



Overview

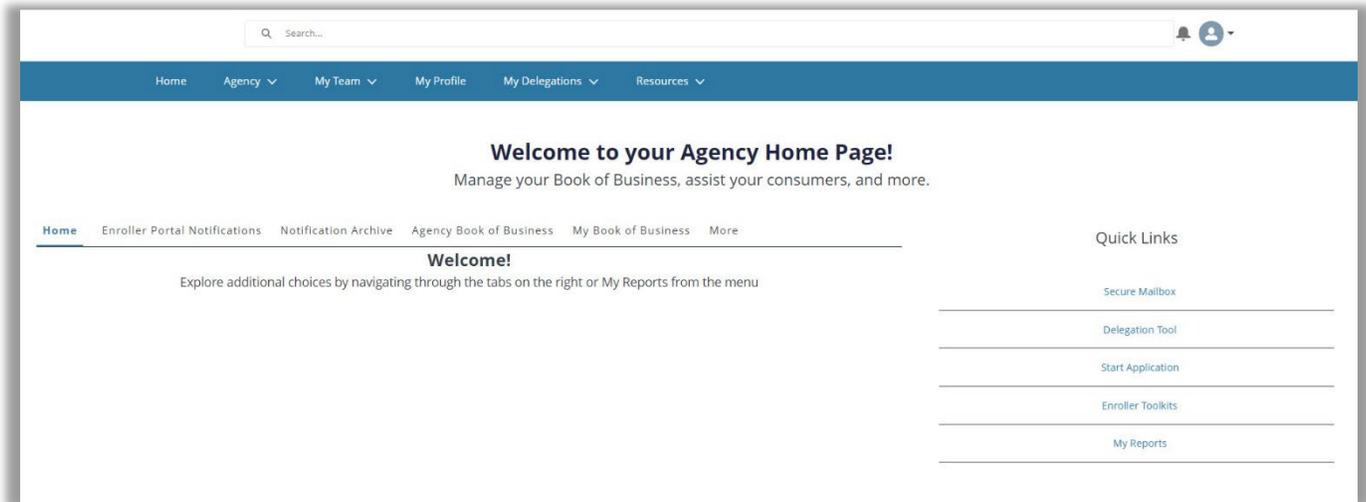
This guide is an overview of the Enroller Portal for Agency and Entity users.

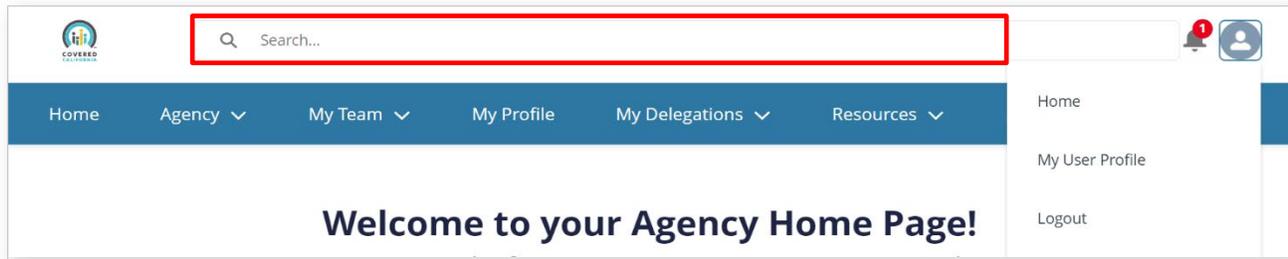
Background

The Enroller Portal enables the following user roles to access their Book of Business, manage and assign delegations, start new applications, and create and export reports: Agency Manager (AM) Level 1 and 2, Authorized Signer (AS), Agent (A) Level 1 and 2, Approved Admin Staff (AAS) Level 1 and 2, Certified Enrollment Counselors (CEC), Plan-Based Enrollers (PBE), Primary Contact (PC), Authorized Contact, and Medi-Cal Managed Care Plan Enroller (MMCPE).

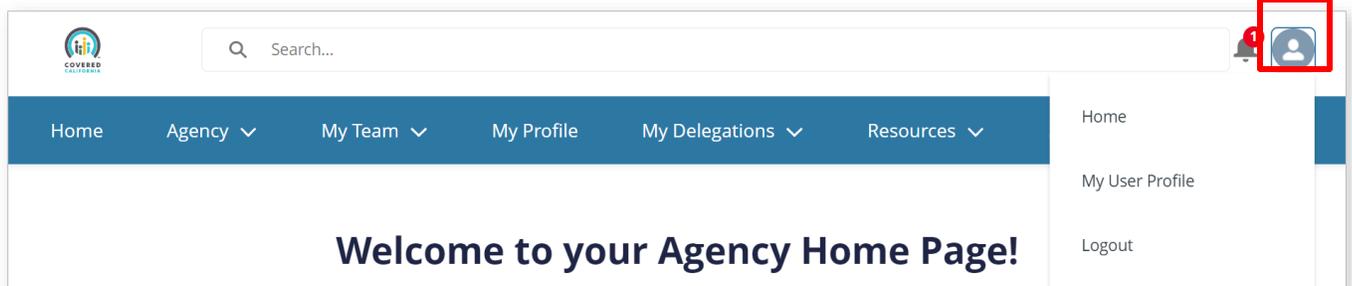
Enroller Portal Home page

The landing page for Agency and Entity users is the *Welcome to your [Agency/Entity] Home Page!* The Agency and Entity landing pages are similar and display the following functionality at the top of the page:





