Agency Management Program (AMP)

April 2019

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What is AMP?

- The Agency Management Program (AMP) is an on-line self-service agency management tool for MNsure's navigator and CAC agencies.
- AMP is how your agency:
  - Adds new staff or inactivates existing staff
  - Updates staff and agency information
  - Make changes to assister portal and assister directory information
  - Assigns and updates the agency's authorized contacts
  - Monitors staff certification and recertification status
  - Completes the contract renewal process

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Access to AMP

- Three authorized contacts at your agency can create an AMP account and manage agency information:
  - Agency Administrator/Primary Contact
  - Authorized Representative/Contract Manager
  - Signature Authority (is required to sign the agency's renewal application and contract)
- Note: For some agencies, the same individual may fill all three roles

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MNsure Contract Renewal Process

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Contract Renewal Overview

- All MNsure contracts with navigator and certified application counselor agencies expire June 30, 2019.
- The new 3-year contracting period will begin July 1, 2019 and run through June 30, 2022.
- To continue as a navigator or CAC partner after June 30, 2019, agencies must complete and submit an application through AMP.
- The application will have four sections:
  - Agency information
  - Authorized agency contacts
  - Additional application questions
  - Data privacy and security practices

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Contract Renewal Process

- Step 1. Agency submits an application
  - You will be notified when the application is available in AMP – likely early May.
  - **ANY** of your three authorized contacts can fill out the application sections.
  - **ONLY** your signature authority can electronically sign and submit the application.
  - Your agency must submit the application by the announced deadline – likely mid-May.
- Step 2. MNsure reviews application
  - MNsure staff will review the completed application. We will contact the agency if there are any questions.
  - MNsure will notify agency if any responses disqualify them from renewing their contract.

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Contract Renewal Process

- Step 3. Agency signs new contract
  - If your application is approved, MNsure will email your signature authority a contract (PDF) for signature.
  - Your signature authority must sign and return the contract to MNsure by email, fax or mail.
  - Signed contracts must be received no later than June 25, 2019.
- Step 4. MNsure executes new contract
  - MNsure's signature authority will sign the contract. The contract is NOT fully executed until MNsure has signed.
  - A copy of the fully executed contract will be emailed to the agency for your records.
  - The new contract will be effective July 1, or the date MNsure signs the contract, whichever is later.

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Avoid a Contract Gap

- April preparation:
  - Make sure **ALL** of your authorized contacts are correct in AMP with accurate email addresses
  - Have your signature authority set up an AMP account **NOW** so they are prepared when the process begins
  - **If your agency has special circumstances for signing contracts, please notify MNsure as soon as possible**
- May and June action:
  - Submit your application electronically by the announced deadline in mid-May
  - Make sure the signature authority listed in AMP is the individual that signs the contract
  - Return signed contract promptly, no later than June 25

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Creating and Logging in to Your AMP Account

Instructions available on Essential Tools:

Agency Management Program (AMP)

Create an AMP Account | Log in to AMP

Instructions for using AMP:

- Create an AMP Account
- Add Staff to Your Roster
- Update Staff on Your Roster
- Update Agency Information
- Monitor Staff Certification and Recertification
- Renew Contract (available May 2019)

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AMP Account Users

- Individuals with the following authorized contact roles for an agency have access their agency's account in AMP:
  - Agency Administrator/Primary Contact
  - Authorized Representative/Contract Manager
  - Signature Authority
- You are assigned to one of these roles in AMP in three ways:
  - At the time your agency completes an application to contract with MNsure
  - By an update to your agency's authorized contacts in AMP by another current AMP user
  - If there is no one currently with access to AMP, by submitting the Agency Authorized Contacts form to MNsure

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Step 1: Initiate an Account

- Go to Navigator One Stop, Essential Tools
  - https://www.mnsure.org/assister-central/navigator-one-stop/essential-tools/index.jsp
- Click on the “Create an AMP Account” link

