



# Case Overview Hub for Enrollers Task Guide

## Overview

This guide assists Enrollers with navigating the Case Overview Hub from the Enroller Portal or the Consumer home page.

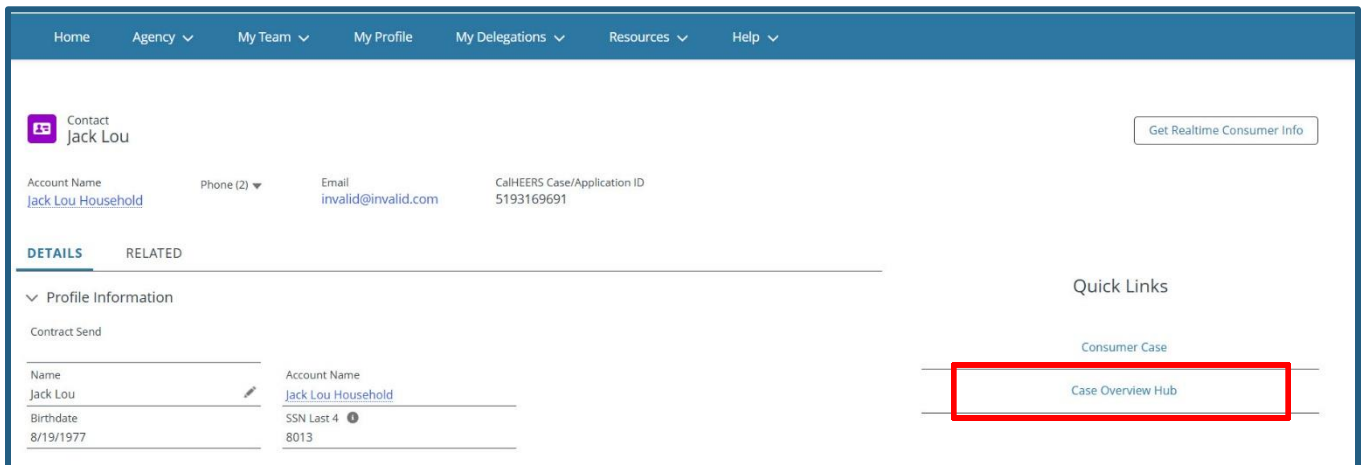
## Background

Enrollers handle complex cases across multiple systems, navigating numerous screens to locate information. Improvement to the Enroller experience by making it easier to complete processes and information in one area, the Case Overview Hub to better serve consumers.

## Steps

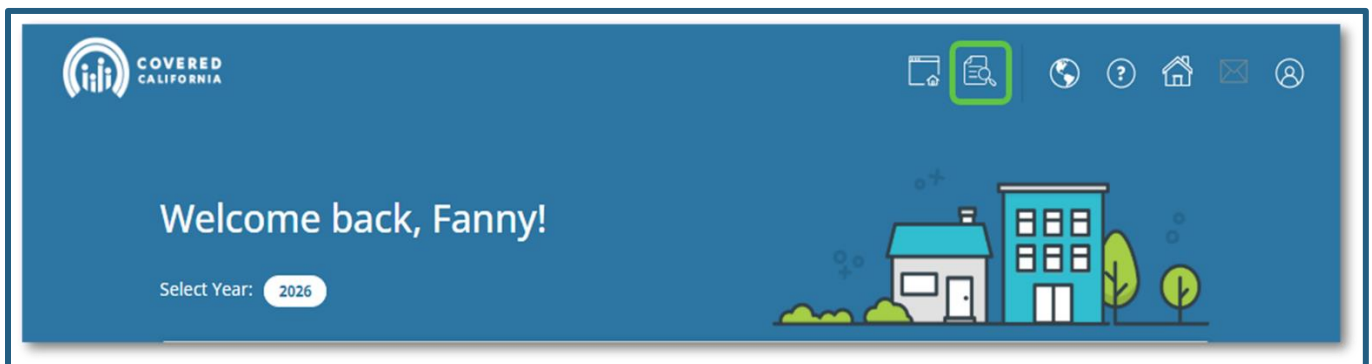
### From the Enroller Portal

1. Login to the Enroller Portal
2. Select the consumer contact
3. From the consumer contact page, select the **Case Overview Hub** link under *Quick Links*



### From the Consumer's Account Home

The page and magnifying glass icon navigates the user to the Case Overview home page.

