



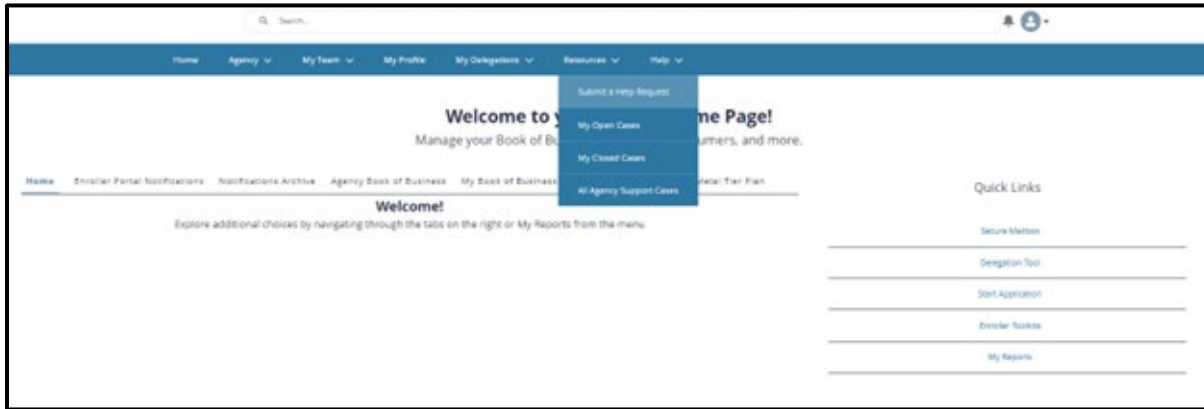
Enroller Portal Submitting a Help Request and Live Chat Guide

Overview

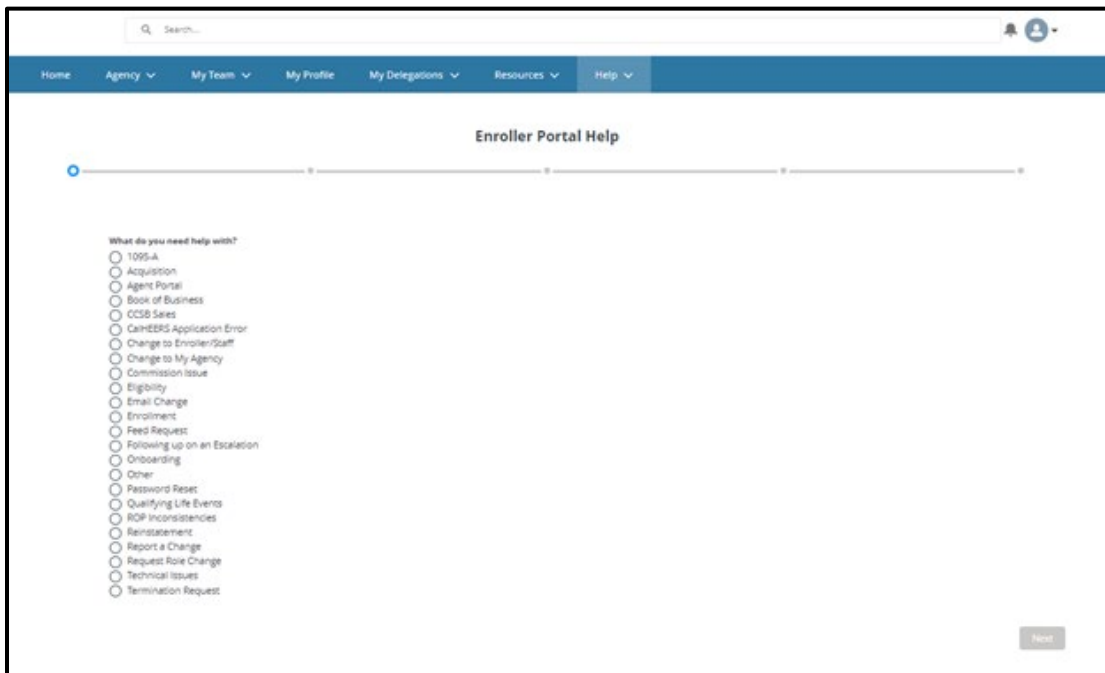
This guide documents the steps to submit a help request and view cases. Depending on the help topic selected, a help request will either generate a case to be distributed to the appropriate department or open a live chat with the Agent Service Center.

Submitting a Help Request for Agencies

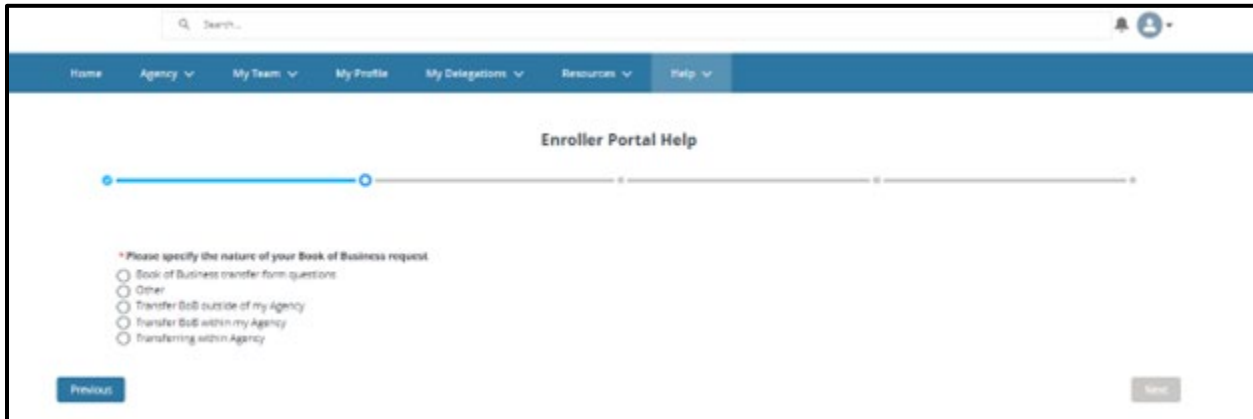
1. From the Home page, navigate to the *Help* dropdown. Select **Submit a Help Request**.



2. A list of topics is provided for the Enroller to select. Topics will be populated based on the logged-in user (i.e., Agency Manager vs. Agent). Select the radio button that relates to the topic for which you are seeking help.

