



Enroller Portal Sprint 2 Release Notes

Automated Email to Primary Contact When Downline is Certified

Impact: Entity and Navigator users

Primary Contacts will now receive an automated email when a downline user is certified by Covered California.

The email will include the following information:

- Name
- Role
- Certification number

From: Do Not Reply Covered California <do-not-reply@covered.ca.gov>
Sent: Monday, February 19, 2024 6:59 AM
To:
Subject: Authorized Contact is Approved for your Entity

PC First Name,

A team member has been Approved for your Entity.

Name:
Role: Authorized Contact
Certification Number:

Questions? Visit coveredca.com/resources/ or contact CEC/PBE Helpline at (855) 324-3147 or email CommunityPartnerCertSupport@covered.ca.gov.

Sincerely,

Covered California



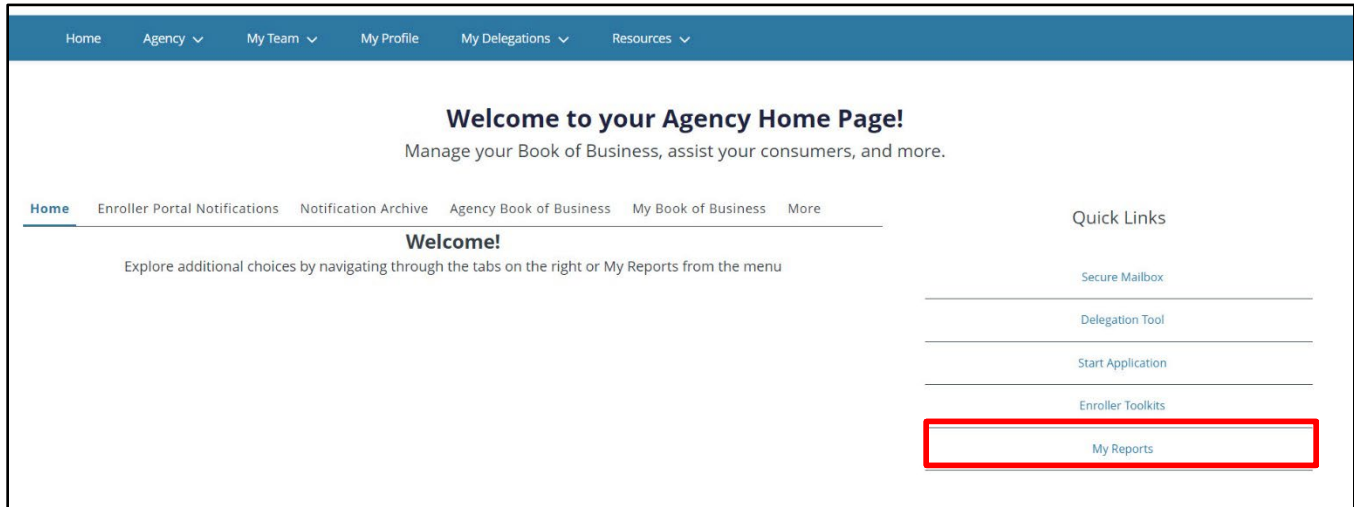
Enroller Portal Sprint 2 Release Notes

Export List of Staff for Enrollers

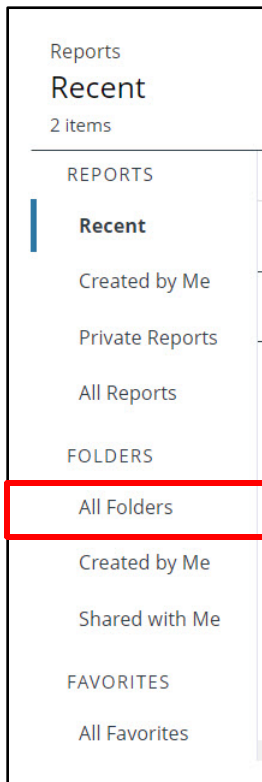
Impact: Agency and Entity users

Enroller Portal users will now be able to export the list of staff.

1. Login to the Enroller Portal
2. Navigate to *My Reports* under *Quick Links*



3. Under Reports, select *All Folders*





Enroller Portal Sprint 2 Release Notes

4. Select *My Agency's Enrollers* or *My Entity's Enrollers* folder

The screenshot shows a folder selection interface. On the left, there is a sidebar with 'All Folders' and 'All Favorites'. The main area displays a folder named 'My Agency's Enrollers' with a red box around its icon. The folder is owned by 'Copado User' and was last modified on '3/1/2024, 9:10 PM'.

The screenshot shows a folder selection interface. On the left, there is a sidebar with 'All Folders' and 'All Favorites'. The main area displays a folder named 'My Entity's enrollers' with a red box around its icon. The folder is owned by 'Copado User' and was last modified on '3/1/2024, 9:10 PM'.

5. From the upper right dropdown, select *Export*

The screenshot shows the 'My Agency Staff' report interface. The title is 'Report: Contacts & Accounts My Agency Staff' and the description is 'Displays your agencies enrollers'. The total records are 9. In the upper right corner, there is a dropdown menu with 'Export' highlighted by a red box.

The screenshot shows the 'My Entity Staff' report interface. The title is 'Report: Contacts & Accounts My Entity Staff' and the description is 'Displays your entity's enrollers'. The total records are 0. In the upper right corner, there is a dropdown menu with 'Export' highlighted by a red box.