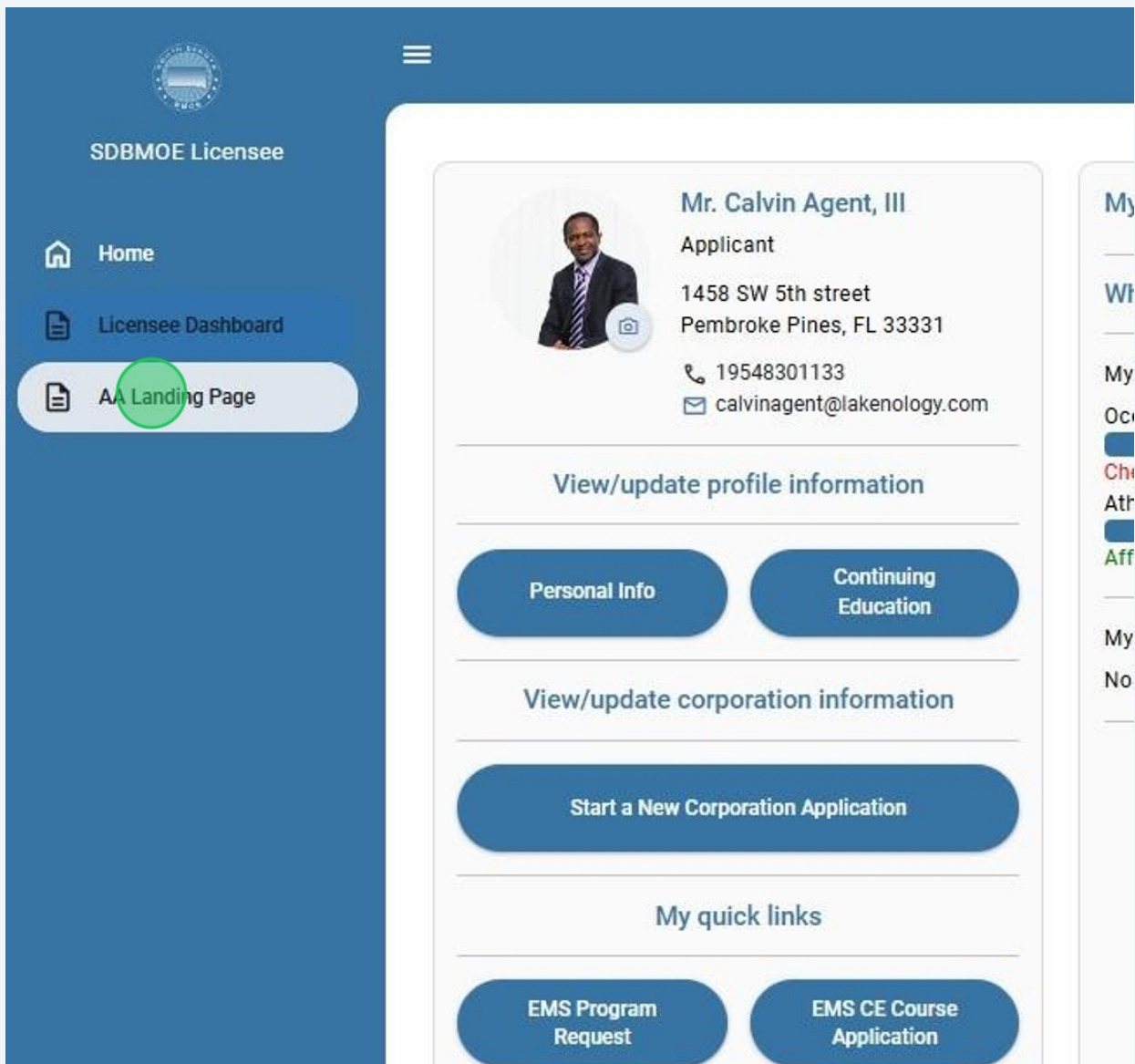# Authorized Agent: Approve, Remove, Export and Proxy