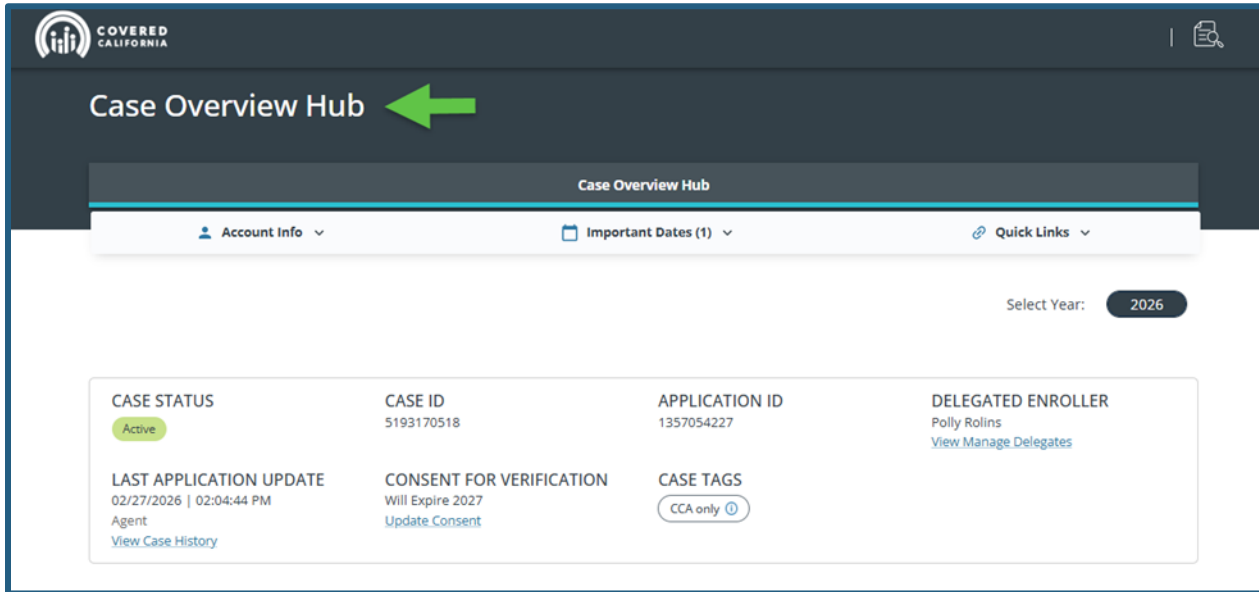




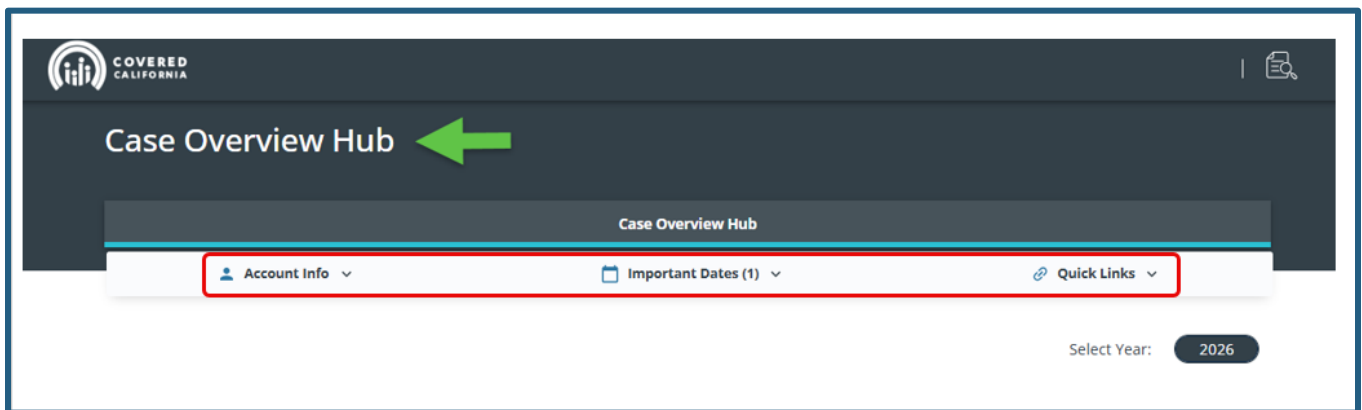
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The magnifying glass icon at the top of the page navigates the user to the Case Overview Hub home page.