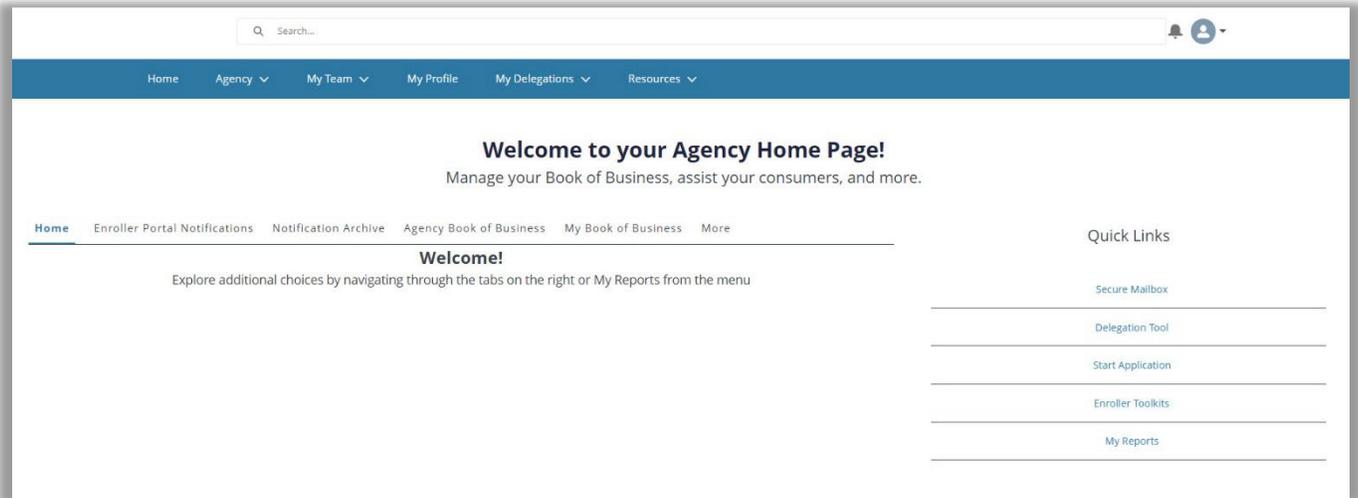
- **Search** field – Allows Agency staff to search for Contacts, Leads, and Accounts
- **Notifications bell** icon – Displays a red number when a pending notification is present
- Notifications may display the following:
 - **Alert for Delegation Request** – Delegation has been assigned
 - **Contract DocuSign Envelope Failed** – Contract DocuSign failed
 - **Delegation Transfer Status** – Indicates the status of a delegation transfer
 - **LiveScan DocuSign Envelope Failed** – The LiveScan DocuSign failed



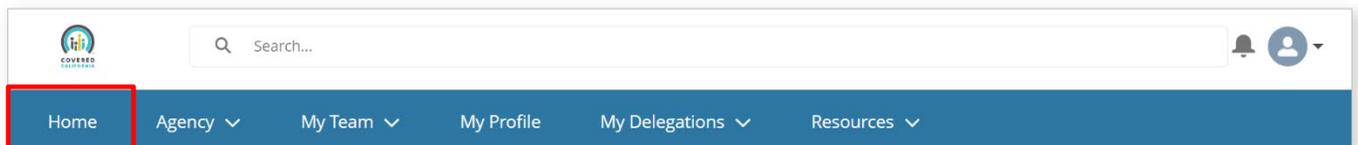
- **Profile icon** – Displays a hover-over, logged-in user role. Clicking the icon displays a dropdown with the following options:
 - **Home** – Navigates the user to the *Welcome to your Agency Home Page!*
 - **My User Profile** – Navigates the user to the *My Security Profile* page
 - **Logout** – Logs the user out of the system

Agency Home Page

AM, AS, A Level 1 and 2, and AAS Level 1 and 2 review information related to the Agency and all of the Agency’s associated Agents, Delegates and Consumers; however, the A1 user may only review information related to their Agency, Delegates and Consumers.

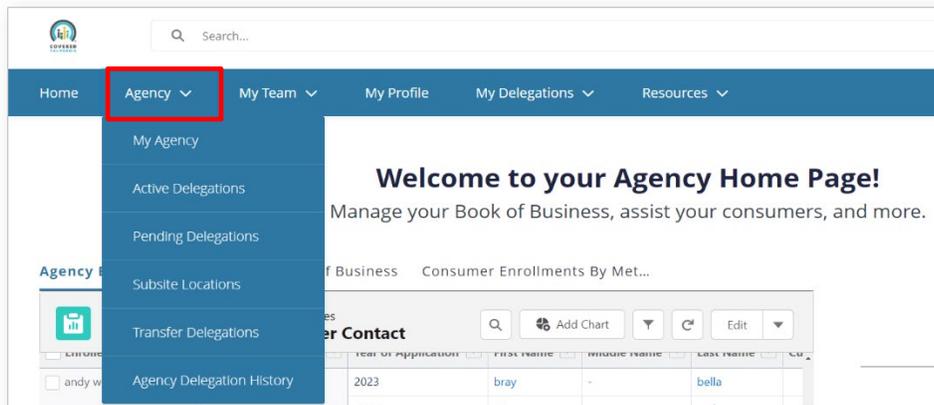


Agency Tabs and Dropdown Options

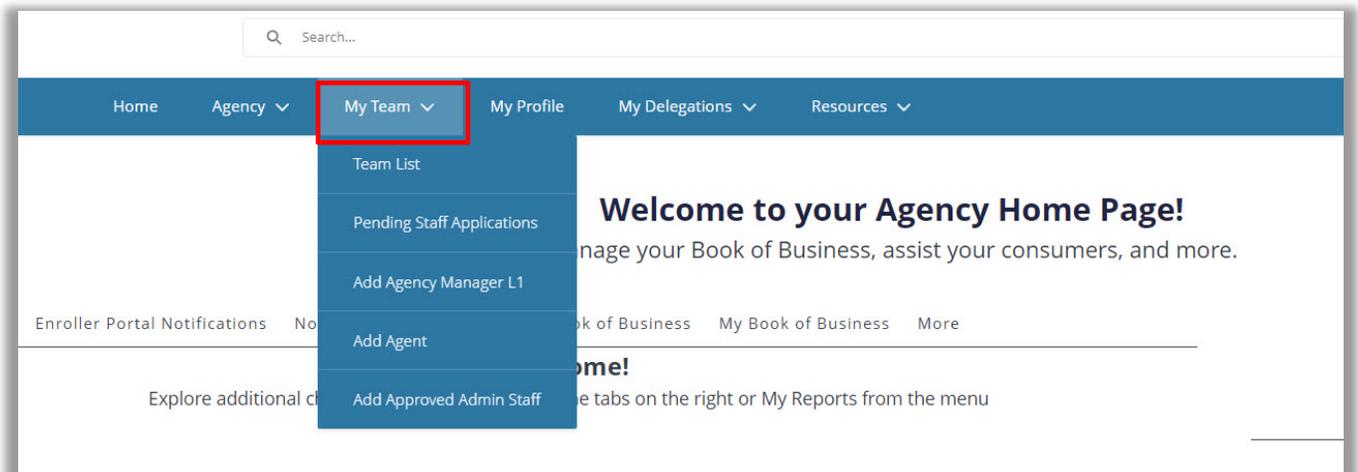


Tabs and dropdown options display dynamically based on user role.