This How-To-Guide is intended for Authorized Agents that already have a MySD account and can login to their dashboard.
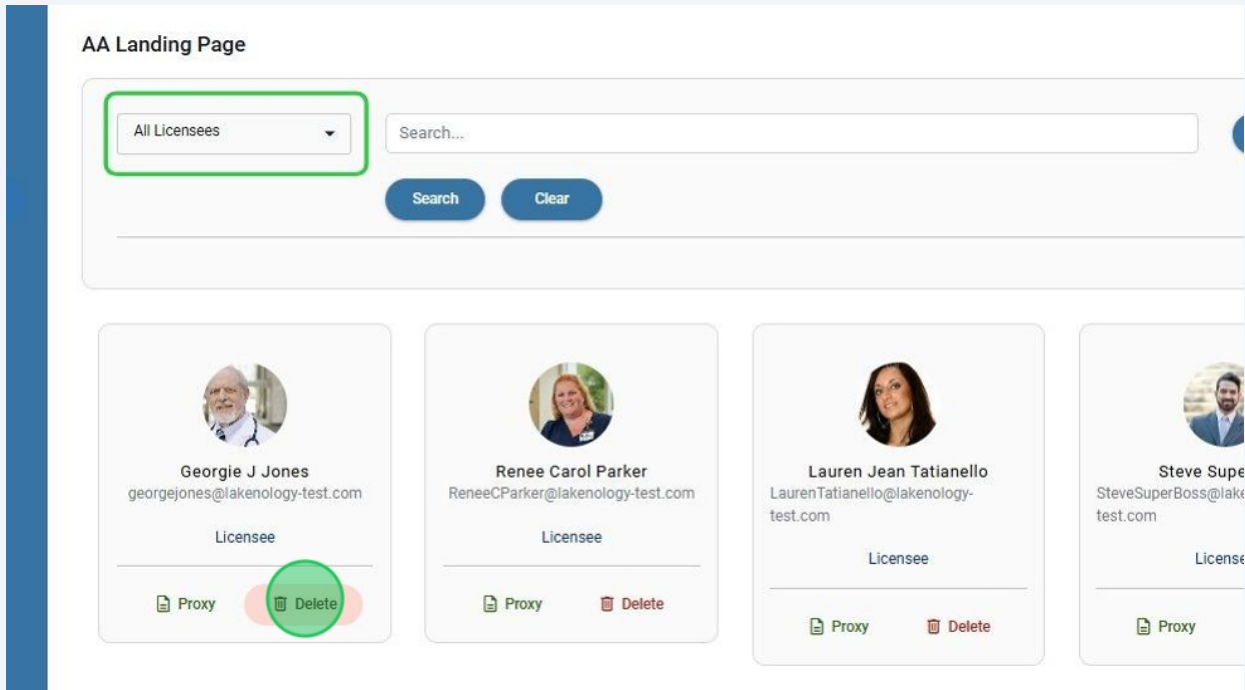
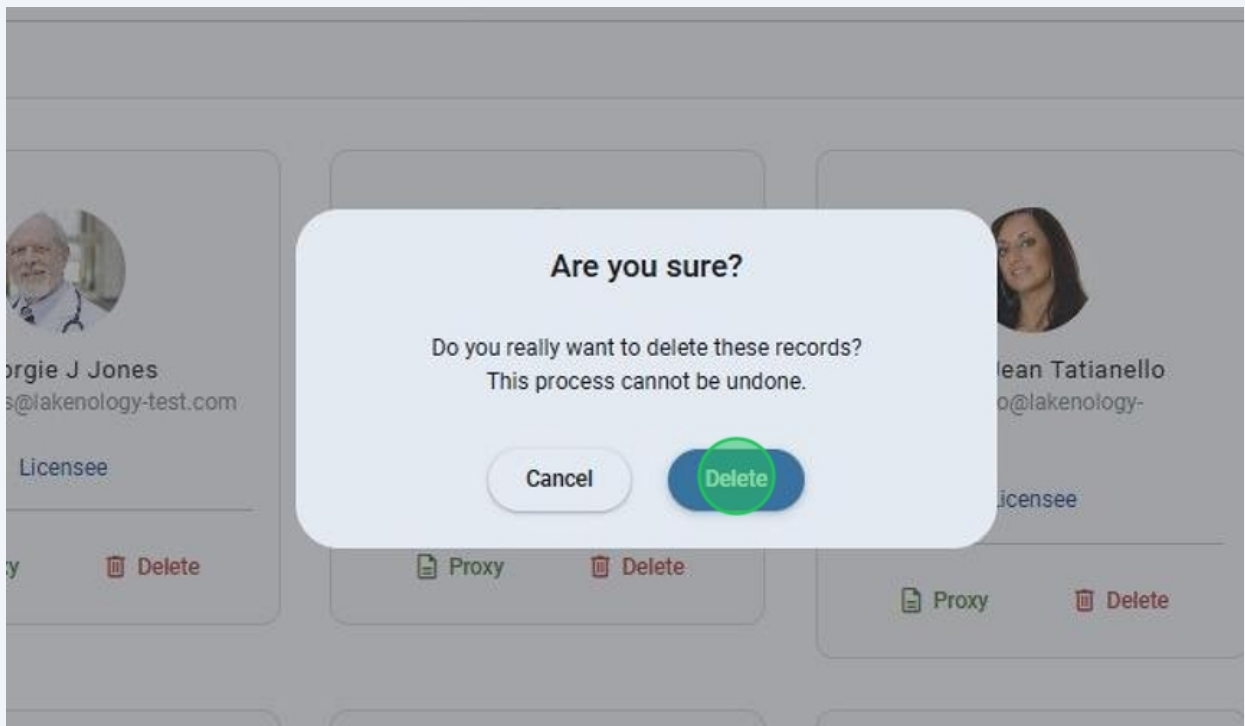**1** Login and Navigate to your dashboard. Click "**AA Landing Page**" from the left navigation menu

2 A list of **All licensees** assigned to you is displayed. (This includes requests that are still pending your approval). If you need to remove someone from your list for any reason, simply Click "**Delete**".

AA Landing Page

All Licensees ▼   Search...

