



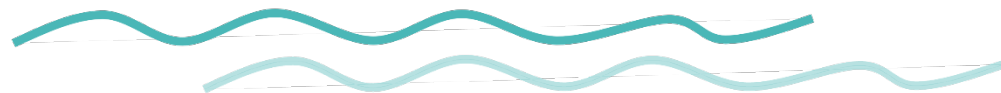
MNsure Portal

Entity Manager Role

Questions or Technical Issues?



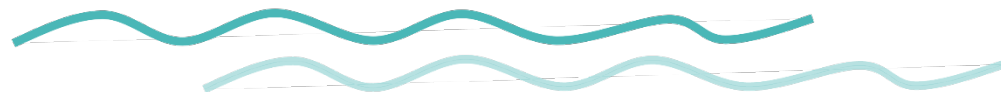
- Email the Assister Resource Center (ARC) if you need assistance (navigators@mnsure.org).



Agency Management Program (AMP)



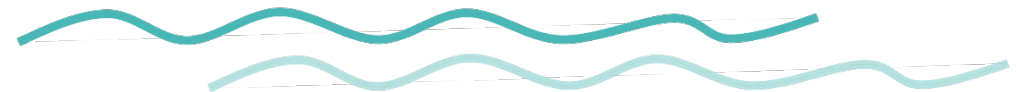
- Agency Management Program (AMP)
 - Login link: <https://www.mnsure.org/assister-central/navigator-one-stop/amp/account-home.html>
 - Only the Primary Contact, Authorized Representative and Signature Authority have access.
 - AMP users do not need to complete certification.
 - Source of truth for MNSure's contact information for certified staff, including email address.
 - Source of truth on certification and recertification status for staff.
- AMP is used to:
 - Manage your agency's contract information with MNSure, including maintaining your authorized contacts.
 - Add new staff to your roster to begin the certification process, including tracking progress on training completion and supporting the background study process.
 - Notify MNSure if staff are inactive.



MNsure Portal – Entity Manager



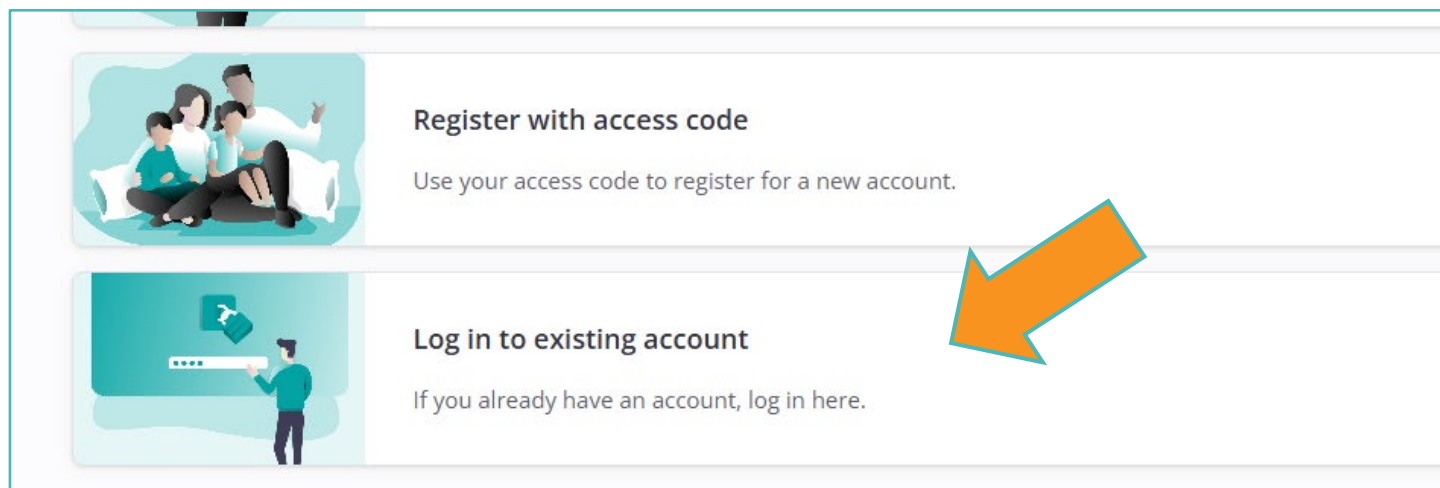
- MNsure Portal (Entity Manager)
 - Login link: <https://enroll.mnsure.org/hix/>
 - Entity Managers must complete the MNsure certification process.
 - Agencies can assign multiple individuals to the Entity Manager role.
 - Is the source of truth for Assister Directory information.
- Entity Manager portal is used to:
 - Create MNsure portal accounts for new certified staff.
 - Manage staff access to the MNsure portal.
 - Manage the agency's Assister Directory information.
 - Manage the agency's authorizations with MNsure consumers in MN-EES.



Logging into the MNsure Portal



- Log in to the MNsure portal at <https://enroll.mnsure.org/hix>. We strongly recommend bookmarking this link.



Entity Manager Dashboard



Entity(Change)

My Account

Navigators or CACs | Authorizations | Account

Pending Authorization Requests

Active Consumers

Inactive Authorizations

Add Staff

Refine Results By [Reset All](#)

First Name

Last Name

Status

☐ Active

☐ Inactive

Certification Status

Name	Role	Number Of Consumers	Certification Renewal For Staff	STATUS	CERTIFICATION STATUS
Connie Burns	Navigator or CAC	6	07/16/2027	Active	Certified
Jack Prince	Navigator or CAC	1	06/19/2027	Active	Certified
Jared Peterson	Navigator or CAC	2	08/20/2027	Active	Certified
Karl Planter	Entity Manager	0	06/19/2027	Active	Certified
Paula Jones	Navigator or CAC	3	06/26/2027	Active	Certified

Entity(Change)

My Roles

✓ Entity

Navigator or CAC

- Use the menu in upper right-hand corner to toggle between the Navigator/CAC role and Entity Manager role.