- **Home** – Navigates the user to the *Welcome to your Agency Home Page!*
- **Agency** – Displays for all Agency staff with the following links:

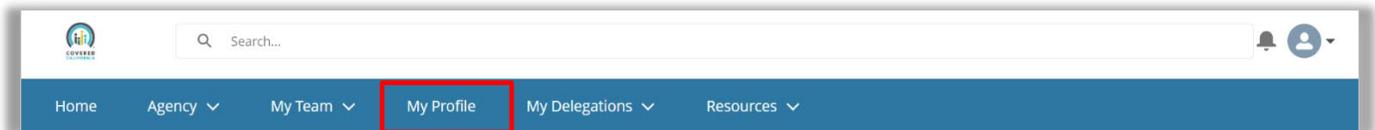


- **My Agency** – Navigates all Agency staff to the *View My Agency* page to view information regarding their agency
- **Active Delegations** – Navigates the user to the *All Active Delegations* list view on the *Delegations* page to view and manage active delegations
 - Displays for AM Level 1 and 2, A2, AAS Level 1 and 2, and AS users
- **Pending Delegations** – Navigates the user to the *All Pending Delegations* list view on the *Delegations* page to view and manage pending delegations
 - Displays for AM Level 1 and 2, A2, AAS, Level 1 and 2, and AS users
- **Subsite Locations** – Navigates the user to the *Subsite Location(s)* page to view and manage subsite locations
 - Displays for AM Level 1 and 2, AAS2, and AS users
- **Transfer Delegations** – Navigates the user to the *Transfer Delegations* list view on the *Delegations* page to transfer delegations
 - Displays for AM Level 1 and 2, AAS2, and AS users
- **Agency Delegation History** – Navigates the user to the *Agency Delegation History* list view on the *Delegation History* page to view delegation history
 - Displays for AM Level 1 and 2, A2, AAS Level 1 and 2, and AS users

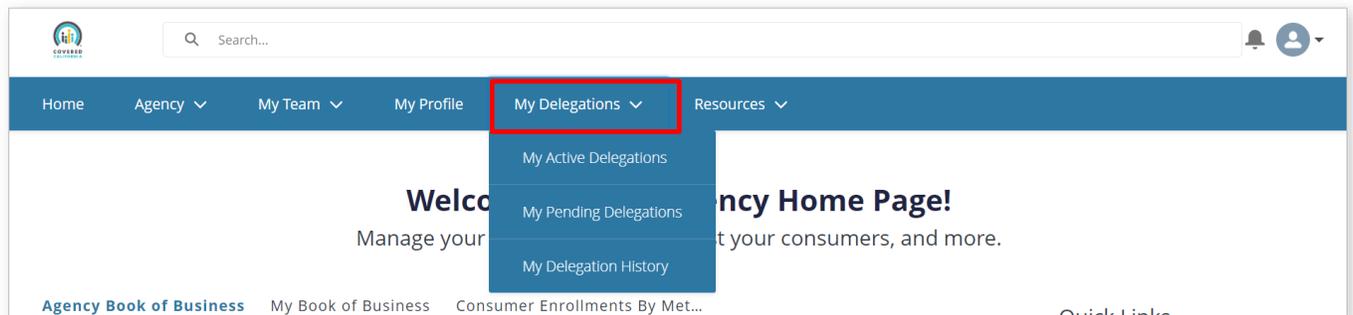


- **My Team** tab dropdown – Displays for all Agency staff with the following links:
 - **Team List** – Navigates the user to the *Contacts – My Agency Enrollers* page to view Agency team members.
 - Displays for all Agency staff with the exception of Agent level 1
 - **Pending Staff Applications** – Navigates the user to the *Leads – My Pending Staff Applications* page to view and manage pending staff applications
 - Displays for AM Level 1 and 2 and AS users

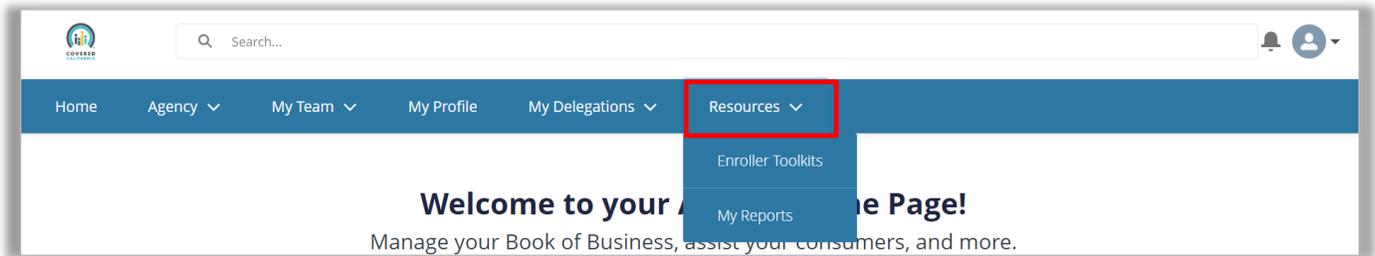
- **Add Agency Manager L1** – Navigates the user to the *Welcome to Covered California – Add Agency Manager Information* page to apply for Agency Manager L1
 - Displays for AM2 and AS users
- **Add Agent** – Navigates the user to the *Welcome to Covered California – Add Agent Information* page to apply for an agent
 - Displays for AM Level 1 and 2, AAS2, and AS users
- **Add Approved Admin Staff** – Navigates the user to the *Welcome to Covered California – Add Approved Admin Staff Information* page to add approved admin staff
 - Displays for AM Level 1 and 2 and AS users



- **My Profile** tab – Navigates users to the *Contact* page to view their profile
 - Displays for all Agency staff