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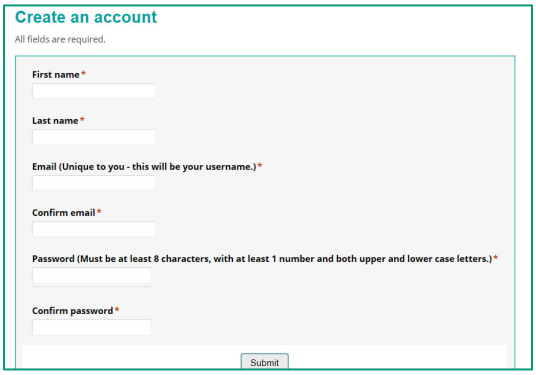
Step 1: Initiate an Account

- You will need to enter your first name, last name and email address exactly as it is entered in AMP.



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Step 2: Validate Your Email Address

- You will receive an email to validate your email address. You must click on the link in this email before you can log in to your account.
- The email will come from the address “mnsure-no-reply@caspio.com” with the subject: “Email Validation – Agency Management Program (AMP) account.”
- It may take several minutes for the email to arrive. Be sure to check your spam/junk mail folder before reporting a problem.

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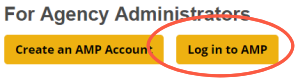
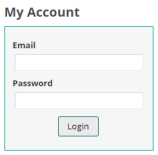
Step 3: Log in to Your Individual Account

- Go to Navigator One Stop, Essential Tools https://www.mnsure.org/assister-central/navigator-one-stop/essential-tools/index.jsp
- Click on the “Login to AMP” box



- Enter your email and password.



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Step 3: Log in to Your Individual Account

- You will be taken to the Account Management home screen. Any agency roles you have been assigned will appear under "Your agency accounts and roles."
- Click on "Manage agency" to sign in to the agency account. If you have multiple roles you may sign in using any role.

Your agency accounts and roles:

Agency Name: Example CAC Agency
Agency ID: N0268
Agency Type: CAC
User Role: Primary Contact/Account Administrator
Manage agency

Agency Name: Example Navigator Organization
Agency ID: N0267
Agency Type: Navigator
User Role: Primary Contact/Account Administrator
Manage agency

Note: If you are logging in to sign an application to contract or renew your contact with MNsure, you must log in under the Signature Authority role.

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Troubleshooting

- I logged into my account and there is no agency listed under "Your agency accounts and roles."
  - **DO NOT click on "Register a new agency"**
  - This means the email address you used to log in is not listed in one of the three authorized roles for the agency

Account Management

What would you like to do?

- Register a new agency
- Validate email address
- Change password
- Log out

- Solution:
  - Someone in your agency that IS in one of the three authorized roles can log in and update the authorized contacts
  - OR - send an email to the ARC at navigators.@mnsure.org and we will help you with updating your authorized contacts

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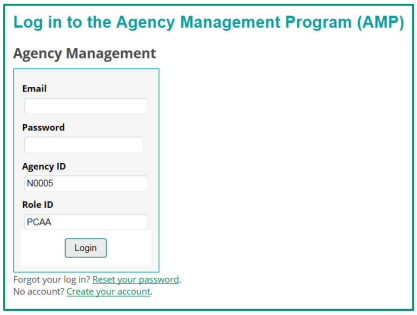
Step 3: Log in to Your Agency Account

- After clicking on “Manage Agency,” you will be asked to log in again. This is not an error, but a necessary step to ensure you are authorized to access this agency’s information.
- The system will autofill your Agency ID and Role ID and ask you to reenter your email and password. Use the **same** email and password you used to log in to your individual account.



Toubleshooting:
If the Agency ID and Role ID field are not auto-filled with values, you will get an error when you try to log in.

If this happens, log in again starting from the “Log into AMP” button on Essential Tools.

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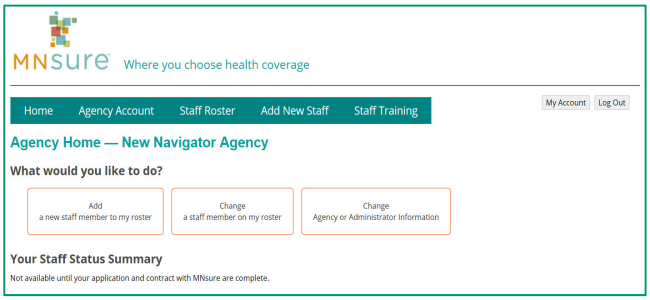
Step 3: Log in to AMP

- After logging in, you will land on the Agency Home screen.



