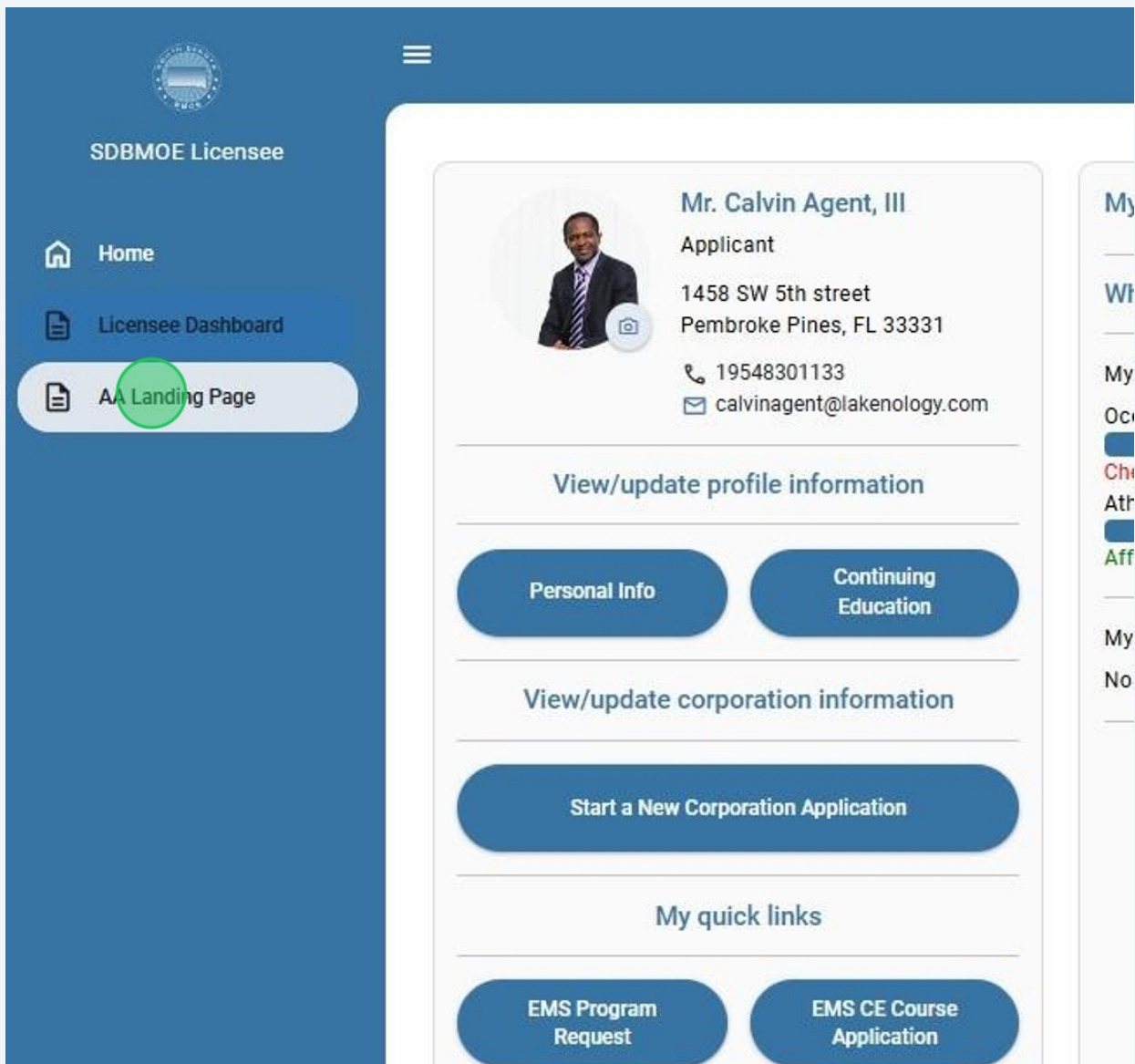


Authorized Agent: Approve, Remove, Export and Proxy

This How-To-Guide is intended for Authorized Agents that already have a MySD account and can login to their dashboard.

