Enroller Portal Consumer Retention Workspace (CRW) Quick Guide

Overview

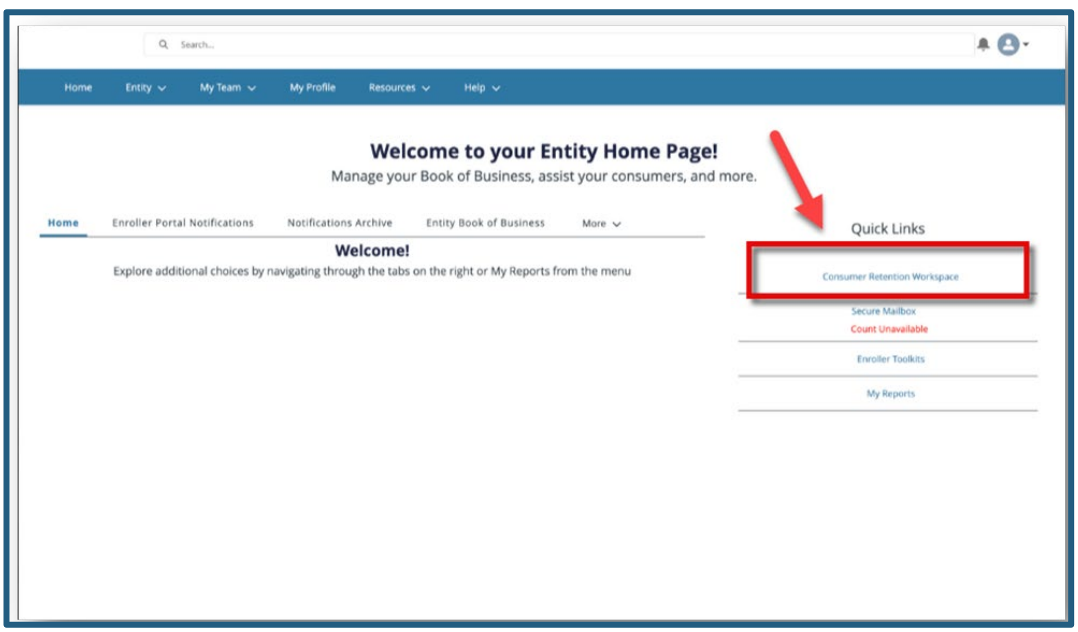
- The Consumer Retention Workspace (CRW) is a new tool in the Enroller Portal that helps track and manage consumer active renewals for Plan Year 2026.
- The goal is to conduct outreach for those identified as potentially least or less likely to renew their health or dental insurance plan through Covered California. The outreach will help enrollees explore affordable options and maintain access to health insurance.
- CRW will help identify enrollees up for renewal, ranked by potential for renewing and provides a space for enrollers to monitor and manage renewal activities.

Objectives

- **Identify Consumer Cases**: List of consumer cases for currently enrolled consumers that need to renew.
- **Assign Category**: Assign category of potential to complete renewal ranking from high to low.
- **Track and Monitor**: Enrollers can access the CRW workspace to track and monitor renewal activities.
- **Access Reports**: Agency managers and Entity Primary Contacts can access reports of all their enroller's CRW activities.