Search   Clear

Georgie J Jones
georgejones@lakenology-test.com

Licensee

📄 Proxy   🗑 Delete

Renee Carol Parker
ReneeCParker@lakenology-test.com

Licensee

📄 Proxy   🗑 Delete

Lauren Jean Tatianello
LaurenTatianello@lakenology-test.com

Licensee

📄 Proxy   🗑 Delete

Steve Supe
SteveSuperBoss@lake
test.com

Licensee

📄 Proxy

3 You will be prompted "Are you sure?" prior to deletion. Click "**Delete"** to permanently remove them from your list of licensees.

orgie J Jones
s@lakenology-test.com

Licensee

y   🗑 Delete

Are you sure?

Do you really want to delete these records?
This process cannot be undone.

Cancel   Delete

📄 Proxy   🗑 Delete

lean Tatianello
o@lakenology-

icensee

📄 Proxy   🗑 Delete

4 There are several ways to limit your display if you do NOT want to see everyone on your list. Click on the **"Dropdown Arrow"** to see a list of your selection choices.
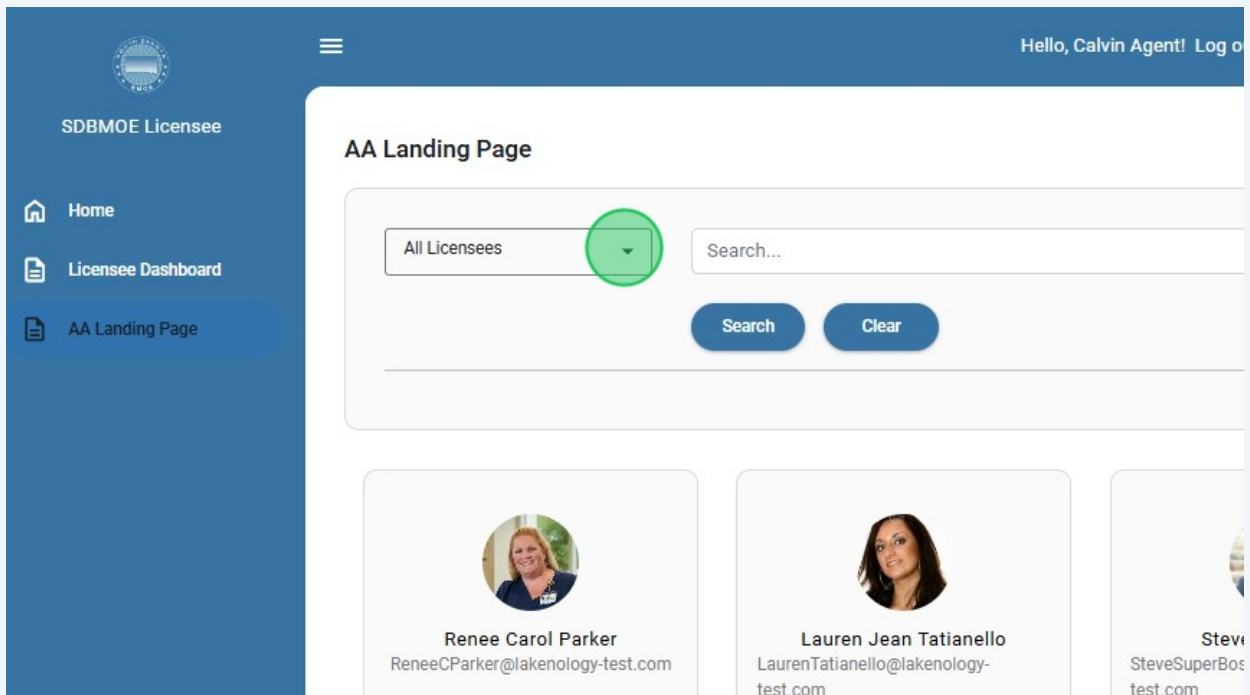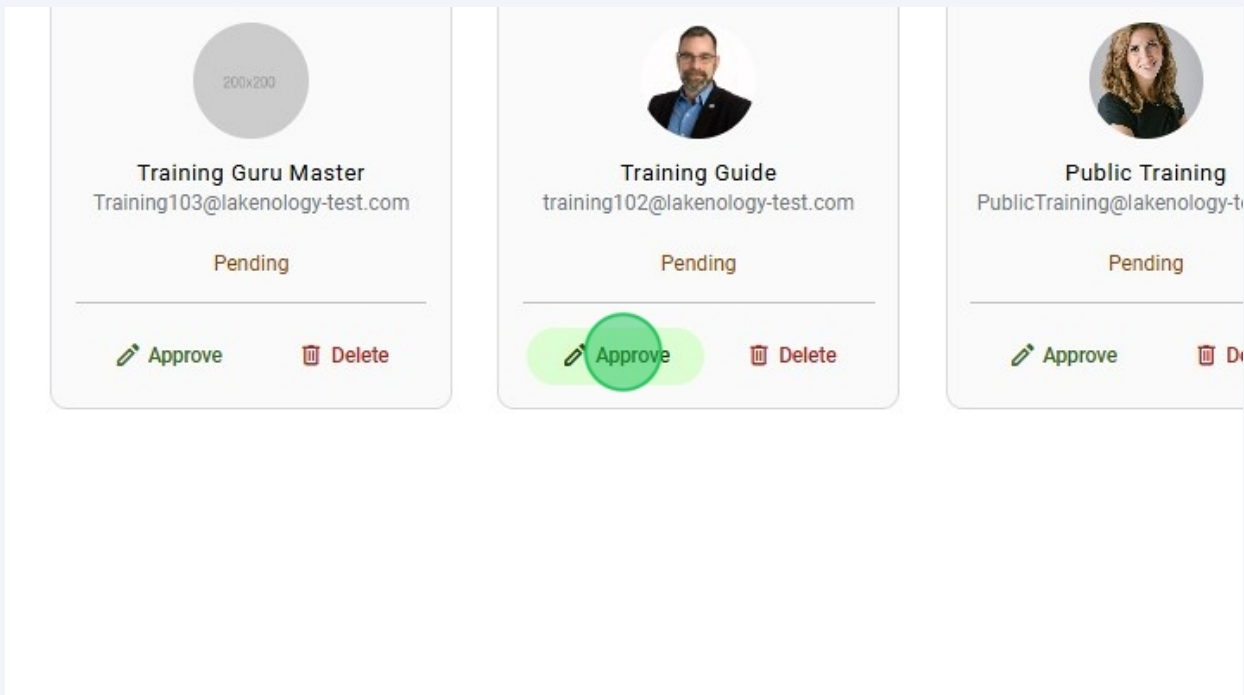