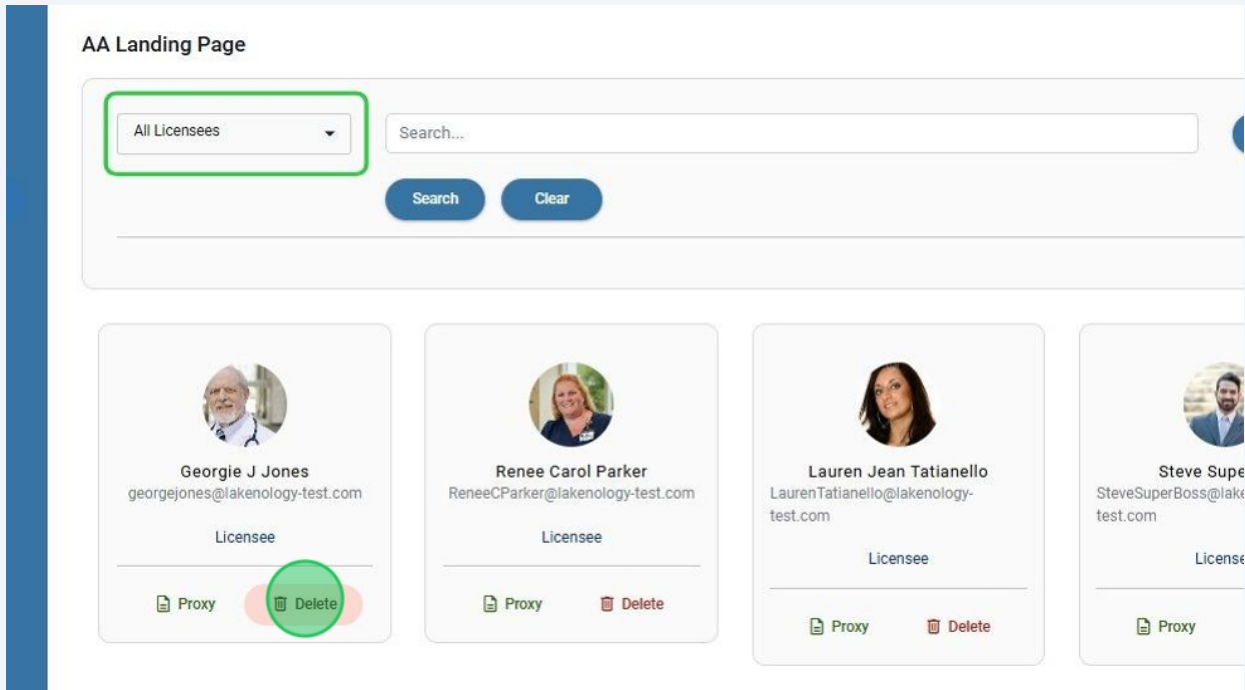
1

Login and Navigate to your dashboard. Click "**AA Landing Page**" from the left navigation menu



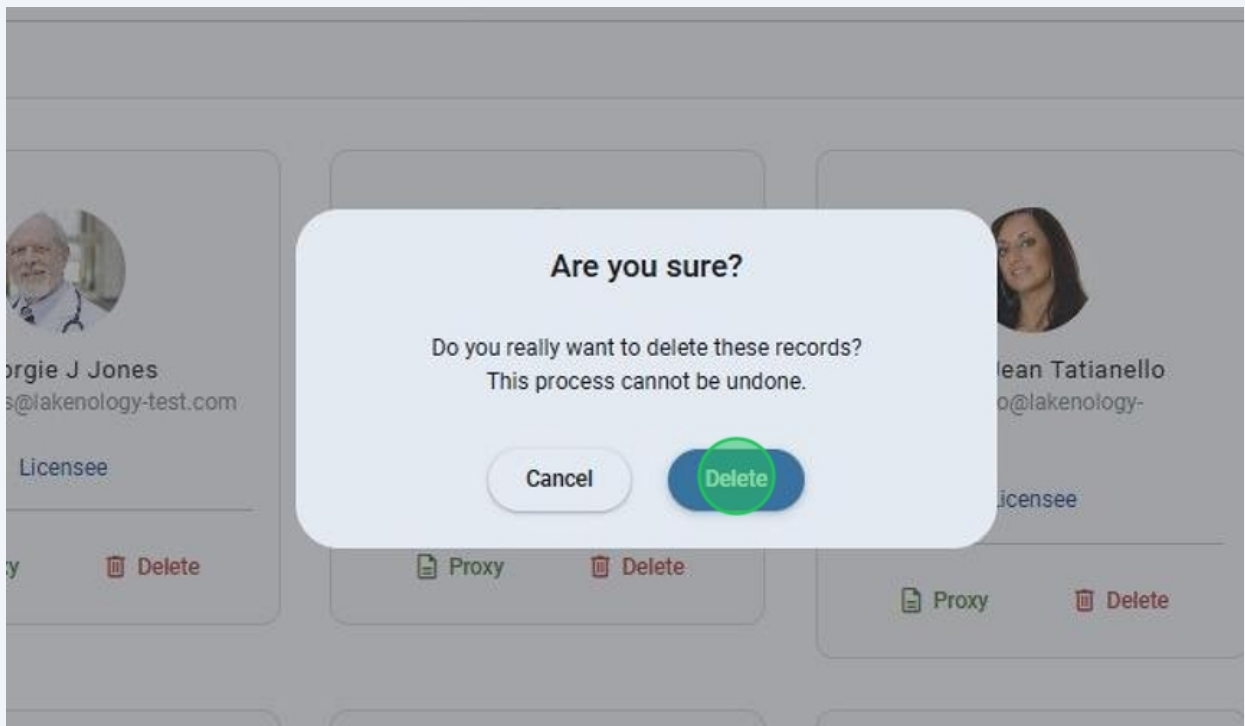
2

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**".



