

Overview

Approved Admin Staff have the ability to act on behalf of the Agency Managers within the Agency, enabling them to step in to complete tasks or assist consumers with the online application.

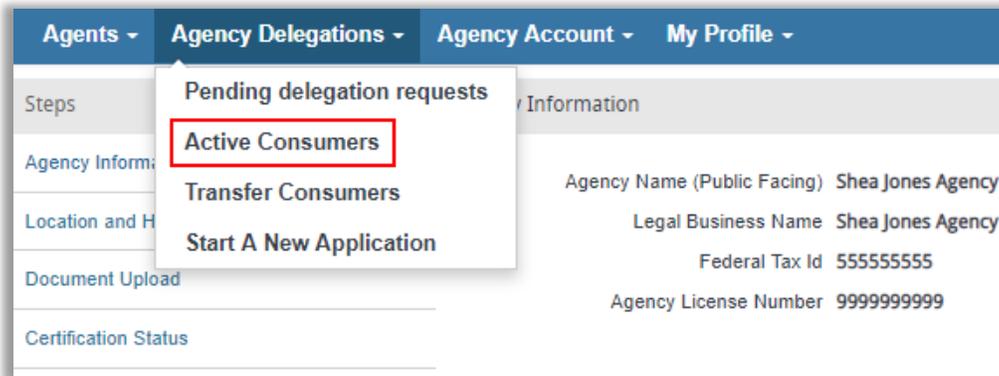
Approved Admin Staff can:

- [View Consumer details](#)
- [Accept an Agent’s pending delegation requests](#)
- [Complete and submit an application for a consumer on behalf of the Agent](#)
- [Start An Application On Behalf of an Agent](#)
- [Call the Agent Service Center](#)

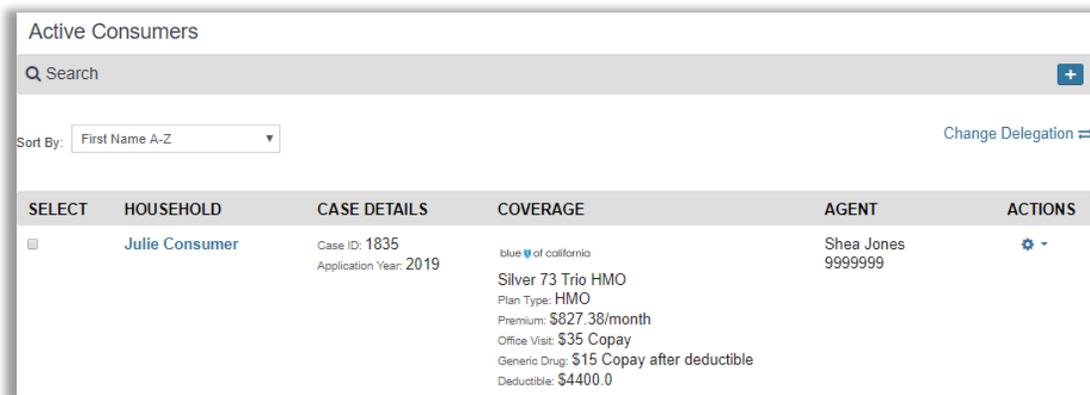
View Consumer Details

Approved Admin Staff, both Levels 1 & 2, have access to view consumer details for all consumer cases delegated to Agents within the Agency. They do not have access to export an agent or agency Book of Business.

From the dashboard, under the “Agency Delegations” tab drop-down menu, select the “Active Consumers” link to navigate to the “Active Consumers” page.



The “Active Consumers” page will display all of the consumers delegated to Agents within the Agency. Approved Admin Staff are able to view the consumer information and application for any agent listed in this list.