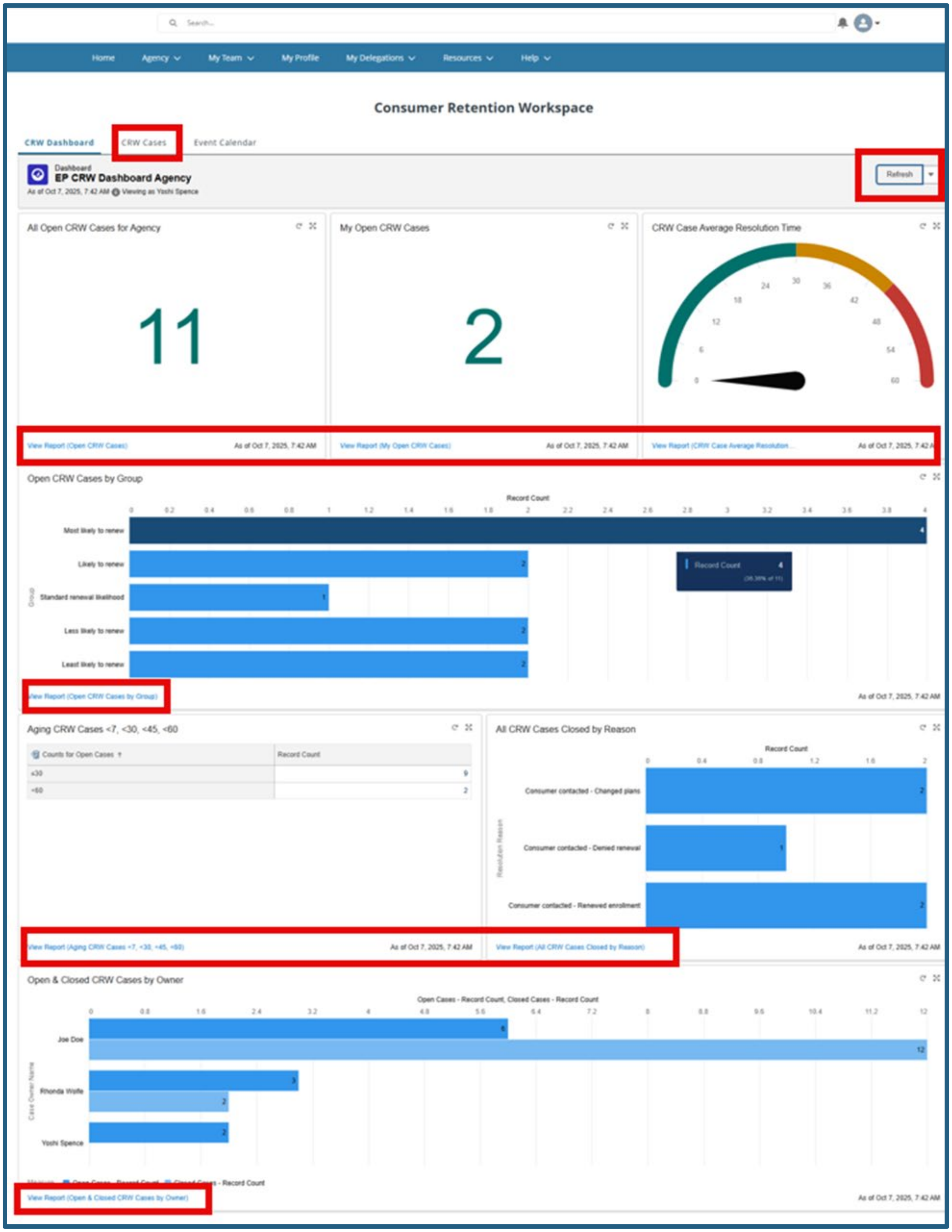
Steps

1. Access the CRW from the Quick Links located on the Enroller Portal home page.



The CRW has the following:

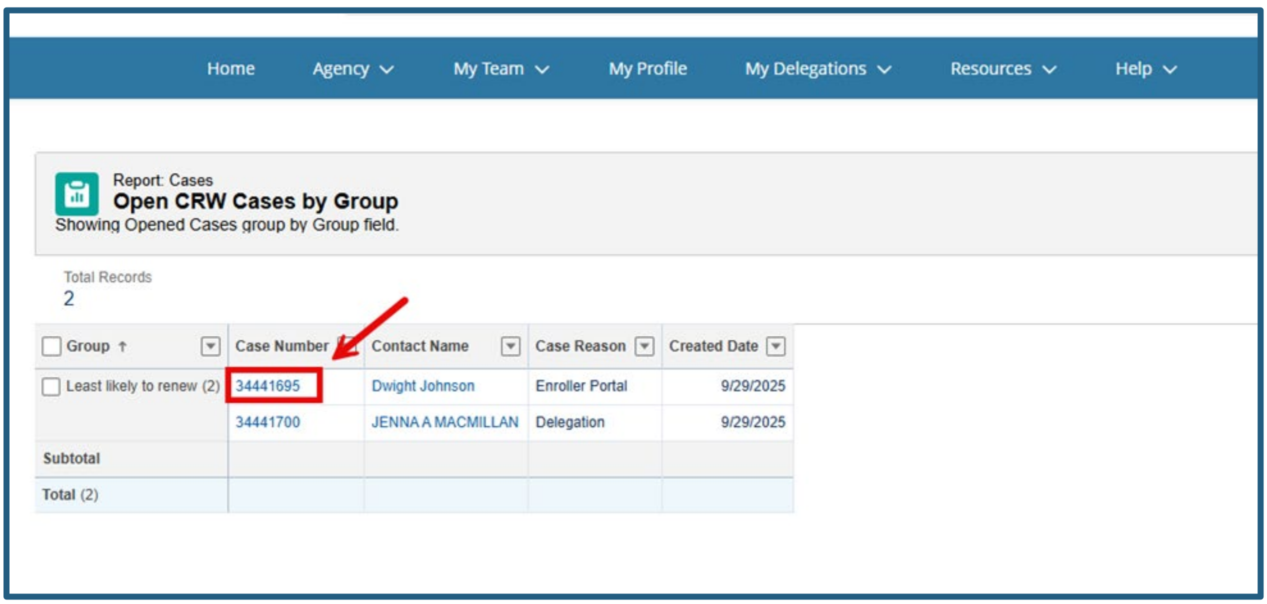
- **Dashboard**: There are two different dashboards specific to the user role. Agency Manager and Entity Primary Contact will have additional access to reports and a more in-depth view. Agency Mangers have the ability to transfer cases to a different Agent Level 2 or Agency Manager in their Agency. Agents and Counselors will have a similar dashboard with reports specific to them. The image below is for the Agency Manager Dashboard view.
- Tab for CRW Cases
- Refresh button
- Links in Dashboard will open reports that are exportable to Excel.
- The following are links on the dashboard:
    - **Open CRW Cases**
        - These are all open cases in the Agency or Entity
    - **My Open CRW Cases**
        - Open cases assigned to the Agency Manager
    - **Average Resolution time**
    - **Open CRW Cases by Group ranking**
        - Most likely to renew
        - Likely to renew
        - Standard renewal likelihood
        - Less likely to renew
        - Least likely to renew
    - **Aging CRW Cases**
        - Open cases that are older than 7, 30, 45, and 60 days
    - **All CRW Cases Closed by Reason**
        - All closed cases by different reason types
    - **Open and Closed CRW Cases by Owner**
        - Open and Closed cases by all agents or counselors in the Agency or Entity.