Managing Staff Access & Information

Viewing Current Staff List



Navigation: Navigators or CACs ▾ Authorizations ▾ Account ▾

Manage Navigators or CACs

Navigators or CACs 5 Matching Staff

Refine Results By [Reset All](#)

First Name

Last Name

Status
☐ Active
☐ Inactive

Certification Status

Name	Role	Number Of Consumers	Certification Renewal Staff
Connie Burns	Navigator or CAC	6	07/16/2024
Jack Prince	Navigator or CAC	1	06/19/2024
Jared Peterson	Navigator or CAC	2	08/20/2024
Karl Planter	Entity Manager	0	06/19/2024
Paula Jones	Navigator or CAC	3	06/26/2024

- As the Entity Manager, select the “Navigators or CACs” menu to view existing staff.
- The dashboard displays:
 - List of staff with MNsure portal accounts.
 - Number of consumer associations for each staff member.
 - Current portal/certification status.
- Note: AMP is the source of truth for certification status and recertification date.

Selecting a Staff Record



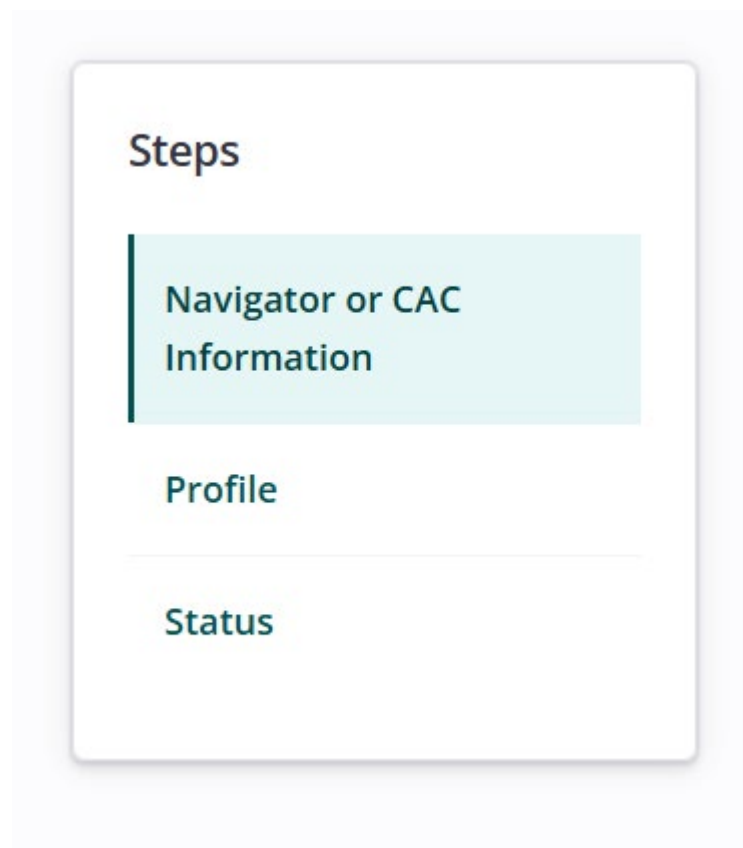
- To view an individual staff member's information or make updates, either:
 - Select the individual's name, or
 - Click on the vertical ellipses (three dots) to get the "Edit" option.

Name	Role	Number Of Consumers	Certification Renewal For Staff	STATUS	CERTIFICATION STATUS
Connie Burns	Navigator or CAC	6	07/16/2027	Active	Certified
Jack Prince	Navigator or CAC	1	06/19/2027	Active	Certified

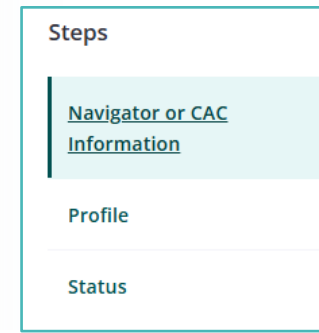
Individual Record Menu



- Once you select an individual record, the left-hand navigator will allow the Entity Manager to view and edit:
 - Navigator or CAC Information: Individual contact information.
 - Profile: Individual directory information.
 - Status: Staff member active/inactive status.
- Note that some fields can be updated in multiple places.



Navigator/CAC Info: Personal Information



Personal Information

First name *

Jack

Last name *

Prince

Role



Entity Manager



Navigator or CAC

- The Entity Manager can update the name displayed in the Assister Directory.
 - **NEVER update this to a different person.** If an individual experiences a name change, that change should also be made in AMP.
- Promote a staff member to be an “Entity Manager.”
 - To remove the Entity Manager role, you will need to contact the Assister Resource Center.

Navigator/CAC Info: Contact Information

Steps

[Navigator or CAC
Information](#)

[Profile](#)

[Status](#)

Contact Information

Email *



connieburns123@Yopmail.com

Primary Phone Number *



612-840-1716

Official Partner *



☒ Yes ☐ No

External Assister Number

096NAV301

How would this person like to be contacted? *



Email



Phone



Mail



Fax

Fax

xxx-xxx-xxxx

Navigator or CAC Certification *

5000000172

- The Entity Manager can update the email address that is displayed to consumers.
 - This will not change their MNsure Portal username. The individual will need to contact the ARC to update a username.
 - MNsure uses the individual's email in AMP for certification, recertification, newsletters and other communications.
- The Primary Phone Number must be unique. To activate their account, it must be a text-enabled phone number.

Navigator/CAC Info: Site Assignment

Steps

[Navigator or CAC
Information](#)

[Profile](#)

[Status](#)

- If your agency has multiple locations, the Entity Manager can select which site to assign the individual in the Assister Directory.
- Individuals can be assigned to up to two sites.

Site Assignment

Primary Navigator or CAC Site *

Osseo Location 55369



Secondary Navigator or CAC Site

Select



Navigator/CAC Info: Mailing Address

Steps	
Navigator or CAC Information	
Profile	
Status	

Mailing Address

Address 1 *	2 Foghorn Blvd
Address 2	Address 2
City *	Keystone
State *	Minnesota
Zip code *	55987

- In most situations, the mailing address in the individual's profile should be the same as the address for the primary site they are assigned to.
- The mailing address information in the individual profile **will be displayed to an associated consumer**, even if it is different than the primary site address.

