



Consumer Retention Workspace (CRW) Lawfully Present Immigrants (LPI) Quick Guide

Background

This quick guide is for enrollers using the Consumer Retention Workspace (CRW) in their Enroller Portal, to identify and support lawfully present immigrant (LPI) consumers who are at risk of losing financial help.

Additional Information

H.R. 1 policy changes specified that certain lawfully present immigrants (LPI) will no longer be eligible for premium tax credits and cost-sharing reductions beginning in 2027.

- These changes affect more than 90% of immigration categories that have historically been eligible for Marketplace financial assistance.
- When eligibility for tax credits is removed, they may face an average premium increase of approximately \$650 or more per member per month.
- Covered California will use a new Exchange Eligible Non-Citizen (ENC) status starting in 2027 to determine who can get exchange financial assistance.
- Consumers who do not fall under an ENC status, even if lawfully present, will be ineligible or discontinued for financial assistance for 2027 coverage.
- “Lawfully present” no longer automatically means “eligible for financial help” in 2027. Only specific ENC statuses will continue to be eligible for Advance Premium Tax Credits, Cost-Sharing Reductions, and state subsidies.

The CRW has been updated to help enrollers identify impacted consumers, support outreach, and monitor outreach activity through dashboards and case documentation.

Eligible Non-Citizens (ENC)

Eligibility to financial assistance programs (APTC: Advance Premium Tax Credit, CSR: Cost-Sharing Reductions, CAPS: California Premium Subsidy and SLS: Strike Lockout Subsidy) will be granted to individuals who have Lawful Presence and are identified as Eligible Non-Citizens (ENC).

- Lawful permanent residents (green card holders)
- Cuban and Haitian entrants
- Migrants from Compact of Free Association (COFA) countries (Micronesia, Marshall Islands, and Palau)

Acceptable ENC document types include:

- Form I-551, Permanent Resident Card (Green Card)
- U.S. Visa



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- I-327 Re-entry Permit
- Form I-94 Arrival/Departure Record
- Foreign Passport Book
- Form I-766, Employment Authorization Document
- EOIR-40, Application for Suspension of Deportation
- EOIR-42A, Application for Cancellation of Removal for Certain Permanent Residents
- EOIR-42B, Application for Cancellation of Removal and Adjustment of Status for Certain Nonpermanent Residents
- Form I-90, Application to Replace Permanent Resident Card
- Form I-589, Application for Asylum and for Withholding of Removal
- Current Temporary I-551 stamp on a foreign passport
- Current Temporary I-551 stamp on Form I-94/I-94A
- Certificate from Department of Interior or Department of Indigenous and Northern Affairs certifying Native American tribal ancestry or other authoritative documents

Lawfully present immigrant (LPI) status ineligible for financial assistance:

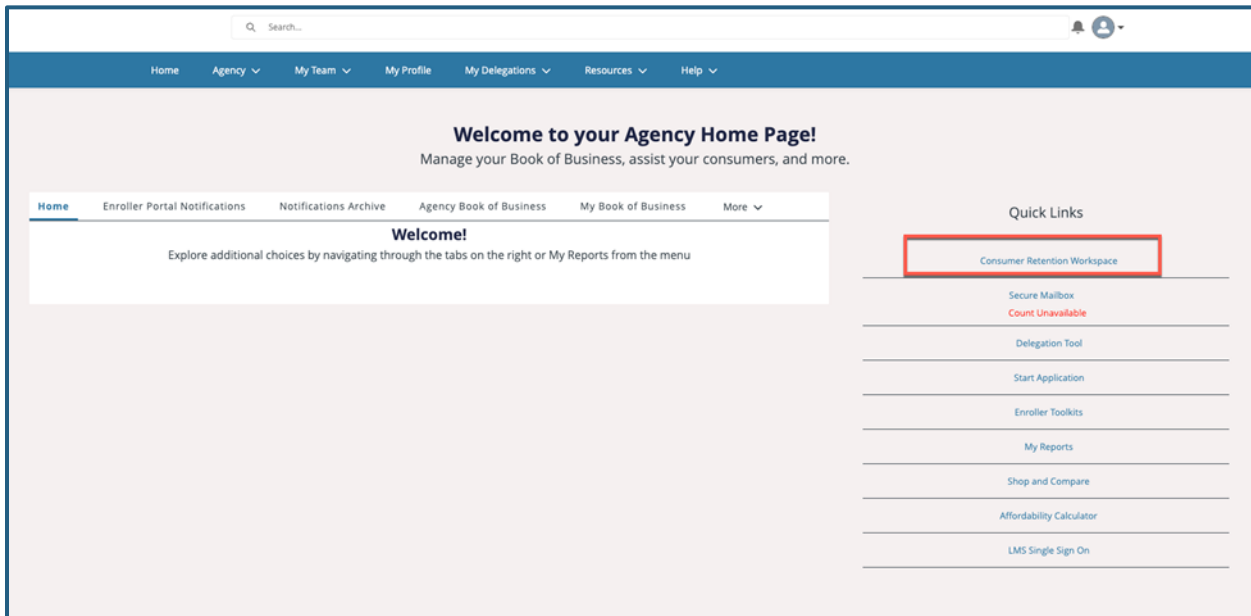
- Individuals with asylum status or pending applications
- Refugees
- Survivors of trafficking, domestic violence, and serious crimes
- Individuals with Temporary Protected Status
- Individuals with non-immigrant visas, such as work visas or student visas
- Other humanitarian or temporary lawful statuses