SELECT	HOUSEHOLD	CASE DETAILS	COVERAGE	AGENT	ACTIONS
<input type="checkbox"/>	Julie Consumer	Case ID: 1835 Application Year: 2019	blue of california Silver 73 Trio HMO Plan Type: HMO Premium: \$827.38/month Office Visit: \$35 Copay Generic Drug: \$15 Copay after deductible Deductible: \$4400.0	Shea Jones 9999999	

This section displays:

- Consumer Name
- Case Number
- Application Year
- Health Plan Information (if applicable)
- Agent Delegated to the consumer case
- Agent License Number
- Edit Menu 

SELECT	HOUSEHOLD	CASE DETAILS	COVERAGE	AGENT	ACTIONS
<input checked="" type="checkbox"/>	Julie Consumer	Case ID: 1835 Application Year: 2019	blue of california Silver 73 Trio HMO Plan Type: HMO Premium: \$827.38/month Office Visit: \$35 Copay Generic Drug: \$15 Copay after deductible Deductible: \$4400.0	Shea Jones 9999999	 <ul style="list-style-type: none"> Account Household Eligibility Mark as Inactive Change Delegation

To view additional consumer data, click on the  and click on the “Household” and/or “Eligibility” links to view additional consumer information.

Household Information displays:

- Consumer Name
- Relationship to Primary Contact
- Date of Birth
- Gender
- SSN Information
- Home and Mailing Address
- Seeking Coverage Information

Household Member Information							
Household Composition for Julie Consumer							
Name	Relationship	Date of Birth	Gender	SSN Information	Home Address	Mailing Address	Seeking Coverage?
Julie Consumer	SELF	04/24/1991	Female	55555555	1902 6th street sacramento , CA 95811	1902 6th street, sacramento , CA CA 95811	Yes

Household Eligibility section displays:

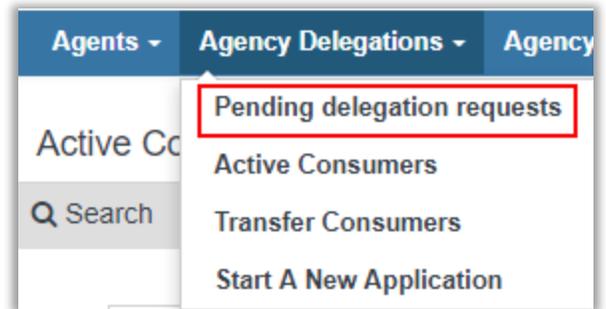
- Covered California Eligibility Status for the Household
- Available Advance Premium Tax Credit (Dollar Amount)
- Name of the Consumer
- Medi-Cal Eligibility Status
- Advance Premium Tax Credit Status
- Cost Sharing Reduction Status

Household Eligibility Information			
Household Eligibility for Julie Consumer			
Covered CA Plan Eligibility:		ConditionalEligible	
Available Advance Premium Tax Credit:			
Name	Medi-Cal Eligibility	Advance Premium Tax Credit	Cost Sharing Reduction
Julie Consumer	No	No	No

Accepting Pending Delegations on Behalf of an Agent

Approved Admin Staff, Level 2, can accept pending delegation requests on behalf of the agents within their agency.

Approved Admin Staff navigate to the **Agency Delegations** drop-down menu and select “Pending Delegation Requests” from the options.



This will navigate the Approved Admin Staff to the “Pending Delegations” page. The Approved Admin Staff will see a list of all consumers requesting delegation with agents within the agency.

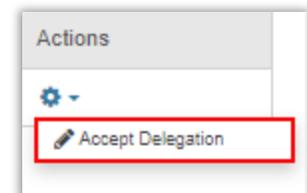
The page displays:

- Consumer Name
- Received on: Date the Request was made by the consumer
- Agent Name: The Agent Requested as a Delegate
- Actions Column