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Updating Agency Information

Instructions available on Essential Tools:

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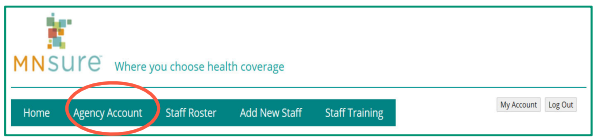
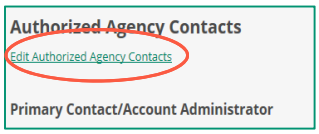
Updating Authorized Contacts

- To update your agency's authorized contacts, click on "Agency Account" from the top menu bar.



- Scroll down the page and click on the "Edit Authorized Agency Contacts" link.



- All fields in this section are required, unless marked optional.

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Updating Authorized Contacts

- When entering information for an agency contact, be sure to accurately spell their first and last name and use an email address that is unique to that individual.
  - Any individual that is assigned the role of Primary Contact, Authorized Representative or Signature Authority will have access to AMP to manage agency and roster information.
  - Once you have added them to AMP, the individual can create their own AMP account using the name and email address you entered. They should follow the same instructions we shared in this training.
  - When they log into AMP, they will be able to manage your agency account based on their role.
  - Once an individual is removed from a role, they will immediately lose access to managing your agency.

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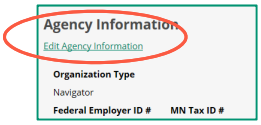
Updating Other Agency Information

- To make changes to your organization's legal name, address, phone, website or your SWIFT vendor number for payment, click on "Agency Account" from the Agency Home screen.
- Click on the "Edit Agency Information" link.



- If any fields with an asterisk (*) are blank, you will need to fill them in before you can update your record.
- Note: Any changes you make to your organization name, address or phone number will **not** automatically be updated for your individual staff members. You will need to update that information in each individual's record.

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Adding Staff to Agency Roster

Instructions available on Essential Tools:

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Instructions for using AMP:

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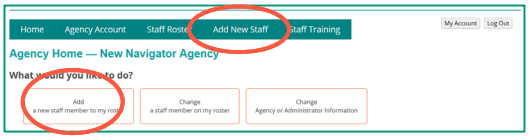
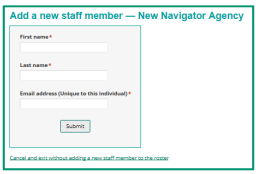
Step 1: Create a New Staff Member

- Click on “Add a new staff member to my roster” or “Add New Staff link”



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



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

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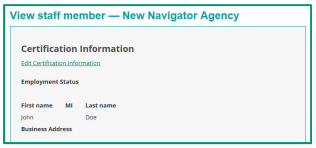
Step 2: Add Certification Information

- After clicking “Submit,” you will be taken to the “View staff member” screen where you can edit this individual’s information.
- Click on “Edit Certification Information”



- Complete all the required fields with an asterisk (*).
- This information should be the information MNsure can use to contact the individual assister.
- Click “Update” when you have completed the section.
- Note: MNsure cannot begin setting up a training account until this section has been completed.

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Step 3: Add Public-Facing Information

- Information in the “Public-Facing Information” section is used for both the Assister Directory and the assister portal.
  - This section **must be** completed for **all** navigators.
  - This section must be completed for any CAC that will be requesting an assister portal account.
- Click on “Edit Public-Facing Information”
- Complete all the required fields with an asterisk (*).
- Information listed here, such as address, phone number or email, may be different from what is listed for an individual’s “Certification Information.”
  - For example, you may choose to enter a central phone number and/or email to direct the public to a central place for screening.

