Enroller Portal Sprint 9 Release Notes

Release Date: 10/5/2024

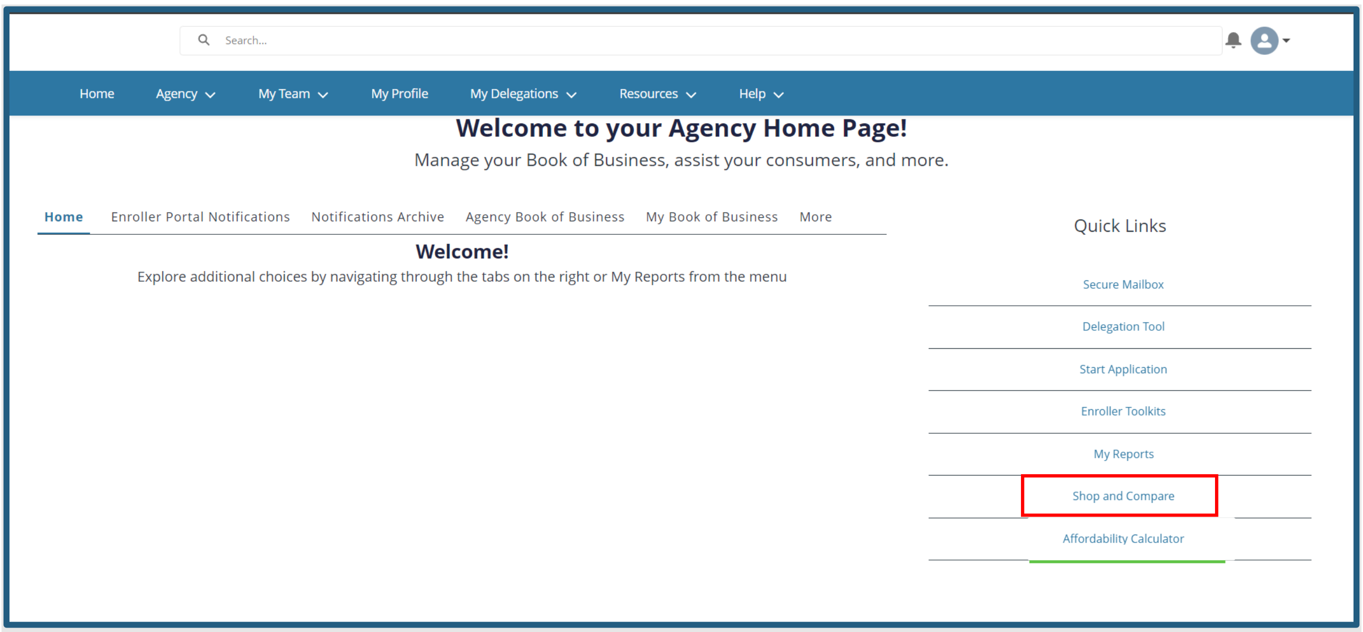
Quick Links Update to Home Page

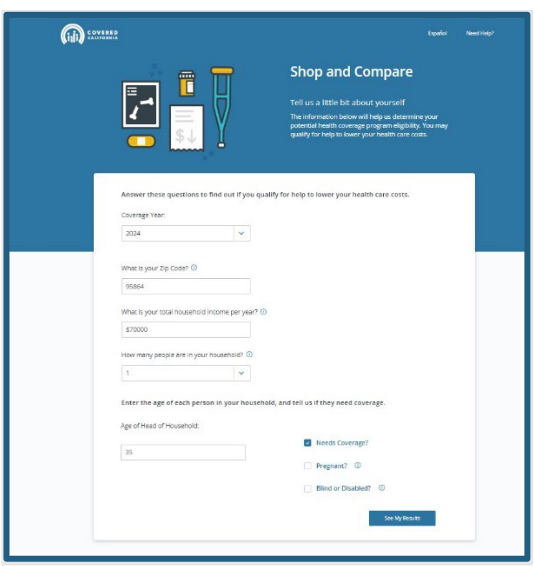
The Enroller Portal home page will now have two additional links in the Quick Links section:

Shop and Compare

Impacted roles: Agency Managers, Agents, Approved Admin Staff, and Counselors

Navigates the user to *Shop and Compare* tool on the Covered California website.