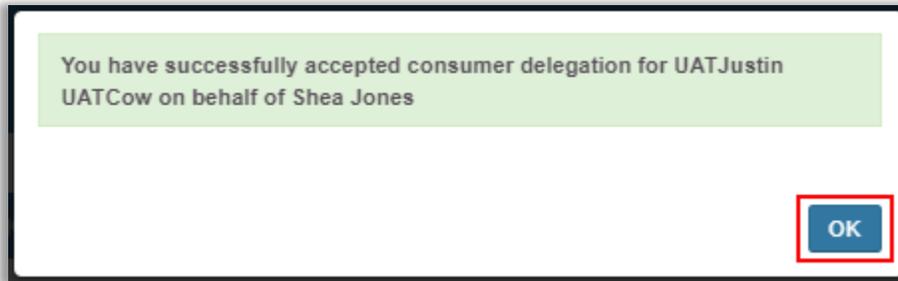
Agents - Agency Delegations - Agency Account - My Profile -				
Refine Results By	Consumer Name	Received On	Agent Name	Actions
Consumer First Name <input type="text"/> Consumer Last Name <input type="text"/>	UATJustin UATCow	03/28/2019	Shea Jones	⚙️
Reset all		Previous 1 Next		

From the **Actions** column, the Approved Admin Staff will click the  and the “Accept Delegation” link will display.

Click on “Accept Delegation” to accept the delegation on behalf of an Agent.



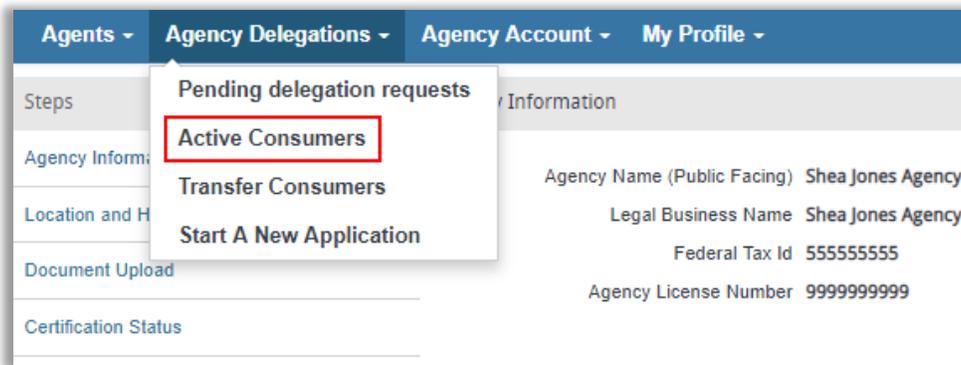
The Approved Admin Staff will get a pop-up confirmation screen: Select “OK” to finalize the delegation to the agent within your agency.



Complete and Submit an Application on Behalf of an Agent

Approved Admin Staff, Levels 1 & 2, have the ability to assist consumers delegated to the Agents, within the Agency, with application changes and submitting new applications.

In the **Agency Delegation** drop-down menu, select “Active Consumers”.



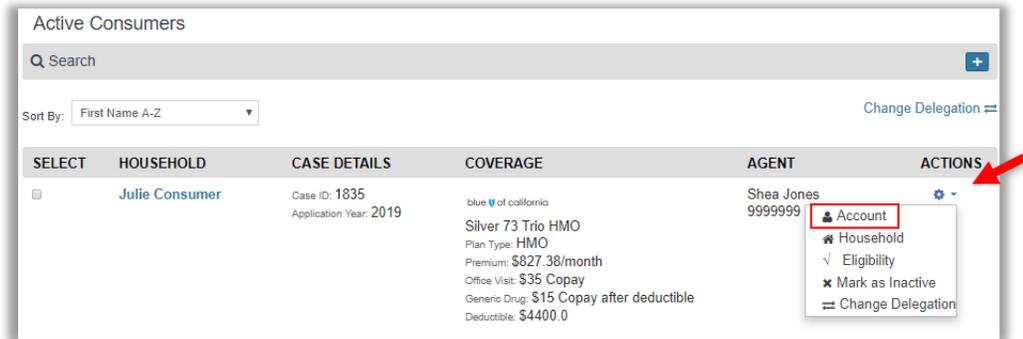
The Approved Admin Staff is navigated to the **Active Consumers** page where there is a complete list of all consumers delegated to Agents within the Agency.

