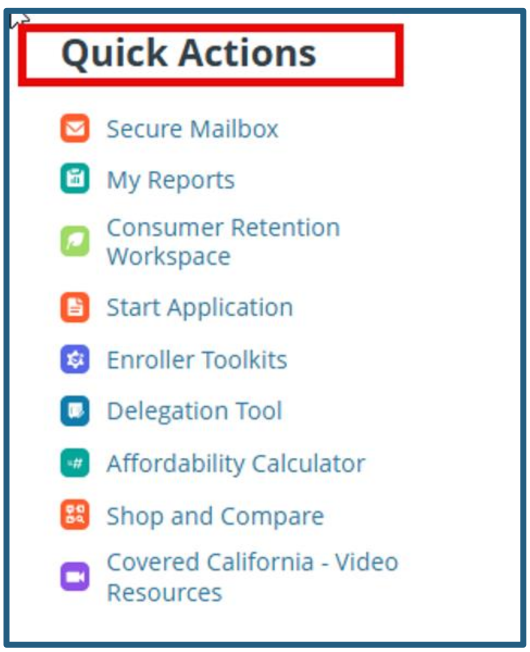
Current Trainings

This section provides information for any trainings currently available. It includes the **LMS Single Sign-On** link.

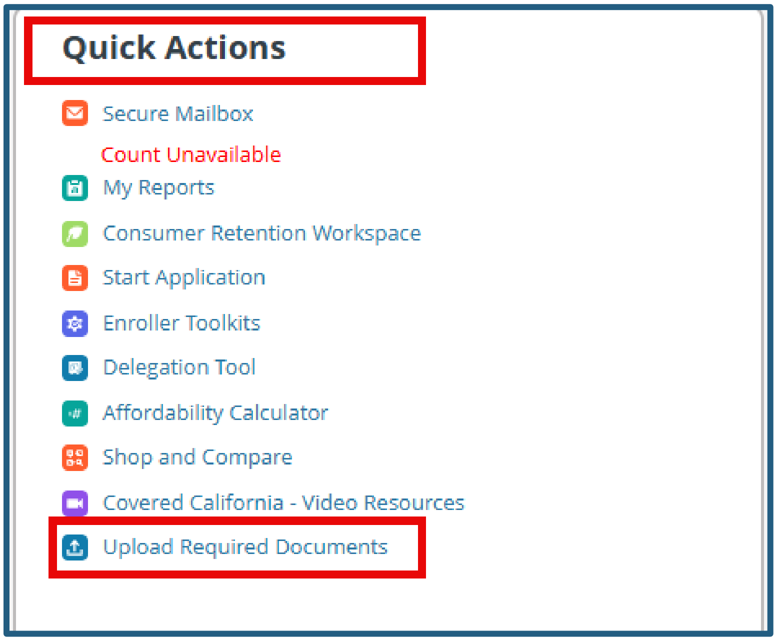


Quick Actions

This section provides the same *Quick Links* with an additional link to Covered California video resources.

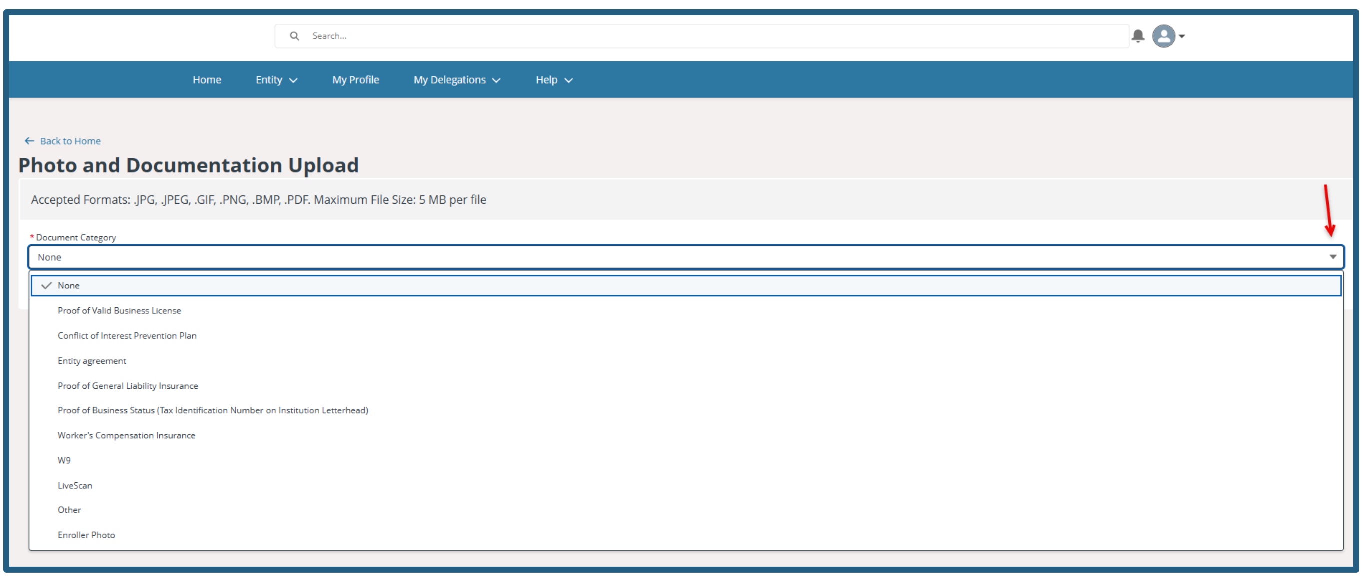


Note: The Entity view for *Quick Actions* has an additional link **Upload Required Documents**.



Clicking the **Upload Required Documents** link take you to *Photo and Documentation Upload* page.

Clicking the *Document Category* caret provides a list of items to select for upload.



Current Enroller guides will be updated with these new features and page images over the next few months.