## Case Overview Hub



The ribbon at the top has 3 different links: *Account Info*, *Important Dates*, and *Quick Links*

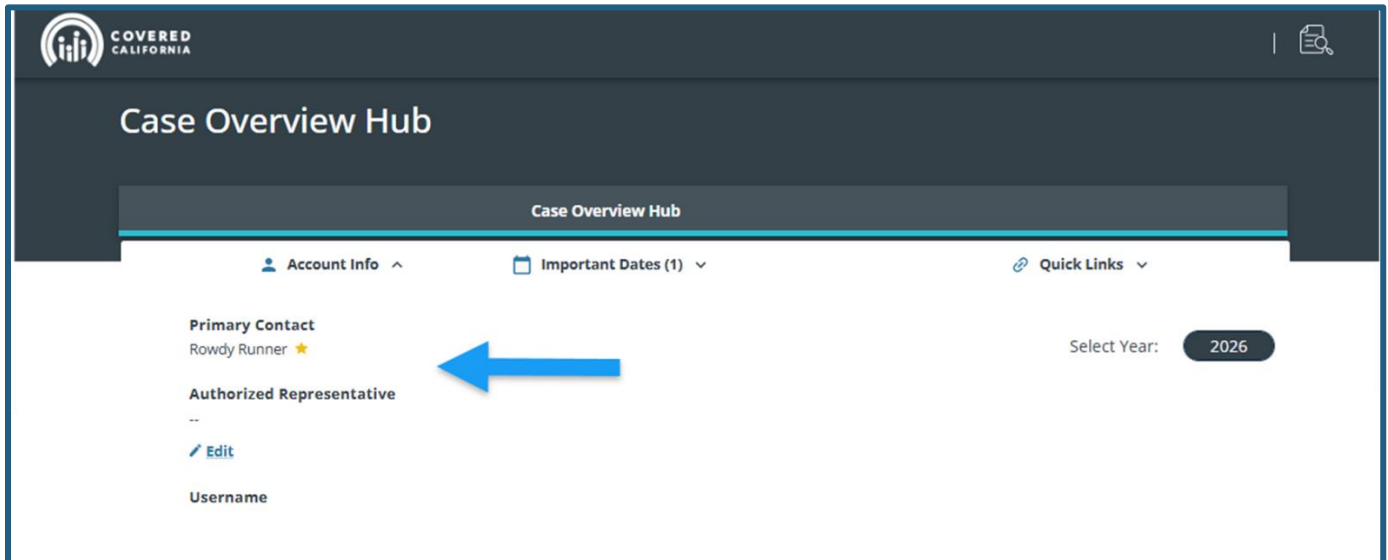


## Account Info Dropdown

The *Account Info* dropdown displays:

- Primary Contact
- Authorized Contact

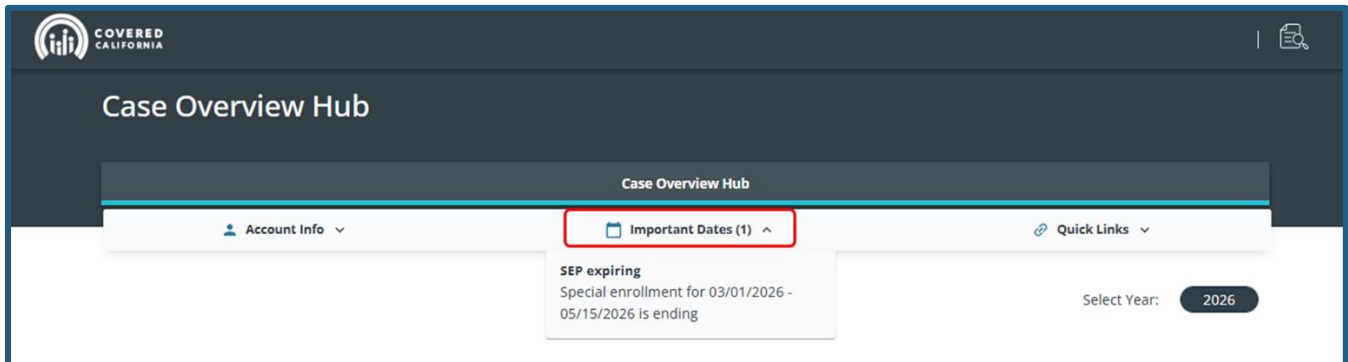
- **Note:** this field cannot be edited by Enrollers



## Important Dates Dropdown

The Important Dates dropdown displays:

- Notice dates for the consumer to take action
- Special Enrollment Period dates
- No important dates listed indicates no current alerts.



## Quick Links Dropdown

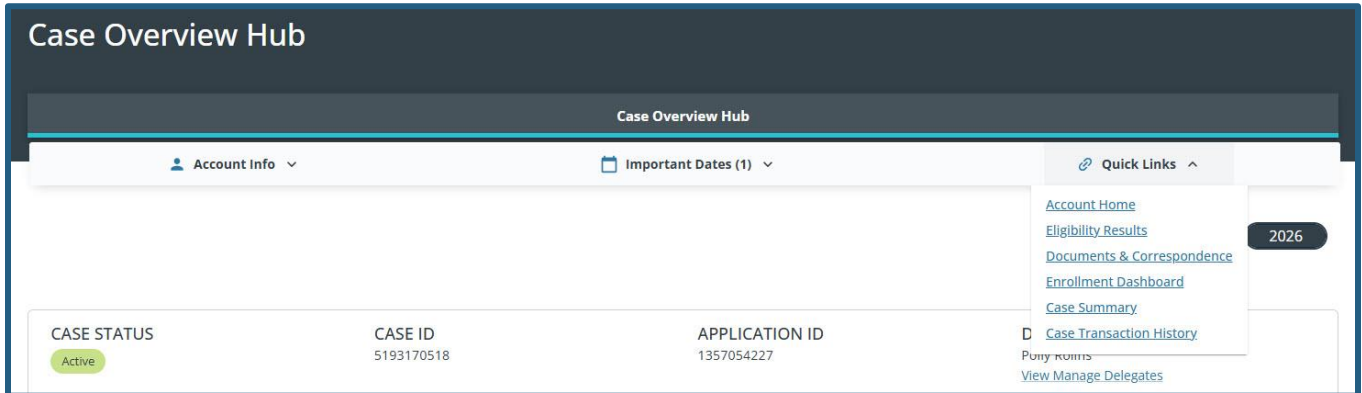
The *Quick Links* dropdown displays:

- **Account Home** – Navigates the user to the consumer account home page
- **Eligibility Results** – Navigates the user to the *Welcome to Your Eligibility Results Summary* page
- **Documents & Correspondence** – Navigates the user to the Documents and Correspondence page



