



Acting on Behalf of an Agent Job Aid Agency Managers

Overview:

Agency Managers have the ability to act on behalf of the Agents within the Agency, enabling them to step in to complete tasks or assist consumers in the Agent’s Book of Business.

Agency Managers can:

- [View Consumer details](#)
- [Accept an Agent’s pending delegation requests](#)
- [Complete and submit an application for a consumer on behalf of the Agent](#)






View Consumer Details

An Agency Manager has access to view Consumer details for all consumer cases delegated to Agents within the Agency.


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

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	Mister Agent 7777777	
<input type="checkbox"/>	Kid Drewy 2200 Susan Ct W Sacramento CA, 95691			Mister Agent 7777777	
<input type="checkbox"/>	Kim Kimberly			Mister Agent 7777777	
<input type="checkbox"/>	Sally Test	Case ID: 1588 Application Year: 2019	 Silver 73 HMO Plan Type: HMO	Mister Agent 7777777	

The Active Consumer page will display all of the consumers delegated to the Agents within the agency. An Agency Manager is 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 californio Silver 73 Trio HMO Plan Type: HMO Premium: \$827.38/month Office Visit: \$35 Copay Generic Drug: \$15 Copay after deductible Deductible: \$4400.0	Mister Agent 7777777	 <ul style="list-style-type: none">  Account  Household  Eligibility  Mark as Inactive  Change Delegation

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 

To view additional consumer data, click on the  and click on the “Household” and/or “Eligibility” links to view additional consumer 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		Female	555555555			Yes

Household Information displays:

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

Household Eligibility Information x

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

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

Accepting Pending Delegations on Behalf of an Agent

Agency Managers can accept pending delegation requests on behalf of the agents within their agency. Agency Managers navigate to the **Agency Delegations** drop-down menu and select “Pending Delegation Requests” from the options.

Agents ▾
Admin Staff ▾
Agency Delegations ▾
Agency Account ▾
My Delegations ▾
My Agent Profile ▾

Refine Results By

First Name

Last Name

Agent Status
 Active Inactive

Certification Status

License Number

Pending Delegation Requests

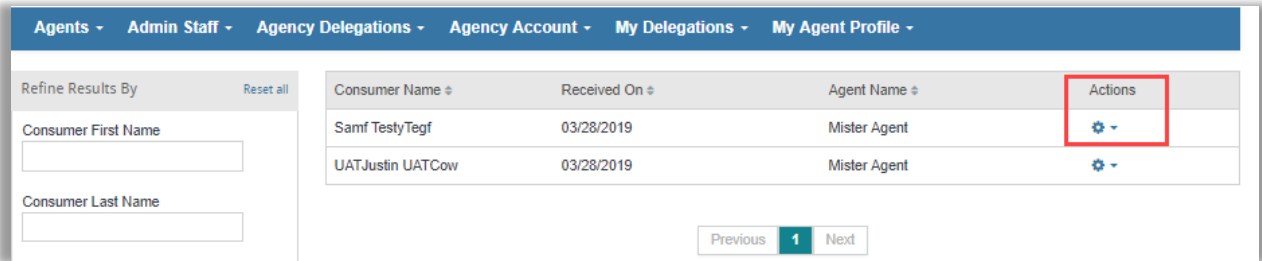
Active Consumers

Transfer Consumers

Active/Inactive	Consumers	Agent License #	Certification Status	Actions
Active	5	7777777	Certified	<input type="button" value="⚙"/>
Active	0	9999999	Certified	<input type="button" value="⚙"/>

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




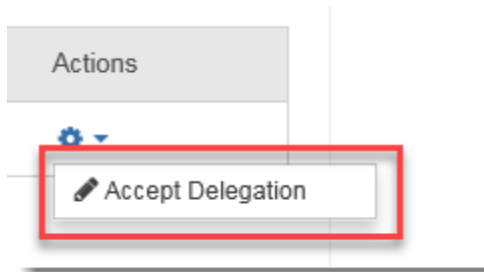
Agents - Admin Staff - Agency Delegations - Agency Account - My Delegations - My Agent Profile					
Refine Results By		Consumer Name	Received On	Agent Name	Actions
Consumer First Name	<input type="text"/>	Samf TestyTegf	03/28/2019	Mister Agent	
Consumer Last Name	<input type="text"/>	UATJustin UATCow	03/28/2019	Mister Agent	

Previous 1 Next

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

From the **Actions** column, the Agency Manager will click the  and the “Accept Delegation” link will display.



