

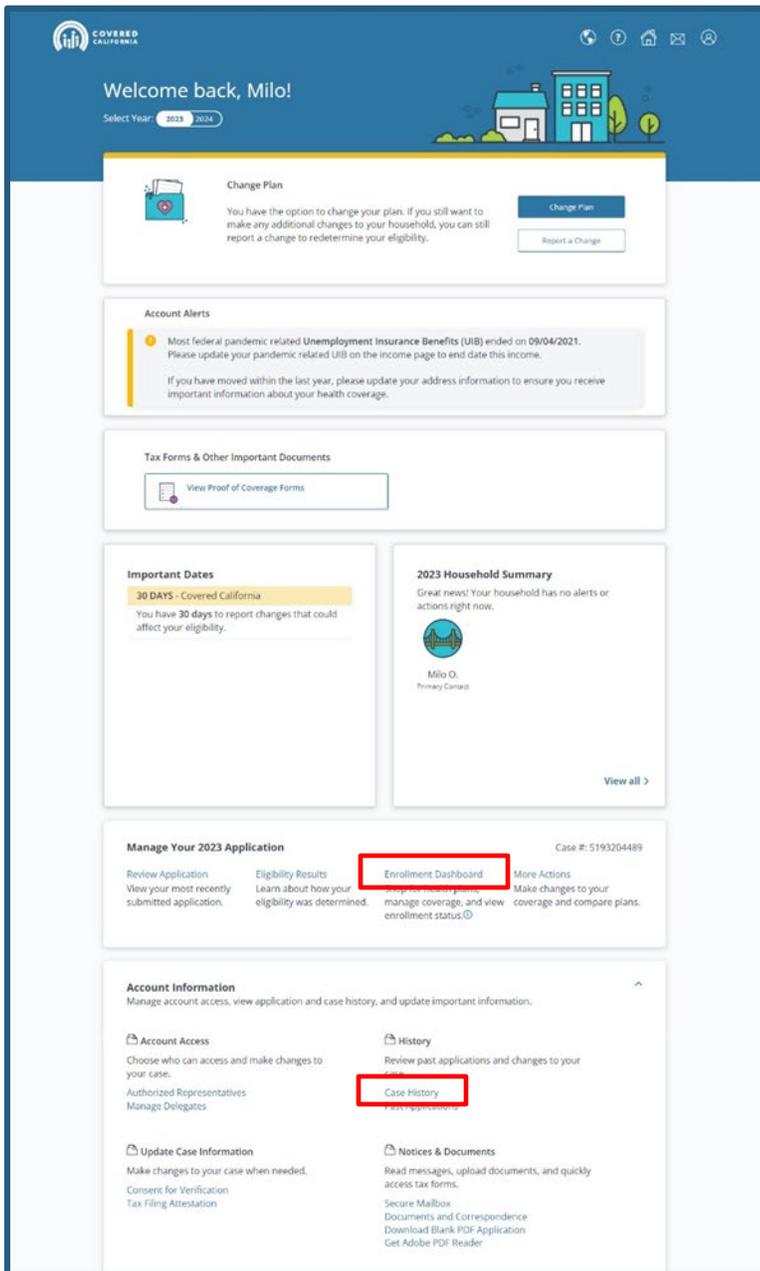


# Enrollment Dashboard Guide for Certified Enrollers

## Overview

This Task Guide illustrates the *Enrollment Dashboard*, a landing page for the Consumer with an at-a-glance view of their enrollment information, application progress, and next steps in the enrollment process.

The *Enrollment Dashboard* is accessible from the Consumer Home page by clicking on the **Enrollment Dashboard** link in the *Manage Your [YYYY] Application* section. Users can also access the Enrollment Dashboard via the **Case History** link in the *Account Information* section of the Consumer Home page.