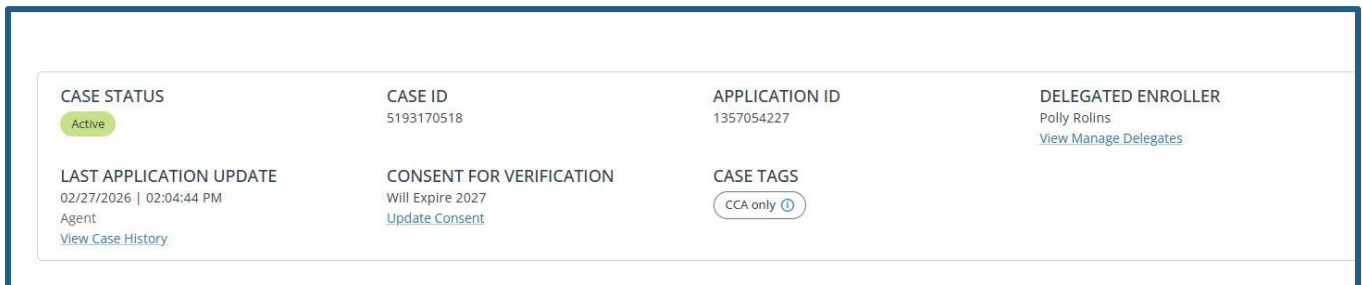
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- **Enrollment Dashboard** – Navigates the user to the Enrollment Dashboard
- **Case Summary** – navigates the user to the *Case Summary* tab
- **Case Transaction History** – Navigates the user to the *Case Transaction History* section of the *Case Summary* tab.



## Home Page Links

The Case Overview Home Page provides the following information:



- **Case Status**
- **Case ID**
- **Application ID**
- **Delegated Enroller**
  - The **View Manage Delegates** link navigates the user to the *Manage Delegates* page
- **Last Application Update date**
  - The **View Case History** link navigates the user to *Case Transaction History* section of the *Case Summary* tab
- **Consent for Verification**



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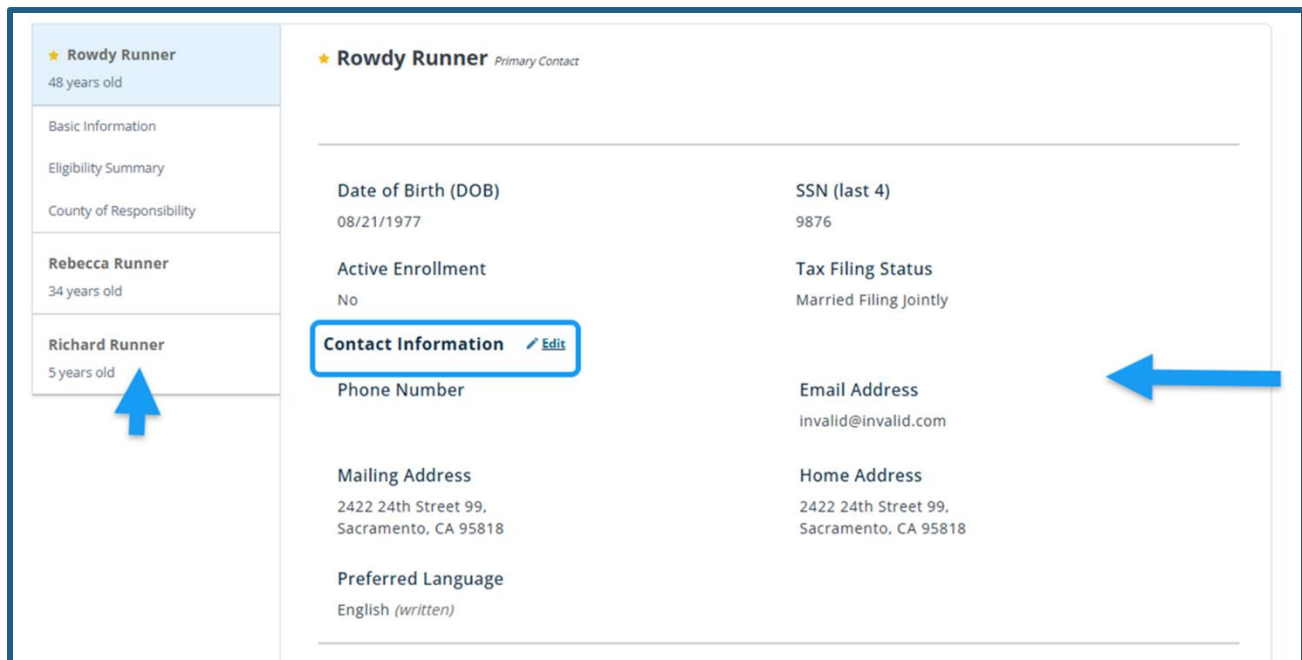
- The date consent expires is displayed and the update consent link navigates the user to the *Update Consent for Verification* page.
- **Case Tags**
  - Indicates the eligibility of the members of the household (i.e. Covered California Only, Medi-Cal Only, or Mixed Household). Hover over the tag or click for explanation of tag.

