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STRATEGIC WORKPLAN

Navigator Entities and their Locations are required to develop a Strategic Workplan for their target market that will leverage existing relationships within their communities to reach eligible consumers to enroll them in Covered California Health Plans.

This Strategic Workplan should take into account the effectuated enrollment goals and identified areas of enrollment opportunity to establish outreach, education, and retention campaign strategies. The Strategic Workplan should include a plan to conduct outreach and education activities throughout the term of the contract with enrollment activities concentrated during Open Enrollment.

COMPLETE A STRATEGIC WORKPLAN

Navigate to the Strategic Workplan via the Strategic Workplans list on the Account page, or from the link provided in the email sent from Covered California.

Account Navigator Entity ABC

+ Follow Edit View Website

Program Type	Primary Phone Number	Website Address	Primary Location Address
Navigator Organization	(916) 247-2692	1601 Exposition Blvd	1601 Exposition Blvd, Sacramento, CA, 95864

Entity Information

Account Name	Entity Status
Navigator Entity ABC	Active
Parent Account	Program Type
	Navigator Organization
Business Legal Name	Primary Email Address
Navigator Entity ABC	doug.obrien@covered.ca.gov
Website Address	Primary Phone Number
1601 Exposition Blvd	(916) 247-2692
Category	Secondary Phone Number
Non-Profit	

Required Documentation (0) New

My Files (0) New

Strategic Workplans (6+)

STRATEGIC WO...	STATUS	DATE SUBMITTED
SW-0116	Approved	
SW-0125	Draft	

CREATE A CAMPAIGN STRATEGY

Click the **New** button next to the Campaign Strategies heading.