- **My Delegations** tab dropdown – Displays only for AM Level 1 and 2 and A Level 1 and 2 users. Clicking the drop down displays the following links:
 - **My Active Delegations** – Navigates the user to the *Delegations – My Active Delegations* page to view and manage active delegations
 - **My Pending Delegations** – Navigates the user to the *Delegations – My Pending Delegations* page to view and manage pending delegations
 - **My Delegation History** – Navigates the user to the *Delegation History – My Delegation History* page to view their delegation history

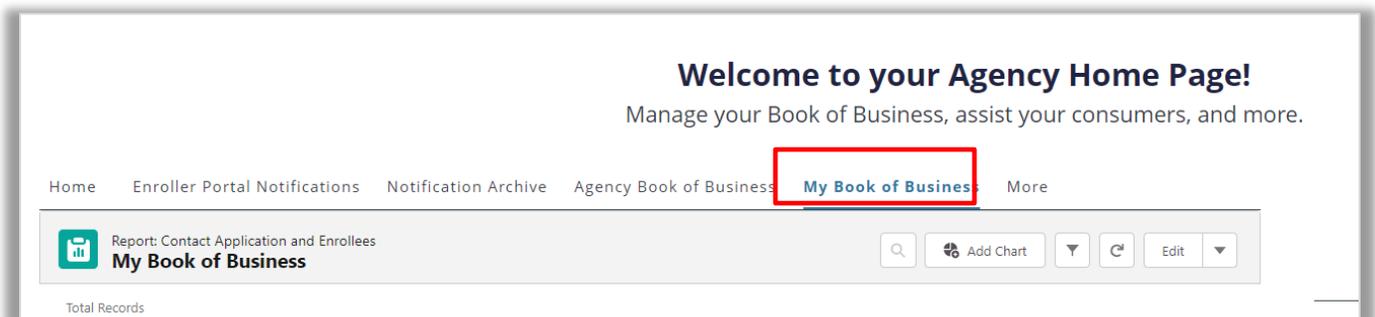


- **Resources** tab dropdown – Displays for all Agency staff with the following links:
 - **Enroller Toolkits** – Navigates the user to the *Enrollment Partner Toolkit* page
 - Displays for AM Level 1 and 2, A Level 1 and 2, AAS Level 1 and 2, and AS users
 - **My Reports** – Navigates the user to the *Reports* page to view, extract and file available reports. The following reports display: *Recent, Created by Me, Private Reports, All Reports*. *Recent* is the default view.
 - Displays for AM Level 1 and 2, AAS Level 1 and 2, and A Level 1 and 2 users

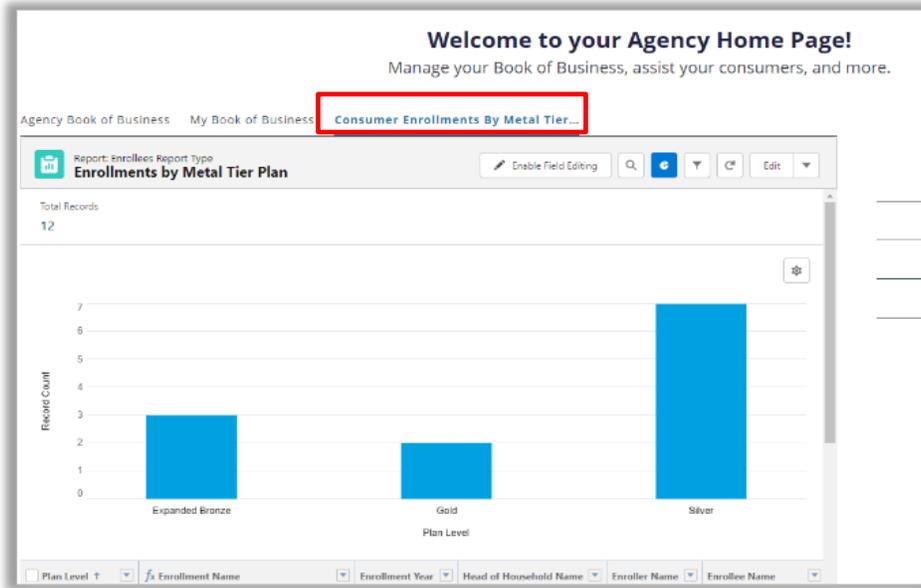
Agency Dashboard

The *Welcome to your Agency Home Page!* page displays three tabs on the Agent’s dashboard:

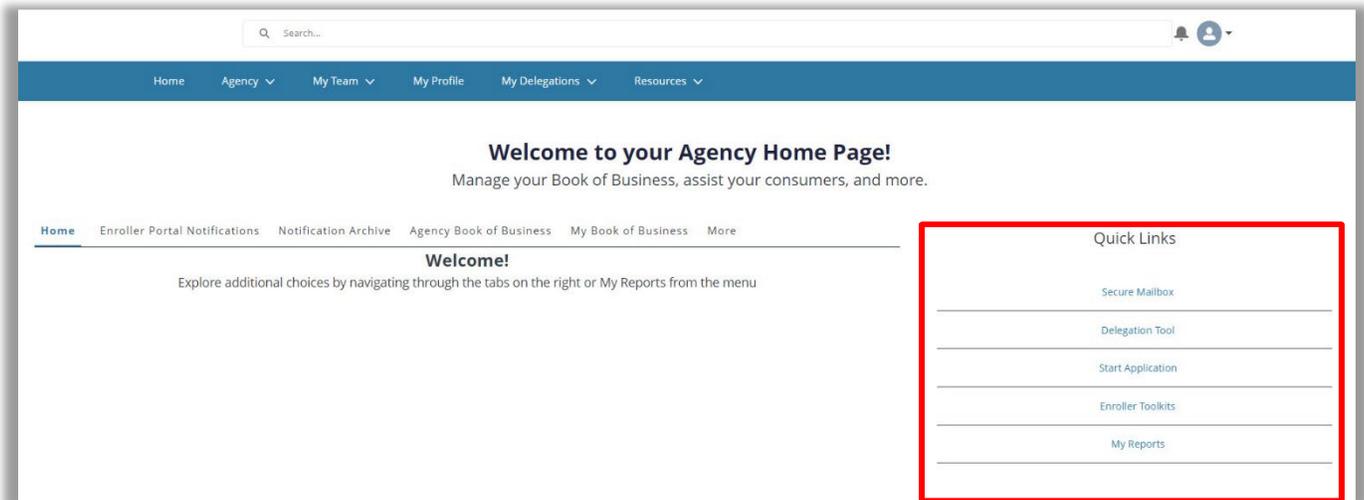
- **Agency Book of Business** tab displays for AM Level 1 and 2, A2, AAS Level 1 and 2 users
 - Clicking the **Agency Book of Business** tab displays the *Agency Book of Business* report, allowing Enrollers to view Consumers in their Agency’s Book of Business (BoB), apply filters to and edit the Agency’s BoB, and save or export the Agency’s BoB. Export options include *Formatted* or *Details Only* views
 - Clicking a Consumers name from the *First Name* or *Last Name* columns displays an individual household account or Consumer contact information
- **My Book of Business** tab displays for AM Level 1 and 2 and A Level 1 and 2 users