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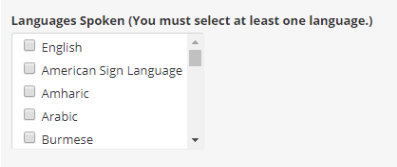
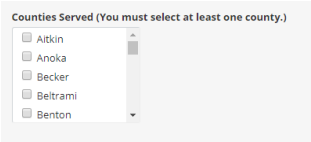
Step 3: Add Public-Facing Information

- Languages spoken: List any language the individual speaks fluently enough to provide services to a consumer. These language skills will be listed on the Assister Directory.



- Counties served: List all counties where the individual is able to provide in-person assistance to a consumer. Consumers can search by counties to find assisters serving their area.



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Step 3: 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.

Staff Roster — New Navigator Agency

	Last Name	First Name	Assister ID	Training ID	Employment Status	Certification Status	Assis
View	Doe	Jane		M02284813	Active	New	

- Once the Assister Resource Center (ARC) 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 sent.
- If a new staff member's "Certification Status" has changed from "New" to "Not certified," they can use their Training ID to log in to the MNsure Learning Center.

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Updating Staff Information

Instructions available on Essential Tools:

Agency Management Program (AMP)

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- Renew Contract (available May 2019)

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Contract Requirements

- REMEMBER, as outline in your contract, it is your duty to:
  - Maintain a roster of all employees, agents and volunteers who require certification to perform the services outlined in your contract.
  - Notify MNsure **without delay** when an individual on your roster is terminated, separates, or otherwise ceases to perform services under your contract.

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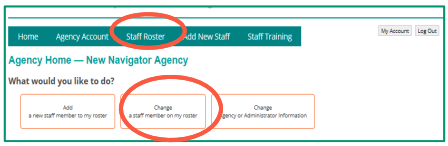
Updating Staff Information

- An agency can use AMP to update any of the following information:
  - Inactivate or reactivate staff
  - Update staff name and contact information
  - Update authorization to have an assister portal account
  - Update assister directory listing status and information
- To update staff, from the “Agency Home” screen, click on “Staff Roster” or “Change a staff member on my roster.”



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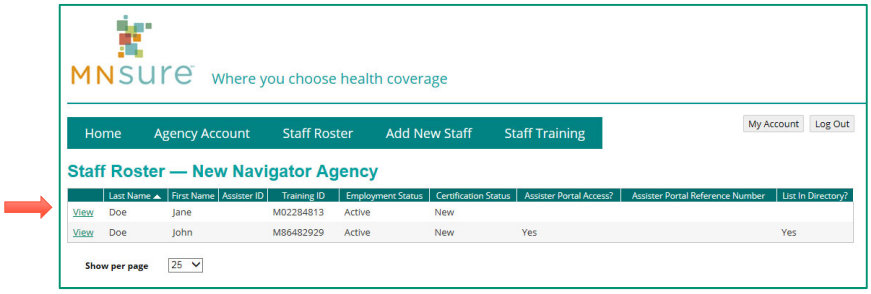
Updating Staff Information

- To edit the information for an individual staff member, click on the “View” link to the left of the name of the staff member.



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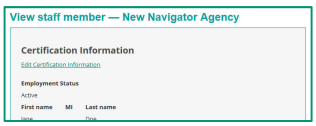
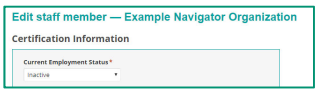
Inactivate or Reactivate Staff

- To inactivate a staff member, or to reactivate a staff member who was previously active, click on “Edit Certification Information” on the “View staff member” screen.



- Select the drop down under “Current Employment Status.”
  - Select “Inactive” to inactivate a staff member.
  - Select “Reactivate” to reactivate a staff member who was previously inactivated.



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Inactivate or Reactivate Staff

- If you are **inactivating** a staff member, do not change any other information.
  - MNsure will take any necessary action to suspend assister portal access
  - Navigators will automatically be immediately removed from the assister directory
- If you are **reactivating** a staff member, review all the other information under “Certification Information” and “Public-Facing Information” and update any information that has changed.
  - MNsure will notify the individual of any outstanding requirements to update their certification status.
- Click “submit” to accept updates.