# Enrollment Dashboard Guide for Certified Enrollers

## Enrollment Dashboard – Consumer View

The *Enrollment Dashboard* provides a current view of Consumer enrollment and indicates the next steps needed in the enrollment process. During Open Enrollment and Active Renewal, the **Select year:** toggle displays two years; the current year and the upcoming year. Once the Open Enrollment period has concluded, only the current year of enrollment displays

An exclamation icon displays in the **Select year:** toggle when there is an informational message for that specific year. The color of the exclamation icon indicates the urgency:

- Red – Monthly Premium is due
- Yellow – Coverage ending soon for one or more Household Members (HHMs)
- Blue – Dynamically displays for various informational messaging

The *Enrollment Dashboard* displays two tabs, one for **Health Plans** and one for **Dental Plans**.

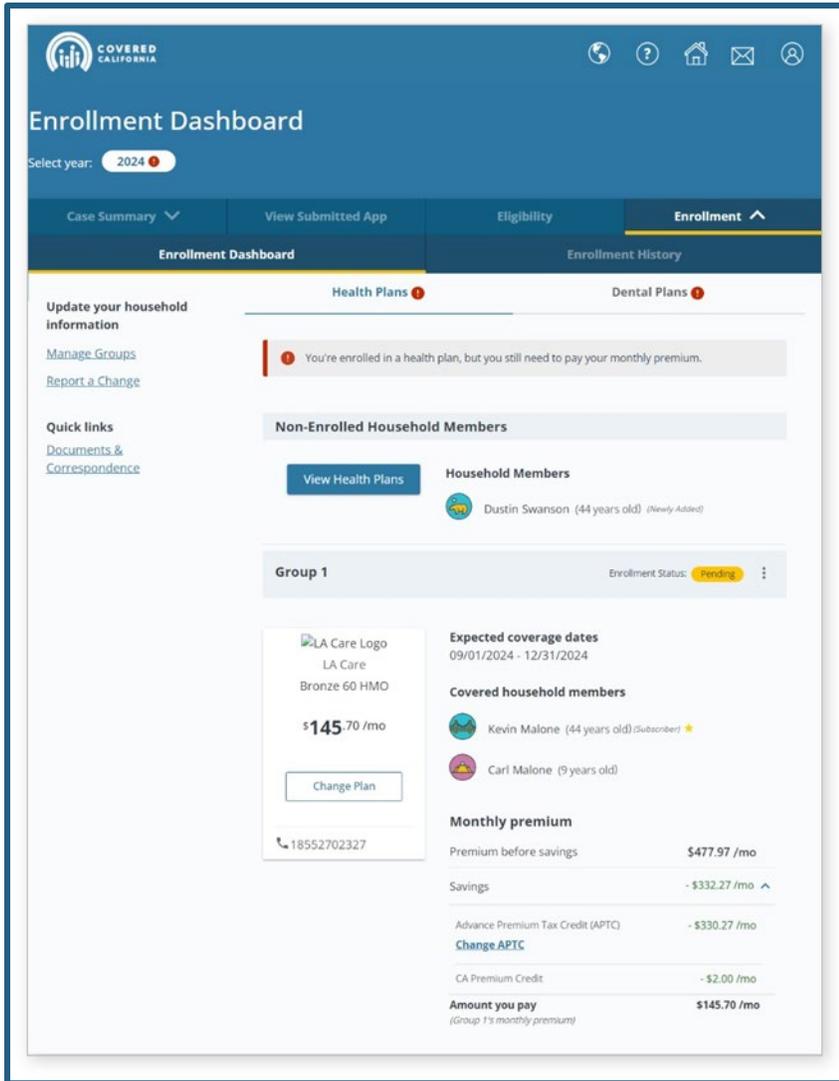
Both the **Health Plans** and **Dental Plans** tabs display the following sections:

- **You Agent** – Dynamically displays when an Agent is delegated to a Consumer's case with the following information:
  - Agent's first and last name
  - Agent's phone number
  - **Manage Delegates** link – Navigates the user to the *Manage Your Delegates* page
- **Update your household information** – Dynamically displays Consumer actions to update their case
  - **Manage Groups** link – Dynamically displays when there are two or more unenrolled HHMs on the case. Clicking the link navigates the user to the *Manage Your Groups* page to edit Groups.
  - **Report a Change** link – Displays when the user submits an application and has an eligibility determination for the current year. Clicking the **Report a Change** (RAC) link navigates the user to the *How would you like to review and update this application?* page
  - **Continue Changes** link – Displays for an initiated (RAC) that has not been submitted. Clicking the **Continue Changes** link navigates the user to the *Has Your Household Changed?* Page
- The *Quick Links* section displays a **Documents & Correspondence** link that navigates the user to the *Documents and Correspondence* page
- Informational banner messaging – Displays dynamic messaging based on enrollment conditions. Examples of possible messaging include the following:
  - Red banner - *You're enrolled in a [Health/Dental] plan, but you still need to pay your monthly premium.*



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- Red banner – *One or more household members haven't selected their health plan. Any members who wish to enroll in a dental plan must first complete their health plan selection.*
- Yellow banner - *Your family dental plan will be renewed before [MM/DD/YYYY] if that plan is still available. If you want to choose a different plan, you must first enroll in a health plan.*
- Blue banner – Displays one of the following messages:
  - *You can choose a Primary Care Provider. If you don't choose one, your health plan will choose one for you.*
  - *We've removed [HHM name] from [plan name] because they're no longer in your household.*
- **Health Plans** tab – Displays HHMs arranged by groups and their health plan information. Non-enrolled and ineligible HHMs also display.

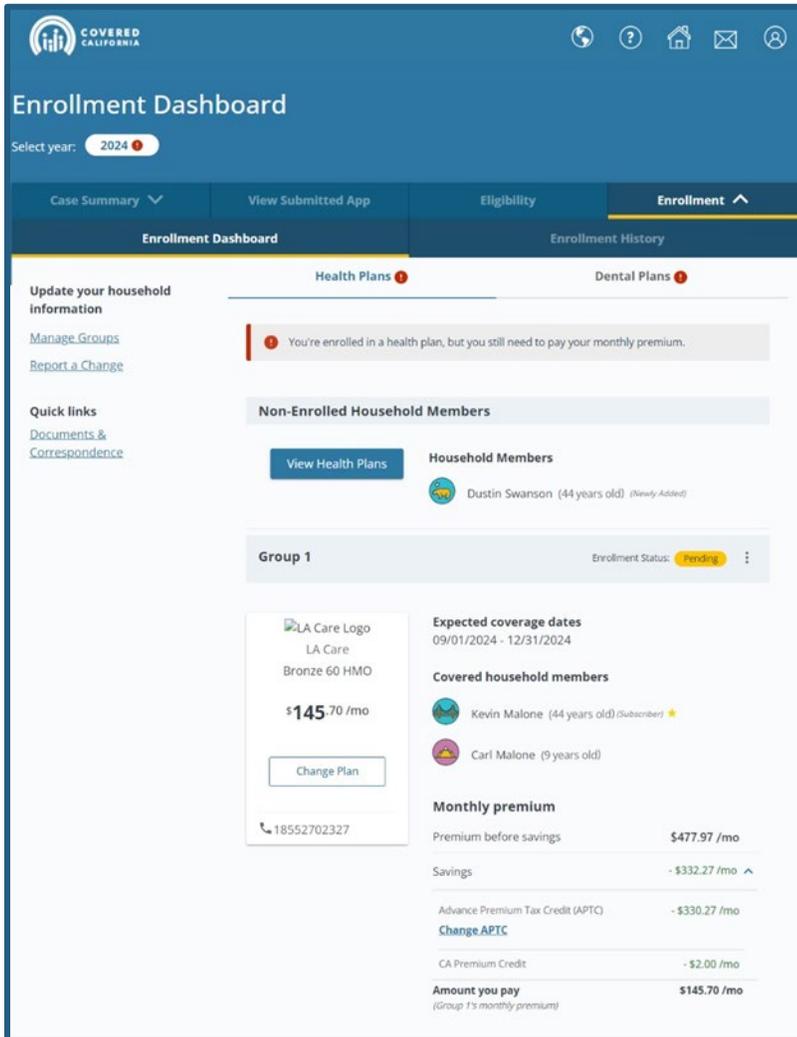


- **Non-Enrolled Household Members** section – Dynamically displays when HHMs are not enrolled in a health or dental plan but are eligible to shop and enroll in a plan. This includes HHMs who are not in a group, newly added HHMs, HHMs who have canceled their health plan, or an HHM who has not selected a plan after the Open Enrollment period.