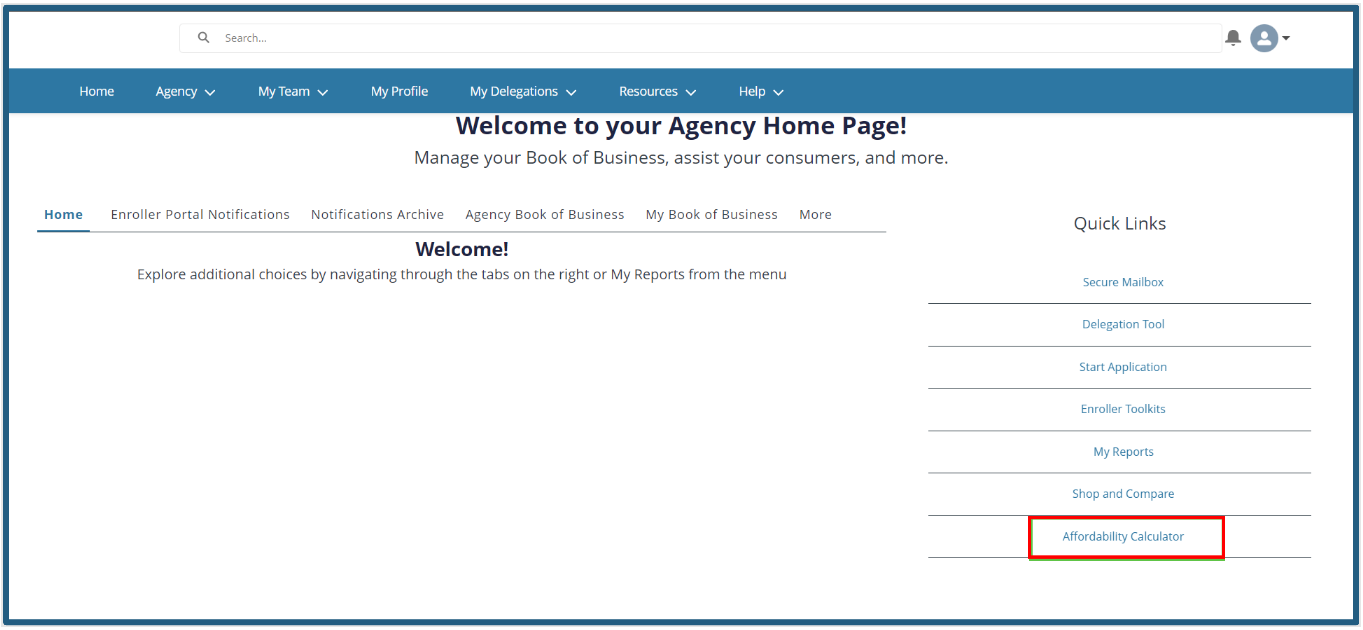


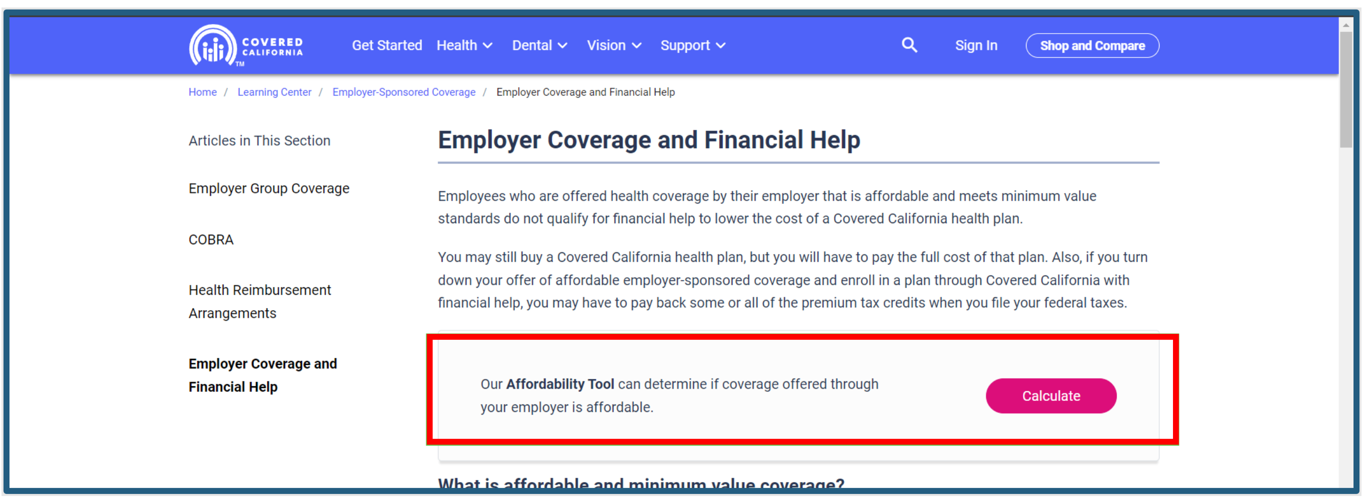


Affordability Calculator

Impacted Roles: Agency Managers, Agents, Approved Admin Staff, and Counselors

Navigates the user to the *Employer Coverage and Financial Help* page of the Covered California website.



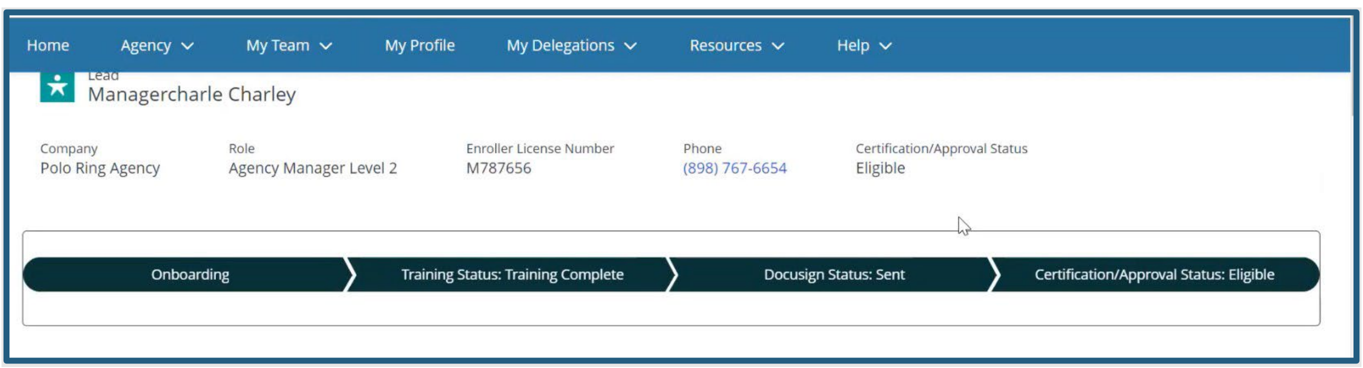