5 Click "**Pending Requests**" to see a list of licensees that requested you as their agent that are still pending approval. The licensees displayed on the page will change accordingly with each option selected.
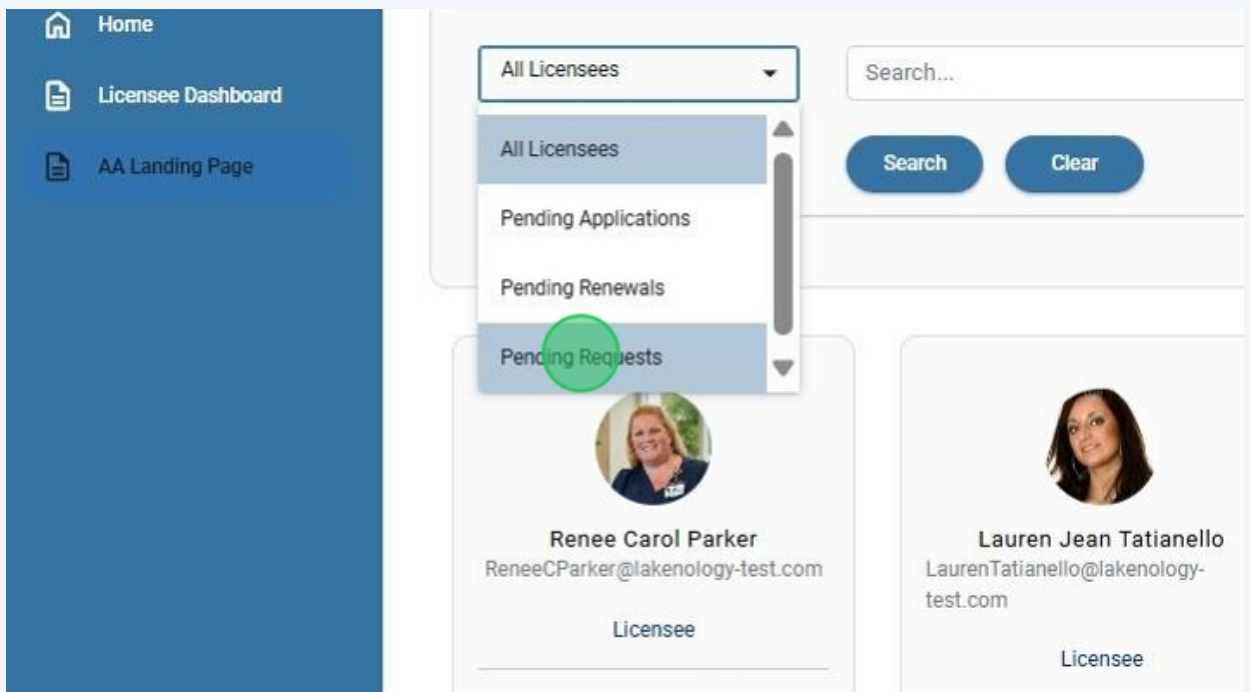
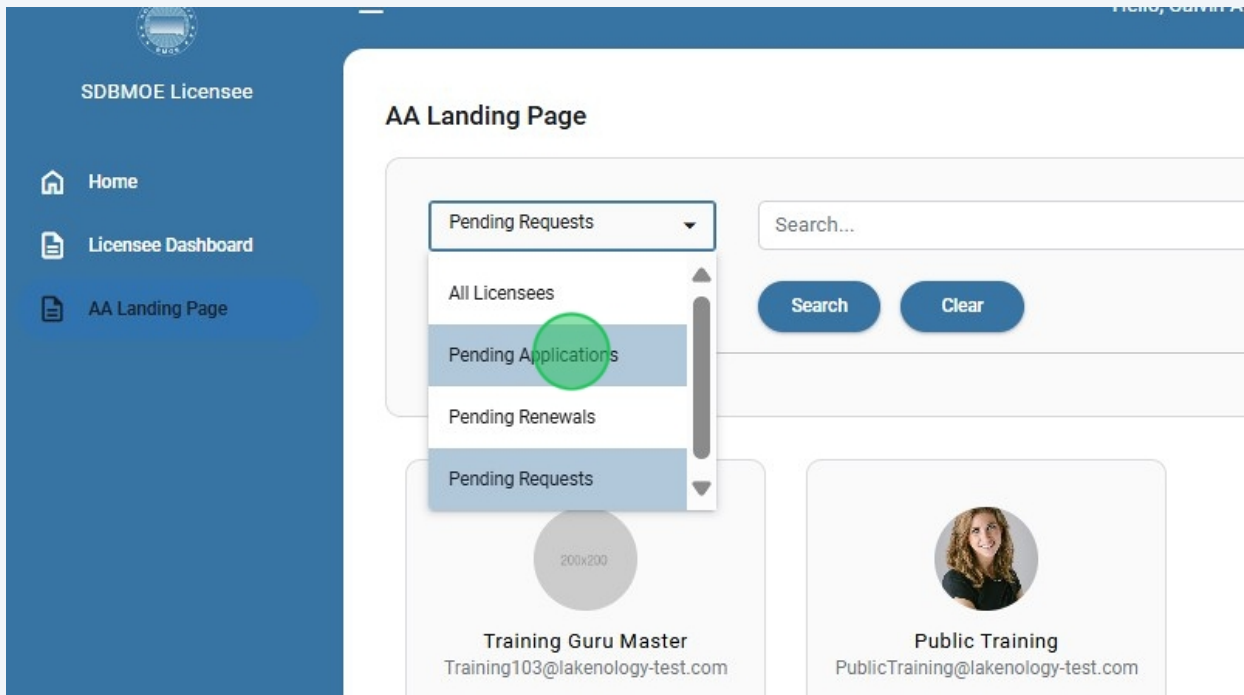**6** Click "**Approve**" on a licensee profile card to confirm any pending request.