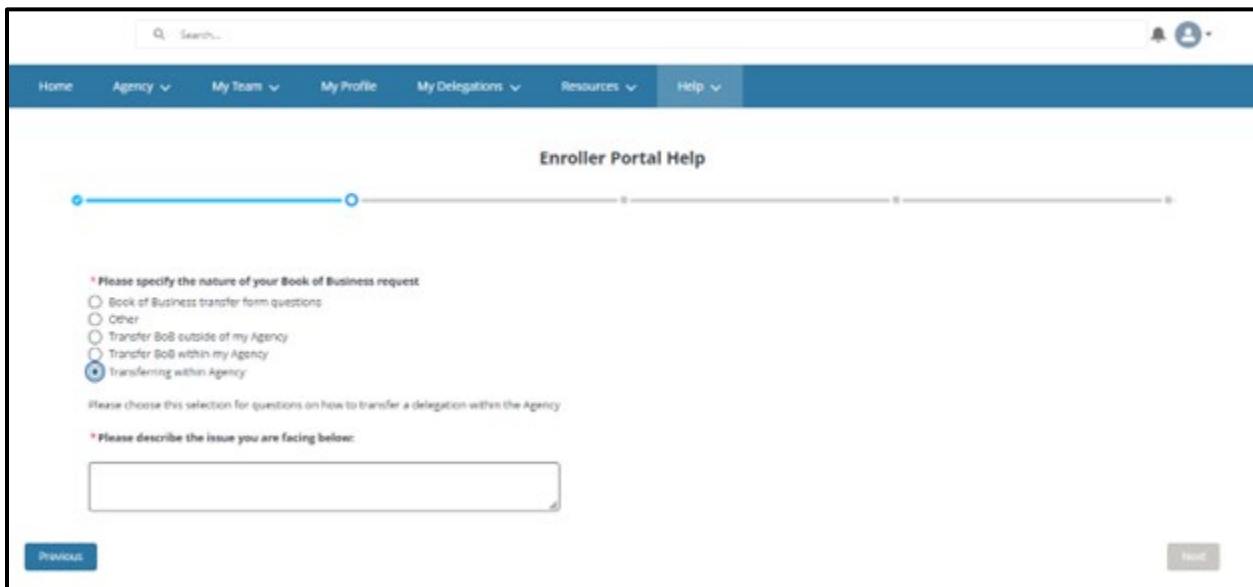


3. Select a reason from the *Please specify the nature of your [category] request* section.



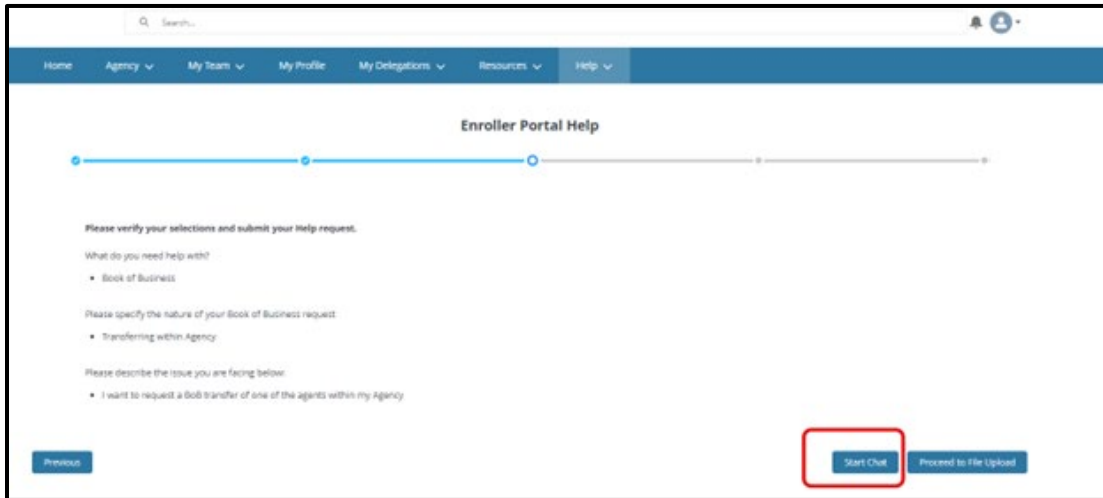
The screenshot shows the 'Enroller Portal Help' page. At the top, there is a search bar and a navigation menu with options: Home, Agency, My Team, My Profile, My Delegations, Resources, and Help. Below the navigation is a progress bar with four steps, the first of which is highlighted. The main content area contains the heading 'Enroller Portal Help' and a section titled '*Please specify the nature of your Book of Business request'. This section has five radio button options: 'Book of Business transfer form questions', 'Other', 'Transfer BOB outside of my Agency', 'Transfer BOB within my Agency', and 'Transferring within Agency'. The 'Transfer BOB within my Agency' option is selected. At the bottom left is a 'Previous' button and at the bottom right is a 'Next' button.

4. After selecting a reason, enter a description of the issue in the provided text box.



This screenshot shows the same 'Enroller Portal Help' page as the previous one, but with the 'Transfer BOB within my Agency' radio button selected. Below the radio buttons, there is a text box for describing the issue. The text box is empty and has a small 'x' icon in the bottom right corner. Below the text box is a 'Previous' button on the left and a 'Next' button on the right.

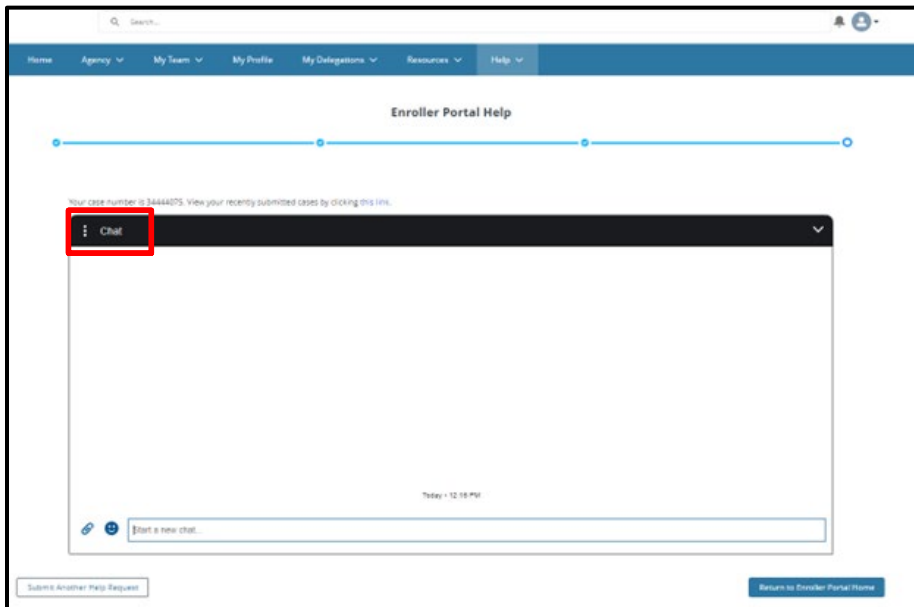
- A summary of the help request is shown.