Strategic Workplan SW-0126

Edit Submit for Approval

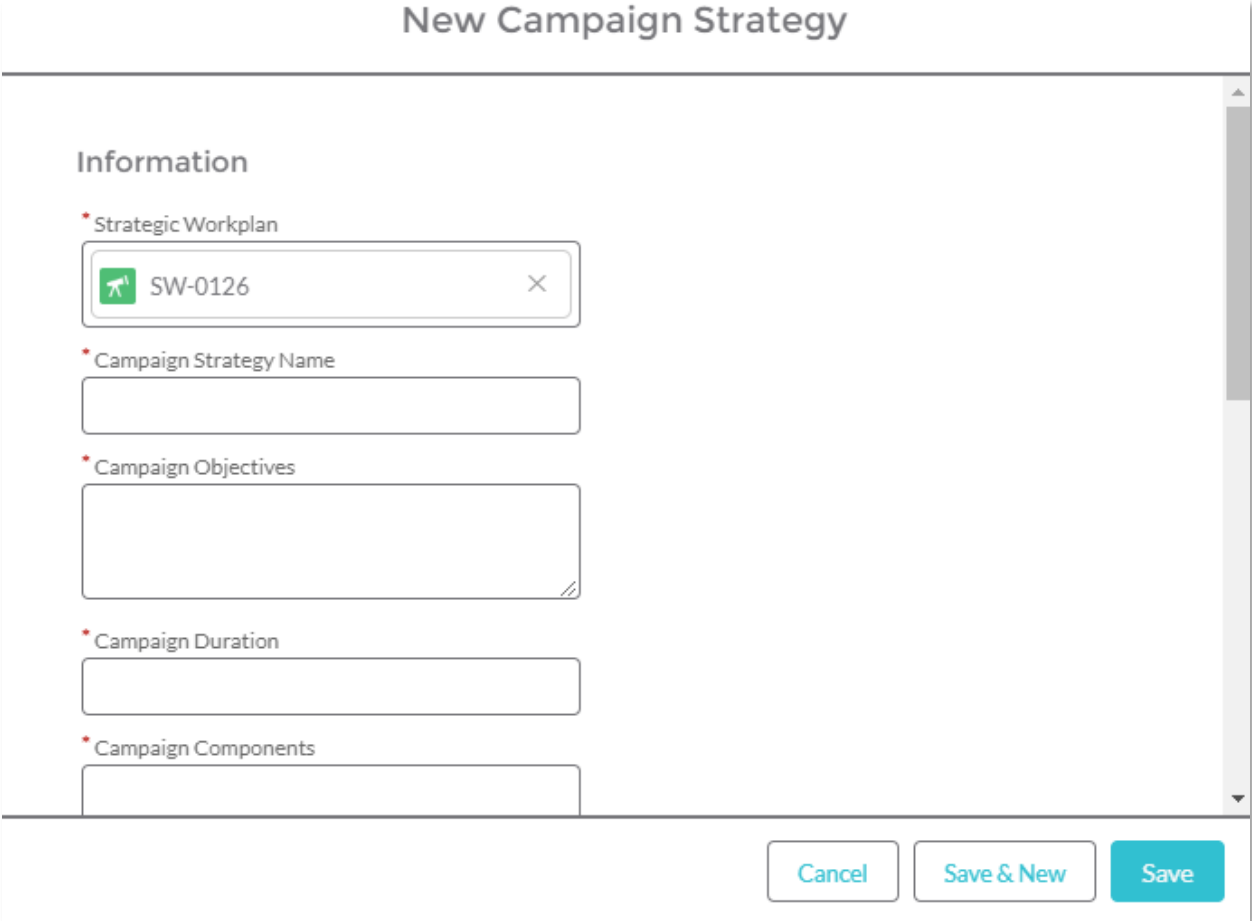
Campaign Strategy Instructions

An effective campaign strategy identifies how you will achieve your enrollment goals. It will define your prospecting and recruitment efforts to drive successful enrollment into Covered California health plans. Your campaign strategy will pinpoint specific locations frequented by your target population. It will describe the environment that influences a potential applicant's purchasing decision and how you will

Campaign Strategies (0) New

Workplan Activities (0) New

This will open a New Campaign Strategy form where the campaign strategy details can be entered. Click **Save** when finished. To create more than one campaign strategy, click **Save & New** instead of Save, which will open a New Campaign Strategy form.

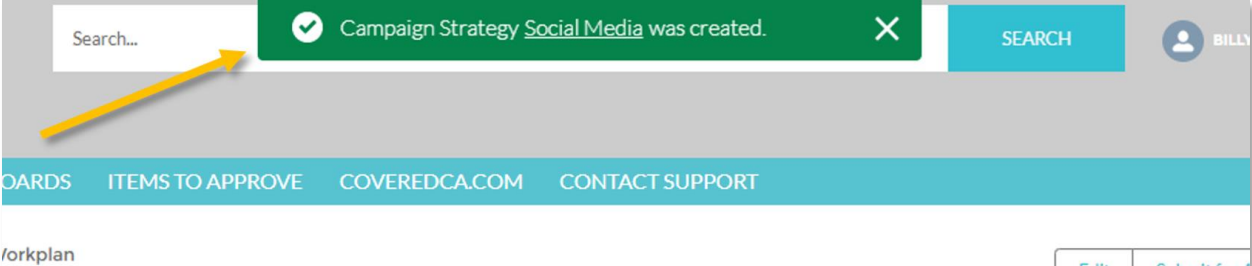


The form is titled "New Campaign Strategy". It contains several input fields, each with a red asterisk indicating it is required:

- Strategic Workplan:** A dropdown menu showing "SW-0126" with a green icon and a close button (X).
- Campaign Strategy Name:** A text input field.
- Campaign Objectives:** A text input field.
- Campaign Duration:** A text input field.
- Campaign Components:** A text input field.

At the bottom right of the form are three buttons: "Cancel", "Save & New", and "Save".

A message will appear once the Campaign Strategy has been created. Click this link to access the Campaign Strategy.



The screenshot shows a notification message at the top: "Campaign Strategy Social Media was created." with a green checkmark icon and a close button (X). Below the notification is a navigation bar with links: "BOARDS", "ITEMS TO APPROVE", "COVEREDCA.COM", and "CONTACT SUPPORT". A yellow arrow points to the "SEARCH" button in the top right corner of the notification area.



CREATE A WORKPLAN ACTIVITY

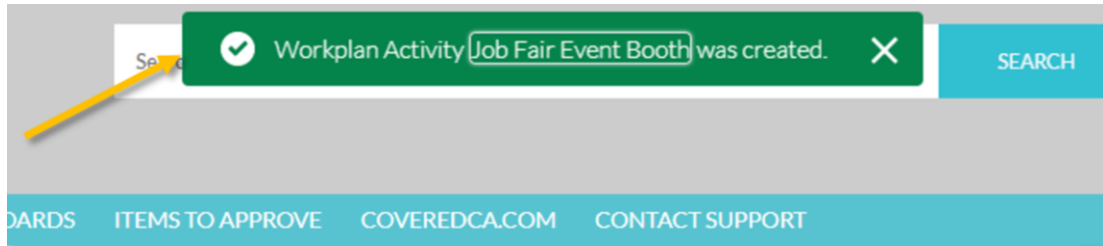
Click the **New** button next to the Workplan Activities heading.