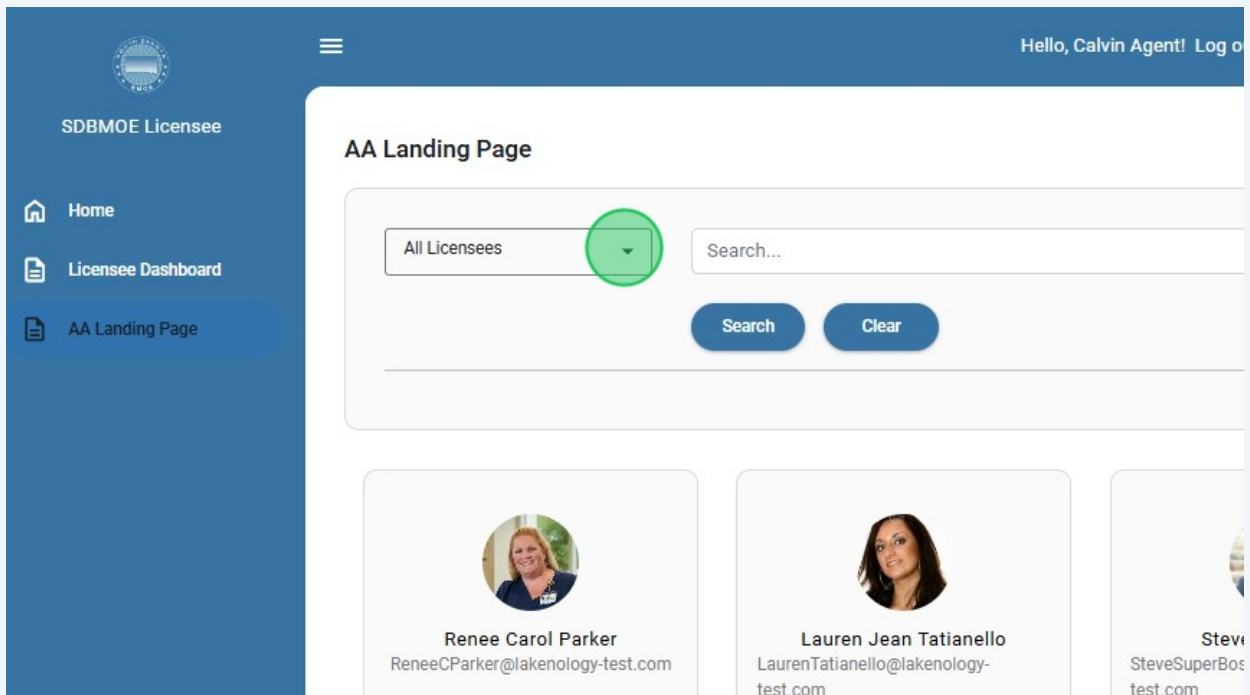
3

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



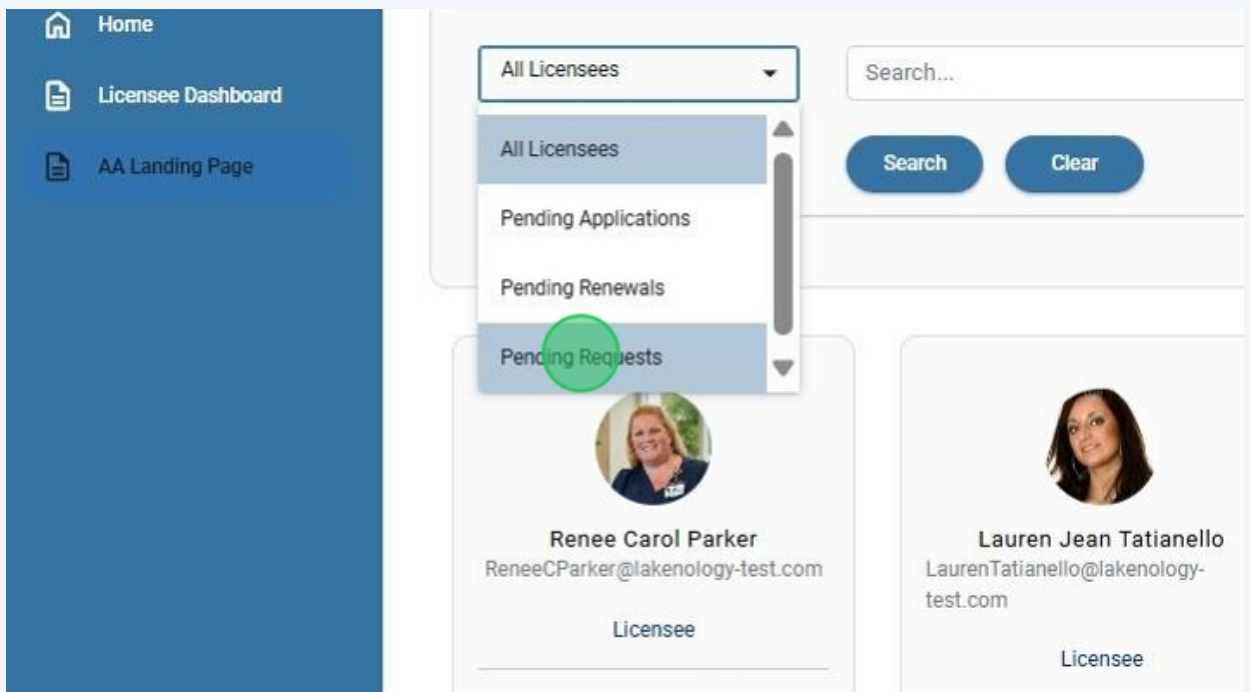
4

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.