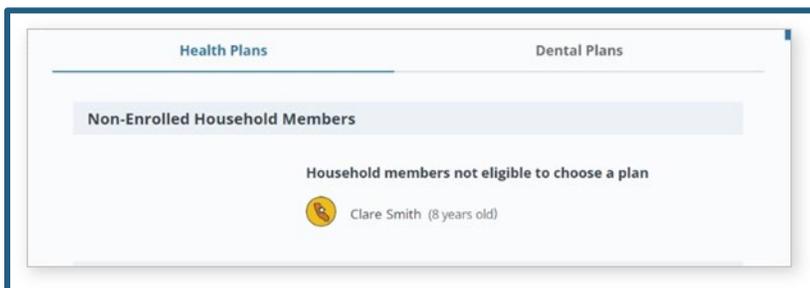
The Non-Enrolled Household Members section displays at the top of the Enrollment Dashboard with the following information:

- A View Health Plans button – Navigates the user to the Who is shopping for a health plan? page to select a health plan when Consumers are eligible to shop for a plan
- An avatar for each HHM with each HHM's name and age

- The text Newly added – Displays next to the name of each HHM who is newly added and has not yet selected a health or dental plan



- *Household members not eligible to choose a plan* section – Dynamically displays HHMs who are unable to shop for a new plan. An avatar, HHM name and HHM age displays for each HHM who is unable to shop for a health plan





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- **Dental Plans** tab – HHMs dynamically display in four sections based on their dental plan enrollment:
  - *Covered household members* – HHMs ready to enroll in a dental plan
    - The dental plan tile displays when at least one HHM has already joined a dental plan
  - *Eligible household members* – HHMS that are eligible to join the enrolled dental plan
    - An **Add to Dental Plan** button displays when there is an existing dental plan to join. Clicking the **Add to Dental Plan** joins the existing dental plan
  - *Need to complete health enrollment* – HHMs that need to enroll in a health plan before enrolling in a dental plan
  - *Household members not eligible to choose a plan* – HHMs that are not eligible to enroll in a dental plan



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The screenshot displays the enrollment dashboard for a household. At the top, there are tabs for "Health Plans" and "Dental Plans". A notification banner states: "One or more household members haven't selected their health plan. Any household members who wish to enroll in a dental plan must first complete their health plan selection." Below this, the "Your Household" section shows the enrollment status as "Pending". A plan card for "Delta Family Dental PPO" is displayed, with a monthly cost of \$51.99 and expected coverage dates from 08/01/2024 to 12/31/2024. Under "Covered household members", Andy Vernard (43 years old) is listed as a subscriber. The "Non-Enrolled Household Members" section is divided into three categories: "Eligible household members" (Gabe Luis, 47 years old) with an "Add to Dental Plan" button; "Need to complete health enrollment" (Erin Hannon, 42 years old and Nelly Bertram, 43 years old); and "Household members not eligible to choose a plan" (Robert Caliphornia, 49 years old).

## Health and Dental Plans Details

The **Health Plan** and **Dental Plans** tabs display at-a-glance health and dental plan details and available actions for each group based on the enrollment status.

- THE Group [#] – Displays for each enrollment group
- Enrollment Status: - Displays a status for each group[ and the colors represent the following plan status:
  - Yellow – *Pending*
  - Green – *Enrolled*



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- Pink – *Canceled*
- Gray – *Terminated*
- **Ellipsis icon** – Clicking the ellipsis icon dynamically displays the actions available for the Group based on the enrollment status. Possible actions include:
  - **Change Plan** – Navigates the user to the *Who’s Changing [Health/Dental] Plans?* page
  - **Choose New Plan** – Navigates the user to the *Who’s Canceling Their [Health/Dental] Plan?* page
  - **Plan Details** – Navigates the user to the *[Health/Dental] Plan Details* page
  - **Update Cancellation Date** – Navigates the user to the *Household Members Ending [Health/Dental] Coverage* page

Select year: 2024

Case Summary | View Submitted App | Eligibility | Enrollment

Enrollment Dashboard | Enrollment History

Update your household information  
[Report a Change](#)

Health Plans | Dental Plans

You're enrolled in a health plan, but you still need to pay your monthly premium.