Progress Bar for Staff Applications

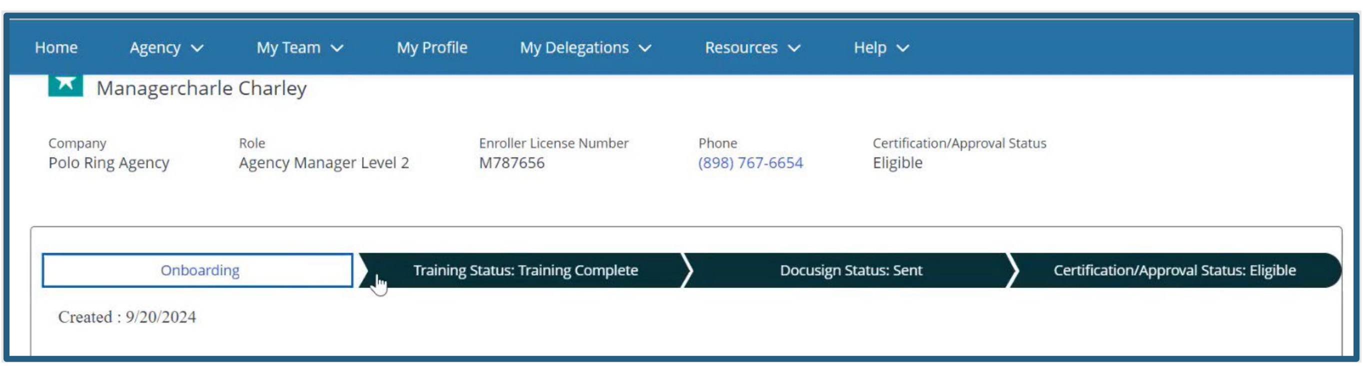
Impacted roles: Agency Managers, Agents, Approved Admin Staff, Authorized Signer, and Entity Business Contacts

Enrollers will be able to see the external page layouts to show where applicants are in the process of being certified.