A screenshot of the 'Strategic Workplan SW-0126' interface. At the top, there's a header with the workplan name and ID, and buttons for 'Edit' and 'Submit for Approval'. Below this, there's a section for 'Campaign Strategy Instructions' with a plus icon and a descriptive paragraph. To the right, there are two buttons: 'Campaign Strategies (0)' with a 'New' button, and 'Workplan Activities (0)' with a 'New' button highlighted in yellow.

This will open a New Workplan Activity form where the workplan activity information can be entered. Click **Save** when finished. To create more than one workplan activity, click **Save & New** instead of Save, which will open a New Workplan Activity form.

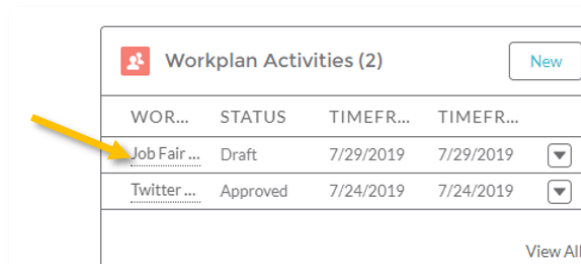
A screenshot of the 'New Workplan Activity' form. The form is titled 'New Workplan Activity' and has a section for 'Information'. It contains several fields: 'Strategic Workplan' (a dropdown menu showing 'SW-0126'), 'Workplan Activity Name' (a text input field), 'Status' (a dropdown menu showing 'Draft'), 'Activity Category' (a dropdown menu showing '--None--'), 'Activity Type' (a dropdown menu showing 'Outreach'), 'Timeframe Date Start' (a date input field), 'Timeframe Date End' (a date input field), 'Frequency/Quantity' (a text input field), 'Hours per Occurrence' (a text input field), and 'Location' (a text input field). At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

A message will appear once the Workplan Activity has been generated. Click this link to access the Workplan Activity.

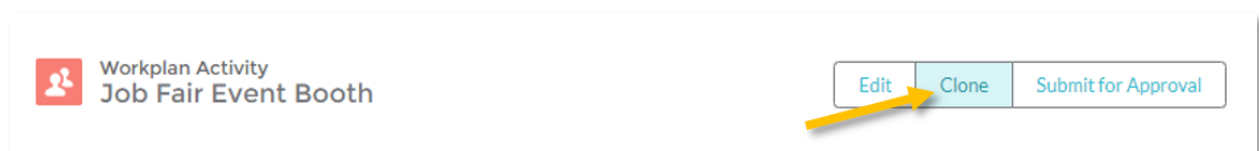


CLONE A WORKPLAN ACTIVITY

To clone a Workplan Activity, navigate to the Workplan Activities list and select the Workplan Activity Name that will be cloned.



In the top, right corner of the Workplan Activity, click the **Clone** button.



A New Workplan Activity form will appear with re-populated fields. Make the necessary changes to the form and when finished, click **Save**. To create more than one workplan activity, click **Save & New** instead of Save, which will open a New Workplan Activity form.

New Workplan Activity

Strategic Workplan

 SW-0132

Workplan Activity Name

Job Fair Event Booth

Status

Draft

Activity Category

Events

Activity Type

Available

Post-Enrol...
Retention

Chosen

Education
Enrollment
Outreach

Timeframe Date Start

7/29/2019

Timeframe Date End

7/29/2019

Frequency/Quantity

1

Hours per Occurrence

4.0

Location

Sacramento

Cancel

Save & New

Save

SUBMIT A STRATEGIC WORKPLAN FOR APPROVAL

Once all Campaign Strategies and Workplan Activities have been added, the Strategic Workplan is ready to be submitted for approval. Click on the **Submit for Approval** button in the top right of the Strategic Workplan page.