How to Navigate to the CRW:

- Log in to the Enroller Portal and find *Consumer Retention Workspace* in the *Quick Links*
- You will be taken to the CRW Dashboard



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- You will find 4 groups of consumers we recommend you prioritize:
1. **Document or Status Not Listed:** Consumer cases that are missing information in the citizenship & immigration section of their application
 - Review each case, update information about immigration status and immigration documents.
 2. **LPI Ineligible for APTC 2027:** Consumer cases with documentation and statuses indicating they may lose subsidy in 2027
 - Review each case, to determine if the immigration status and document information is still accurate, assist with updates if immigration status and document types have changed.
 3. **Mixed Household - Document or Status Not Listed:** Mixed Household consumer cases that are missing information in the citizenship & immigration section of their application
 - Review each case, advise consumer to call their county to update their information.
 4. **Mixed Household - LPI Ineligible for APTC 2027:** Mixed Household consumer cases with documentation and statuses indicating they may lose subsidy in 2027
 - Review each case, to determine if the immigration status and document information is still accurate, Advice consumer to contact their county if updates need to be made.



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The screenshot displays the 'Consumer Retention Workspace' dashboard. At the top, there is a navigation bar with links for Home, Agency, My Team, My Profile, My Delegations, Resources, and Help. Below this, the dashboard title 'Consumer Retention Workspace' is centered. The main content area is divided into several sections:

- CRW Dashboard:** Includes 'Agency LPI Consumer Retention Dashboard' with a refresh button and a timestamp 'As of May 26, 2026 9:09 AM'.
- Helping Your Impacted Consumers Keep Their Coverage:** A text-based section providing instructions for enrollers, such as contacting impacted consumers and reviewing citizenship information.
- My Open LPI Outreach Cases:** A large green number '8' representing the total count of open cases.
- My Open LPI Outreach Cases by Group:** A horizontal bar chart showing counts for different groups: Document or Status not listed (2), LPI Ineligible for APTC 2027 (2), Mixed Household - Document or Status Not Listed (3), and Mixed Household - LPI Ineligible for APTC 2027 (1).
- My LPI Outreach Cases by Status:** A donut chart showing the distribution of cases by status (New, In Progress, Closed) with a total count of 9.
- Open LPI Outreach Cases - Agency:** A large green number '9' representing the total count of open cases by agency.
- Open LPI Outreach Cases by Group - Agency:** A horizontal bar chart showing counts for different groups: Document or Status not listed (2), LPI Ineligible for APTC 2027 (3), Mixed Household - Document or Status Not Listed (3), and Mixed Household - LPI Ineligible for APTC 2027 (1).
- LPI Outreach Cases by Status - Agency:** A donut chart showing the distribution of cases by status (New, In Progress, Closed) with a total count of 10.
- LPI Outreach Cases by Owner & Status - Agency:** A horizontal bar chart showing counts for different case owners: User1779204885286211225 (1) and Warren Mitchell (9).
- Closed LPI Outreach Cases - Agency:** A horizontal bar chart showing counts for different resolution reasons: Document or Status not listed (1).