Click on “Accept Delegation” to accept the delegation on behalf of your agent.

The Agency Manager will get a pop-up confirmation screen:

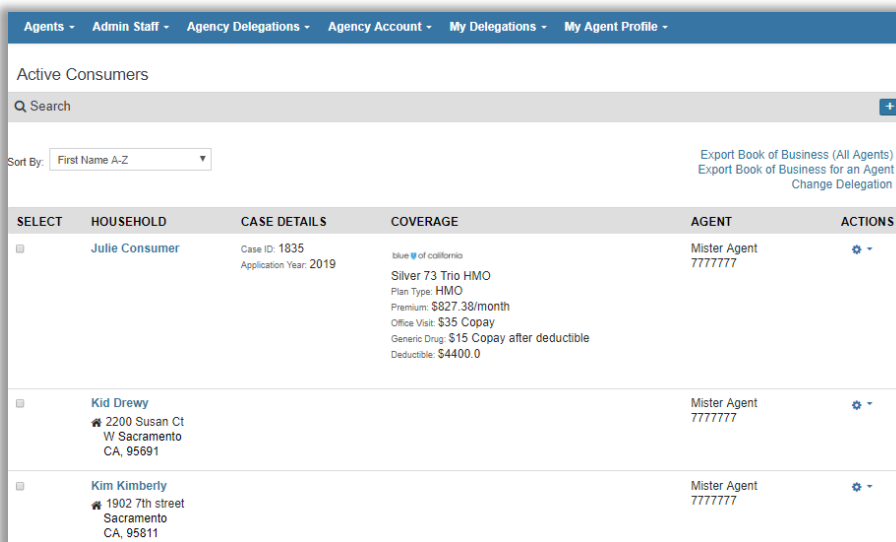
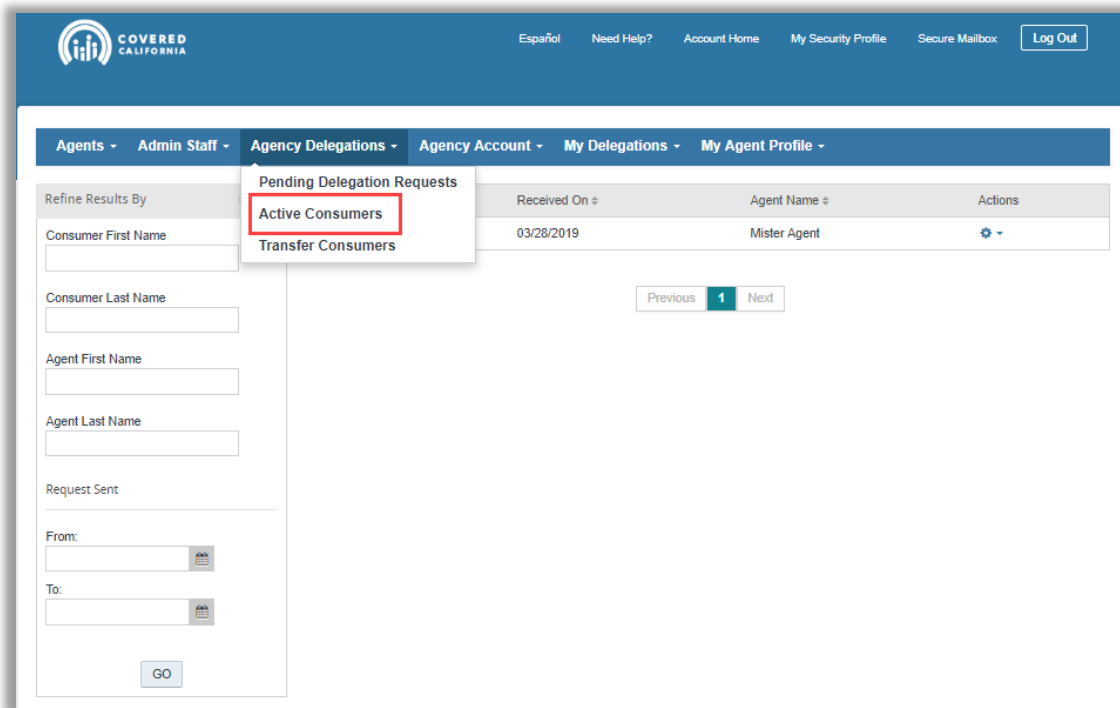