HOME MY ENTITY DASHBOARDS ITEMS TO APPROVE COVEREDCA.COM CONTACT SUPPORT

Strategic Workplan
SW-0126

Edit

Submit for Approval

A screen will be presented where the user can enter comments. Comments entered here are for the Reviewer to read prior to making any decision in the approval process. Click **Submit** to submit the Strategic Workplan for approval.

Submit for Approval

Comments

Optional
Comments for
Reviewer

Cancel

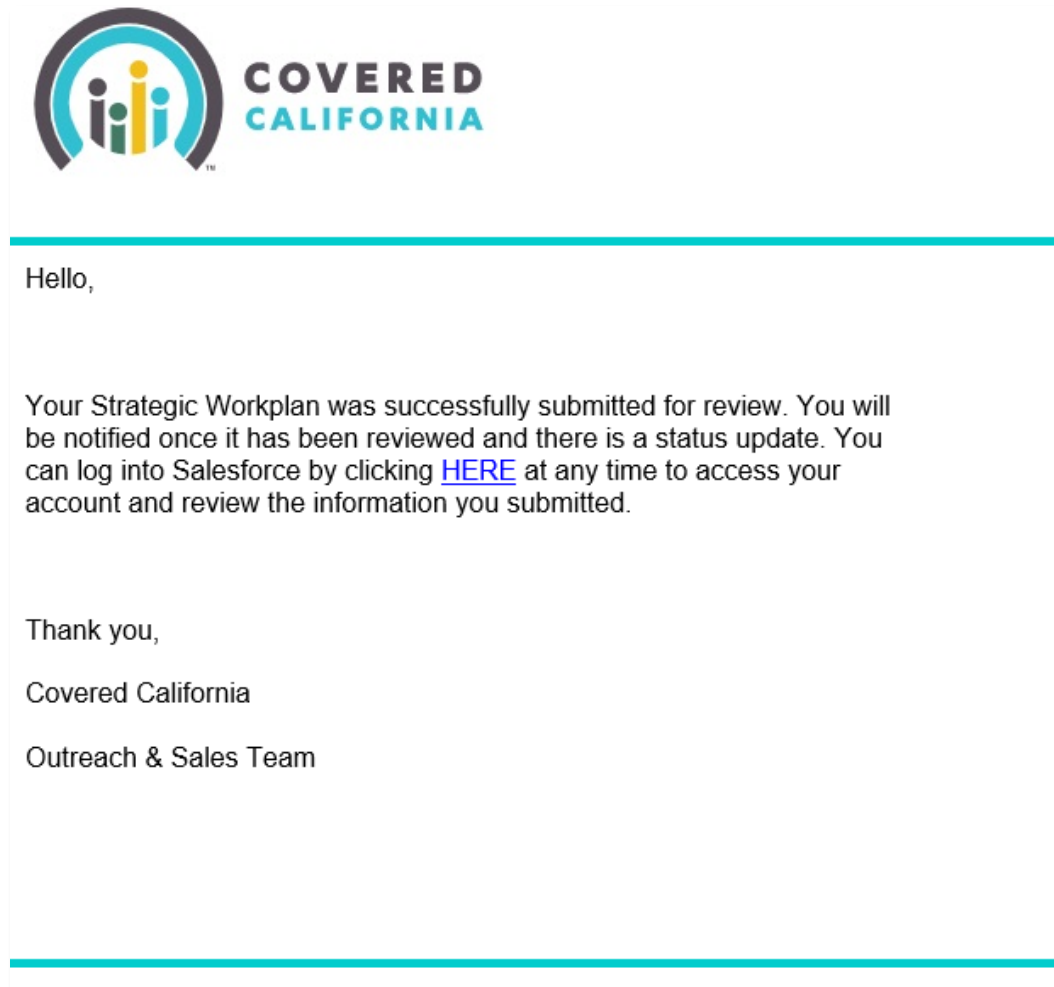
Submit

The Approval History list will have an updated entry listed as Submitted and Pending (Approval) for this submission and the Strategic Workplan is locked until it is Approved / Rejected.

Approval History (2)			
STEP...	DATE	STATUS	ASSIGN...
Accou...	7/24/201...	Pending	Anthony ...
Appro...	7/24/201...	Submitted	Jennifer L...



The Entity will receive an email notification of the Strategic Workplan submission. The Entity can use the link provided in the email to review the Strategic Workplan and check on its approval status.