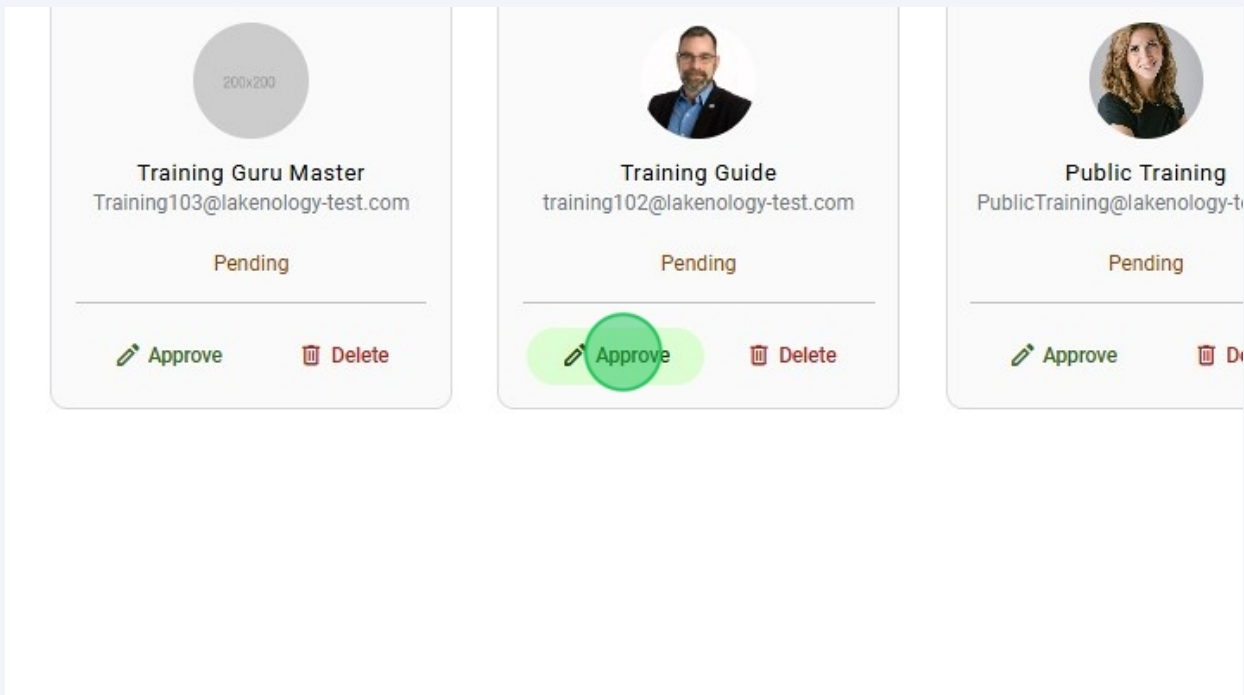


5

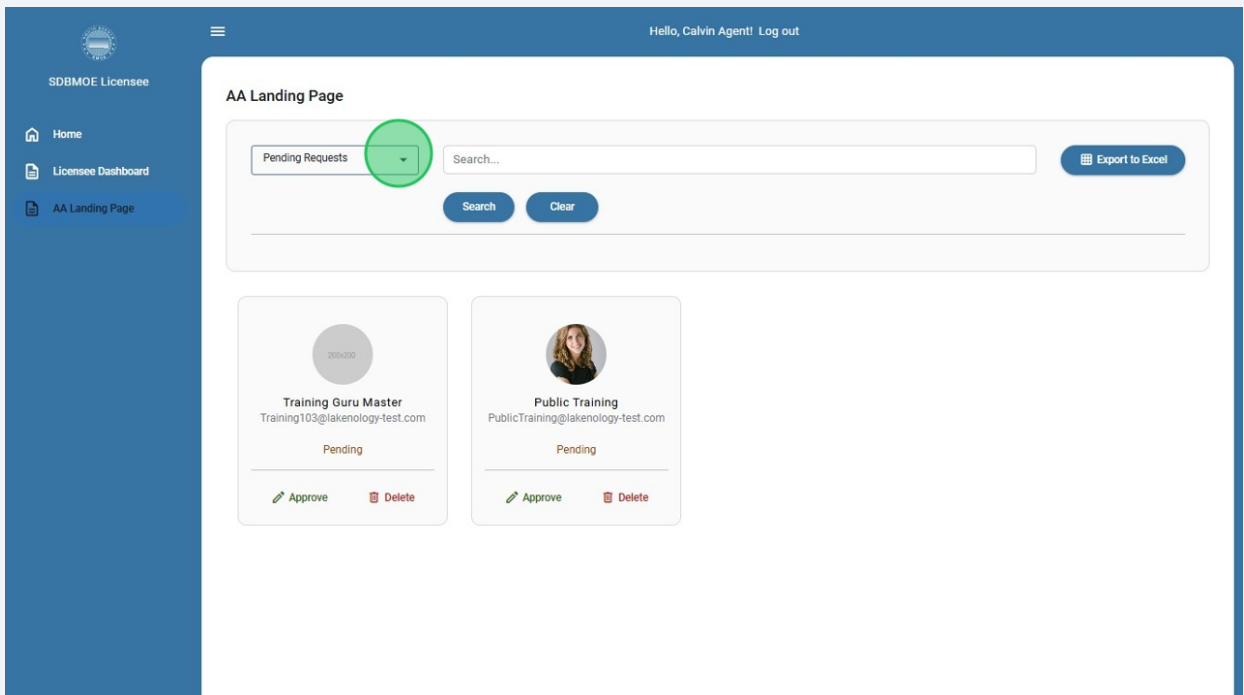
Click **"Pending Requests"** to see a list of licensees that requested you as their agent that are still pending approval. The licensees displayed on the page will change accordingly with each option selected.