Navigator/CAC Info: Languages & Photo

Steps	
Navigator or CAC Information	
Profile	
Status	

Languages Supported

Spoken Languages *

English X

Spanish X

American Sign Language X

Written Languages *

English X

Upload Photo

Choose File

BowtiesAreCool.png

Acceptable file types: GIF, JPEG, JPG, PNG, BMP. Maximum file size: 5MB.

- Additional Assister Directory information:
 - Provide the spoken and written languages the individual can support.
 - Uploading an image for the Assister Directory is optional.

Profile: List on Assister Directory

Steps
Navigator or CAC Information
<u>Profile</u>
Status

Profile

Upload Photo  [Edit Photo](#)

First name *

Last name *

Allow consumers to search  ☒ Yes ☐ No

Available for remote assistance  ☒ Yes ☐ No

- The “Profile” section is another place to update individual information displayed to the consumer:
 - Upload or edit an image displayed on the Assister Directory.
 - First and last name.
- Available for consumers to search?
 - Must select “Yes” for individual to appear on the Assister Directory.
 - If the individual is not listed, a consumer cannot initiate an association.

Profile: Other Directory Information

Steps
Navigator or CAC Information
Profile
Status

Mailing Address

Address 1 *

2 Foghorn Blvd

Address 2

Address 2

City *

Keystone

State *

Minnesota

Zip code *

55987

Primary Phone Number *

612-840-1716

Public Facing Phone Number * 

888-888-8888

Email *

infoconnieburns123@Yopmail.com

Languages Supported

Spoken Languages *

English X

Spanish X

American Sign Language X

Written Languages *

English X

- The mailing address and languages supported can also be updated in the “Profile” section.
- Remember, the mailing address will be displayed to consumers associated with the individual navigator/CAC.

Status: Active vs Inactive

Steps

Navigator or CAC Information

Profile

Status

Status

Status Active

New Status *

Select

Comment

Enter your comment here

1000 Characters left

CancelSave

Navigator or CAC History

Date	Previous status	New Status	View Comment
07/16/2026	Inactive	Active	No Comments

- In the “Status” section, Entity Managers must update staff status to “Inactive” if the individual is no longer acting as a navigator/CAC.
- The status must also be updated to “Inactive” in AMP.
- If the individual has associations with consumers, you may want to transfer those associations to another certified staff member.
- Adding a comment is optional.

Public View: Assister Directory Search



Karl Planter Navigators

Back

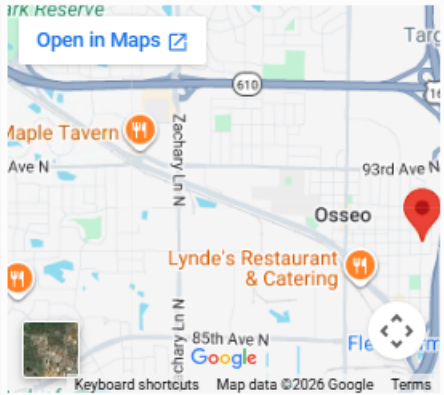
108 7th Ave NE, Osseo, MN, 55369
888-888-8888
Osseo@karlplanternavs.org

Languages Spoken **English, Arabic, Armenian**

Languages Written **English, Cambodian, Hmong**

Hours of Operation
Monday 08:15 am-01:00 pm
Tuesday 08:15 am-01:00 pm
Wednesday 08:15 am-01:00 pm
Thursday 08:15 am-01:00 pm
Friday 08:15 am-01:00 pm
Saturday Closed
Sunday Closed

"Karl Planter Navigators" has 3 MNsure Navigators
[Show Navigators](#)



Open in Maps

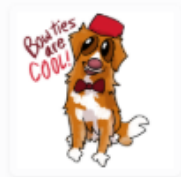
Name	Contact Info	Languages
Connie Burns	108 7th Ave NE Osseo MN 55369 888-888-8888 infoconnieburns123@Yopmail.com	English, Spanish, American Sign Language

- Under an individual's "Contact Info" in the Assister Directory search result:
 - Address: Will display the location address from the agency's location.
 - Phone Number: Will display the individual's public-facing phone number from their profile.
 - Email: Will display the individual's email address from their profile.
 - Languages: Will display the individual's spoken languages from their profile.

Public View: Profile in Consumer's Account



Connie Burns



Connie Burns

Email infoconnieburns123@Yopmail.com

Secondary Phone Number (888) 888-8888

How would you like us to contact you? email

Is this Navigator Certified? Yes

System ID (office use only) 5000000172

Primary Location Osseo Location 55369

Street Address 2 Foghorn Blvd

Suite

City Keystone

State MN

Zip Code 55987

- When an associated consumer views the “Navigator Profile” in their portal:
 - Email: Will display the navigator’s email address from their profile.
 - Phone Number: Will display the navigator’s public-facing phone number from their profile.
 - Street Address: Will display the navigator’s mailing address from their profile.

Creating a MNsure Portal for New Staff

Creating a MNsure Portal Account



Navigation: Navigators or CACs ▾ Authorizations ▾ Account ▾

Manage Navigators or CACs

Navigators or CACs 5 Matching Staff

Refine Results By [Reset All](#)

First Name

Last Name

Status
☐ Active
☐ Inactive

Certification Status

Name	Role	Number Of Consumers	Certified Renew Staff
Connie Burns	Navigator or CAC	6	07/16/20
Jack Prince	Navigator or CAC	1	06/19/20
Jared Peterson	Navigator or CAC	2	08/20/20
Karl Planter	Entity Manager		
Paula Jones	Navigator or CAC		

- Once new staff has certified, the Entity Manager must create their MNsure Portal account.
- Select the “Navigators or CACs” header to manage your staff (this will also be the default view when you log into your MNsure portal).
- Select the option to “Add Staff.”