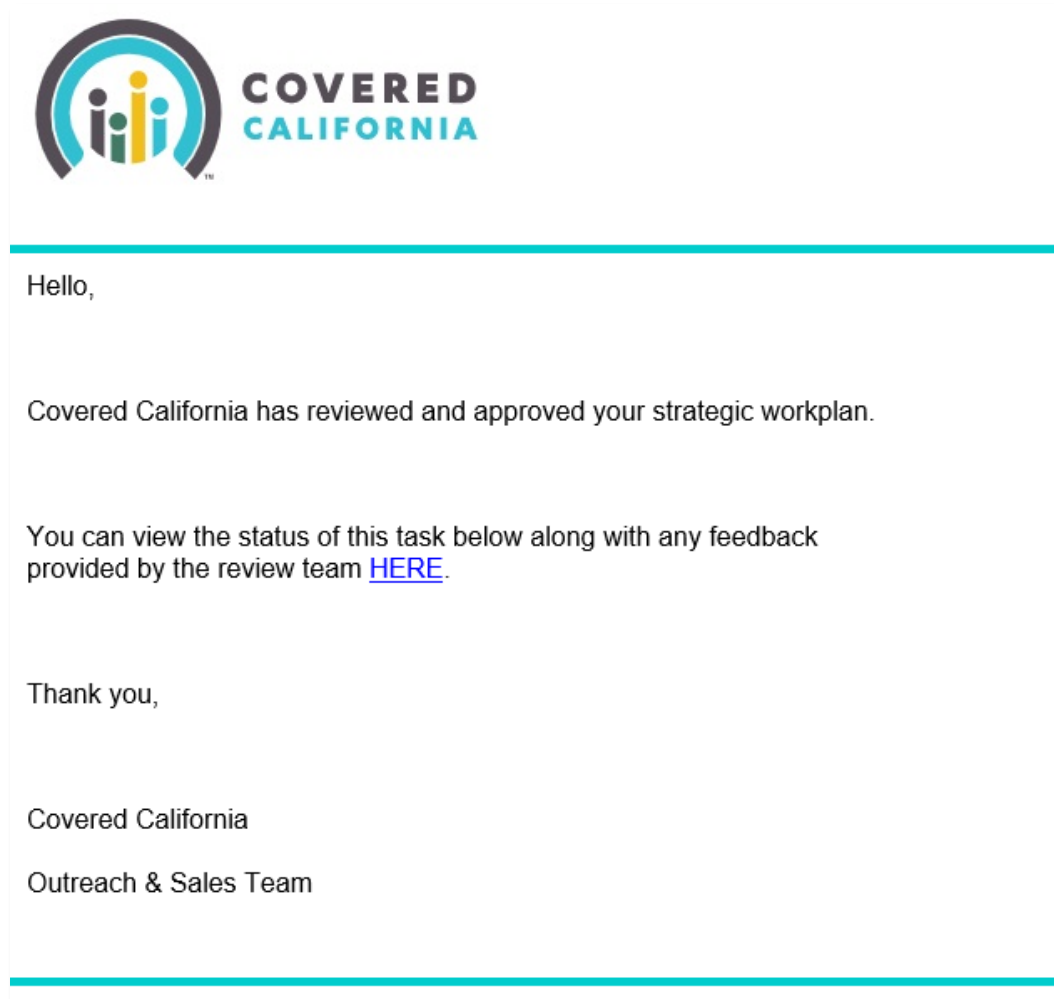
STRATEGIC WORKPLAN APPROVAL PROCESS

When a Strategic Workplan is submitted for approval it is assigned to an Account Services Representative. The Account Services Representative will receive an email for each Strategic Workplan submission. The Account Services Representative will review the Campaign Strategies and planned Workplan Activities and approve / reject the Strategic Workplan. A comment box is provided to the Account Services Representative to provide any additional comments to the Entity.



APPROVAL OF THE STRATEGIC WORKPLAN

If the Strategic Workplan is approved, the Strategic Workplan is considered complete. The Entity will receive an email notification of the approved Workplan with corresponding comments, if applicable.



REJECTION OF THE STRATEGIC WORKPLAN

If the Strategic Workplan is rejected the record's status is reset to Draft and unlocked for editing and re-submission. The Entity will receive an email notification of the rejected Workplan with corresponding comments and can edit and re-submit the Strategic Workplan for approval.