6 Click **"Approve"** on a licensee profile card to confirm any pending request.

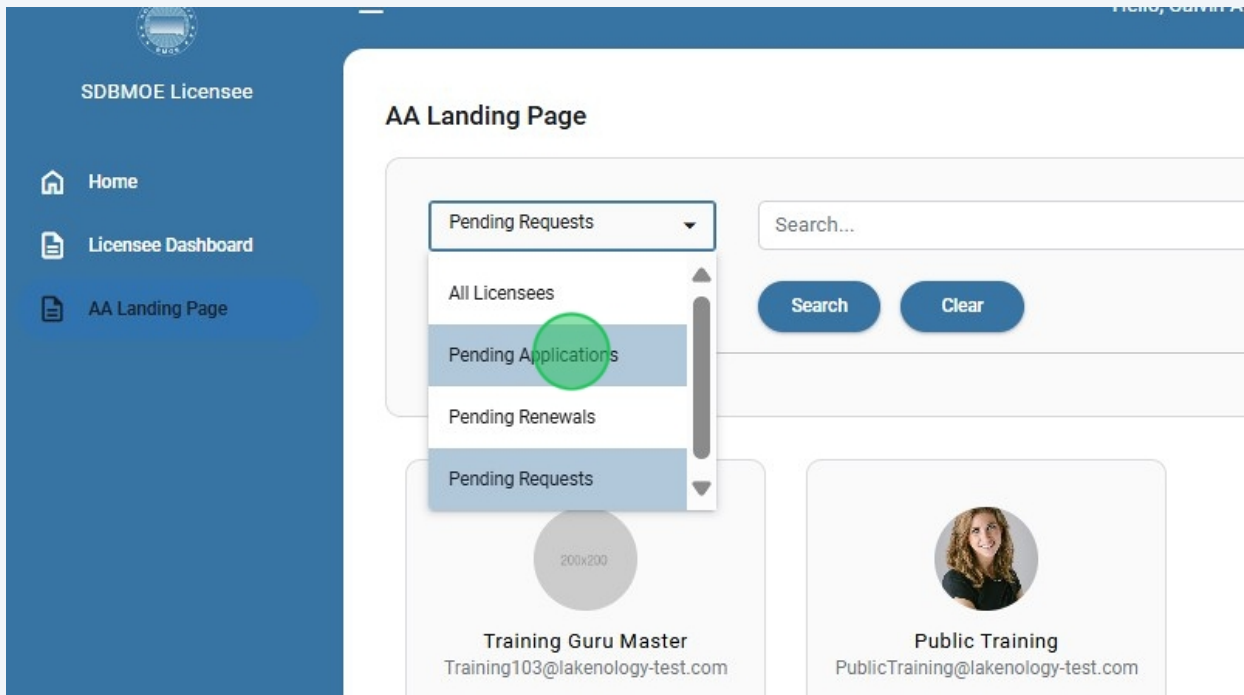


7 Once approved, the licensee no longer appears in your list of pending requests. Click the **"dropdown arrow"** to view the remaining choices in the dropdown box.