- Depending on the options selected on the previous screens and the availability of an Agent Service Center Representative, the Enroller will be presented with **Start chat**, which navigates the user to a live chat with a Pinnacle Service Center Representative. Once the chat has begun, there is a 3-minute timeout time.

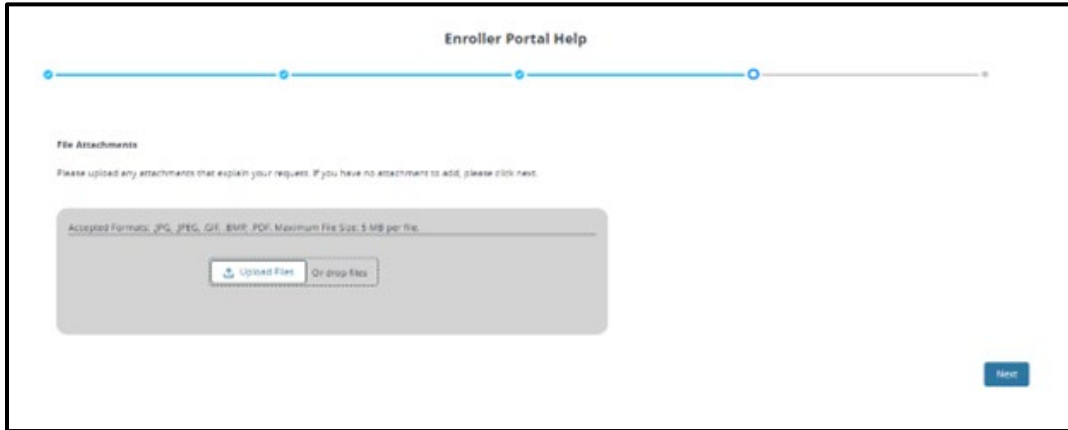
Note: When a chat is started, the case number is displayed above the chat window.

- Discontinue the chat by clicking the three dots located in the top left corner of the chat window.
- After clicking the three dots, select the option to leave the chat.



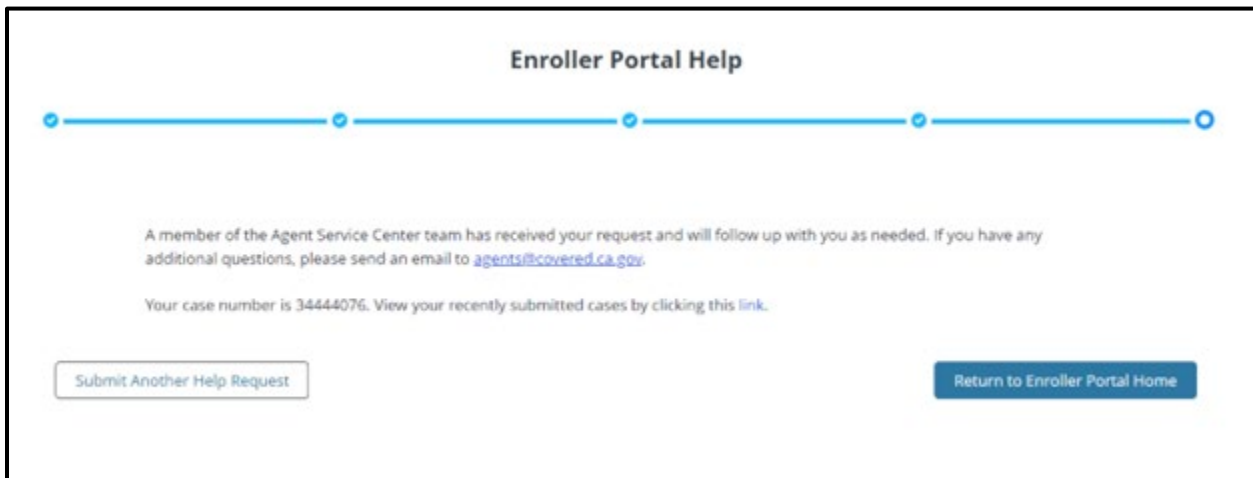
Note: The **Start Chat** function is **not** available during non-office hours. (Office hours are Monday through Friday 8 a.m. to 6 p.m.)

- **Proceed to File Upload** – navigates the user to a page to upload supporting files or documents for the help request. The user can bypass this screen by selecting **Next** if they do not have anything to upload.

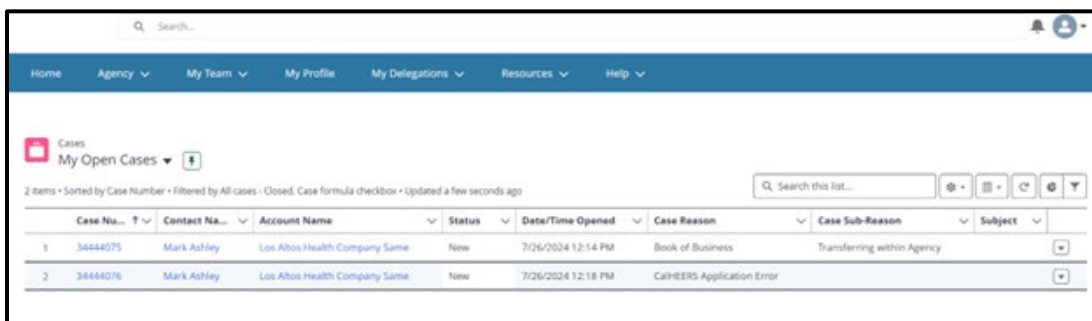


- **Previous** – navigates the user to the previous page.

- Once the help request is submitted and the chat option is not selected, a confirmation displays with an assigned case number. The case is directed to the appropriate department for further review of the help request.



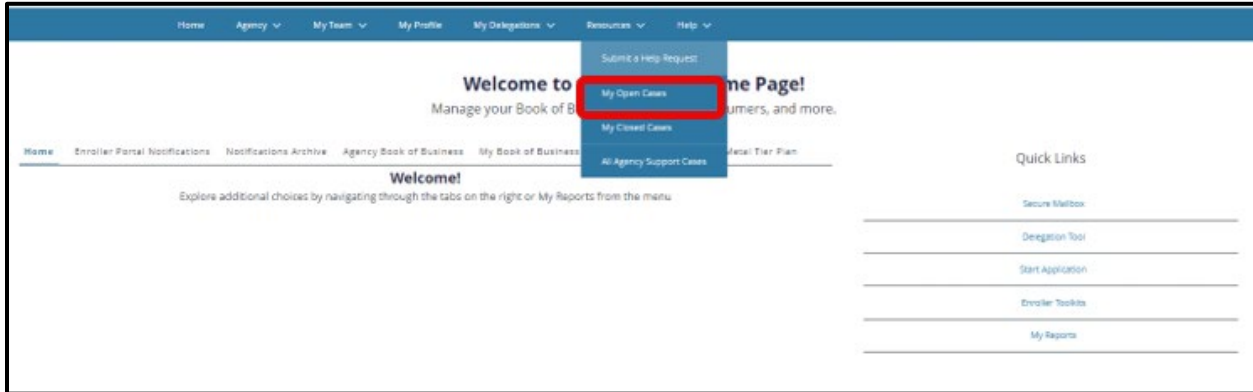
Clicking the link navigates the user to *My Open Cases*.





