



Enroller Portal Sprint 3 Release Notes

Release Date: 3/30/2024

Report for PC/AC of their Counselors

Impacted roles: Primary Contacts and Authorized Contacts

Primary Contacts (PC) and Authorized Contacts (AC) see a report on their home page dashboard titled *Counselors with Sites Served* with the following information:

- Counselor Name
- Certification/Approval Status
- Site Served – Location Name
- Enroller Primary Office Location

The *Counselors with Sites Served* report shows all the Counselors belonging to the Entity that have a status of Certified, Eligible, Pending, or Suspended, and each Site Served where Enroller Contact is populated (they actively serve the site).

The screenshot shows the 'Reports' section of the Enroller Portal. A search bar is at the top right. Below the navigation bar, there's a 'Reports' section with 'All Reports' and '8 items'. A table lists various reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The 'Counselors with Sites Served' report is highlighted with a red box.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Book of Business		Book of Business Report	Vinay Bhatia	4/29/2023, 8:37 AM	
Created by Me	Book of Business by Enroller Cont:		Book of Business Report	Vinay Bhatia	4/29/2023, 8:37 AM	
Private Reports						
All Reports	Counselors with Sites Served		My Entity's enrollers	Copado User	3/12/2024, 1:00 AM	
FOLDERS						
All Folders	Enrollments by Metal Tier Plan		Book of Business Report	Vinay Bhatia	4/29/2023, 8:37 AM	
Created by Me	My Book of Business		Book of Business Report	Vinay Bhatia	4/29/2023, 8:37 AM	
Shared with Me	My Entity Staff	Displays your entity's enrollers	My Entity's enrollers	Copado User	2/7/2024, 4:59 PM	
FAVORITES	Transfer Delegations Update Detai		Bulk Transactions	Copado User	10/14/2023, 10:04 AM	



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The screenshot shows a web interface with a search bar at the top. Below the search bar is a navigation menu with items: Home, Entity, My Team, My Profile, and Resources. The main content area displays a report titled "Report: Site Served with Contacts" and "Counselors with Sites Served". A red box highlights the report title. Below the title, a "Total Records" box shows the number "1". A table below the records has columns: Location, Location Name, Full Name, Certification/Approval Status, and Enroller Primary Office Location. One record is shown for California with Full Name "MWbpOIok JUqNnPVH", Certification "Certified", and a checked checkbox for "Enroller Primary Office Location".

Release Date: 4/15/2024

Update to Hours of Operation for Subsite Locations - Agency

Impacted roles: Agency Manager 2, Authorized Signer

When adding subsite locations, Agencies will be able to select a checkbox *for Same hours for all Weekdays* which will automatically populate the same opening and closing hours for every day. When selecting the *My business is open 24/7* checkbox, the hours will automatically populate to opening at 12:00 AM and closing at 11:59 PM.

The screenshot shows a form titled "Hours of Operation". It has two checkboxes at the top: "Same hours for all Weekdays" (checked) and "My business is open 24/7" (checked). Below these are two columns of time pickers. The left column shows "Open Hours" for each day of the week, all set to "8:00 AM". The right column shows "Closing Hours" for each day, all set to "5:00 PM".



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Update to Hours of Operation for Subsite Locations - Entity

Impacted roles: Primary Contact, Authorized Contact

When adding subsite locations, Entities will be able to select a checkbox *for Same hours for all Weekdays* which will automatically populate the same opening and closing hours for every day. When selecting the *My business is open 24/7* checkbox, the hours will automatically populate to opening at 12:00 AM and closing at 11:59 PM.

Hours of Operation	
<input type="checkbox"/> Same hours for all Weekdays	<input type="checkbox"/> My business is open 24/7
* Monday Open Hours 8:00 AM	* Monday Closing Hours 5:00 PM
* Tuesday Open Hours 8:00 AM	* Tuesday Closing Hours 5:00 PM
* Wednesday Open Hours 8:00 AM	* Wednesday Closing Hours 5:00 PM
* Thursday Open Hours 8:00 AM	* Thursday Closing Hours 5:00 PM
* Friday Open Hours 8:00 AM	* Friday Closing Hours 5:00 PM
* Saturday Open Hours 8:00 AM	* Saturday Closing Hours 5:00 PM
* Sunday Open Hours 8:00 AM	* Sunday Closing Hours 5:00 PM