- Clicking the **My Book of Business** tab displays the *My Book of Business* report, allowing Enrollers to view Consumers in their BoB, apply filters to and edit their BoB, and save or export their BoB. Export options include *Formatted* or *Details Only* views
- Clicking a Consumer name from the *Contact: First Name* or *Contact: Last Name* columns displays an individual household account or Consumer contact information



- A **Consumer Enrollments By Metal Tier** tab displays for AM Level 1 and 2, AAS Level 1 and 2, AS, A Level 1 and 2. All users except A1 displays all active Health Enrollments for their agency. A1 users display Health Enrollments assigned to them
 - Clicking the **Consumer Enrollments by Metal Tier Plan** tab displays the *Enrollment By Metal Tier Plan Type* report, allowing staff to view the number of Consumers delegated to them for each metal tier plan Level. A *Consumers by Metal Tier* bar graph showing the number of Consumers delegated to the Agency for each metal tier plan Level



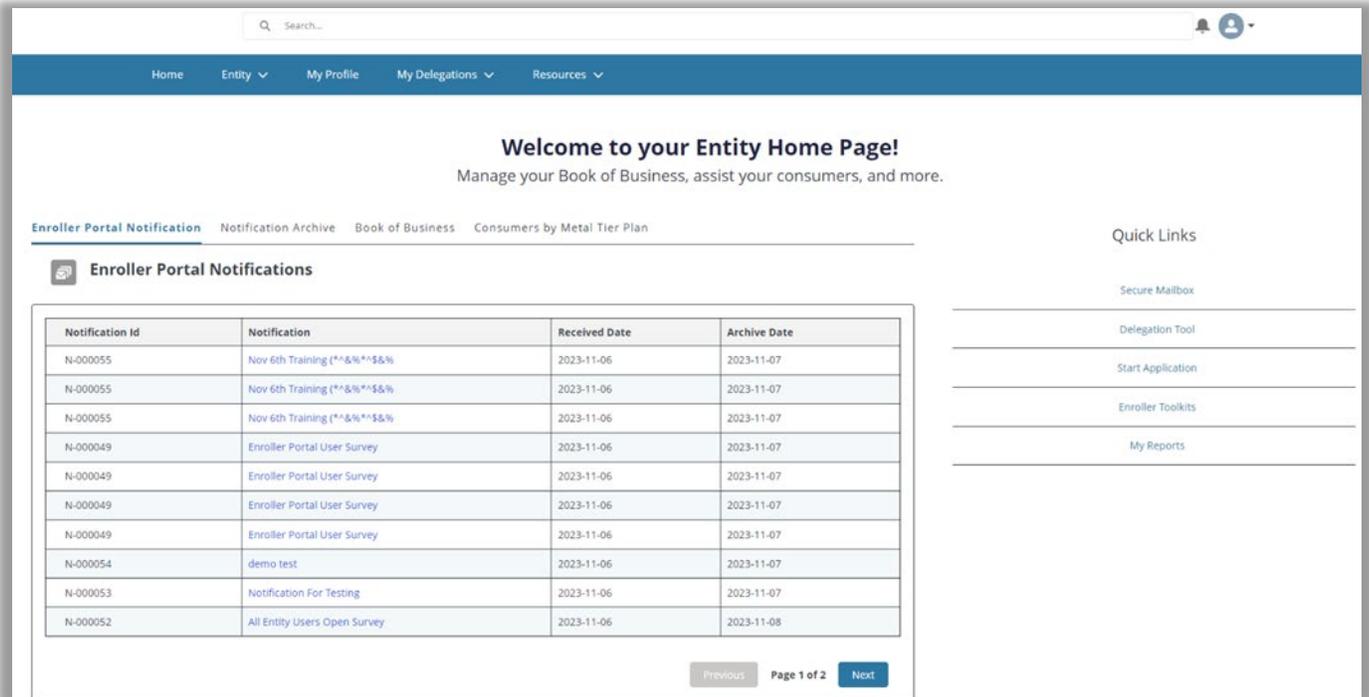
Agency Quick Links

The *Welcome to your Agency Home Page!* page displays a *Quick Links* section containing the following links:

- **Secure Mailbox** – Navigates the user to their *Secure Mailbox* to view messages
 - Displays for all Agency staff
- **Delegation Tool** – Navigates the user to the *Consumer Delegation* page to delegate an Agent to the case
 - Displays for AM Level 1 and 2 and Agent Level 1 and 2 users
- **Start Application** – Navigates the user to the Consumer Home page to start an application for the Consumer
 - Displays for AM Level 1 and 2, A Level 1 and 2 users
 - Note:** AAS Level 1 and 2 users must start the Consumer application from the Agent contact record.
- **Enroller Toolkits** – Navigates the user to the *Enrollment Partner Toolkit* page
 - Displays for AM Level 1 and 2, A Level 1 and 2, AAS Level 1 and 2 and AS users
- **My Reports** – Navigates the user to the *Reports* page to view, generate, extract or file available reports. The following reports display: *Recent*, *Created by Me*, *Private Reports*, *All Reports*. *Recent* is the default view.
 - Displays for AS Level 1 and 2, AM Level 1 and 2, A and Level 1 and 2, and AAS users

Entity Home Page

The Entity Home page is similar to the Agency Home page with some differences in the tab dropdown options. A Primary Contact (PC) user can review information related to the Entity and all associated Agents, Delegations, and Consumers. Additional Entity roles include: AC, CEC, MMCPE and PBE.