Navigation: Navigators or CACs ▾ Authorizations ▾ Account ▾

Navigators or CACs 5 Matching Staff

[Add Staff](#)

New Account: Initial Steps



- The first and last name used for the MNsure Portal account must match the name in AMP, or MNsure will not be able to confirm certification status to activate the account.
- Navigators should be marked as “Allow consumer to search” so consumers can find and associate with them.

New Navigator or CAC Form

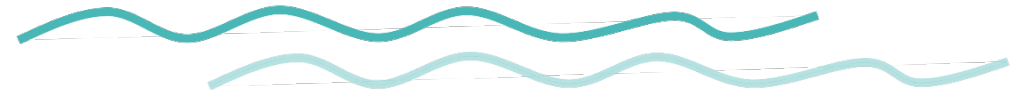
Personal Information

First name *

Last name *

Allow consumers to search  ☒ Yes ☐ No

Available for remote assistance  ☐ Yes ☒ No



New Account: Email Address



- IMPORTANT: The email address you enter when you create the individual's MNSure Portal account will be their username.
- The email must be **unique** and should be an email used for business purposes.
 - If they use a personal email, they will not be able to use that email for a personal MNSure account.
- The email should also match their email address in AMP.
- If the individual wants to change their username after you create their MNSure portal account, they will need to contact the ARC.

Contact Information

Email *  email@example.com

Primary Phone Number *  XXX-XXX-XXXX

Public Facing Phone Number *  XXX-XXX-XXXX

External Assister Number

How would this person like to be contacted? * ☒ Email
☐ Phone
☐ Mail
☐ Fax

New Account: Phone Numbers



- The Primary Phone Number must be a unique SMS-enabled number to receive a text message with a code to activate their new account.
 - Once the account is activated, this phone number can be changed.
 - If the individual needs to change the number to receive an activation text, please reach out to the ARC.
- The Public-Facing Phone Number will be displayed to consumers. This number does not need to be unique to the individual.

Contact Information

Email *  email@example.com

Primary Phone Number *  XXX-XXX-XXXX

Public Facing Phone Number *  XXX-XXX-XXXX

External Assister Number

How would this person like to be contacted? *

☒ Email

☐ Phone

☐ Mail

☐ Fax

New Account: Contact Information



- The “External Assister Number” should be the individual’s Assister ID, assigned in AMP when they complete certification.
- The contact preference is required but is not used. MNsure will use the individual’s email address in AMP for important communications.

Contact Information

Email *  email@example.com

Primary Phone Number *  XXX-XXX-XXXX

Public Facing Phone Number *  XXX-XXX-XXXX

External Assister Number

How would this person like to be contacted? * ☒ Email
☐ Phone
☐ Mail
☐ Fax

Fax

New Account: Site Assignment

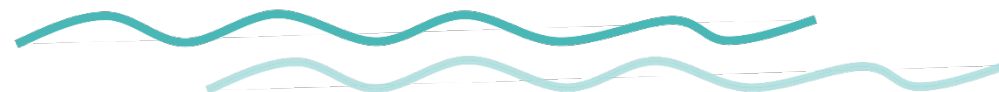


- The individual must be assigned to one of the agency's locations.
- If the individual is listed on the Assister Directory, the individual will appear as working at this location.

Site Assignment

Primary Navigator or CAC Site * 

Secondary Navigator or CAC Site 



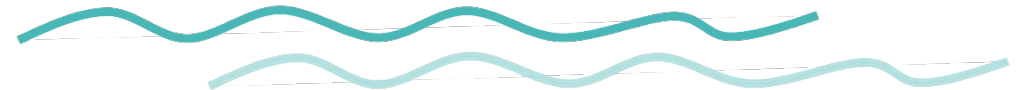
New Account: Mailing Address



- In most situations, the mailing address in the individual's profile should be the same as the address for the primary site they are assigned to.
- The mailing address information in the individual profile **will be displayed to an associated consumer**, even if it is different than the primary site address.

Mailing Address

Address 1 *	Address 1
Address 2	Address 2
City *	City
State *	<input data-cs="2" data-kind="parent" type="text" value="Select"/> ▼
Zip code *	Zip code



New Account: Languages & Photo



- Additional Assister Directory information:
 - Provide the spoken and written languages the individual can support.
 - Uploading an image for the Assister Directory is optional.

Languages Supported

Spoken Languages *

Please Select

Written Languages *

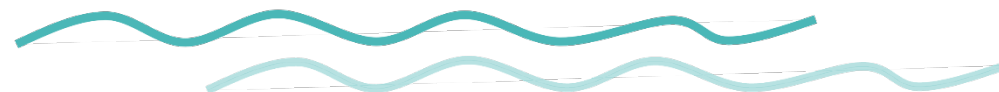
Please Select

Upload Photo

Choose File

 No file chosen

Acceptable file types: GIF, JPEG, JPG, PNG, BMP. Maximum file size: 5MB.

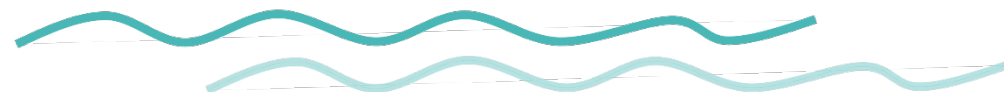


New Account: Update Status



- When you initially add a new staff member, they will be set up with an “Inactive” and “Pending” status.
- After setting up their account, edit their status to make them “Active”. If you leave them in an “Inactive” status, MNsure will not review and activate their account.

Name	Role	Number Of Consumers	Certification Renewal For Staff	STATUS	CERTIFICATION STATUS	
Connie Burns	Entity Manager	7	07/16/2027	Active	Certified	⋮
Jack Prince	Navigator or CAC	1	06/19/2027	Active	Certified	⋮
Jared Peterson	Navigator or CAC	1	08/20/2027	Active	Certified	⋮
Karl Planter	Entity Manager	0	06/19/2027	Active	Certified	⋮
Myrna Loy	Navigator or CAC	0	-	Inactive	Pending	⋮
Paula Jones	Navigator or CAC	3	06/26/2027	Active	Certified	⋮



New Account: Active Status



- Edit the individual's status to make them "Active".
- Adding a comment is optional.
- Once you have updated their status to "Active," MNsure will still need to confirm their certification status in AMP prior to activating the account.