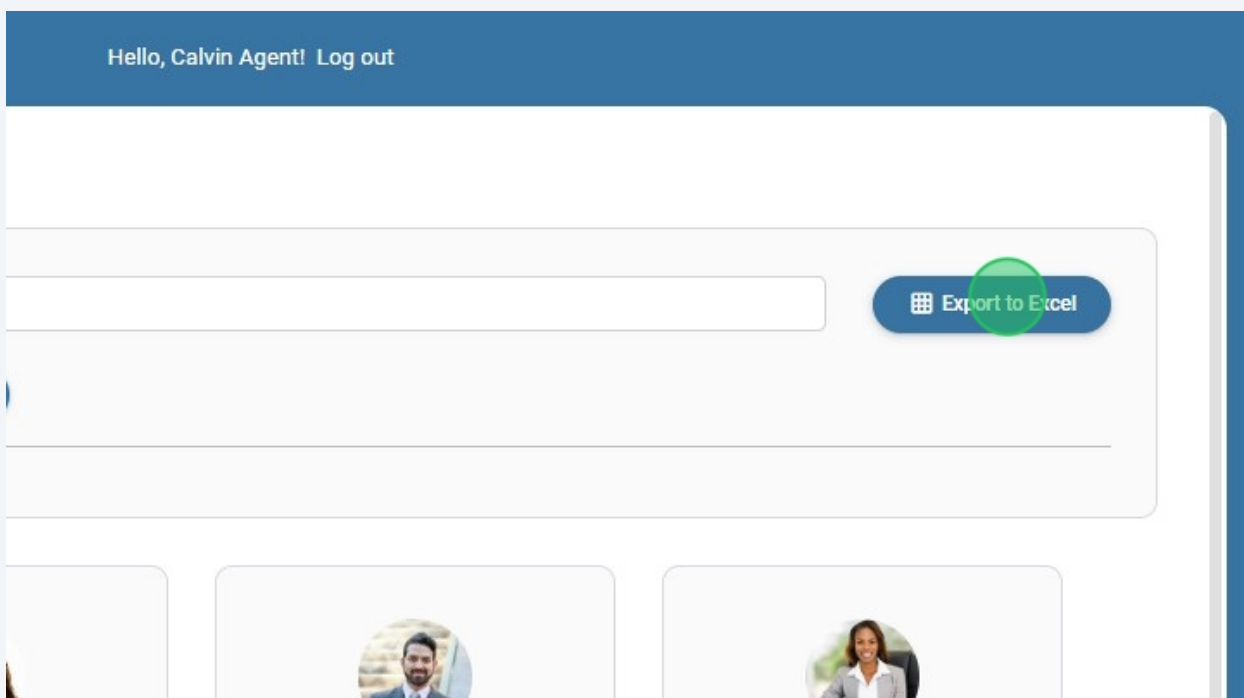
8

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

The screenshot displays the 'AA Landing Page' interface. On the left is a blue sidebar with navigation links: 'Home', 'Licensee Dashboard', and 'AA Landing Page'. The main content area features a dropdown menu currently set to 'Pending Applications'. The dropdown list includes 'All Licensees', 'Pending Applications', 'Pending Renewals' (highlighted with a green circle), and 'Pending Requests'. To the right of the dropdown is a search bar with a 'Search...' placeholder and two buttons: 'Search' and 'Clear'. Below the dropdown, two licensee profiles are visible: 'Renee Carol Parker' with email 'ReneeCParker@lakenology-test.com' and 'Lauren Jean Tatianello' with email 'LaurenTatianello@lakenology-test.com'. The word 'Licensee' is partially visible below the first profile.

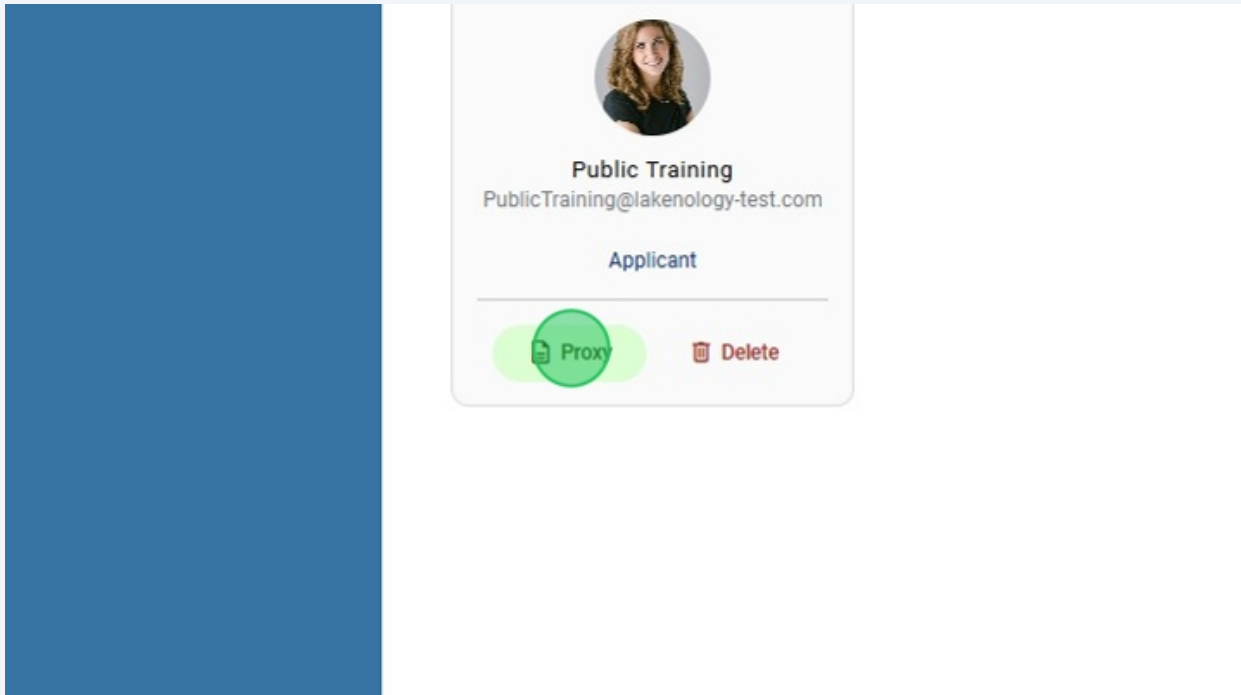
11

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**".