1. From the *My Team* dropdown on the Enroller Portal Home page, select **Pending Staff Applications**
2. Click the name of the applicant
3. The applicant's contact page will appear with the progress bar along the top that includes:
    - Onboarding
    - Training Status
    - DocuSign Status
    - Certification/Approval Status



Hovering over the four categories provides further details.



Targeted Reports

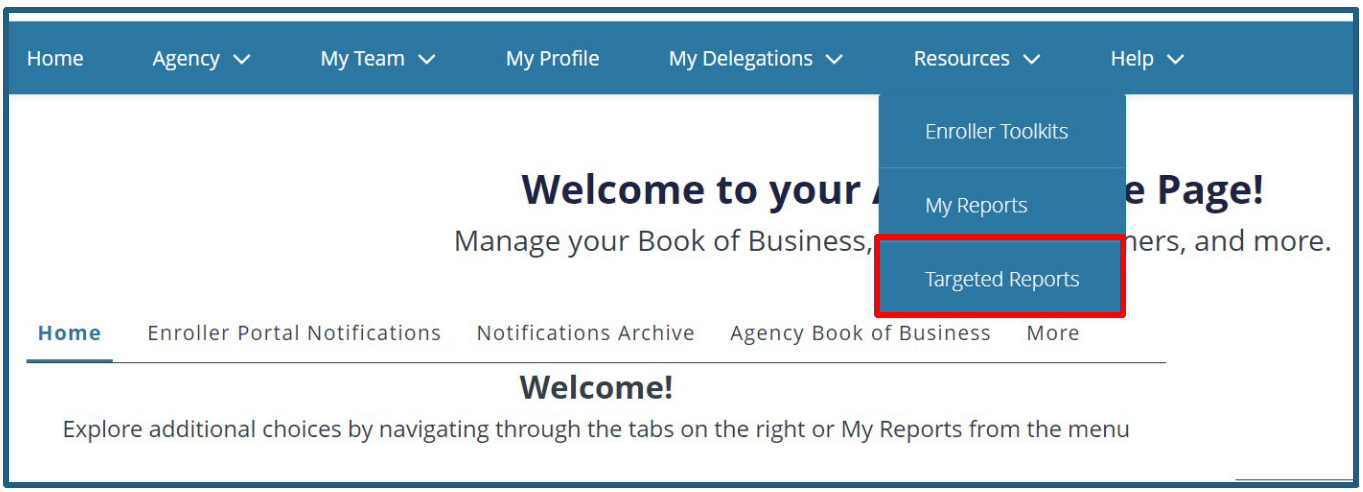
Impacted roles: Agency Managers, Agents, Authorized Signer, Admin Staff, Primary Contact, Authorized Contact, Entity Counselor

Enrollers will be able to view and export the following targeted reports:

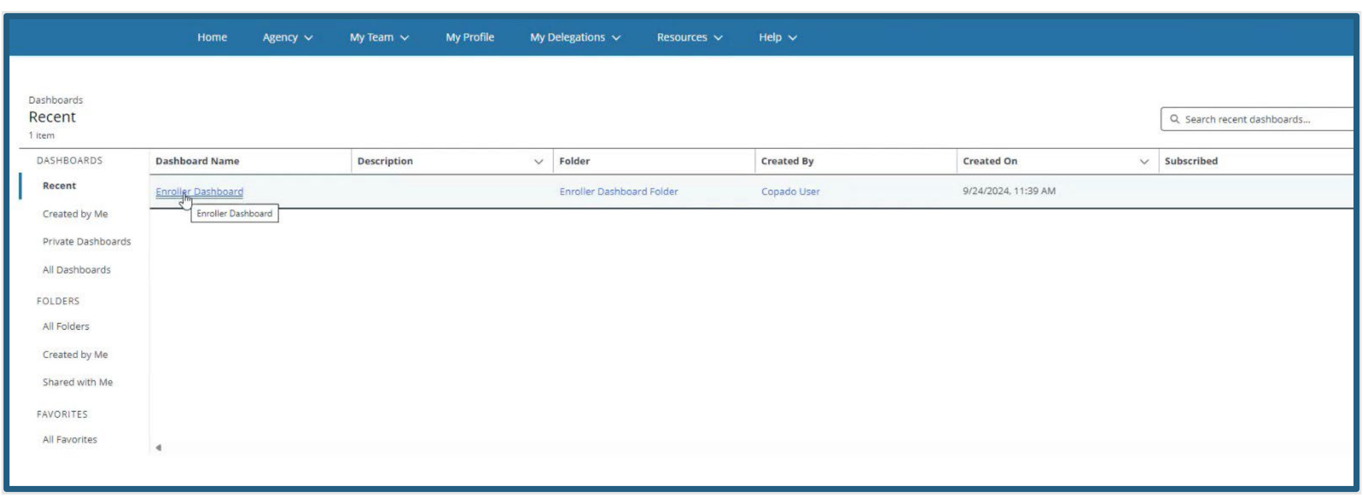
- Delegations lost
- Consumer cases by carrier
- Active consumers only

To get to these reports, follow the below steps:

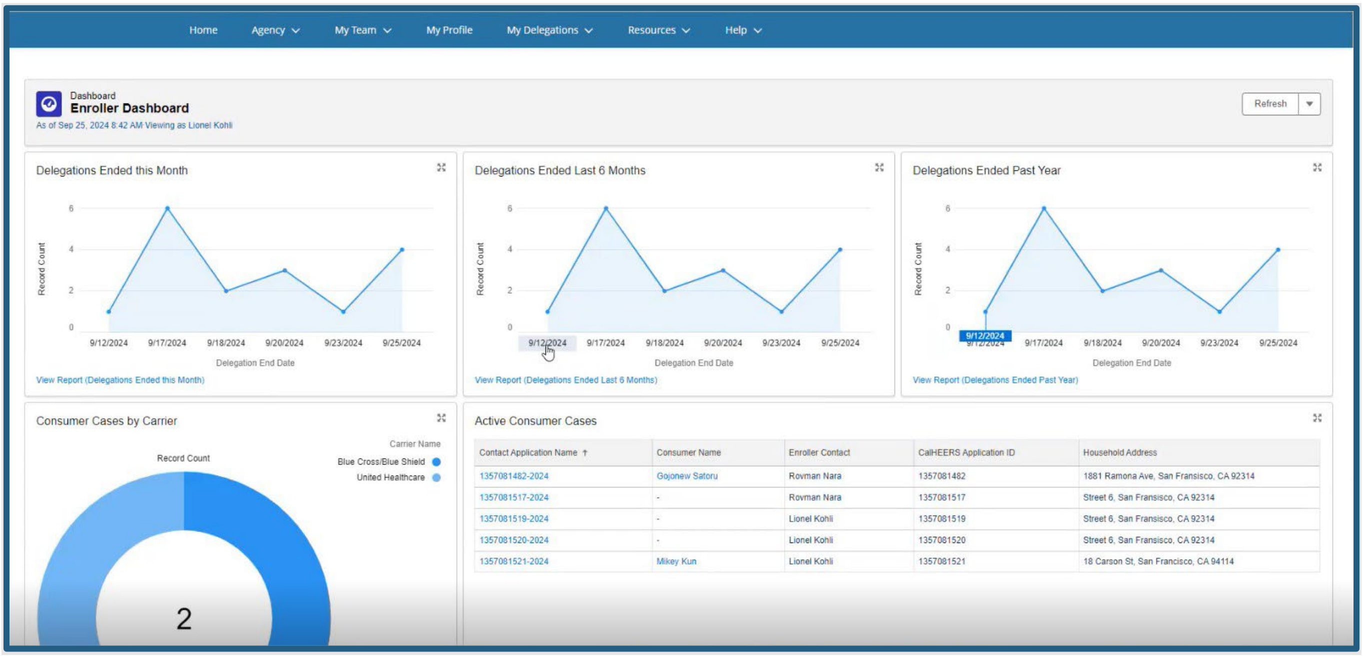
1. From the *Resources* dropdown on the Enroller Portal Home page, select **Targeted Reports**



2. Under the *Dashboard Name* column, select **Enroller Dashboard**



3. The *Enroller Dashboard* displays with the following:
    - Delegations Ended this Month (calendar month)
    - Delegations Ended Last 6 Months
    - Delegations Ended Past Year
    - Consumer Cases by Carrier
    - Active Consumer Cases



Note: for a Book of Business over 10,000, there may be longer wait times to load or experience a time out. Enhancements to address this are in development.