Hello,

Covered California has returned the status of your Strategic Workplan to draft due to missing or incomplete information.

Approver Comments: Need more info

Please log into Salesforce ([LINK](#)) to access your Strategic Workplan so you can update and resubmit the workplan.

Thank you,
Covered California
Outreach & Sales Team

EARN OUTREACH POINTS FOR WORKPLAN ACTIVITIES

Navigator grant entities will be assigned outreach expectations based on their Grant Amount Award tier as listed in the Proposed Outreach Activity Goals in the [Navigator Grant Program Request for Application \(RFA\) Announcement](#). Navigator grant entities will earn points throughout the grant award year by participating in, tracking, and reporting on their planned Workplan Activities and various outreach activities as listed the Activities that Earn Outreach Points section of the Navigator Grant Program RFA Announcement. Please see [Appendix A](#) for a table that outlines documentation types Navigator Grantees can submit confirming their execution of their outreach activities for this grant cycle.

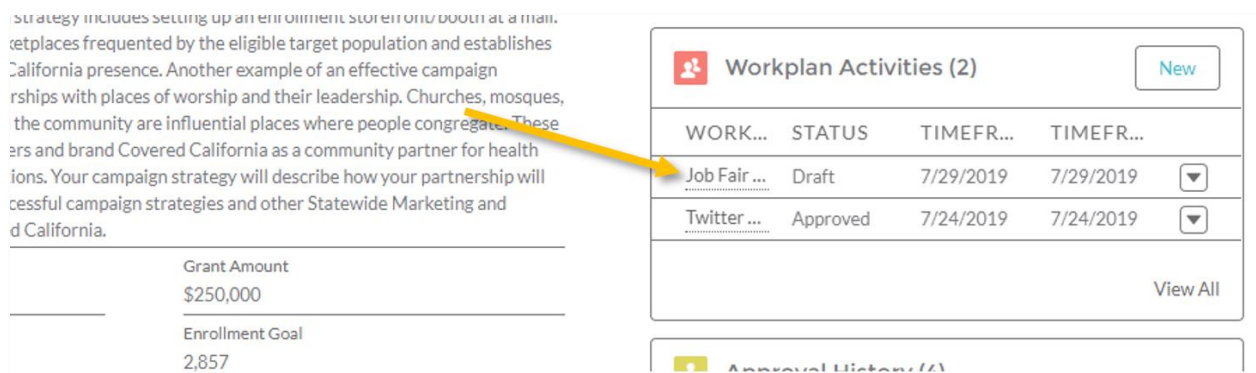
Grant entities with subcontractors may report on the activities of sub-entities and will be awarded points for activities tracked. However, it is the lead entity's responsibility to ensure that all activities are correctly logged in order to receive points. The social media categories with

capped accruals are limited to the lead entity earning the specified point maximum regardless of which entity (lead or sub) performs the activity.

SUBMIT WORKPLAN ACTIVITIES FOR APPROVAL

Once the Entity completes a Workplan Activity from their approved Strategic Workplan, it must be submitted with corresponding documents and / or information for approval and Outreach Points earnings.

To submit a Workplan Activity for approval, navigate to the Strategic Workplan via the Strategic Workplans list on the Account page, or from the link provided in the Strategic Workplan Approved email. Under the Workplan Activities list, select the draft Workplan Activity Name that will be submitted for approval.



WORK...	STATUS	TIMEFR...	TIMEFR...	
Job Fair ...	Draft	7/29/2019	7/29/2019	▼
Twitter ...	Approved	7/24/2019	7/24/2019	▼

View All

Under the Notes & Attachments tab, click the **Upload Files** button to upload files required for approval.

Examples of required documents for Outreach Activity approval include:

- In-Person Event: copy of registration or copy of agenda or other proof of attendance
- Social Media: screenshot of post AND link to the post
- Paid Media: invoice AND media (or scanned) file or screenshot AND link to media (if applicable)
- Earned Media: media (or scanned) file or screenshot AND link to media (if applicable)

For questions or concerns regarding documentation needed to receive Outreach Points, contact your assigned Account Services Representative for assistance.

 **Workplan Activity**
Job Fair Event Booth

EditCloneSubmit for Approval

DETAILSNOTES & ATTACHMENTSAPPROVAL HISTORY

 **Notes & Attachments (0)** Upload Files

TITLE	TYPE	OWNER	LAST MODIFIED
-------	------	-------	---------------

Click the **Done** button once the file has been uploaded.