Select “Ok” to finalize the delegation to the agent within your agency.

Complete and Submit an Application on Behalf of an Agent


Agency Managers have the ability to assist consumers delegated to the Agents, within the Agency, with application completion and submission.


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



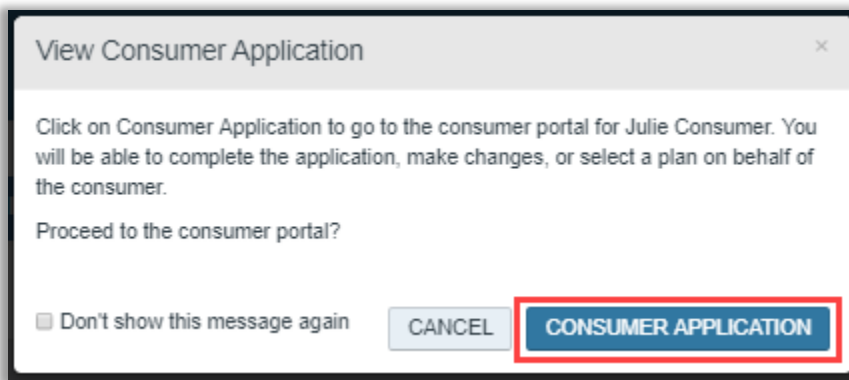
The Agency Manager is navigated to the **Active Consumers** page where there is a complete list of all consumers delegated to Agents within the Agency. Here, the Agency Manager can select the consumer they need to assist with their application.

When the Agency Manager identifies the consumer they are assisting in the list, they can access the consumer case by:

- 1) Clicking the consumer's name, or
- 2) Select  and then click "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	Mister Agent 7777777	 Account Household Eligibility Mark as Inactive Change Delegation