Group 1 | Enrollment Status: Pending

**Health Net**  
Health Net  
Silver 94 Ambetter PPO  
\$152.96 /mo  
Extra Savings  
[Pay Now](#)  
[Change Plan](#)  
[Plan Details](#)

Expected coverage dates  
05/01/2024 - 12/31/2024

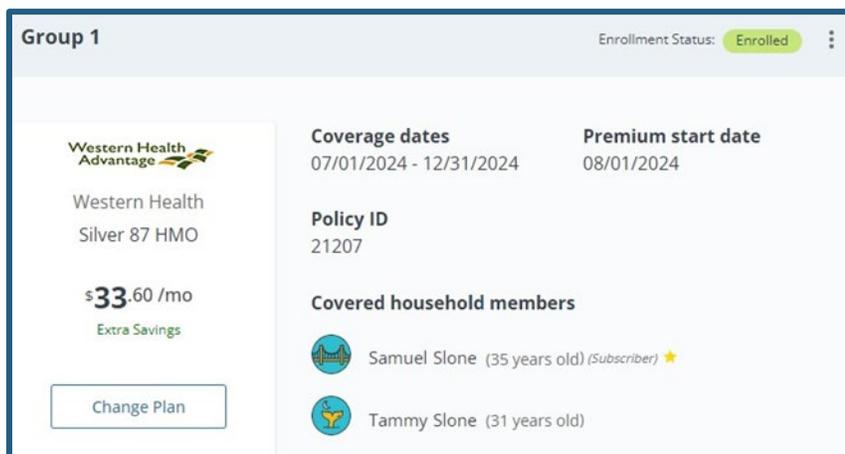
Covered household members  
Barney Thompson (34 years old) (Subscriber)

Monthly premium

Premium before savings	\$637.55 /mo
Savings	-\$484.59 /mo
Advance Premium Tax Credit (APTC)	-\$76.14 /mo
CA Premium Credit	-\$1.00 /mo
Strike Lockout Benefit	-\$407.45 /mo
<b>Amount you pay</b> (Group 1's monthly premium)	<b>\$152.96 /mo</b>

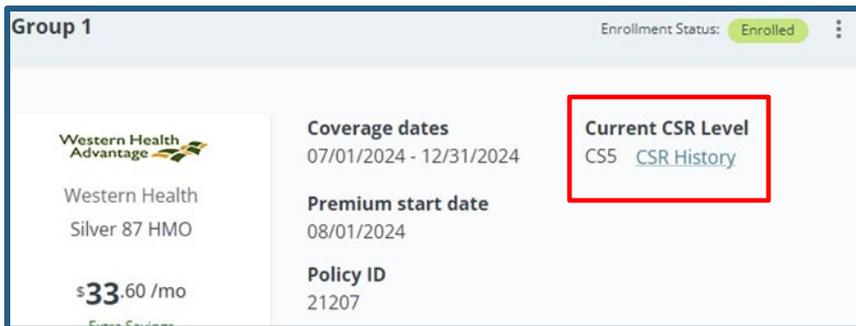
[Change APTC](#)

- The plan Carrier tile – Displays the plan logo, carrier name, plan name, plan monthly premium and *Extra Savings* for CSR health plans. One of the following buttons may dynamically display on the carrier tile based on enrollment conditions:
  - **Pay Now** – Displays for each new group with a pending payment
  - **Change Plan** – Displays during Open Enrollment (OE), Special Enrollment (SE), and 60-day Enrollment period following a Qualifying Life Event (QLE)
  - **Keep Plan** – Displays for each group during Renewal when the health or dental plan is available
  - **Choose New Plan** – Displays when no enrollment exists for Health or Dental
  - **Choose Primary Care Provider** – Displays for groups that have a \$0 premium plan in a *Pending* status
  - **Plan Details** link – Navigates the user to the Health Plan Details page
  - **Website** link – Displays when the carrier provided a website. Navigates the user to the carrier’s website
  - Carrier’s contact number