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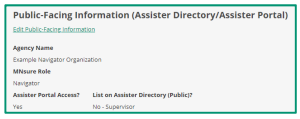
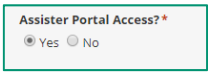
Update Assister Portal Authorization

- To approve access to the assister portal, or to remove approval, click on “Edit Public-Facing Information” on the “View staff member” screen.



- Under “Assister Portal Access?” select either “Yes” or “No.”



- If you select “Yes,” the individual must still complete required training before MNsure will create an assister portal account. If you select “No,” MNsure will suspend their assister portal account if they currently have one.

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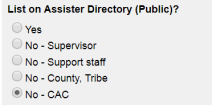
Update Assister Directory Information

- To add or remove a staff member from the assister directory, or to update their public-facing information, click on “Edit Public-Facing Information” on the “View staff member” screen.
- Scroll down to section: “List on Assister Directory (Public?)



- Select the appropriate option:
  - Navigators – **Must be** listed on the directory unless they do not directly serve consumers in their role as a supervisor or support staff.
  - County and Tribal entities – Are not required to be listed on the directory
  - CACs – Are not required to be listed on the directory

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Monitor Staff Information and Status

Instructions available on Essential Tools:

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Monitor Staff Information

- Resolve frequently asked questions:
  - Use AMP to find out Assister IDs, training IDs and assister portal reference numbers
  - Use AMP to check whether staff is authorized to use the Assister Portal and if they are listed on the Assister Directory
- Click on "Staff Roster" to view all of this information for your staff

Home | Agency Account | Staff Roster | Add New Staff | Staff Training

My Account | Log Out

Staff Roster — Example Navigator Organization

	First Name	Last Name	Assister ID	Training ID	Employment Status	Certification Status	Assister Portal Access?	Assister Portal Reference Number	List In Directory?
View	Helen	Navigator	999NAV100	C000056	Active	Certified	Yes	999999999	Yes

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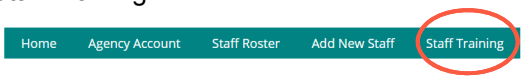
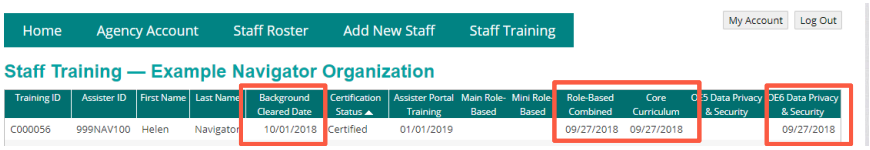
Monitor Certification

- Not certified? If the “Certification Status” shows as “Not Certified,” click on Staff Training.



- On the “Staff Training” page, you can see whether the individual has passed a background study and whether all required training has been completed. The column will show the date of completion.



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Troubleshooting Certification

- No Background Cleared Date?
  - If a background check consent form has not been submitted, download and submit the form available on Navigator One Stop.
  - If there is no date in the column, and it has been more than **10 business days** since the background study consent form was submitted, email the ARC to check on the status.
- No date shown for a required training?
  - If there is no date, the staff member should review their training records in the MNsure Learning Center to verify the course shows as “complete/all current” in their Learning Path Summary.
  - If the course does show as “complete/all current” in their Learning Path, MNsure has not yet updated their record to reflect completion. Please wait at least **five business days** after the individual completed the course before emailing the ARC to check the status.

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Troubleshooting Certification

- All requirements are completed, but it still shows as “Not Certified?”
  - Once a week, MNsure reviews all individuals who have met the certification requirements and processes their certification. Please wait at least **six business days** after the individual has completed the final requirement before emailing the ARC to check the status.
- Recertification
  - Prior to next open enrollment, all assisters will be required to complete recertification. At a minimum, recertification will include the annual data privacy and security training.
  - Agencies will be able to use AMP to monitor staff completion of recertification by checking the “Staff Training” page.
  - MNsure will provide instructions for tracking recertification when the process begins in late summer 2019.

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Resources

- Detailed instructions on using AMP are available on Navigator One Stop under Essential Tools https://www.mnsure.org/assister-central/navigator-one-stop/essential-tools/index.jsp

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