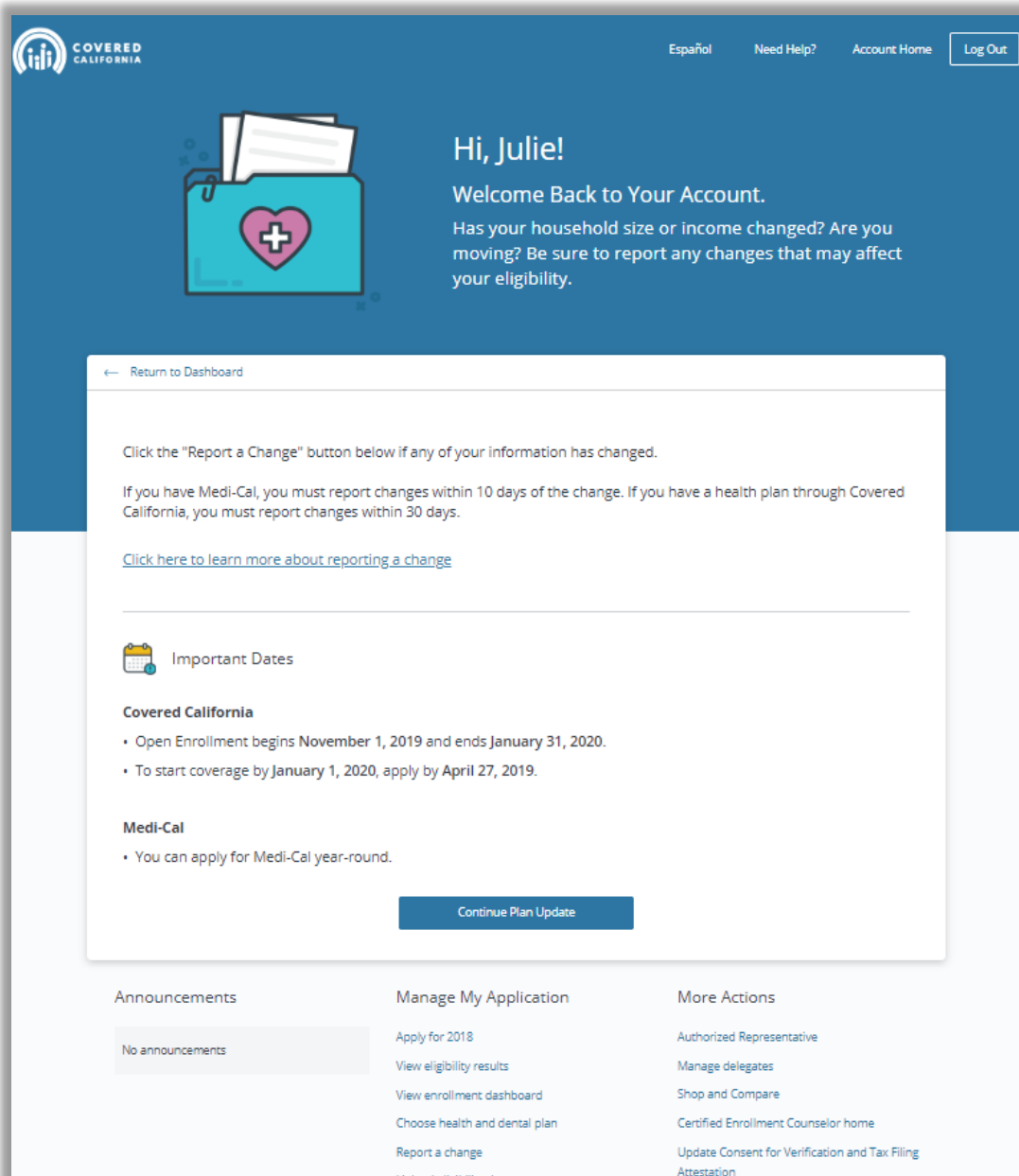
A popup message will display, confirming that the Agency Manager wishes to navigate to the consumer's individual application.



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

The Agency Manager will select "Consumer Application" button to continue to the application homepage.

The Agency Manager is able to complete a Report a Change, submit the application for an eligibility determination and or assist with plan selections and terminations.




← Return to Dashboard

Click the "Report a Change" button below if any of your information has changed.

If you have Medi-Cal, you must report changes within 10 days of the change. If you have a health plan through Covered California, you must report changes within 30 days.

[Click here to learn more about reporting a change](#)

 **Important Dates**

Covered California

- Open Enrollment begins **November 1, 2019** and ends **January 31, 2020**.
- To start coverage by **January 1, 2020**, apply by **April 27, 2019**.

Medi-Cal

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

[Continue Plan Update](#)

<p>Announcements</p> <p>No announcements</p>	<p>Manage My Application</p> <ul style="list-style-type: none"> Apply for 2018 View eligibility results View enrollment dashboard Choose health and dental plan Report a change 	<p>More Actions</p> <ul style="list-style-type: none"> Authorized Representative Manage delegates Shop and Compare Certified Enrollment Counselor home Update Consent for Verification and Tax Filing Attestation
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