Home
Agency
My Team
My Profile
My Delegations
Resources
Help
Consumer Retention Workspace
CRW Dashboard
CRW Cases
Event Calendar
Dashboard
EP CRW Dashboard Agency
Refresh
All Open CRW Cases for Agency
11
My Open CRW Cases
2
CRW Case Average Resolution Time
Open CRW Cases by Group
Record Count
Most likely to renew
Likely to renew
Standard renewal likelihood
Less likely to renew
Least likely to renew
Aging CRW Cases <7, <30, <45, <60
All CRW Cases Closed by Reason
Consumer contacted - Changed plans
Consumer contacted - Denied renewal
Consumer contacted - Renewed enrollment
Open & Closed CRW Cases by Owner
Joe Doe
Rhonda Wolfe
Yoshi Spence

2. The enroller can select a group of cases in a specific category using *Open CRW Cases by Group*.

   - Click the bar that corresponds to the category. In the example below, less likely to renew is selected.

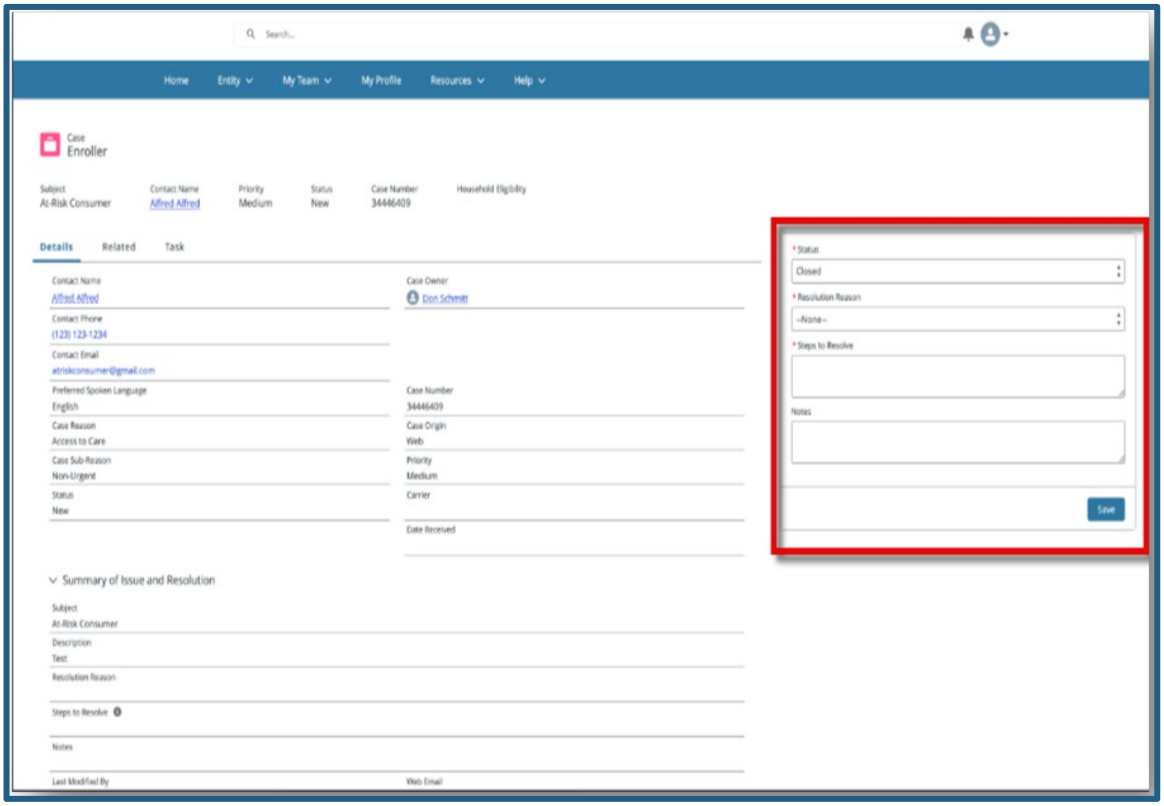
3. A report of the case for that category will populate and the enroller can click for each case to start their outreach.