7 Once approved, the licensee no longer appears in your list of pending requests. Click the "**dropdown arrow**" to view the remaining choices in the dropdown box.
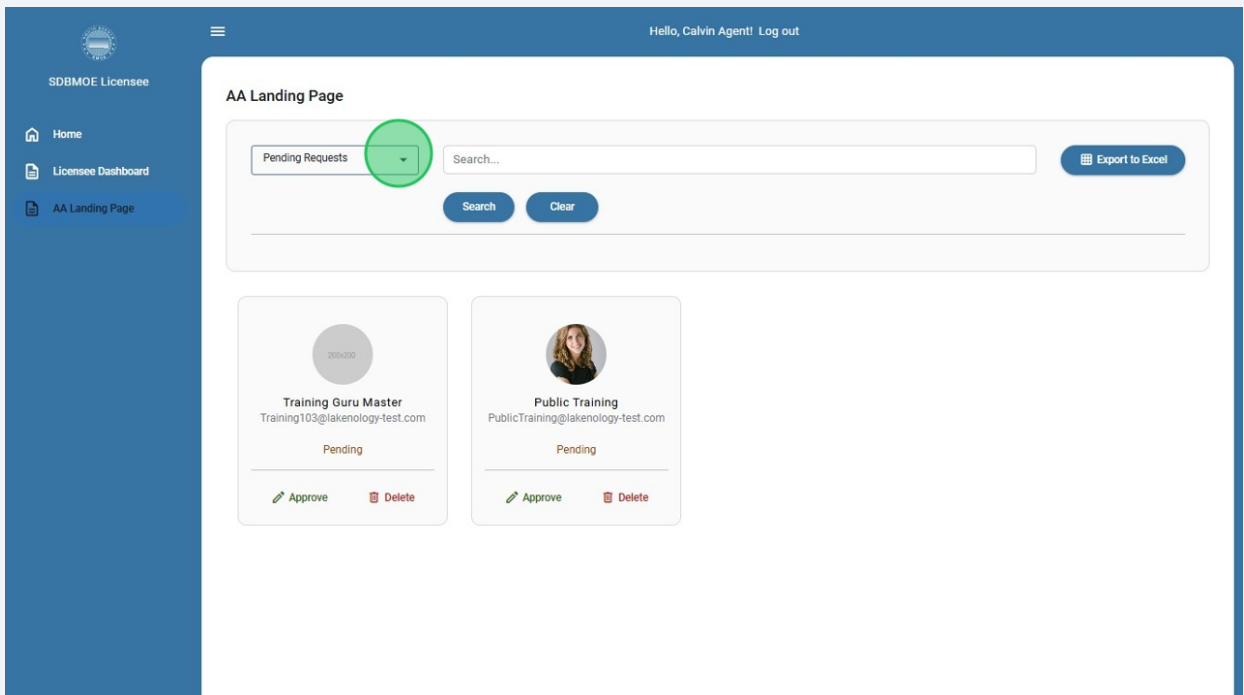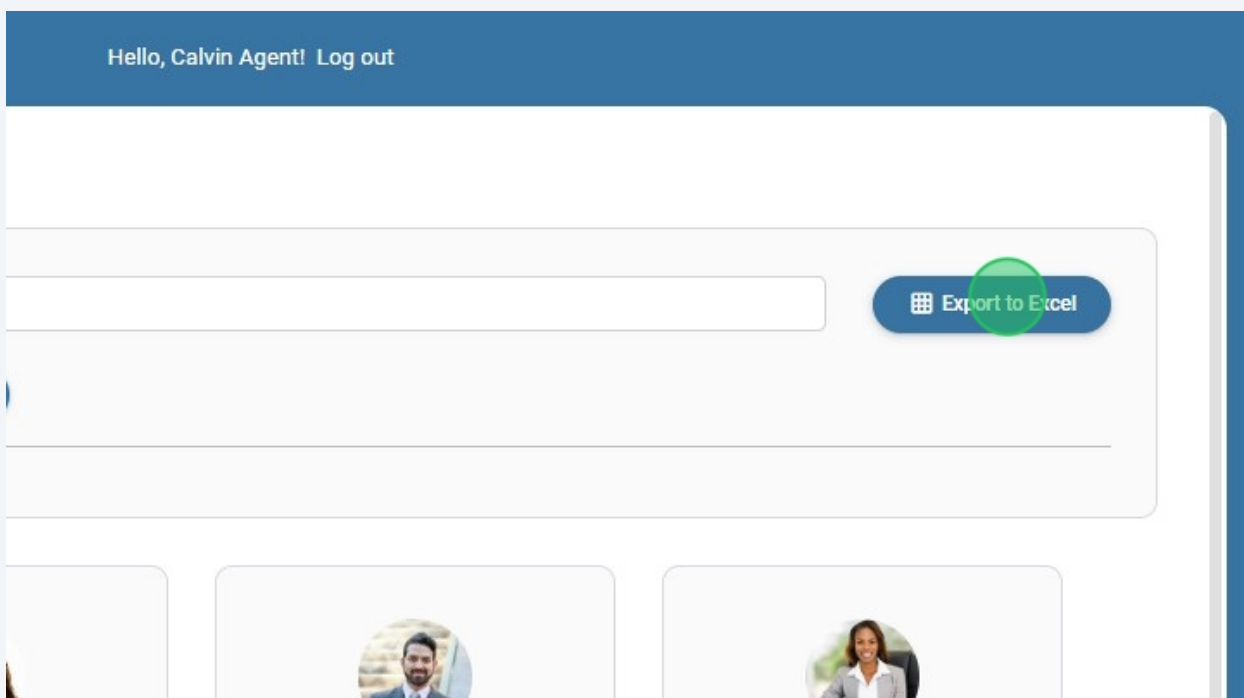
8 Click "**Pending Applications**" to display a list of only licensees that have an application in-progress.