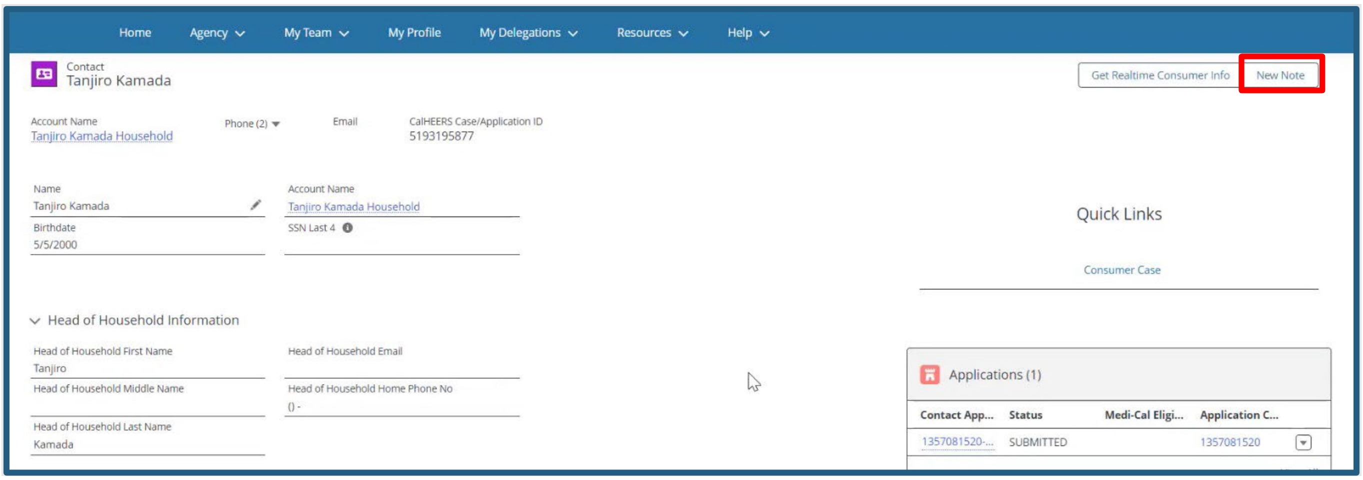
Track Interactions with Consumers

Note: this functionality will become available10/26/2024

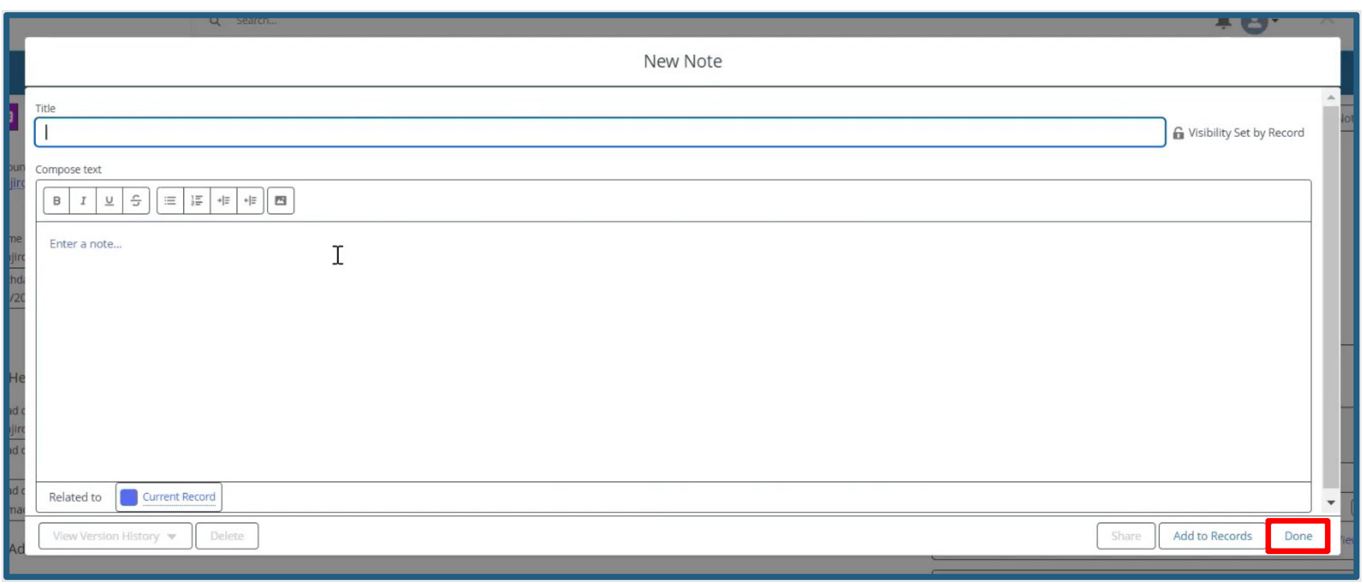
Impacted roles: Agency Managers, Authorized Signers, Agents, Approved Admin Staff, Primary Contact, Authorized Contact, and Entity Counselor