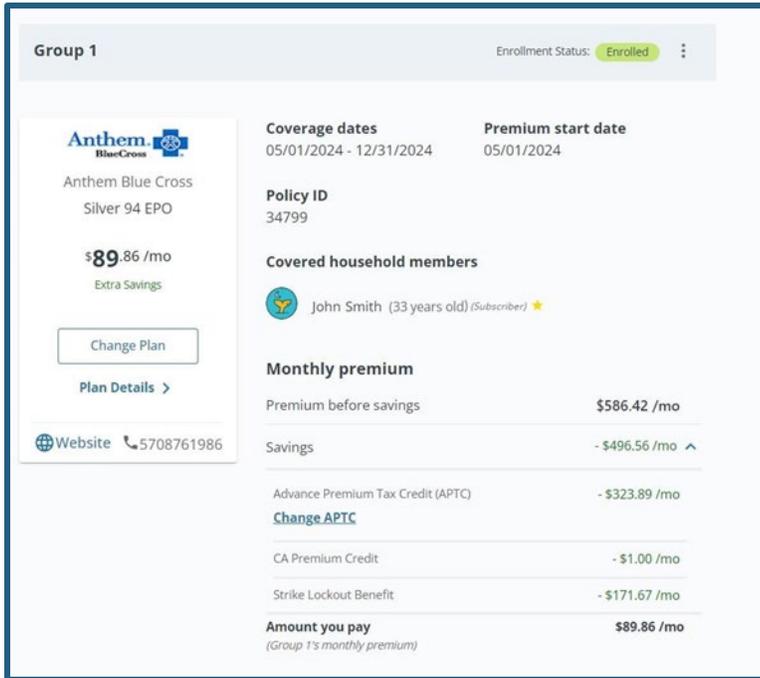


- *Coverage dates* – Displays beginning and end dates for groups enrolled in a plan
- *Current CSR Level* – Displays the cost savings level and a CSR History link. Clicking the link displays the CSR History popup

Note: The Current CSR Level only displays for Enrollers



- *Premium start date* – Displays the premium start date for groups enrolled in a plan
- *Policy ID* – Displays the policy ID assigned to the plan
- *Covered household members* – Displays each HHMs avatar, name, and age. Covered HHMs are HHMs enrolled in a plan
  - A (Subscriber) indicator–Displays next to the first person listed in the Covered household members section
  - A star icon displays next to a HHM’s name if the HHM is the Primary Contact
- *Monthly premium* section – Displays the eligible health plan savings for the group
  - *Premium before savings* – Displays the premium amount before eligible savings
  - *Savings* – Clicking the caret expands the sections
    - *Advance Premium Tax Credit (APTC)*
    - The **Change APTC** link – Navigates the user to the Adjust Advance Premium Tax Credit (APTC) page
    - *CA Premium Subsidy* – Displays the CA Premium Subsidy for which the group is eligible
    - *CA Premium Credit* – Displays the CA Premium credit for which the group is eligible
    - *Strike Lockout Benefit* – Displays the Strike Lockout benefit subsidy for which the group is eligible
    - *Amount you pay* – Displays the monthly premium the group pays