Welcome to your Entity Home Page!
Manage your Book of Business, assist your consumers, and more.

Enroller Portal Notification | Notification Archive | Book of Business | Consumers by Metal Tier Plan

Enroller Portal Notifications

Notification Id	Notification	Received Date	Archive Date
N-000055	Nov 6th Training (**&%**\$%)	2023-11-06	2023-11-07
N-000055	Nov 6th Training (**&%**\$%)	2023-11-06	2023-11-07
N-000055	Nov 6th Training (**&%**\$%)	2023-11-06	2023-11-07
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
N-000054	demo test	2023-11-06	2023-11-07
N-000053	Notification For Testing	2023-11-06	2023-11-07
N-000052	All Entity Users Open Survey	2023-11-06	2023-11-08

Quick Links

- Secure Mailbox
- Delegation Tool
- Start Application
- Enroller Toolkits
- My Reports

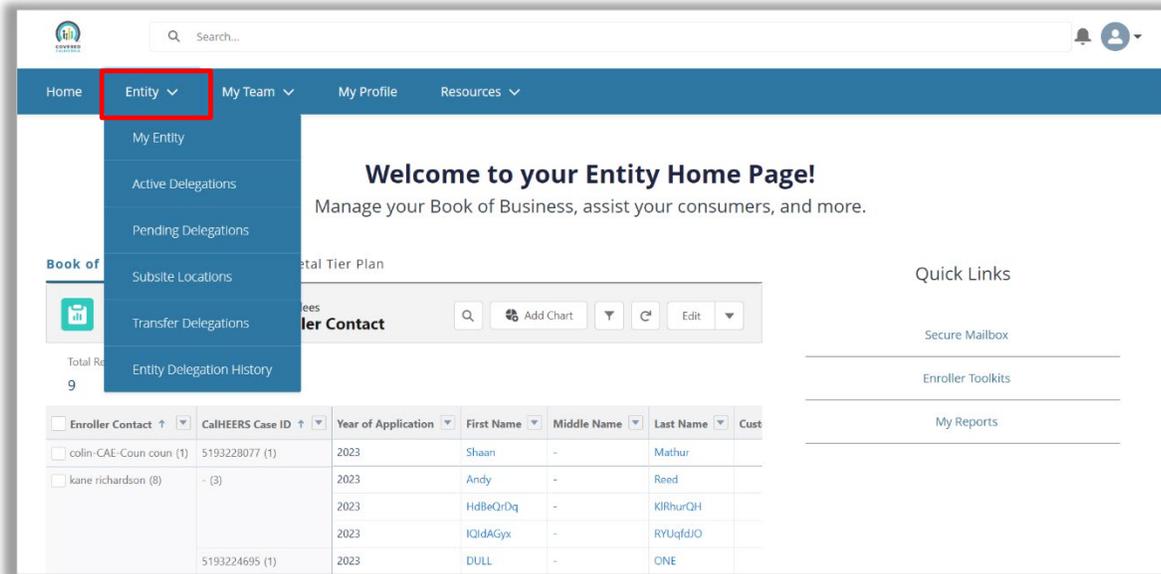
Entity Tabs and Dropdown Options

Tabs and dropdown options dynamically display based on user role.

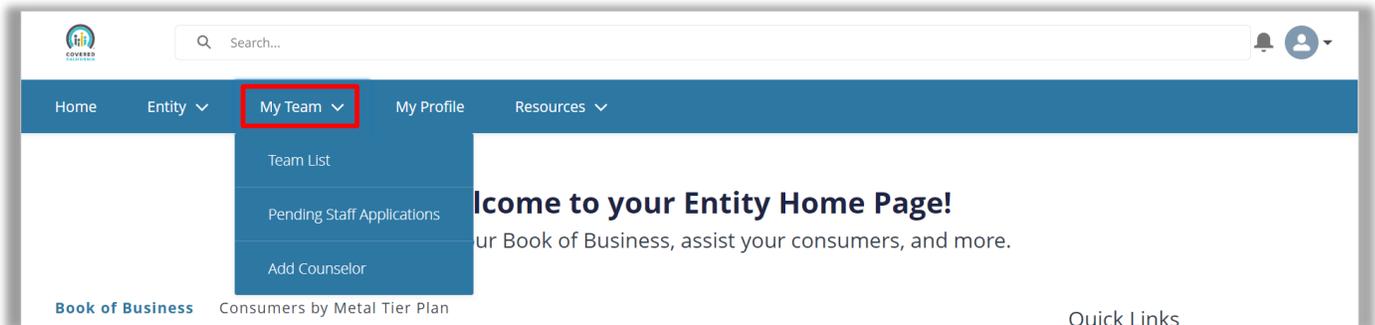


Home | Entity | My Team | My Profile | Resources

- **Home** – Navigates the user to the *Welcome to your Entity Home Page!*
- **Entity** – Displays for all Entity staff. Entity dropdown options display for PC and AC users only



- **My Entity** – Navigates the user to the *View My Entity* page to view the entity account information
- **Active Delegations** – Navigates the user to the *All Active Delegations* list view on the *Delegations* page to view and manage active delegations
- **Pending Delegations** – Navigates the user to the *All Pending Delegations* list view on the *Delegations* page to view and manage pending delegations
- **Subsite Locations** – Navigates the user to the *Subsite Location(s)* page to view locations for subsites
- **Transfer Delegations** – Navigates the user to the *Transfer Delegations* list view on the *Delegations* page to transfer delegations
- **Entity Delegation History** – Navigates the user to the *Entity Delegation History* list view on the *Delegation History* page to view delegation history

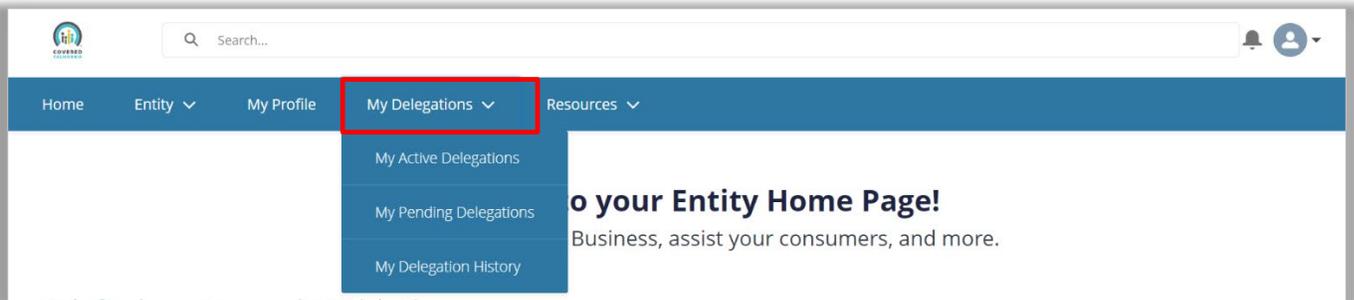


- **My Team** – Displays the following options for PC and AC users:

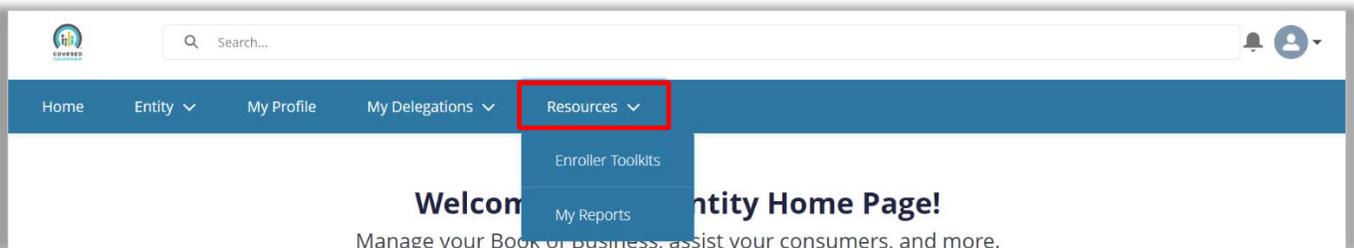
- **Team List** – Navigates the user to the *Contacts My Entity Staff* page to view all entity staff
- **Pending Staff Applications** – Navigates the user to the *Leads My Pending Staff Applications* page to view and manage staff applications
- **Add Counselor** – Navigates the user to the *Add Counselor Information* page to add a Counselor
- **My Profile** tab – Navigates Entity staff to the Contact page to view their profile



- **My Delegations** tab – Displays the following links for Counselors:



- **My Active Delegations** – Navigates the user to the *My Active Delegations* list view on the *Delegations* page to view active delegations
- **My Pending Delegations** – Navigates the user to the *My Pending Delegations* list view on the *Delegations* page to view pending delegations
- **My Delegation History** – Navigates the user to the *My Delegation History* list view on the *Delegation History* page to view the delegation history
- **Resources** – Displays for all Entity staff



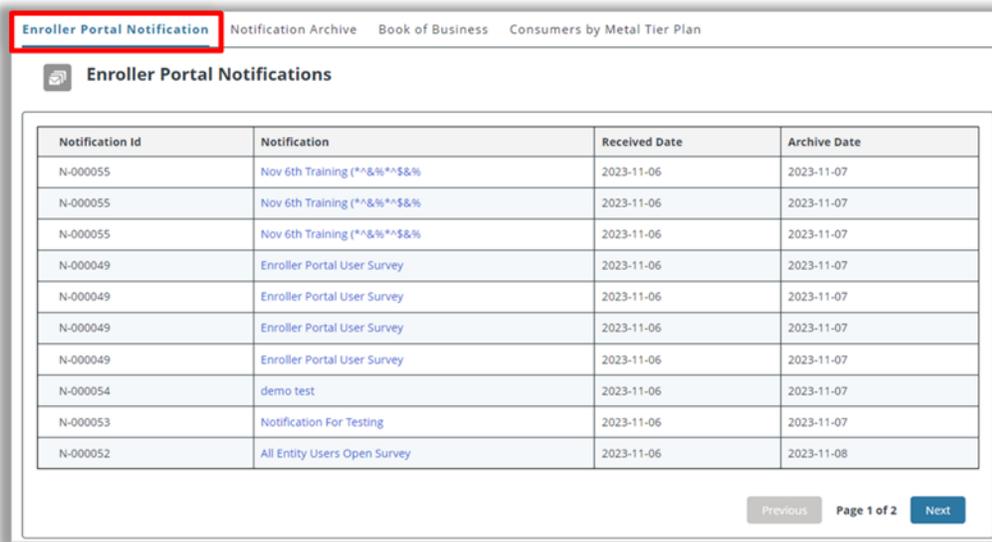
- **Enroller Toolkits** – Navigates the user to the *Enrollment Partner Toolkit* page to access additional resources

- **My Reports** – Navigates the user to the *Reports Recent* page to view and generate reports

Entity Dashboard

The *Welcome to your Entity Home Page!* page displays the below tabs for the PC, AC, and Counselors:

- An **Enroller Portal Notification** tab:
 - Clicking the **Enroller Portal Notification** tab displays the Counselor’s active notifications sent by the Distribution Services Communications Team. The most recent notification displays at the top of the list.
 - Clicking a link from the *Notification* column displays a popup with the notification details



Notification Id	Notification	Received Date	Archive Date
N-000055	Nov 6th Training (*^&%*^\$&%	2023-11-06	2023-11-07
N-000055	Nov 6th Training (*^&%*^\$&%	2023-11-06	2023-11-07
N-000055	Nov 6th Training (*^&%*^\$&%	2023-11-06	2023-11-07
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
N-000054	demo test	2023-11-06	2023-11-07
N-000053	Notification For Testing	2023-11-06	2023-11-07
N-000052	All Entity Users Open Survey	2023-11-06	2023-11-08

- A **Notification Archive** tab:
 - Clicking the Notifications Archive tab displays a list of the Counselor’s archived notifications sent by the Distribution Services Communications Team. The most recent notification displays at the top of the list.
 - Clicking a link from the Notifications column displays a popup with the notification details.

