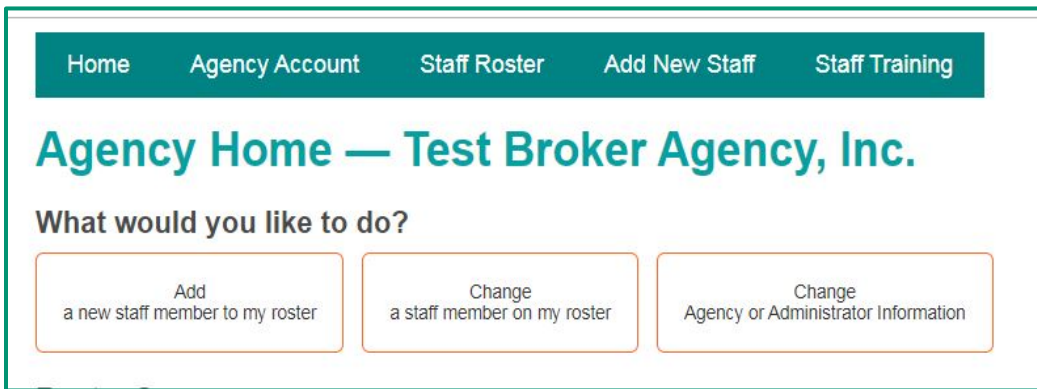


Adding Staff to Agency Roster

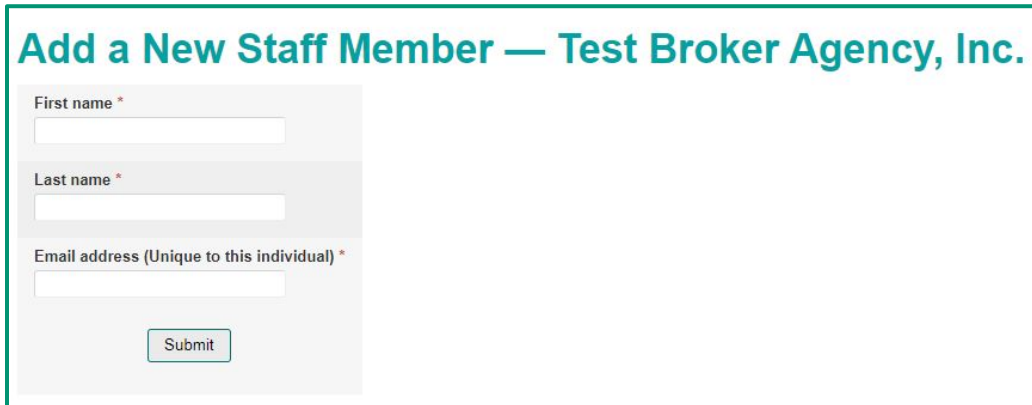
Step 1: Create a New Staff Member

After logging in to BAMP, from the Agency Home screen, click on “Add a new staff member to my roster” or “Add New Staff” link.



The screenshot shows the 'Agency Home' interface for 'Test Broker Agency, Inc.'. At the top is a navigation bar with links: Home, Agency Account, Staff Roster, Add New Staff, and Staff Training. Below the navigation bar is the title 'Agency Home — Test Broker Agency, Inc.'. Underneath is the heading 'What would you like to do?' followed by three buttons: 'Add a new staff member to my roster', 'Change a staff member on my roster', and 'Change Agency or Administrator Information'.

Enter the new staff member’s first name, last name and email address.



The screenshot shows the 'Add a New Staff Member' form for 'Test Broker Agency, Inc.'. It contains three input fields: 'First name *', 'Last name *', and 'Email address (Unique to this individual) *'. Each field has a corresponding text input box. Below the input fields is a 'Submit' button.

The email address must be unique to this individual. BAMP will give you an error if the individual’s email address is already in the system associated with another staff member.

Add a New Staff Member — Test Broker Agency, Inc.

Values in one or more fields are invalid.

First name *
Jane

Last name *
Doe

Email address (Unique to this individual) *
ada@testbrokeragency.com ✘ Value already present

Submit

Step 2: Add Certification Information

After you click “submit” to create a new staff member, you be taken to the “View staff member” screen where you can edit this individual’s information. MNSure will not begin setting up training access for a staff member until the Certification Information section has been completed.