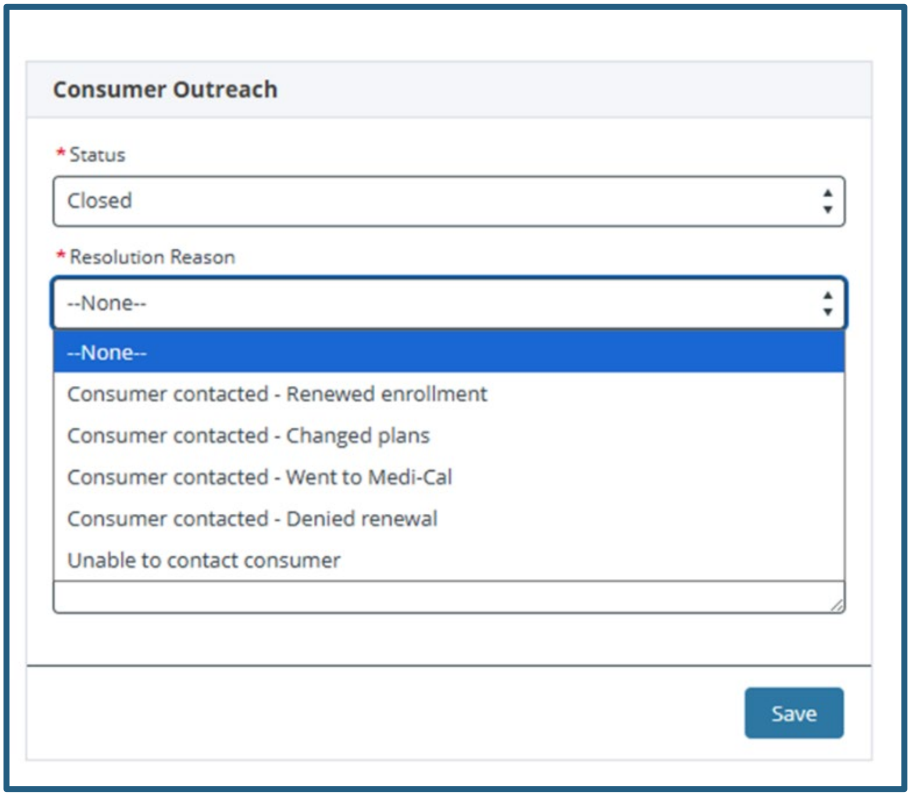
4. Enrollers can track and document their renewal outreach for each consumer case.

   - Includes consumer information, phone, email and preferred language.
   - Potential Renewal categories range from Most likely to renew to Least likely to renew.
   - All cases will be in “New” status.
   - You can mark cases as “In Progress” or “Closed”

- Space to document your interaction.
- Provide resolution information when closing the case from a drop down.
- Notes section
- The highlighted area is required to complete the resolution.



5. Closing the assigned case.
    - Enrollers select the resolution reason that fits the outcome of their outreach efforts.



Notify consumers of the potential change to their monthly premium starting in 2026 and offer to update their application if there have been any changes and use Shop and Compare to review other plan options.

Offer more affordable plan options (such as bronze plans), especially if they previously had gold, silver, or platinum coverage.

Resources

coveredca.com/important-changes

Enhanced Premium Tax Credit (ePTC) for Enrollers Quick Guide

Plan Selection and Benefits for Certified Enrollers Task Guide

Renewals Job Aid for Enrollers