Enroller Portal Notification **Notification Archive** Book of Business Consumers by Metal Tier Plan

Enroller Portal Notifications Archive

Notification Id	Notification	Received Date	Archive Date
N-000031	Thursday testing	2023-11-02	2023-11-03
N-000011	Notifica	2023-10-30	2023-10-31
N-000010	training demo 1	2023-10-30	2023-10-31
N-000000	Home Page Notification	2023-10-24	2023-10-26

Previous Page 1 of 1 Next

- An **Entity Book of Business** tab:
 - Clicking the **Entity Book of Business** tab displays the *My Book of Business* report, allowing Enrollers to view Consumers in their BoB, apply filters to and edit their BoB, and save or export their BoB. Export options include *Formatted* or *Details Only* views
 - Clicking a Consumer’s name from the Contact: *First Name* or Contact: *Last Name* columns displays an individual household account or Consumer contact information

Welcome to your Entity Home Page!
Manage your Book of Business, assist your consumers, and more.

Entity Book of Business Consumers by Metal Tier Plan

Report: Contact Application and Enrollees
Book of Business by Enroller Contact

Search Add Chart Filter Refresh Edit

Note: For Counselors, a **My Book of Business** tab displays instead, automatically filtered to Consumers with active delegations along with Consumer, application, eligibility, and enrollment details.

Home Enroller Portal Notifications Notifications Archive **My Book of Business** Consumer Enrollments by Metal Tier ...

Report: Contact Application and Enrollees
My Book of Business

Search Add Chart Filter Refresh Edit

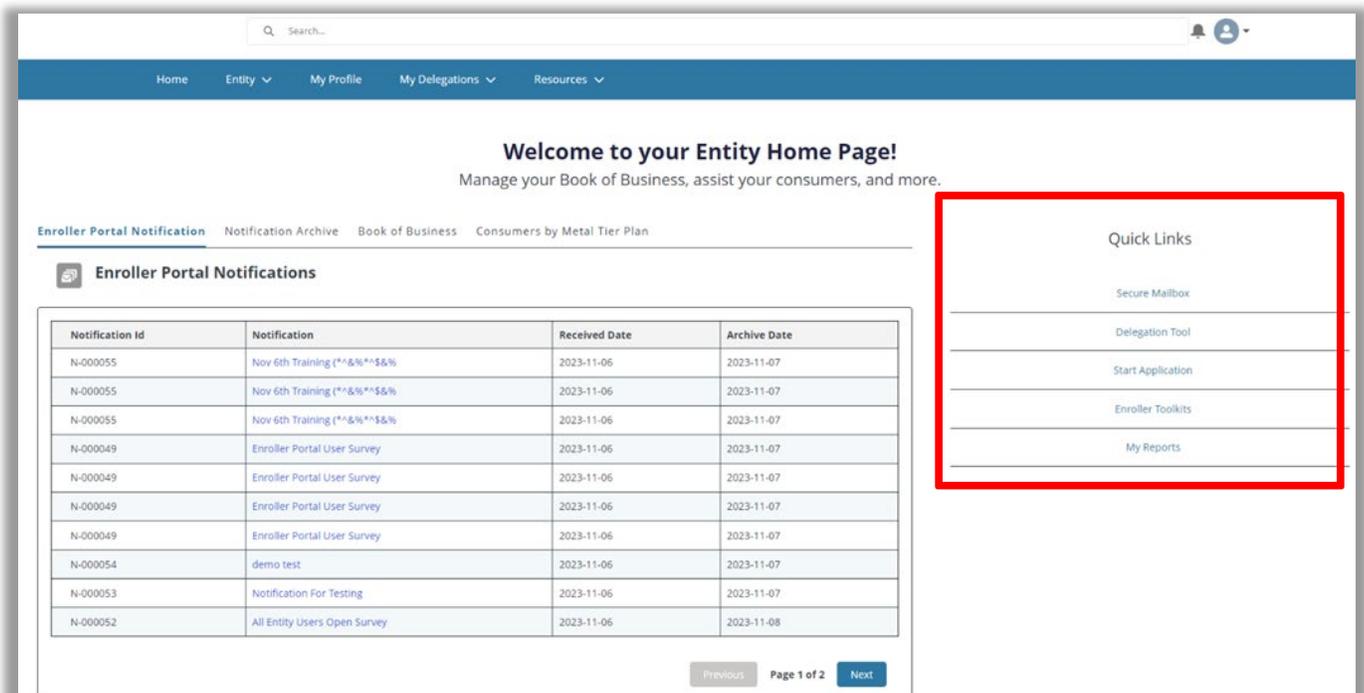
Total Records

- A **Consumers by Metal Tier Plan** tab:

- Clicking the **Consumers by Metal Tier Plan** tab displays the *Enrollment By Metal Tier Plan Type* report, allowing Staff to view the number of Consumers delegated to them for each metal tier plan Level. A Consumers by Metal Tier bar graph is also available

Entity Quick Links

The *Welcome to your Entity Home Page!* displays a *Quick Links* section. The links displayed are based on user role. The *Quick Links* section may contain the following links:



The screenshot shows the 'Entity Home Page' with a 'Quick Links' section highlighted in red. The 'Quick Links' section contains the following links:

- Secure Mailbox
- Delegation Tool
- Start Application
- Enroller Toolkits
- My Reports

The 'Enroller Portal Notifications' table is also visible, containing the following data:

Notification Id	Notification	Received Date	Archive Date
N-000055	Nov 6th Training (**&%**\$&%)	2023-11-06	2023-11-07
N-000055	Nov 6th Training (**&%**\$&%)	2023-11-06	2023-11-07
N-000055	Nov 6th Training (**&%**\$&%)	2023-11-06	2023-11-07
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
N-000049	Enroller Portal User Survey	2023-11-06	2023-11-07
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N-000054	demo test	2023-11-06	2023-11-07
N-000053	Notification For Testing	2023-11-06	2023-11-07
N-000052	All Entity Users Open Survey	2023-11-06	2023-11-08

- **Secure Mailbox** – Navigates the user to the *Secure Mailbox* to view messages
- **Delegation Tool** – Navigates the user to the *Consumer Delegation* page to delegate an CEC to the case
 - Displays only for Counselors
- **Start Application** – Navigates the user to the Consumer Home page to begin a new application on behalf of a Consumer
 - Displays only for Counselors
- **Enroller Toolkits** – Navigates the user to the *Enrollment Partner Toolkit* page
 - Displays for PC, AC and Counselors
- **My Reports** – Navigates the user to the *Reports* page to view, generate, extract and file available reports. The following reports display: *Recent*, *Created by Me*, *Private Reports*, *All Reports*. *Recent* is the default view.