Upload Files

 Event Flyer.jpg
120 KB

1 of 1 file uploaded

Done

A message will appear once the file has been successfully uploaded to the Workplan Activity. Once all files have been uploaded, click the **Submit for Approval** button.

 1 file was added to Workplan Activity. × SEARCH 

A screen will be presented where the user can enter comments. Links to websites that are required to approve Workplan Activities can be entered in this section. Comments here are for the Reviewer to read prior to making any decision in the approval process. Click **Submit** to submit the Workplan Activity for approval and points earnings.

Submit for Approval

Comments

<https://www.jobfair.com>

Please review Workplan Activity for approval and points assignment. Thank you!

Optional Comments for Reviewer

Cancel Submit

The Approval History list will have an updated entry listed as Submitted and Pending (Approval) and the Workplan Activity is locked until it is Approved / Rejected.

DETAILS
NOTES & ATTACHMENTS
APPROVAL HISTORY


Approval History (2)

STEP NAME	DATE	STATUS	ASSIGNED TO
Account Manager Appr...	7/24/2019 3:43 PM	Pending	Sys Admin
Approval Request Subm...	7/24/2019 3:43 PM	Submitted	Billy Jean

The Entity will receive an email notification of the Workplan Activity submission. The Entity can use the link provided in the email to review the Workplan Activity and check on its approval status.



Hello,

Your Workplan Activity was successfully submitted for review. You will be notified once it has been reviewed and there is a status update. You can log into Salesforce by clicking [HERE](#) at any time to access your account and review the information you submitted.

Thank you,

Covered California

Outreach & Sales Team

WORKPLAN ACTIVITY APPROVAL PROCESS

When a Workplan Activity is submitted for approval it is assigned to an Account Services Representative. The Account Services Representative will receive an email for each Workplan Activity submission. The Account Services Representative will review the Workplan Activity and approve / reject the Workplan Activity. A comment box is provided to the Account Services Representative to provide any additional comments to the Entity.

APPROVAL OF A WORKPLAN ACTIVITY AND ASSIGNMENT OF OUTREACH POINTS

If the Workplan Activity is approved, it is considered complete and the Account Services Representative will assign Outreach Points based on the Activities that Earn Outreach Points section of the Navigator Grant Program RFA Announcement.

The Entity will receive an email notification of the approved Workplan with corresponding comments, if applicable.



Hello,

Covered California has reviewed and approved your Activity/Event.

You can view the status [HERE](#) along with any feedback provided by the review team.

Entity Name: Navigator Entity ABC

Workplan Activity Name: twitter July

Status: Approved

Outreach Points Earned: 3

Thank you,

Covered California

Outreach & Sales Team

REJECTION OF A WORKPLAN ACTIVITY

If the Workplan Activity is rejected the record's status is reset to Draft and unlocked for editing and re-submission. The Entity will receive an email notification of the rejected Workplan Activity with corresponding comments and can edit and re-submit for approval.



Hello,

Covered California has returned the status of your Workplan Activity to draft due to missing or incomplete information.

Approver Comments: deinied. need to upload proof

Please log into Salesforce ([LINK](#)) to access your Workplan Activity.

Thank you,
Covered California
Outreach & Sales Team

CHECK STATUS OF WORKPLAN ACTIVITIES AND OUTREACH GOAL

Outreach Points earned and details about the percentage of Outreach Goal will be reflected on the Strategic Workplan page under the Details section.


Strategic Workplan
SW-0132

[Edit](#)
[Submit for Approval](#)

▼ Campaign Strategy Instructions

+

An effective campaign strategy identifies how you will achieve your enrollment goals. It will define your prospecting and recruitment efforts to drive successful enrollment into Covered California health plans. Your campaign strategy will pinpoint specific locations frequented by your target population. It will describe the environment that influences a potential applicant's purchasing decision and how you will inspire and leverage those opportunities to produce enrollment in a Covered California health plan.