Here, the Approved Admin Staff can select the consumer they need to assist with their application.

SELECT	HOUSEHOLD	CASE DETAILS	COVERAGE	AGENT	ACTIONS
<input type="checkbox"/>	Julie Consumer	Case ID: 1835 Application Year: 2019	blue of california Silver 73 Trio HMO Plan Type: HMO Premium: \$827.38/month Office Visit: \$35 Copay Generic Drug: \$15 Copay after deductible Deductible: \$4400.0	Shea Jones 9999999	

Acting on Behalf of an Agent Job Aid Approved Admin Staff

When the Approved Admin Staff selects the consumer, they can access the consumer case by: clicking the consumer's name, OR selecting  and then clicking the "Account" link.



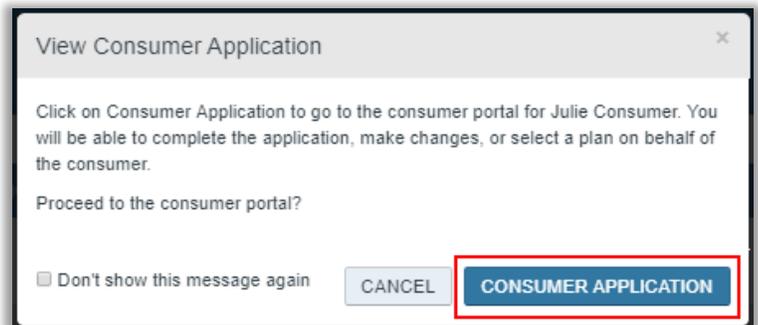
SELECT	HOUSEHOLD	CASE DETAILS	COVERAGE	AGENT	ACTIONS
<input type="checkbox"/>	Julie Consumer	Case ID: 1835 Application Year: 2019	blue of california Silver 73 Trio HMO Plan Type: HMO Premium: \$827.38/month Office Visit: \$35 Copay Generic Drug: \$15 Copay after deductible Deductible: \$4400.0	Shea Jones 9999999	<ul style="list-style-type: none"> Account Household Eligibility Mark as Inactive Change Delegation

A popup message will display, confirming that the Approved Admin Staff wishes to navigate to the consumer's individual application.

If Approved Admin Staff selected the wrong consumer, the Approved Admin Staff will select "Cancel" button and navigate back to the **Active Consumer** page.

The Approved Admin Staff will select "Consumer Application" button to continue to the application homepage.

The Approved Admin Staff are able to start a new application, complete a Report a Change, submit the application for an eligibility determination and upload eligibility documents.



View Consumer Application

Click on Consumer Application to go to the consumer portal for Julie Consumer. You will be able to complete the application, make changes, or select a plan on behalf of the consumer.

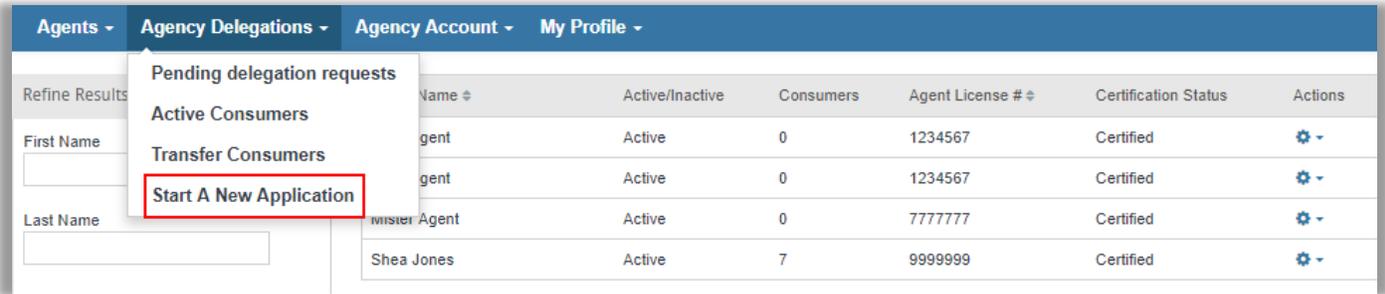
Proceed to the consumer portal?