**Group 1** Enrollment Status: Enrolled

**Anthem Blue Cross**  
Silver 94 EPO

**\$89.86 /mo**  
Extra Savings

Change Plan

Plan Details >

Website 5708761986

**Coverage dates**  
05/01/2024 - 12/31/2024

**Premium start date**  
05/01/2024

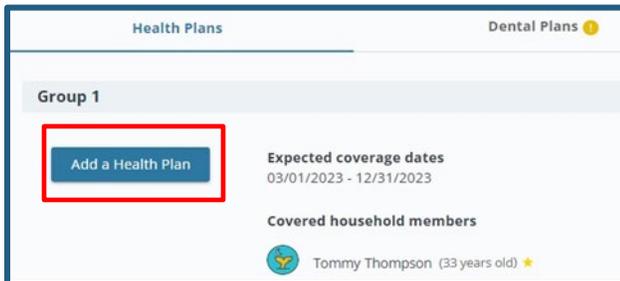
**Policy ID**  
34799

**Covered household members**  
John Smith (33 years old) *(Subscriber)* ★

**Monthly premium**

Premium before savings	\$586.42 /mo
Savings	-\$496.56 /mo
Advance Premium Tax Credit (APTC)	-\$323.89 /mo
<a href="#">Change APTC</a>	
CA Premium Credit	-\$1.00 /mo
Strike Lockout Benefit	-\$171.67 /mo
<b>Amount you pay</b> <i>(Group 1's monthly premium)</i>	<b>\$89.86 /mo</b>

The **Health Plans** and **Dental Plans** tabs display differently with the respective buttons **Add a Health Plan/Add a Dental Plan** when a group has not enrolled in a plan.



**Health Plans** **Dental Plans** ●

**Group 1**

Add a Health Plan

**Expected coverage dates**  
03/01/2023 - 12/31/2023

**Covered household members**  
Tommy Thompson (33 years old) ★



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## Enrollment History

The *Enrollment History* page displays all available years of **Health** and **Dental** plan history. Enrollment History defaults to the current year.

- N/A displays when there is no enrollment history available

Users can search for specific information by clicking one of the available *Filters*:

- Coverage Year
- Insurance Companies
- Network Types

Clicking the **Clear All** link clears the filter selections.

The *Filters* section displays N/A under each filter option and a *There is no health enrollment history yet.* message displays when there is no enrollment history.

Clicking the **Expand All** link expands all the [YYYY] sections. Clicking the **Collapse All** link collapses all the [YYYY] sections.



# Enrollment Dashboard Guide for Certified Enrollers

## Enrollment History

Case Summary | View Submitted App | Eligibility | **Enrollment**

Enrollment Dashboard | **Enrollment History**

Health Plans | Dental Plans

Expand All | Collapse All

2024

Group 1 Enrollment Status: Pending

**Health Net**  
Health Net  
Silver 94 Ambetter PPO

\$152.96 /mo  
Extra Savings

**Pay Now**

Plan Details >

**Coverage dates**  
05/01/2024 - 12/31/2024

**Policy ID**  
34629

**Household coverage details**

HOUSEHOLD MEMBERS | COVERAGE DATES

Barney Thompson  
(34 years old) (subscriber)

05/01/2024 - 12/31/2024

**Monthly Premium**

Premium before savings	\$637.55 /mo
Savings	-\$484.59 /mo
Advance Premium Tax Credit (APTC)	-\$76.14 /mo
<b>Change APTC</b>	
CA Premium Credit	-\$1.00 /mo
Strike Lockout Benefit	-\$407.45 /mo
<b>Amount you pay</b> (Group 1's Monthly Premium)	<b>\$152.96 /mo</b>

Group 2 Enrollment Status: Cancelled

**Anthem Blue Cross**  
Anthem Blue Cross  
Silver 94 EPO

\$83.76 /mo  
Extra Savings

Plan Details >

Website 5708761986

**Coverage dates**  
05/01/2024 - 05/01/2024

**Policy ID**  
34583

**Household coverage details**

HOUSEHOLD MEMBERS | COVERAGE DATES

Barney Thompson  
(34 years old) (subscriber)

05/01/2024 - 05/01/2024

**Monthly Premium**

Premium before savings	\$568.35 /mo
Savings	-\$484.59 /mo
Advance Premium Tax Credit (APTC)	-\$76.14 /mo
<b>Change APTC</b>	
CA Premium Credit	-\$1.00 /mo
Strike Lockout Benefit	-\$407.45 /mo
<b>Amount you pay</b> (Group 2's Monthly Premium)	<b>\$83.76 /mo</b>