Enrollers will be able to track and log interactions with consumers and take notes of their recent calls.

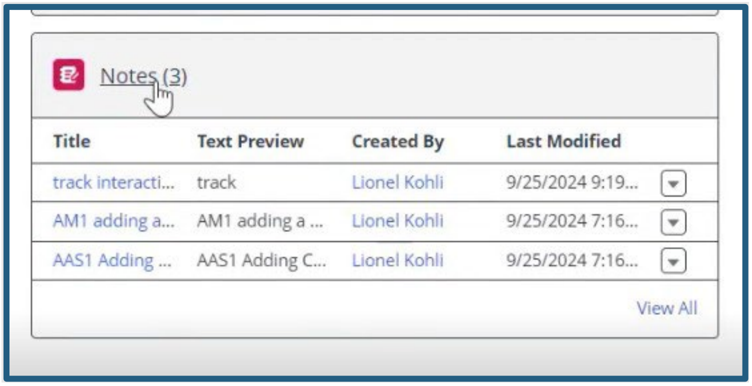
1. From the *Agency* dropdown on the Enroller Portal Home page, select **Active Delegations**
2. Select the hyperlink of the name of the contact
3. Select the **New Note** button on the top right corner of the page



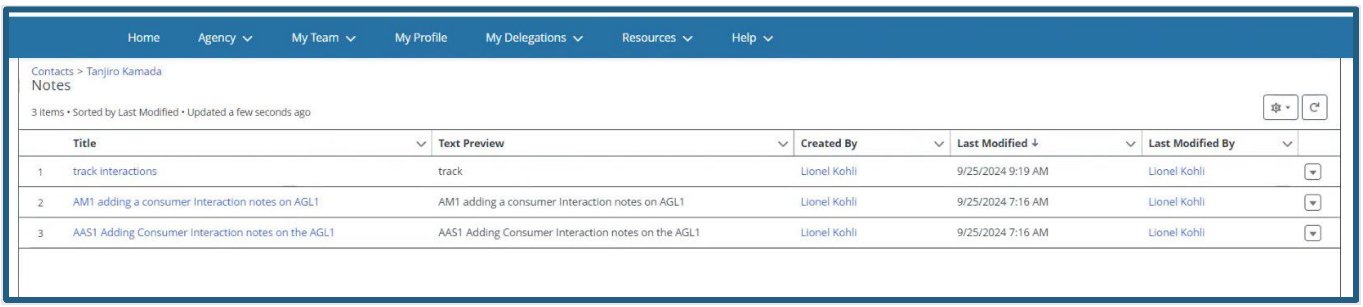
4. The note text box appears with a title and body. When the note has been completed, select **Done**.



5. The notes for the consumer are located at the bottom of the consumer contact page.



6. Clicking **View All** shows all the notes for that consumer



Note: Only the person who created the note can update or delete the note. Other enrollers can view the notes, but they are unable to update or delete the note.

Inactive delegations and delegations transferred outside the agency will delete the notes.