Status

Status

Inactive

Edit

View the status of your certification application here. You can also see the history of previous actions related to your status.

Navigator or CAC History

Status Inactive

New Status *

Select

Comment

Enter your comment here

1000 Characters left

CancelSave

New Account: Activation Email



- MNsure will review and confirm when certification has been completed.
- Once MNsure updates the record to confirm certification, they will receive an account activation email.
- Account activation emails come from noreply@system.mnsure.org.
- The individual will click on the link to begin activating their account. **The account must be completed in one sitting. The link cannot be reused.**

Date: October 13, 2026

Re: Activate your new MNsure account

Dear Myrna Loy,

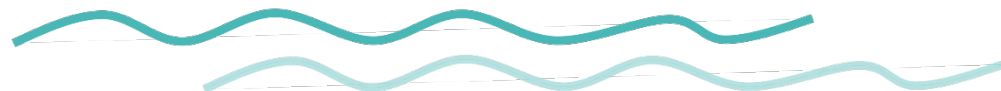
Welcome!

A MNsure account has been created for you. Activate your account now at:

<https://mn3uat.ghixqa.com/hix/account/user/activation/a16586baea354f7aac4cecce41da3d98>

This is a one-time login. It will expire in 1 day(s).

Thank you,
MNsure



Assister Directory Information

MNsure's Assister Directory



- The Assister Directory is integrated into MNsure's system (MN-EES). Directory information comes from agency and staff information in MN-EES.
- Consumer's can only use the Assister Directory to request to associate with a navigator/CAC if:
 1. The consumer has a MNsure account and is logged in.
 2. The navigator/CAC is listed on the directory.
- The agency will not appear on the directory if the Entity Manager has not activated their portal account.



Locations and Hours



- The Entity Manager can edit the information displayed in the Assister Directory through their MNsure portal.
- Find “Locations and Hours” under the “Account” menu option on the dashboard.

A screenshot of the MNsure portal dashboard. At the top, there are three tabs: "Navigators or CACs", "Authorizations", and "Account". The "Account" tab is selected, and a dropdown menu is open, showing options: "Organizations Information", "Locations and Hours" (highlighted), "Contact Information", "Navigators or CACs", "Document Upload", and "Registration Status". Below the tabs, the main heading is "Navigators or CACs" with "1 Matching S" next to it. On the left, there is a "Refine Results By" section with "Reset All" and two input fields for "First Name" and "Last Name". On the right, there is a table with columns "Na" and "Num/Cons". The table contains one row for "Nancy Drew" with the role "Entity Manager" and the value "0". At the bottom right, it says "Showing 1-1 of 1 items".

Primary Location



- Your agency will always have a Primary Location. The Primary location will be the first location in the list under “Locations and Hours.”
- You can add secondary locations if you have staff working at multiple sites.
- Click on the “+” next to the location name to see more details.
- Click on “Edit” to make changes to the location information.

Locations and Hours

Add Secondary Location

+ Osseo Location 55369	Contact us for appointment Osseo, MN	Edit
+ Winona Location 55987	Contact us for appointment Winona, MN	Edit
+ Olmsted Location 55912	Contact us for appointment Austin, MN	Edit
+ Minneapolis Location 55401	Contact us for appointment Minneapolis, MN	Edit
+ Mankato Location - 56001	10 Civic Center Plz Mankato, MN	Edit

Multiple Locations



- If you have multiple locations, it is helpful to give each location a name.
- Providing a unique name for each location will make it easier to assign staff to a specific location.
- You can create multiple secondary locations, but once a location is created, it cannot be deleted.
- If no staff are assigned to a secondary location, that location will not appear on the Assister Directory.

Name	Contact Info	Languages
Karl Planter Navigators	Osseo Location 55369 108 7th Ave NE Osseo MN 55369 888-888-8888 Osseo@karlplanternavs.org	English, Arabic, Armenian
Karl Planter Navigators	Minneapolis Location 55401 Contact us for appointment Minneapolis MN 55401	Cantonese
Karl Planter Navigators	Olmsted Location 55912 1515 Happy Drive Austin MN 55912	English
Karl Planter Navigators	Mankato Location - 56001 2200 Adams Street Mankato MN 56001 777-777-7777	Mandarin

Adding/Editing Locations



- When editing/adding a location, you can provide an identifying name.
- An email address and phone number for the location are not required but are recommended to provide consumers with a centralized point of contact for the agency.

Please list all locations and business hours for your organization.

Primary Location *

Osseo Location 55369

Primary Email Address

Osseo@karlplanternavs.org

Primary Phone Number

888-888-8888

Secondary Phone Number

XXX-XXX-XXXX

Location Hours of Operation



- The agency is required to provide hours of operation for the location.
- This information will be displayed in the Assister Directory (if the location is listed).

Hours of Operation

☒ Monday *	08:15 AM ▾	To	01:00 PM ▾	☐ Closed	☐ Apply to all weekdays ⓘ
☒ Tuesday *	08:15 AM ▾	To	01:00 PM ▾	☐ Closed	
☒ Wednesday *	08:15 AM ▾	To	01:00 PM ▾	☐ Closed	
☒ Thursday *	08:15 AM ▾	To	01:00 PM ▾	☐ Closed	
☒ Friday *	08:15 AM ▾	To	01:00 PM ▾	☐ Closed	
☐ Saturday *	Closed ▾	To	Closed ▾	☒ Closed	
☐ Sunday *	Closed ▾	To	Closed ▾	☒ Closed	

Location Mailing and Physical Address



- Provide a mailing and physical address for the location.
- The physical address is what will appear in the Assister Directory.
- The mailing address will not be used by MNsure. Please make sure the agency's address in AMP is always update to date for receiving any mailings from MNsure.