Case Tags	Tooltips
<b>CCA only</b>	Shows when all active Household Members (HHMs) are eligible for Covered California-only Plan (CCP).
<b>MC only</b>	Shows when all active HHMs are eligible for Medi-Cal.
<b>Mixed Household</b>	Shows at least one active HHM is eligible for Medi-Cal and one active HHM is eligible for CCA.
<b>CFS - Carry Forward Status</b>	Covered CA enrolled consumer is potentially eligible for Medi-Cal coverage.
<b>MCT - Medi-Cal Transition</b>	Consumer is transitioning from Medi-Cal to CCA.
<b>APS - Auto Plan Selection</b>	CCA plan is auto-selected.
<b>MAPS - Manual Auto Plan Selection</b>	Medi-Cal Transition (MCT) consumer that needs to take an action to complete plan selection.
<b>Soft Pause</b>	Medi-Cal member under review with county before discontinuance.
<b>SLS - Strike and Lockout Subsidy</b>	Special benefits for those that lose ESI due to a strike or lockout.
<b>QHP Hold - Pregnancy Hold</b>	Pregnant individual has a choice to stay in current plan or move to a pregnancy Medi-Cal program.
<b>AI/AN - American Indian and Alaska Native</b>	Consumers that are in a federally recognized tribe are eligible for special benefits that will be attached to their health plan.
<b>Negative Action</b>	Administrative action taken to discontinue Medi-Cal.

Case Tags	Tooltips
<b>MCAP Hold - Medi-Cal Access Program</b>	Prevents premature termination or override of MCAP coverage.

## Household Information Section

The left column of the section provides a list of all household members. Clicking the household member's name will provide details in the right-hand pane. This includes basic information such as demographic details for the individuals.



## Eligibility Summary Section

The *Eligibility Summary* section is located below the Household Information section. This section provides quick access to review programs and important dates for each individual.

The **Upload Documents** link navigates the user to the *Upload Eligibility Documents* page.

The **View Program Eligibility by Person** link navigates the user to *Program Eligibility Summary by Person* under the Case Summary tab.



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## Eligibility Summary

### Eligible Programs

Program	Eligibility Status	Expected Start Date
Federal Premium Assistance	Conditional Eligible <a href="#">Upload Documents</a>	04/01/2026
Enhanced Silver Benefits	Conditional Eligible <a href="#">Upload Documents</a>	04/01/2026
Covered California	Conditional Eligible <a href="#">Upload Documents</a>	04/01/2026
State Premium Assistance	Conditional Eligible <a href="#">Upload Documents</a>	04/01/2026
Non-MAGI Medi-Cal	Unknown	03/01/2026

[View Program Eligibility by Person](#)

## County of Responsibility Section

The County of Responsibility section provides consumer's current county information and phone number.

The **click here** link navigates the user to the Department of Health Care Services' *Find your county Medi-Cal office* page.



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## County of Responsibility

City and County of San Francisco Office

Phone Number

[(000) 000-0000]

Please [click here](#) to view a full list of locations.