The screenshot shows the 'AA Landing Page' interface. At the top right, it says 'Hello, Calvi'. Below the header, there is a search section. On the left, a dropdown menu is set to 'All Licensees' and is highlighted with a green box. To its right is a search input field containing the text 'train', with a green arrow pointing to the end of the text. Below the search field are two buttons: 'Search' (highlighted with a green circle) and 'Clear'. Below the search section, two search results are displayed as cards. The first card shows a profile picture of Renee Carol Parker with her name and email address 'ReneeCParker@lakenology-test.com'. The second card shows a profile picture of Lauren Jean Tatianello with her name and email address 'LaurenTatianello@lakenology-test.com'.

12

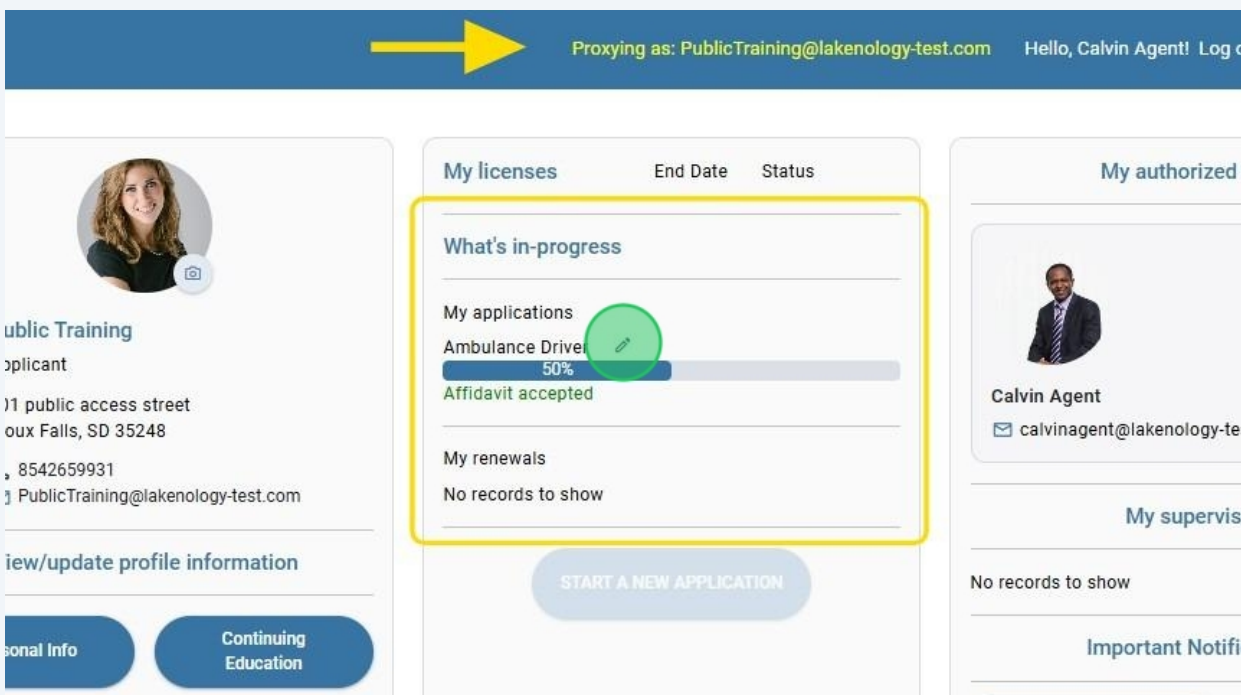
Only licensees that meet your dropdown and search criteria are displayed. Click "Proxy" if you want to act on behalf of that licensee as their **Authorized Agent**.



A screenshot of a user profile card. On the left is a solid blue vertical bar. The profile card is white with a rounded top and bottom. It features a circular profile picture of a woman with long brown hair. Below the picture, the text reads "Public Training" and "PublicTraining@lakenology-test.com". Underneath that, it says "Applicant". At the bottom of the card, there are two buttons: a green "Proxy" button with a document icon and a red "Delete" button with a trash can icon.