Mailing Address

Address 1 *

Address 2

City *

State *

Zip code *

Physical Address

Provide referrals to customer assistance programs that are culturally and linguistically appropriate

☐ Same as Mailing Address

Address 1

Address 2

City

State

Zip code

Languages Supported at Location



- Select the languages supported at this specific location.
- The Assister Directory will allow consumers to see which languages are supported.

Languages Supported

Spoken Languages *

English X

Arabic X

Armenian X

Written Languages *

English X

Cambodian X

Hmong X

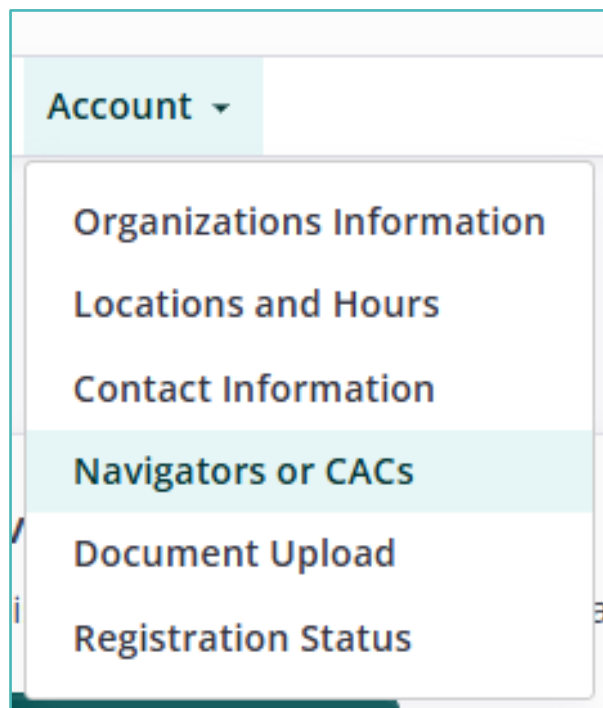
Cancel

Save Primary Site

Assigning Staff to Locations



- You can assign staff to locations within their individual record, but an easier way to check location assignments is to view your list of staff under “Account” and “Navigators or CACs”.
- Remember, if no staff are assigned to one of the secondary locations, that location will not appear on the Assister Directory.



Steps	Navigators or CACs		
	In this section, you will provide information about this organization's Navigators or CACs		
Organization Information	Add Navigator or CAC		
Locations and Hours	Name	Site	Actions
Contact Information	Jared Peterson	Osseo Location 55369	Edit
Navigators or CACs	Karl Planter	Osseo Location 55369	Edit
Document Upload	Paula Jones	Olmsted Location 55912	Edit
Payment Information	Jack Prince	Mankato Location - 56001	Edit
Contract Status	Myrna Loy	Minneapolis Location 55401	Edit

Updating Staff Location Assignment



- If you want to move staff to a different site, select “Edit” next to their name. This will take you to the individual’s profile, and you can update their Site Assignment.

Name	Site	Actions
Jared Peterson	Osseo Location 55369	Edit
Karl Planter	Osseo Location 55369	Edit
Paula Jones	Olmsted Location 55912	Edit
Jack Prince	Mankato Location - 56001	Edit
Myrna Loy	Minneapolis Location 55401	Edit
Connie Burns	Osseo Location 55369	Edit

Public View: Search Results



- If your agency has multiple locations, each location will show up as its own record in the Assister Directory.
- If you check your directory listing and don't see a location, make sure you have staff assigned to that location.
- If a location shows up you don't want listed, review your staff assignments to reassign staff to another location.

Name	Contact Info	Languages
Karl Planter Navigators	Osseo Location 55369 108 7th Ave NE Osseo MN 55369 888-888-8888 Osseo@karlplanternavs.org	English, Arabic, Armenian
Karl Planter Navigators	Minneapolis Location 55401 Contact us for appointment Minneapolis MN 55401	Cantonese
Karl Planter Navigators	Olmsted Location 55912 1515 Happy Drive Austin MN 55912	English
Karl Planter Navigators	Mankato Location - 56001 2200 Adams Street Mankato MN 56001 777-777-7777	Mandarin

Public View: Location Details

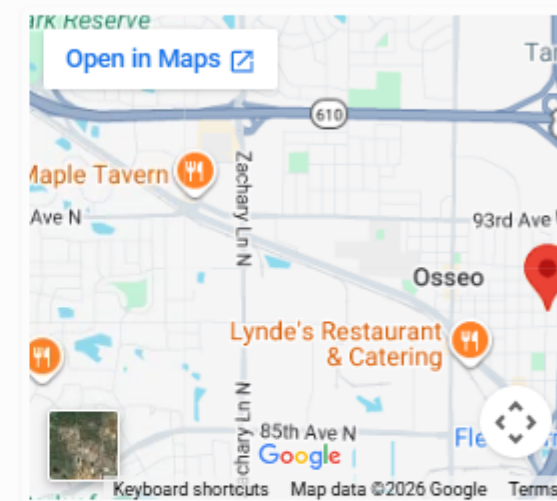
- When a consumer selects a particular location, the details will display the information from that location's record.
- If anything is incorrect, use the Entity Manager portal to update the information for the location.

Karl Planter Navigators

108 7th Ave NE, Osseo, MN, 55369
888-888-8888
Osseo@karlplanternavs.org

Languages Spoken	English, Arabic, Armenian
Languages Written	English, Cambodian, Hmong
Hours of Operation	Monday 08:15 am-01:00 pm Tuesday 08:15 am-01:00 pm Wednesday 08:15 am-01:00 pm Thursday 08:15 am-01:00 pm Friday 08:15 am-01:00 pm Saturday Closed Sunday Closed

"Karl Planter Navigators" has 3 MNsure Navigators
[Show Navigators](#)