Enroller Portal Submitting a Help Request and Live Chat Guide

This page can also be accessed by selecting **My Open Cases** from the *Help* dropdown.

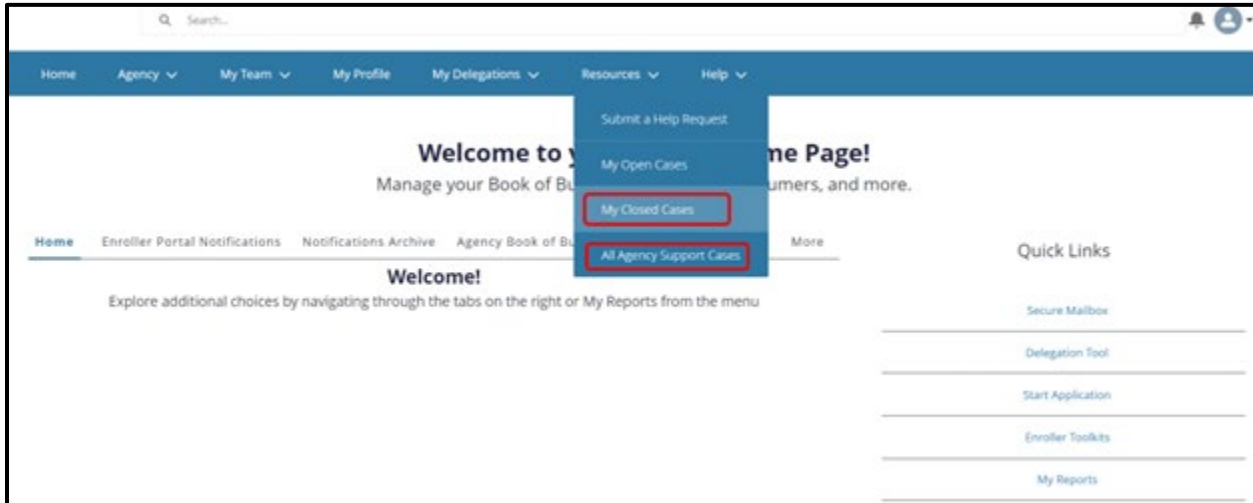




Enroller Portal Submitting a Help Request and Live Chat Guide

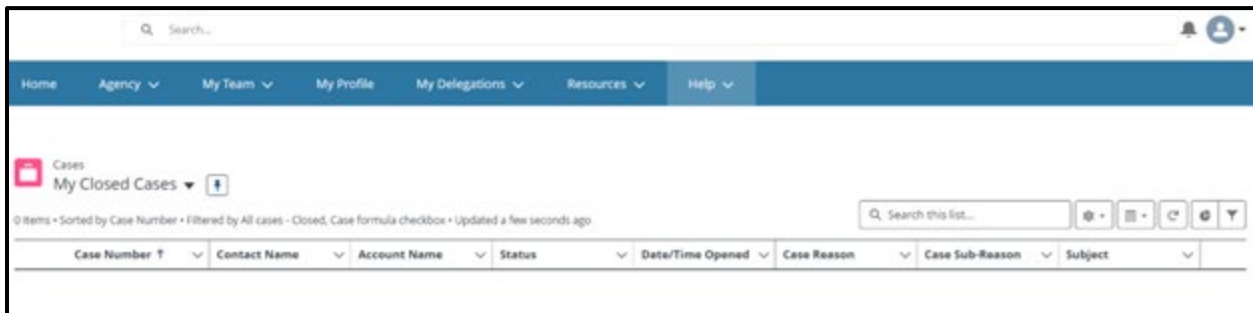
Accessing Previously Closed Cases & All Agency Support Cases

From the Home page, navigate to the *Help* dropdown.



My Closed Cases

The user can see their closed cases and their Agency's support cases (The *All Agency Support Cases* option is available to Agency Managers, Authorized Signers, Agent 2, and Approved Administrative Staff 2).





Enroller Portal Submitting a Help Request and Live Chat Guide

All Agency Support Cases

Agency Managers, Authorized Signers, Agent 2, and Approved Administrative Staff 2 can see all the cases that staff in their Agency have created.

Case Nu...	Contact N...	Account Name	Status	Date/Time Opened	Case Reason	Case Sub-Reason	Subject
1	34444075	Mark Ashley	Los Altos Health Company Same	New	7/26/2024 12:14 PM	Book of Business	Transferring within Agency
2	34444076	Mark Ashley	Los Altos Health Company Same	New	7/26/2024 12:18 PM	CalEERS Application Error	

Case Page Layout

Case: **Mark Ashley** Clone Printable View

Priority	Enroller License Number	Status	Case Number	Subject
Medium	G678567	New	34444075	

DETAILS | RELATED

Case Number	34444075	Account Name	Los Altos Health Company Same
Status	New	Contact Name	Mark Ashley
Case Owner	ASC - EP Help Queue	Enroller Role	Agency Manager Level 2
Current Queue	ASC - EP Help Queue	Contact Phone	(890) 999-0999
Case Reason	Book of Business	Contact Email	markashley784@mailinator.com
Case Sub-Reason	Transferring within Agency		
Case Origin	Chat		
Priority	Medium		
Received Date			
Assigned Date			
Due Date			
Web Email			