Don't show this message again

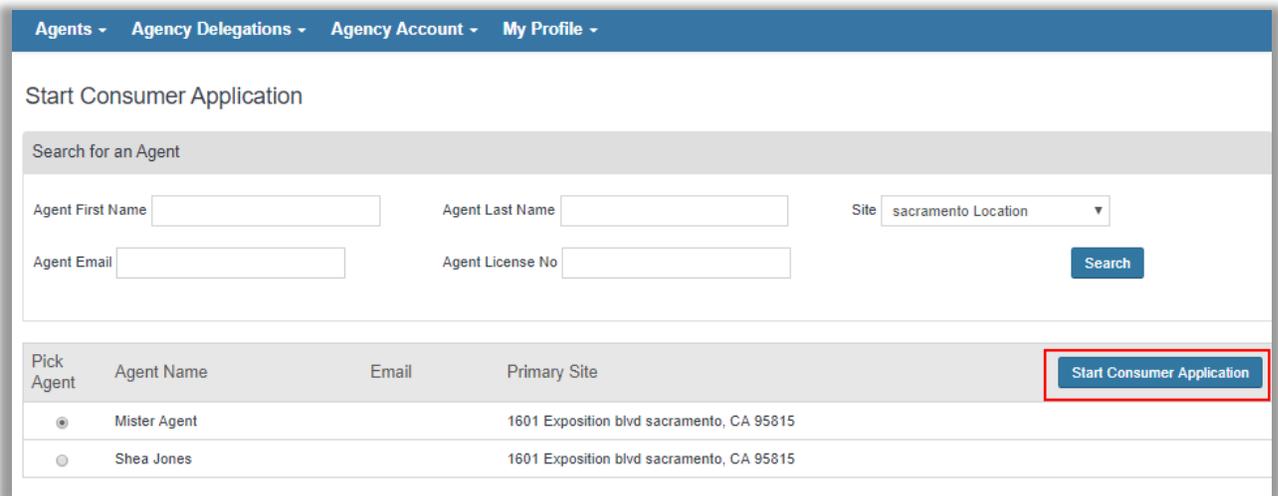
Start New Applications on Behalf of an Agent

Approved Admin Staff, both Levels 1 & 2, have access to begin new applications for consumers on behalf of an agent within the agency. They do not have the ability to plan select, terminate participation, or change APTC.

From the dashboard, under the "Agency Delegations" tab drop-down menu, select the "Start A New Application" link to navigate to the **Start A New Application** page.



From the **Start a New Application Page**, the Approved Admin Staff will search and locate an Agent to assign as the Agent of Record to the new case.



After selecting the Agent from the results of the agent search, the Approved Admin Staff will select the “Start A New Application” button to navigate to the application homepage to initiate the new application on behalf of the Agent.



Hi,

Welcome to Your Account.
Apply for health insurance through Covered CA and free and low-cost Medi-Cal on one application.

← account-home-approvedAdmin-dashboard

If you are eligible for a health plan through Covered California, you may also qualify for financial assistance to help pay for your coverage.

If you are eligible for free or low cost Medi-Cal, we may also be able to help pay for your last 3 months of medical bills.

We are currently outside the Covered California Open Enrollment Period.
To apply for a health plan through Covered California outside of Open Enrollment, you must have a qualifying life event.

[Click here to learn more about qualifying life events](#)

You can apply for Medi-Cal year-round.

 Important Dates

Covered California

- Your next chance to apply for Covered California without a qualifying life event is **November 1, 2019**.

Medi-Cal

- You can apply for Medi-Cal year-round.

[Begin Application](#)

Contact the Agent Service Center

Approved Admin Staff, both levels 1 & 2, are able to contact the Agent Service Center when in need of assistance.

Contact via:

- Phone: (877) 453-9198
- Email: agents@covered.ca.gov

View the [Hours of Operation](#) for a full list of availability.