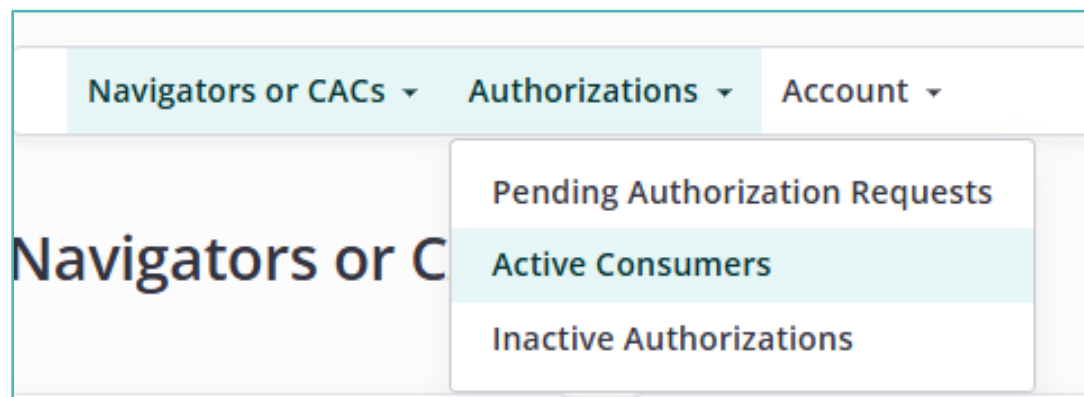


Managing Agency Consumers

All Agency Authorizations



- When a consumer set up an association with a navigator/CAC in MN-EES, they become an active individual/consumer with that navigator/CAC.
- The Entity Manager can see all consumers associated with any certified staff by selecting “Active Consumers” under “Authorizations”.



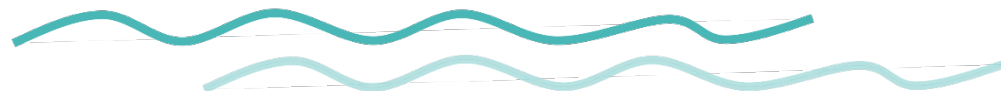
View Individual Consumers



Jerry Towson	Application Year	2026 (2 members)	Household not enrolled in a plan >
Household Case ID MN100011460	Application Status	Shop for Plans	
Navigator or CAC Connie Burns	Eligibility Status	Eligible	
☐ Select Household Composition & Eligibility Applicant Verifications More Actions ⋮			

Pink Ribbon	Application Year	2026 (2 members)	Household not enrolled in a plan >
Household Case ID MN100011416	Application Status	Start New Application	
Navigator or CAC Jared Peterson	Eligibility Status	Eligible	
☐ Select Household Composition & Eligibility Applicant Verifications More Actions ⋮			

- The Entity Manager can see detailed information for any associated consumers, as well as act on behalf of the consumer.
- The Entity Manager can also see which navigator/CAC the consumer is associated with.



Actions: Export Consumer Lists

Export data

1 selected Select all on this page Transfer Selected **Export Consumer List**

☐ Export currently selected consumers (1)

☐ Export all consumers in search results (4)

☐ Export entire list of your consumers (All Navigator or CACs)

☐ Export Book of Business for an Navigator or CAC

Format

☒ XLS (Microsoft Excel)

☐ CSV

You are attempting to download consumer information. You must agree that you will follow MNsure's privacy and security standards to continue.

☐ I agree

Cancel

Export

- Entity Managers can export consumer lists.
 - The entire list of active consumers for the agency.
 - The list of consumers for a specific navigator/CAC.
 - A specific list of selected consumers.
 - A list of consumers resulting from a search.
- You must agree to MNsure's privacy and security standards before you can select the export type.
- The export will include basic information, such as consumer name, contact information, plan enrollment information.

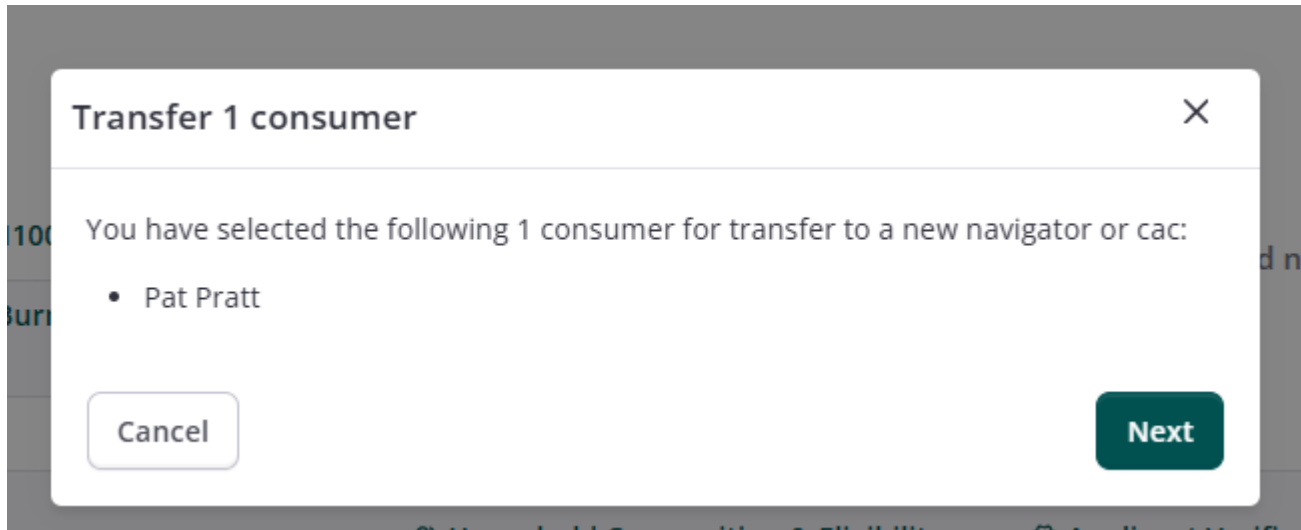
Actions: Transferring Consumers



- Entity Managers can transfer consumers between certified staff by viewing the list of “Active Consumers.”
- Transfer a single consumer by selecting “Transfer Consumer” from the “More Actions” option. Or transfer multiple consumers by selecting them and then clicking “Transfer Selected.”