Click on “Edit Certification information.”

View Staff Member — Test Broker Agency, Inc.

Certification Information

[Edit Certification Information](#)

| | | |
|--------------------------|--------------------------|--------------------------------|
| MNSure Role | Employment Status | |
| Broker | Active | |
| NPN | | |
| 1234567890 | | |
| MN Lic # | Licensed Broker? | License Expiration Date |
| 1234567890 | Yes | 09/30/2019 |
| First name | MI | Last name |
| Ada | | Broker |
| Business Address | | |
| 1 Test Broker Agency Way | | |
| Mailing Address | | |

You will need to complete all the required fields with an asterisk (*).

Note:

- The fields will be blank when first entering in new staff.
- Indicate whether the staff member is “active” or “inactive.” If the individual is not listed as “active,” MNSure will not set up training access or evaluate this individual for certification.
- Make sure all the information entered in the Certification Information section is the information MNSure can use to contact the individual assister. The address may be the same as the organization’s main address. If the individual is based at another location, enter that address here.

Click “Update” when you have completed the section.

If you leave any required fields incomplete, you will get an error message.

Certification Information

Values in one or more fields are invalid.

Current Employment Status *

- Select Employment Status - ▼

✖ Required

Step 3: Add Public-Facing Information

If the assister will be listed on the assister directory and/or will request an assister portal account, the public-facing information section must be completed.

Click on “Edit Public-Facing Information.”

Edit Staff Member — Test Broker Agency, Inc.

Public-Facing Information (Assister Directory/Assister Portal)

Enter the contact information here that you would like to be visible to the public. This may include an AKA (also known as) name for your agency, a central phone number, and/or a central email.

MNsure Role
Broker

Assister Portal Access?*
 Yes No

List on Assister Directory (Public)?*
 Yes No

Agency Name *

First Name * **Last Name ***

Address Street 1 *

Address Street 2

State * **County *** **City ***

Zip *

Phone (numbers only) *

You will need to complete all the required fields with an asterisk (*).

Note:

- The phone number and email entered here are what will appear to members of the general public in the assister directory. You may choose to enter a central phone number and/or email for the staff member.
- When selecting counties served by the staff member, **only select counties where the staff member is able to provide in-person assistance** if requested by a consumer.

Click “Update” when you have completed the section.

Step 4: Data Privacy and Security Information

Data Privacy and Security information must be answered for all staff seeking certification. Carrier appointments will be requested from licensed staff who will be actively selling health plans. All fields in this section are required. If any of the required questions is missed, an error message will appear.

Home Agency Account Staff Roster Add New Staff Staff Training

Edit Staff Member — Test Broker Agency, Inc.

Data Privacy, Security, Compliance and Appointments Information

Values in one or more fields are invalid.

MNsure Individual Certification Agreement and the Notice of Monitored Broker Performance:
(Click here to [view the policy](#), or here to [download the PDF](#).)

Appointed Carriers:
(Check all that apply.)

BCBS HealthPartners Medica
 UCare Delta Dental Dentegra

Step 5: Wait for Training ID to be Activated

When you add a new staff member to your roster, they will be assigned a randomly generated Training ID. If their “Certification Status” shows as “New,” the Training ID has **not** been activated.

Home Agency Account Staff Roster Add New Staff Staff Training

Staff Roster — Test Broker Agency, Inc.

| | First Name | Last Name ▲ | NPN | Admin ID | Training ID | Employment Status | Certification Status |
|----------------------|------------|-------------|------------|----------|-------------|-------------------|----------------------|
| View | Ada | Broker | 1234567890 | | M27YnJw4Cn | Active | New |
| View | August | Broker | [redacted] | | M6cq5VyWZV | [redacted] | New |

Once the Broker Service Line team has set up the individual’s account in the MNsure Learning Center, the individual’s “Certification Status” will change from “New” to “Not certified.” An email notifying the individual that they can begin completing certification training will automatically be sent.

If a staff member’s “Certification Status” is “Not certified,” they can use their Training ID to log in to the MNsure Learning Center.