13

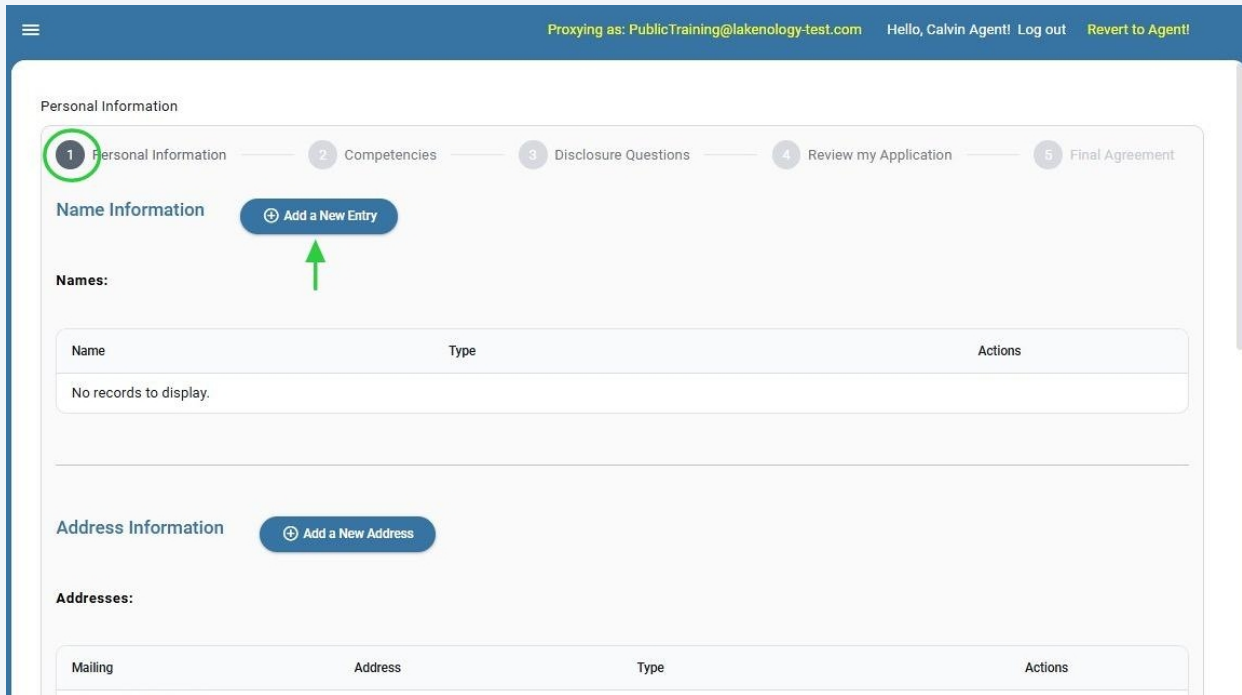
Notice the message that appears in yellow at the top of the page. "**Proxying as: Public Training@Lakenology-test.com**". The dashboard for the selected licensee is displayed. The application must be at **Affidavit accepted** or **Checklist** status before the Agent can take action on their behalf. Click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



A screenshot of a dashboard interface. At the top, a dark blue header bar contains a yellow arrow pointing right, followed by the text "Proxying as: PublicTraining@lakenology-test.com" and "Hello, Calvin Agent! Log o". Below the header, the dashboard is divided into several sections. On the left is a profile card for "Public Training" with a profile picture and contact information. The main area is titled "My licenses" and contains a "What's in-progress" section. This section lists "My applications" with a progress bar for "Ambulance Driver" at 50% and the status "Affidavit accepted". A green pencil icon is visible next to the application name. Below this, it says "My renewals" and "No records to show". A "START A NEW APPLICATION" button is at the bottom of this section. On the right, there is a "My authorized" section showing a profile for "Calvin Agent" with the email "calvinagent@lakenology-te:". Below that is a "My supervis" section with "No records to show". At the bottom right, there is a section for "Important Notifi".

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.



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)

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

ntifiers (NPI) Is a Health Insurance Portability and Accountability Act (HIPAA) Administrative Simplification Standard <http://www.cms.hhs.gov/NationalProviderstand/>.

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.

| | | Answer |
|---|--|---|
| 2 | Competencies | |
| 3 | Disclosure Questions | |
| 4 | Review my Application | |
| 5 | Final Agreement | |
| | ation? | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| | ies in HIPAA Awareness? | <input type="radio"/> Yes <input type="radio"/> No |
| | ies in Infection Control? | <input type="radio"/> Yes <input type="radio"/> No |
| | ies in Patient Movement? | <input type="radio"/> Yes <input type="radio"/> No |
| | ies in Equipment and Communication System Knowledge? | <input type="radio"/> Yes <input type="radio"/> No |
| | Vehicles Operation Course (EVOC) certification? | <input type="radio"/> Yes <input type="radio"/> No |

[Submit Competencies](#)

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!

The screenshot shows a web interface for an application process. At the top, a blue header bar contains the text "Proxying as: PublicTraining@lakenology-test.com", "Hello, Calvin Agent!", "Log out", and "Revert to Agent!". Below the header is a navigation bar with five steps: "1 Application", "2 Competencies", "3 Disclosure Questions", "4 Review my Application", and "5 Final Agreement". The "3 Disclosure Questions" step is highlighted with a green box. Below the navigation bar is a section titled "Important Notice for Authorized Agents" with a yellow background. The notice text reads: "Thank you for your assistance with this application process. Please note that the current step you are attempting to access is required to be completed personally by the applicant. This is to ensure the accuracy and authenticity of the information provided. What You Need to Know: Applicant-Only Step: This step of the application process is designed to be completed exclusively by the applicant. Reason for Restriction: This may involve providing personal details, making declarations, or other actions that require direct input from the applicant. How to Proceed: Please inform the applicant that they need to personally complete this step. Provide them with any necessary instructions or links to access this part of the application."