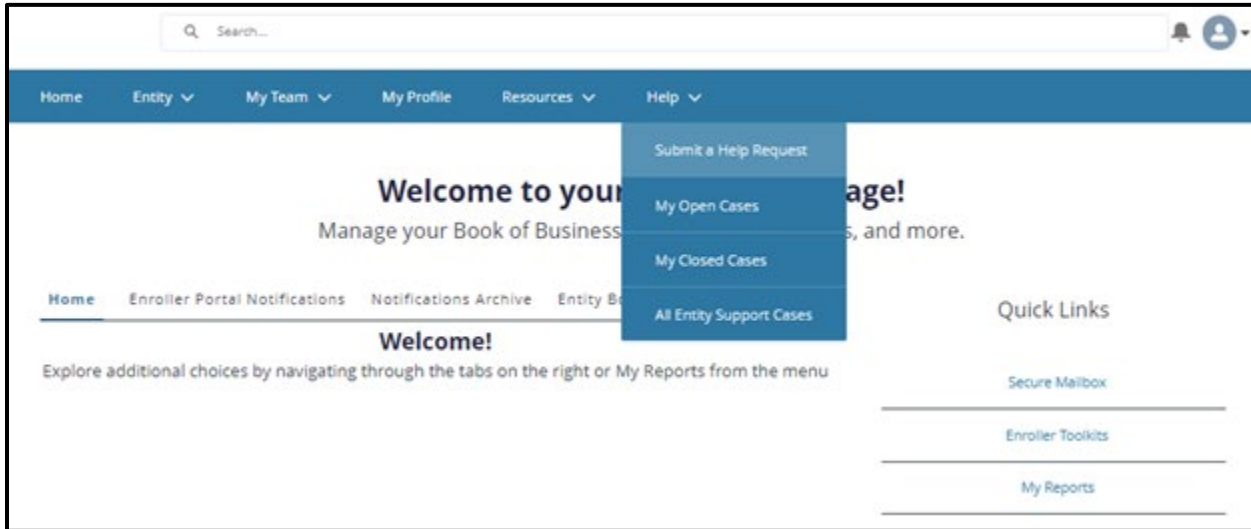
Summary of Issue and Resolution

Subject	Steps to Resolve
Description	

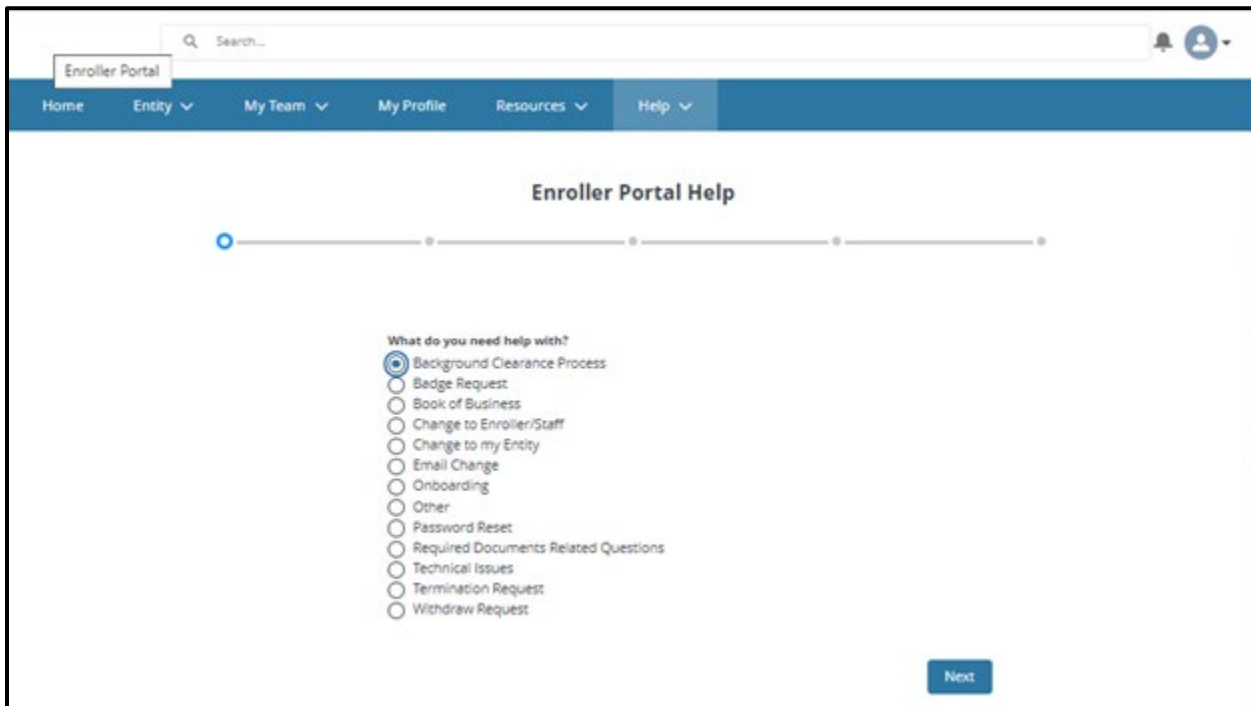
I want to request a BoB transfer of one of the agents within my Agency

Submitting a Help Request for Entities

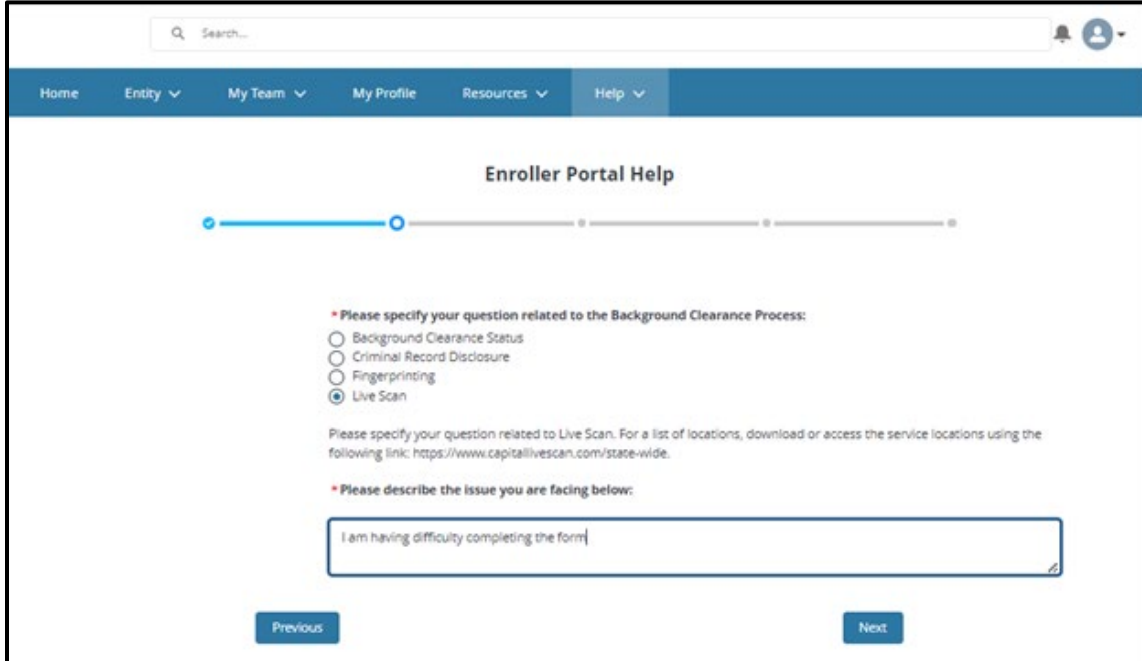
1. From the Home page, navigate to the *Help* dropdown. Select **Submit a Help Request**.