A screenshot of the MNSure web application interface. At the top, it says 'Showing 1-7 of 7 items'. Below this is a navigation bar with 'Previous', '1', and 'Next' buttons. To the right, it shows '1 selected' and buttons for 'Select all on this page', 'Transfer Selected' (highlighted with an orange box), and 'Export Consumer List'. The main content area displays a consumer profile for 'Cindy Beach' with Household Case ID 'MN100011459'. It lists 'Application Year' as '2026 (2 members)', 'Application Status' as 'Shop for Plans', and 'Eligibility Status' as 'Eligible'. A dropdown menu for 'Navigator or CAC' shows 'Connie Burns'. At the bottom left, a 'Select' button with a checkmark icon is highlighted with an orange box. On the right, a 'More Actions' dropdown menu is open, showing options: 'View Details', 'View Household Details', 'Transfer Consumer' (highlighted with an orange box), and 'Mark As Inactive'. At the bottom of the interface, there are links for 'Household Composition & Eligibility' and 'Applicant Verifications'.

Actions: Transferring Consumers



- Once you select the consumers to be transferred, you will be asked to confirm the names of the consumers you are transferring.

Actions: Transferring Consumers



Transfer 1 consumer

Search for an navigator or cac to transfer to

First name

connie

Last name

Site

Select One

Email address

Certification number

Clear all

Search

Select an navigator or cac and click Next

Select

Navigator or CAC name	Status	Email address	Site
Connie Burns	Active	infoconnieburns123@Yopmail.com	108 7th Ave NE, Osseo, MN 55369

Previous

1

Next

Back

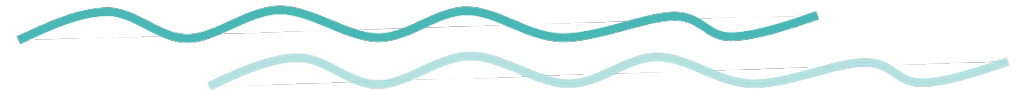
Next

- You will then need to select which navigator/CAC to transfer the consumers to.
- You can search for a specific staff member and then select them and click “Next” to make the transfer.

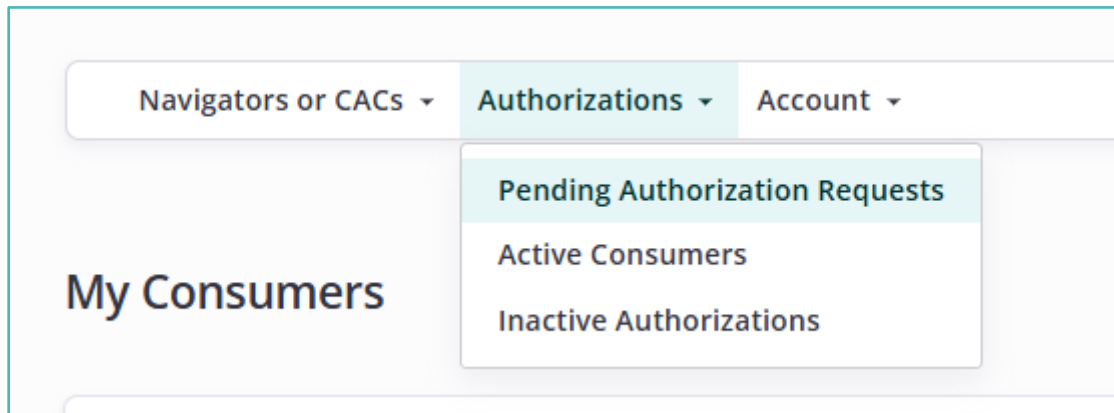
Actions: Transferring Consumers

A screenshot of a web application showing a "Confirm transfer" modal dialog box. The dialog has a title bar with the text "Confirm transfer" and a close button (X) in the top right corner. The main content area of the dialog contains the text "You will be transferring 1 consumer to Connie Burns" followed by a bulleted list containing the name "Pat Pratt". At the bottom of the dialog, there are two buttons: a light blue "Back" button on the left and a dark teal "Confirm" button on the right. The background of the application is partially visible, showing a sidebar with navigation links like "Household Composition & Eligibility" and "Applicant Verification".

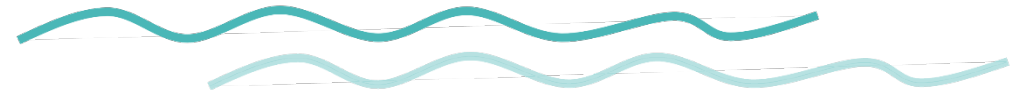
- You will be asked to confirm the name of the navigator/CAC and the names of the consumers to complete the transfer.
- If the information is not correct, select “Back” to make changes.



Monitoring Pending Consumer Requests



- Entity Managers can also monitor pending authorization requests from new consumers. These are consumers who have found a navigator/CAC in the Assister Directory and sent an electronic request to work with that individual.
- To see all pending requests, go to “Pending Authorization Requests” under “Authorizations.”



Viewing Pending Consumer Requests



- Entity Managers will see a list of all outstanding pending requests from consumers, including the date the request was sent and the navigator/CAC requested.

Pending Requests

5 Pending Requests

Refine Results By (reset all)

Individual Name

Navigator's or CAC's Name

Received On

From:

Individual Name	Received On ↓	Navigator's Or CAC's Name
Cindy Williamson	10/12/2026	Connie Burns
Noel Smith	10/06/2026	Connie Burns
Boyfriend Yamal	07/22/2026	Paula Jones
girlfriend yamal	07/22/2026	Connie Burns
Peter Benson	07/16/2026	Paula Jones

Acting on Pending Consumer Requests



Noel Smith	10/06/2026	Connie Burns	⋮
Boyfriend Yamal	07/22/2026	Paula Jones	Accept
girlfriend yamal	07/22/2026	Connie Burns	Decline

- The Entity Manager can “Accept” or “Decline” requests on behalf of their staff.
- If the navigator/CAC requested is not available, the Entity Manager can accept the request and then transfer the consumer to an available navigator/CAC for assistance.