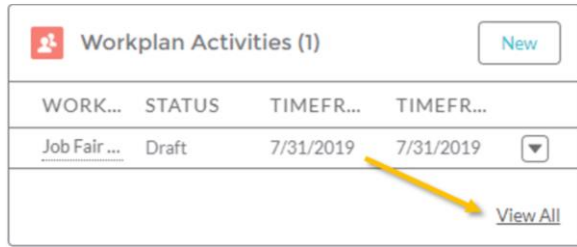
++

An example of an effective campaign strategy includes setting up an enrollment storefront/booth at a mall. This strategy leverages existing marketplaces frequented by the eligible target population and establishes an ongoing and prominent Covered California presence. Another example of an effective campaign strategy could be to establish partnerships with places of worship and their leadership. Churches, mosques, temples and other trusted centers in the community are influential places where people congregate. These are opportunities to engage consumers and brand Covered California as a community partner for health and health-insurance purchasing options. Your campaign strategy will describe how your partnership will align with and compliment these successful campaign strategies and other Statewide Marketing and Outreach efforts to promote Covered California.

Strategic Workplan Name	Grant Amount
SW-0132	\$250,000
Navigator Entity	Enrollment Goal
Navigator Entity ABC	2,857
Agreement Number	Outreach Points Goal
16-N-007	260
Grantee Name	Workplan Activity Points Earned
Navigator Entity ABC	1
Number of Subs	Percent of Goal
	0.38
Status	
Approved	
Created By	Last Modified By
Jennifer Louie 7/23/2019 9:41 AM	Sys Admin 7/23/2019 10:48 PM



To check the status of individual Workplan Activities, click **View All** in the Workplan Activities within a Strategic Workplan.



The Workplan Activities list will include details about each Workplan Activity, including status, dates, Activity type, and (Outreach) Points Earned. Points earned will not be present until the Workplan Activity is approved.

Strategic Workplans > SW-0116
Workplan Activities

3 items • Sorted by Activity Category • Updated a minute ago

New

⚙️ 🔄 ⏏️

	WORKPLAN ACTIVITY ...	STATUS	TIMEFRAME DATE START	TIMEFRAME DATE END	POINTS EARNED	ACTIVI
1	Instagram - July	Draft	7/16/2019	7/16/2019		Outreach
2	Enrollment Awareness Event	Approved	7/19/2019	7/19/2019	3	Outreach
3	July Twitter	Approved	7/16/2019	7/16/2019	3	Outreach

APPENDIX A

2019-2020 Navigator Program:

Outreach Activity Supporting Documentation List

This table outlines the documentation types the Navigator Grantees can submit to Covered California via the Entity Certification Portal confirming their execution of their outreach activities for this grant cycle. Navigator Grantees must enter all events completed by their sub-grantees in their portal to obtain the outreach activity points.

Note, the list is not limited to the types listed. Please contact your regional field representative if you have a different form of documentation than what is listed.

Outreach Activity Category	Points	Documentation Proof Types	Helpful Notes
1. In-Person Event	3 points earned per education or enrollment event logged	• Copy of registration of attendees; • Copy of agenda; • Copy of agreement (or communications) with facility manager; or • Copy of advertisement of event (flyers, mailers, etc.).	Log events in Entity Certification Portal On flyer with multiple dates can be used for the same recurring events such as weekly library events, etc. Events can be held in the entity office.
2. Social Media: Twitter	1 point per month wherein 4 published tweets	• Screenshot of post; and/or • Copy the link to the post in the comments section	Must mention Covered California via @CoveredCA Tagging other social media pages do not get additional points.
3. Social Media: Facebook	1 point per month wherein 2 published posts	• Screenshot of post; and/or • Copy the link to the post in the comments section and upload any images used as attachments	Must mention Covered California via @CoveredCA Can be the same content as the other social media platforms
4. Social Media: Instagram	1 point per month wherein 2 published posts	• Screenshot of post; and/or • Copy the link to the post in the comments section and upload any images used as attachments	Must mention Covered California via @CoveredCA



5. Social Media: LinkedIn	1 point per month wherein 2 published posts	• Screenshot of post; and/or • Copy the link to the post in the comments section and upload any images used as attachments	Must mention Covered California via @CoveredCA
6. Paid Media	1 point per \$100 spent on advertising	• Copy of the paid invoice or purchase order; and • Link to media (if applicable).	Promoting Covered California enrollment
7. Earned Media	10 points earned per documented instance	• Print media: Soft copy of the print or a link to the media (if applicable); • Radio or TV: link to reference on the station's website (if applicable), and recording of mention and/or interview; or • Social media: screenshot and link to posting. • Press Release and photos	