2. A list of topics is provided for the Enroller to select. Topics will be populated based on the logged-in user (i.e. Primary Contact vs. Counselor). Select the radio button that relates to the topic for which you are seeking help.



- Select a reason from the *Please specify the nature of your [category] request* section. After selecting a reason, enter a description of the issue in the provided text box. Click **Next** to continue. The previous button navigates the user to the previous page.



The screenshot shows the 'Enroller Portal Help' page. At the top, there is a search bar and navigation tabs for Home, Entity, My Team, My Profile, Resources, and Help. Below the navigation is a progress indicator with four steps, the first of which is active. The main content area contains the following text:

***Please specify your question related to the Background Clearance Process:**

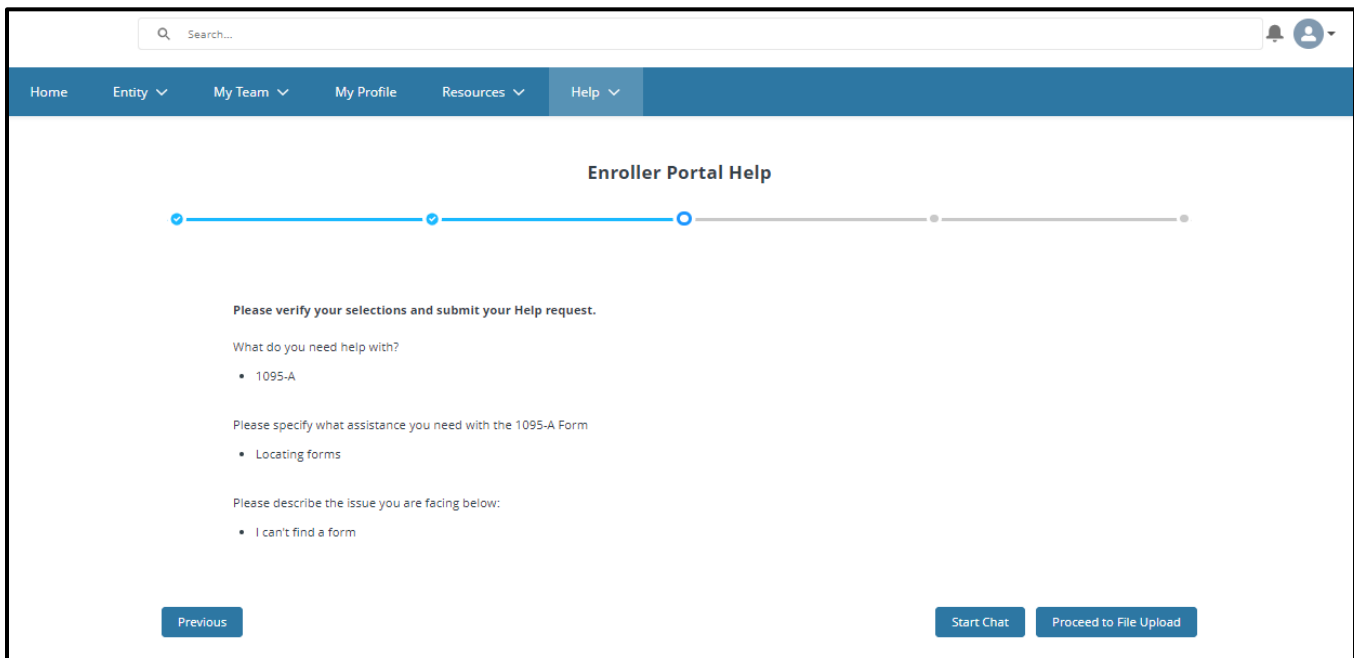
- Background Clearance Status
- Criminal Record Disclosure
- Fingerprinting
- Live Scan

Please specify your question related to Live Scan. For a list of locations, download or access the service locations using the following link: <https://www.capitalivescan.com/state-wide>.

***Please describe the issue you are facing below:**

At the bottom of the form, there are two buttons: 'Previous' and 'Next'.

- A summary of the help request is shown.



The screenshot shows the 'Enroller Portal Help' page. At the top, there is a search bar and navigation tabs for Home, Entity, My Team, My Profile, Resources, and Help. Below the navigation is a progress indicator with four steps, the second of which is active. The main content area contains the following text:

Please verify your selections and submit your Help request.

What do you need help with?

- 1095-A

Please specify what assistance you need with the 1095-A Form

- Locating forms

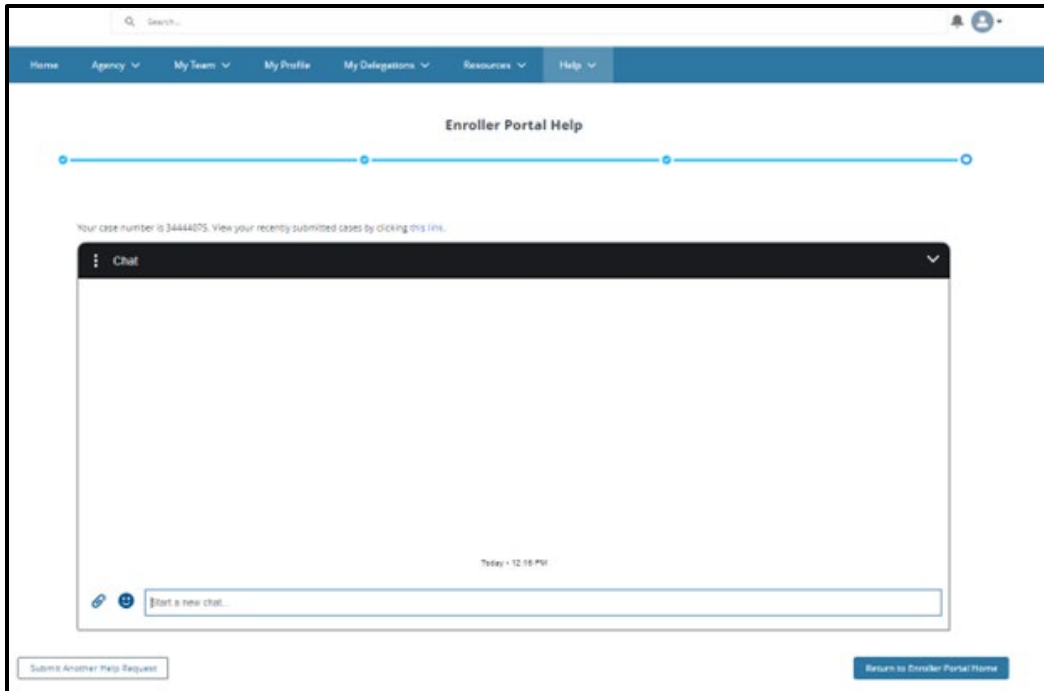
Please describe the issue you are facing below:

- I can't find a form

At the bottom of the form, there are three buttons: 'Previous', 'Start Chat', and 'Proceed to File Upload'.