9 Click "**Export to Excel**" if you would like to save licensee contact information in a separate spreadsheet. A **download .xls file** appears in a **new browser tab.** *Note: The data exported pertains to your current selection which is not necessarily all licensees on your list.*

10 Click "**Pending Renewals**" to display a list of only licensees that have a renewal application in-progress

AA Landing Page

| Home |
| Licensee Dashboard |
| AA Landing Page |

Pending Applications ▼   Search...

All Licensees

Pending Applications

Pending Renewals

Pending Requests

Search   Clear

Renee Carol Parker
ReneeCParker@lakenology-test.com

Licensee

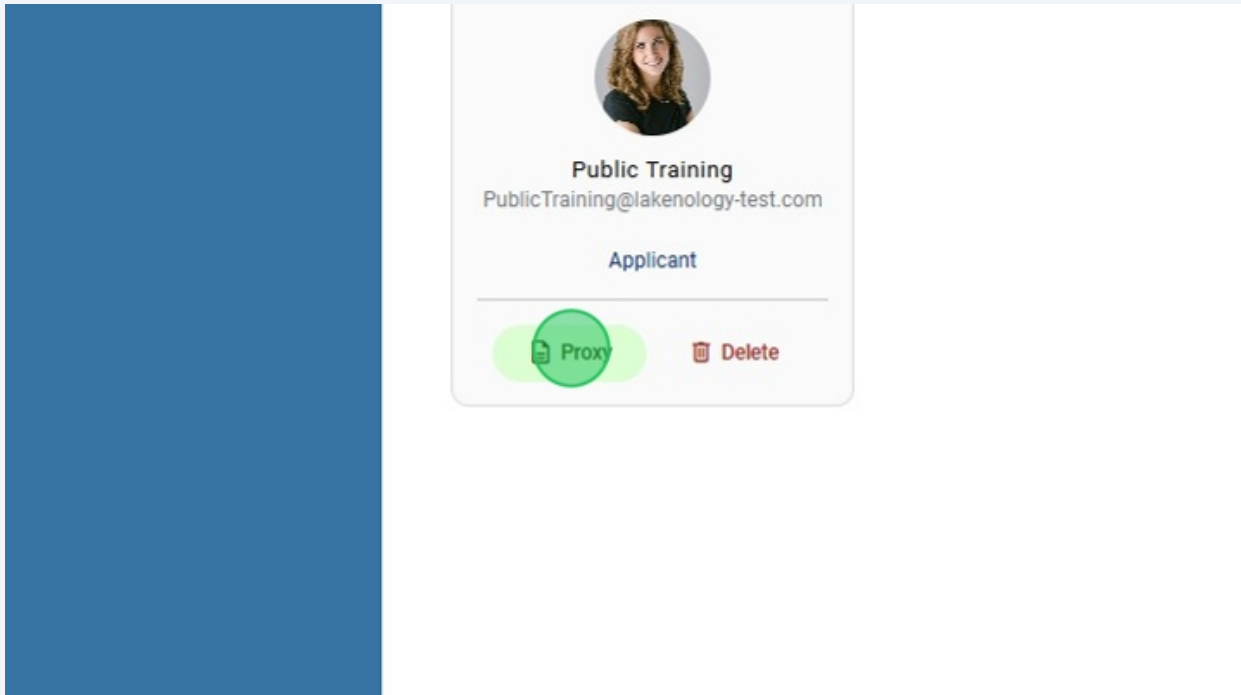**Lauren Jean Tatianello**
LaurenTatianello@lakenology-test.com