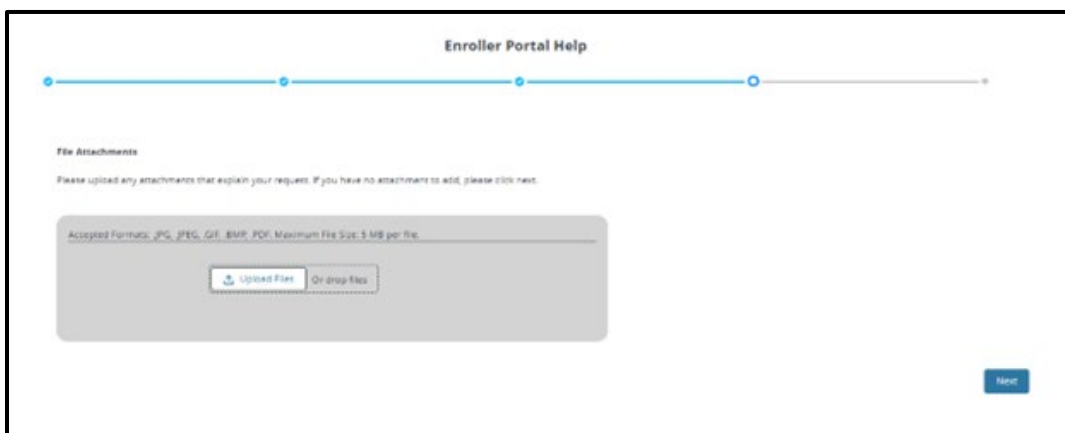
- Depending on the options selected on the previous screens and the availability of an Agent Service Center Representative, the Enroller will be presented with **Start chat**, which navigates the user to a live chat with a Pinnacle Service Center Representative. Once the chat has begun, there is a 3-minute timeout time.

Note: When a chat is started, the case number is displayed above the chat window.



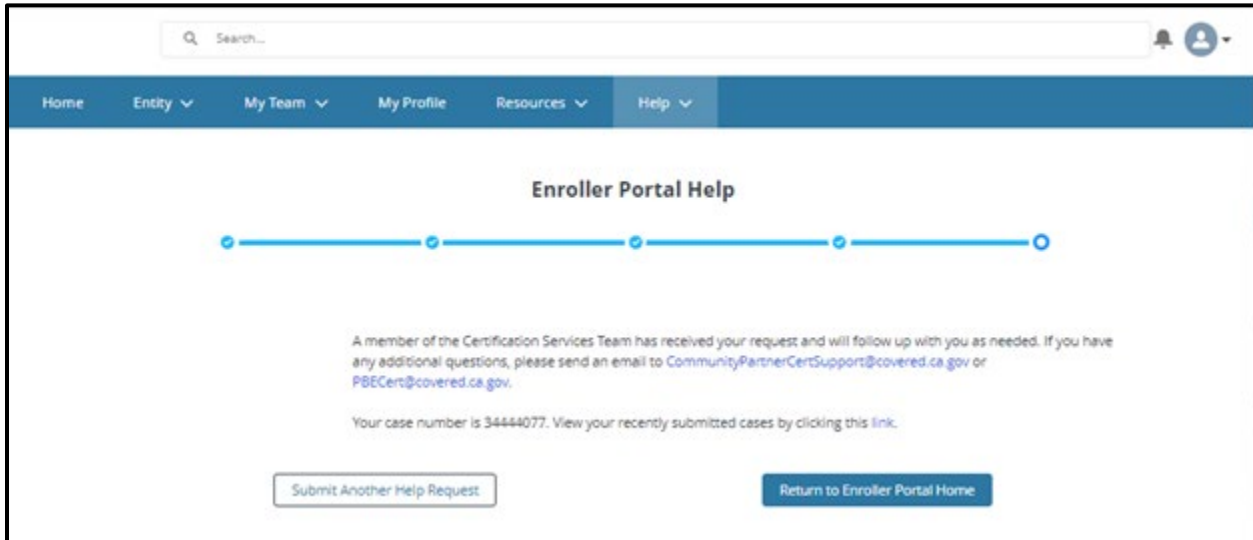
Note: The **Start Chat** function is not available during non-office hours. (Office hours are Monday through Friday 8 a.m. to 6 p.m.)

- **Proceed to File Upload** – navigates the user to a page to upload supporting files or documents for the help request. The user can bypass this screen by selecting **Next** if they do not have anything to upload.

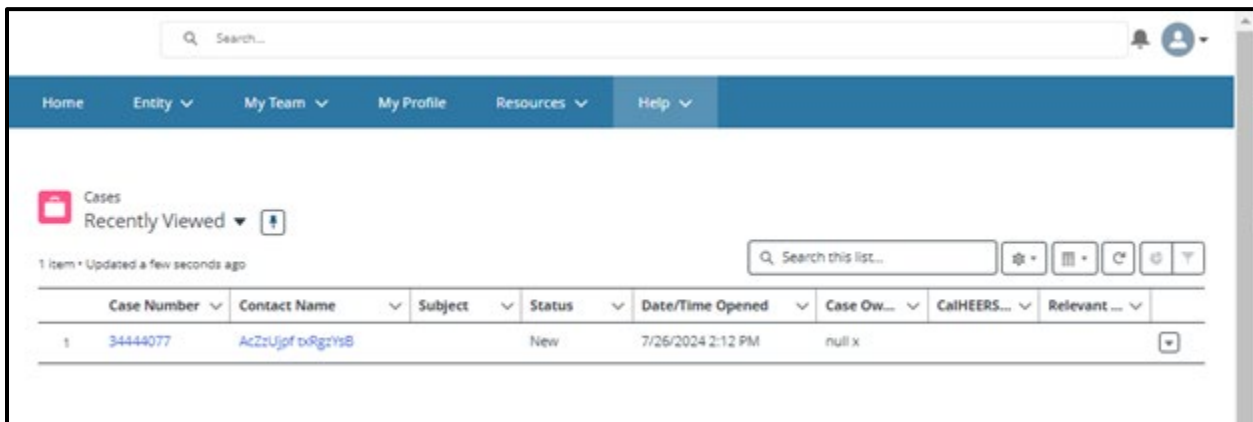


- **Previous** – navigates the user to the previous page.

- Once the help request is submitted and the chat option is not selected, a confirmation displays with an assigned case number. The case is directed to the appropriate department for further review of the help request.



- Clicking the link navigates the user to *My Open Cases*. This page can also be accessed by selecting **My Open Cases** from the *Help* dropdown.





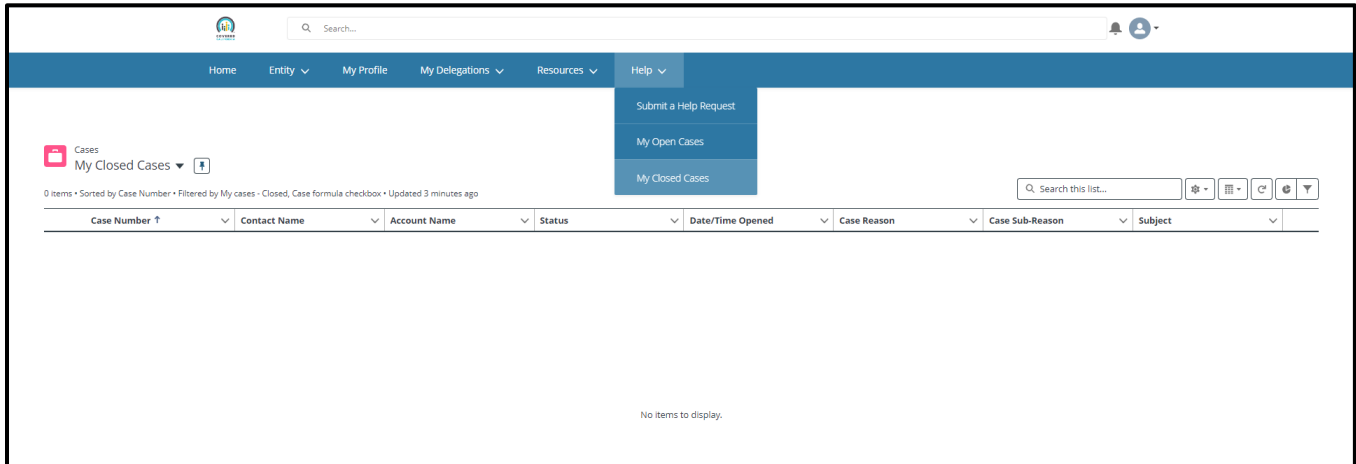
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Accessing Previously Closed Cases & All Entity Support Cases

From the Home page, navigate to the *My Open Cases* or *All Entity Support Cases*

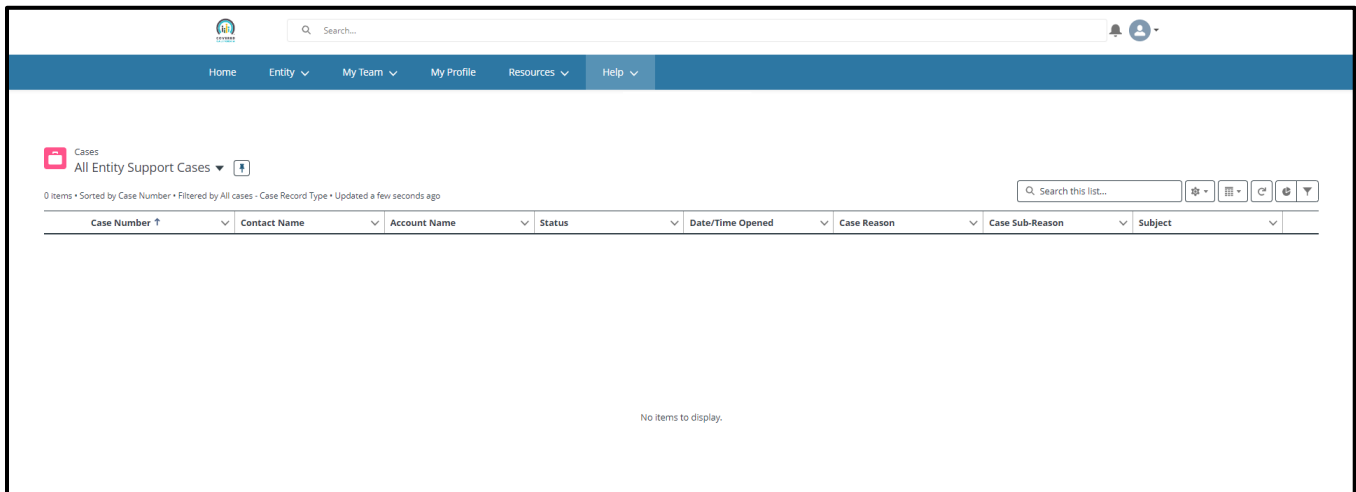
My Closed Cases

The user can see their closed cases and their Entity's support cases (*All Entity Support Cases* is only available to Primary Contacts and Authorized Contacts).



All Entity Support Cases

Only Primary Contacts and Authorized Contacts can see all the cases that staff in their Entity have created.





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Case Page Layout

The screenshot shows a web interface for a case page. At the top, there is a search bar and navigation tabs: Home, Entity, My Team, My Profile, Resources, and Help. The main content area displays a case card for 'AcZzUjpf txRgzYsB'. The card includes a 'Clone' and 'Printable View' button. Below the card, there is a table with columns for Priority, Enroller License Number, Case Number, Status, and Subject. The table shows a 'Medium' priority case with Case Number '34444077' and Status 'New'. Below the table, there are two tabs: 'DETAILS' and 'RELATED'. The 'DETAILS' tab is active, showing a list of case attributes and their values. The 'Summary of Issue and Resolution' section is expanded, showing the subject and a description of the issue.

Priority	Enroller License Number	Case Number	Status	Subject
Medium		34444077	New	

DETAILS	RELATED
Case Number 34444077	Account Name zUkHJest
Status New	Contact Name AcZzUjpf txRgzYsB
Case Owner AcZzUjpf txRgzYsB	Enroller Role Agency Manager Level 2
Current Queue	Contact Phone (603) 132-9022
Case Reason Background Clearance Process	Contact Email aczzujpf@mailinator.com
Case Sub-Reason Live Scan	
Case Origin	
Priority Medium	
Received Date	
Assigned Date	
Due Date	
Web Email	
Summary of Issue and Resolution	
Subject	Steps to Resolve
Description I am having difficulty completing the form	