11 You can also use the **SEARCH** feature to find a specific licensee on your list. The search works within the selection you have chosen in the dropdown box. Choose "**All Licensees**" and enter a partial first and/or last name in the search box. Click "**Search**".
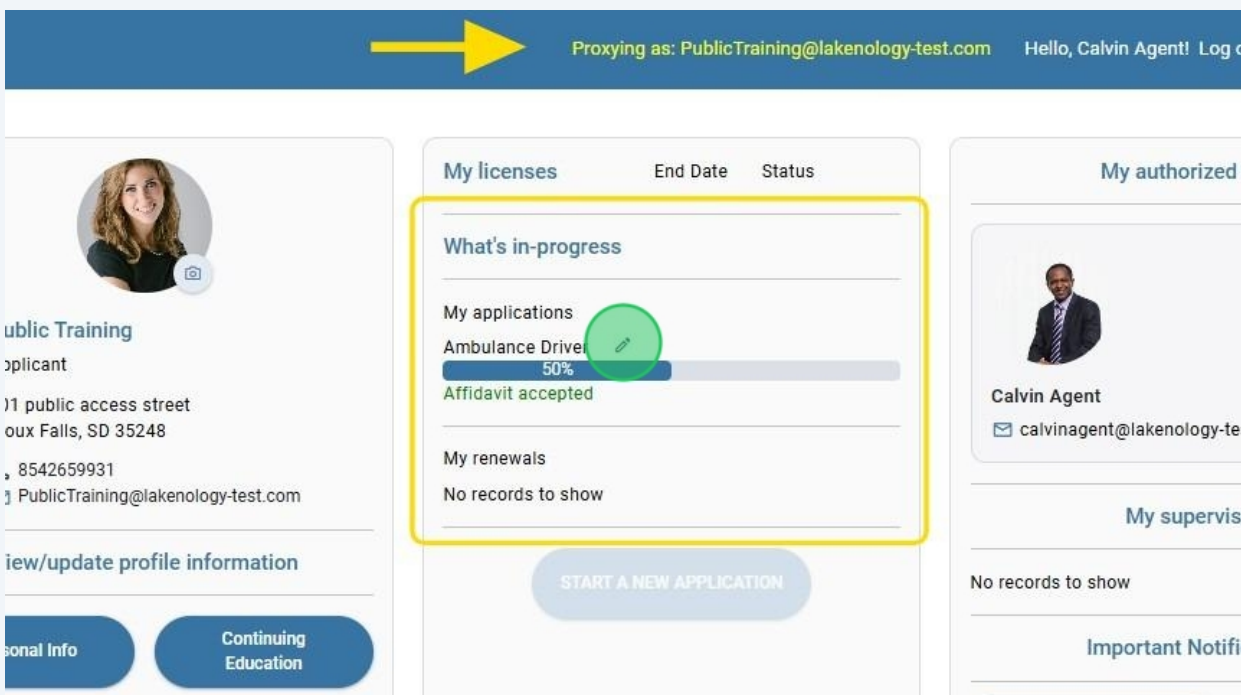
12 Only licensees that meet your dropdown and search criteria are displayed. Click "**Proxy**" if you want to act on behalf of that licensee as their **Authorized Agent.**
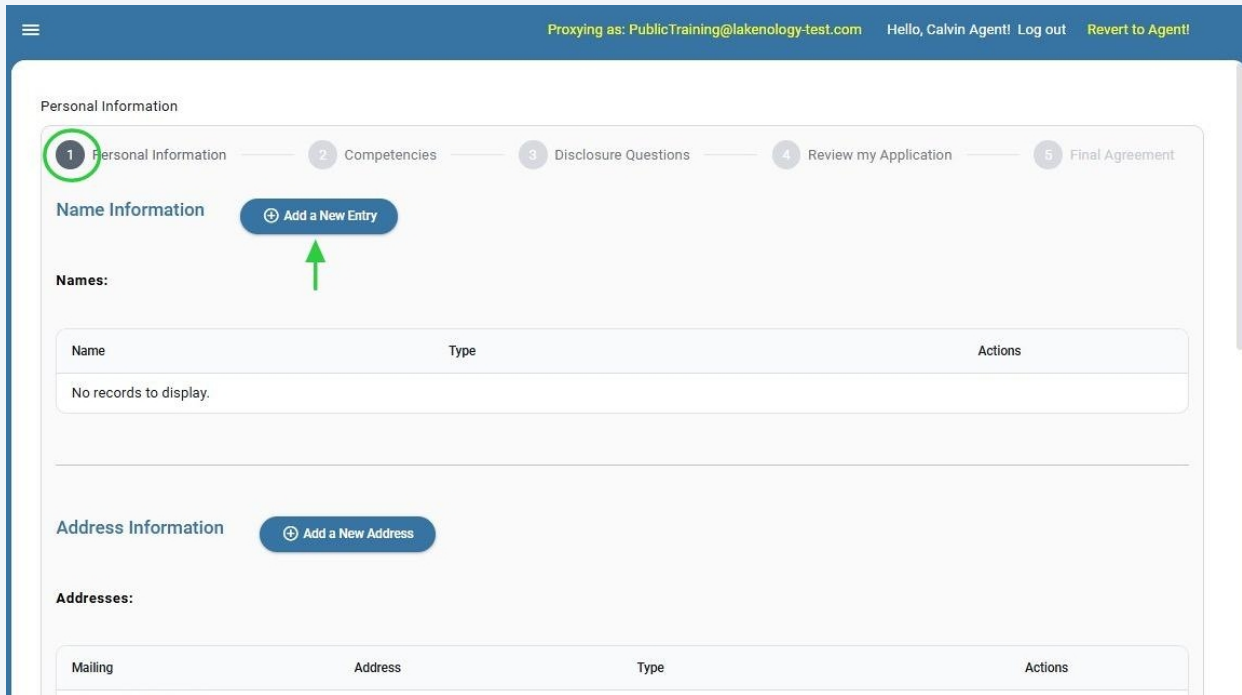

13 Notice the message that appears in yellow at the top of the page. "**Proxying as: Public Training@Lakenology-test.com**". The dashboard for the selected licensee is displayed. The application must be at **Affidavit accepted** or **Checklist** status before the Agent can take action on their behalf. Click the "**pencil icon**" to update the application

14 **The licensee must complete Part 1 of the application process** (Submit their Affidavit for approval) Once the affidavit is approved, the Agent can begin to complete those Tabs of the application prior to the **Disclosure Questions.** Start with **Tab 1:Personal Information.** Click "**Add a new Entry**" to add a current name. Continue adding all of the applicant's personal data on this tab.

Proxying as: PublicTraining@lakenology-test.com   Hello, Calvin Agent! Log out   Revert to Agent!

Personal Information

| 1 Personal Information | 2 Competencies | 3 Disclosure Questions | 4 Review my Application | 5 Final Agreement |

Name Information   ⊕ Add a New Entry

Names:

Name	Type	Actions
No records to display.		

Address Information   ⊕ Add a New Address

Addresses:

Mailing	Address	Type	Actions

15 When you have entered all of the required data for **Tab 1: Personal Information**, Click "**Submit Personal Information**" at the bottom of the page. This will automatically advance you to the next Tab. Each profession will have a different set of required tabs to complete. (Refer to the How-To-Guide **Application for Licensure: Part 2** for more detailed instructions on completing each tab of the application for licensure)

ber is required to facilitate reporting to the Federal Healthcare Integrity and Protection Data Bank (42 U.S.C. Sectio
pt 61) and for accurate identification under the federal and state child support enforcement law (42 U.S.C. Sectio
or reporting to the National Practitioner Data Bank (42 U.S.C. Section 1101 and 45 C.F.R. pt.60) and for other inve
ith State laws governing physician discipline or as otherwise required by State or Federal law.

tifiers (NPI) Is a Health Insurance Portability and Accountability Act (HIPAA) Administrative Simplification Standa
ttp://www.cms.hhs.gov/NationalProvidenistand/.

Submit Personal Information

16 Continue to **complete each Tab** of the application and Click **Submit** at the bottom of each page to advance to the next Tab. The tabs can also be completed in any order by clicking on the **Tab number/title** at the top of the application. This allows you to **start and stop** as needed for each applicant.

17 When all Agent-related Tabs have been completed, an "**Important Notice for Authorized Agents**" message is displayed. **STOP HERE**! Only the applicant can complete the next set of Tabs in the application process. You should notify the applicant that it is their responsibility to login and finish the disclosure questions Tab and submission of the application.

Notice the message that appears in yellow at the top far right of the page. Click "**Revert to Agent**" to exit the proxy session and resume transacting business as an Agent!

Proxying as: PublicTraining@lakenology-test.com   Hello, Calvin Agent! Log out   Revert to Agent!

| ...ation | ② Competencies | ③ Disclosure Questions | ④ Review my Application | ⑤ Final Agreement |

Important Notice for Authorized Agents

...ank you for your assistance with this application process. Please note that the current step you are attempting to access is required to be completed ...rsonally by the applicant. This is to ensure the accuracy and authenticity of the information provided.

...at You Need to Know:

...plicant-Only Step: This step of the application process is designed to be completed exclusively by the applicant.

...ason for Restriction: This may involve providing personal details, making declarations, or other actions that require direct input from the applicant.

...w to Proceed: Please inform the applicant that they need to personally complete this step. Provide them with any necessary instructions or links to ...cess this part of the application.