What to Review in the CRW

When you open the consumer's CRW record, review:

- Coverage summary and current financial help.
- Any LPI-related flags or labels.



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Case Enroller

Subject: Retention - LPI Consumer Outreach | Contact Name: Kira Villa | Priority: Medium | Status: In Progress | Case Number: 43170553 | CalHEERS Case No: 5196478871

DETAILS	RELATED
Contact Name: Kira Villa	Case Owner: Warren Mitchell
Contact Phone:	CalHEERS Case No: 5196478871
Contact Mobile: (345) 345-3354	Case Origin: CalHEERS
Contact Email:	Priority: Medium
Preferred Spoken Language: English	Date Received:
Case Reason: Retention	
Case Sub-Reason: LPI	
Status: In Progress	
Group:	

Coverage Information

Gross Premium Amount: \$494.91	Coverage Level: BRONZE
APTC (Monthly): \$461.16	Plan Type: Health
Carriers (List of): Kaiser	

Summary of Issue and Resolution

Subject: Retention - LPI Consumer Outreach
Description: Retention of Lawfully Present Immigrant
Resolution Reason:
Steps to Resolve:
Notes:

Consumer Outreach

Status: In Progress
Notes:
Save

Transfer Case

Case Owner: Select a case owner ...
Save

Suggested Review and Update Steps

Before contacting the consumer, review the citizenship and immigration section of the application any eligibility or immigration-related documents already on file to confirm whether updated documentation may be needed.

If appropriate, remind the consumer to review and update their immigration documentation and status information and submit any acceptable supporting documents through the proper Covered California process.

During outreach, also review:

- Whether income or household information has changed.
- Whether there are lower-cost plan options or other coverage pathways to discuss for the 2027 plan year.

Outreach Reminders

When speaking with the consumer:



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- Some households may have varied immigration eligibility for different members resulting in only some members enrolling in Covered California with financial assistance.
- Explain that households with varied immigration eligibility for different members may result in household members being enrolled in separate plans.
- Clarify with consumers if there has been any update to their immigration status or citizenship.
- Be aware that if immigration statuses or documents are updated, this will result in a redetermination of eligibility for this plan year (2026). This eligibility result does not predict eligibility for 2027.
- Non-eligible LPI consumers will still be able to enroll in Covered California coverage, however, they will not be eligible for any financial assistance. As a result, many of these consumers will see their health care costs increase. Explain that federal rule changes are ending financial assistance for many lawfully present immigrants in 2027. Be clear that consumers may see a large premium increase if they keep the same plan without APTC/CSR.
- These changes do not go into effect until 2027, therefore, non-eligible LPI can still use their current health care coverage to go to the doctor and seek the health services they need.

Documentation in CRW

After each outreach attempt, select a case resolution from the dropdowns and add a concise note in CRW that includes:

- Whether contact was made.
- What was explained.
- Any plan options or next steps discussed.

Any follow-up needed.

Case information is visible by Covered California staff. Clear documentation is important to support coordination, reduce duplicate outreach, and ensure anyone assisting the consumer can quickly understand prior actions and next steps.

Update the status as appropriate so dashboard reporting reflects current activity.

Case resolution options include:

- *Consumer contacted – Updated immigration status and document information*
- *Consumer contacted – Will not be eligible for financial assistance*
- *Consumer contacted – Does not wish to renew for 2027*



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- *Consumer contacted – Mixed Household, advised to call county*
- *Contact attempted – No response*
- *Unable to contact*

The screenshot shows the CRW interface for a case. The 'Consumer Outreach' dropdown menu is open, showing options: 'None', 'In Progress', and 'Closed'. The 'None' option is selected. The 'Status' field is currently set to 'None'. The 'Resolution Reason' field is empty. The 'Transfer Case' section is also visible, with a 'Case Owner' dropdown menu set to 'Select a case owner ...'.

The screenshot shows the CRW interface for a case. The 'Consumer Outreach' dropdown menu is open, showing a list of resolution reasons: 'Consumer contacted – Updated immigration status and document information', 'Consumer contacted – Will not be eligible for financial assistance', 'Consumer contacted – Does not wish to renew for 2027', 'Consumer contacted – Mixed Household, advised to call county', 'Contact attempted – No response', and 'Unable to contact'. The 'Status' field is currently set to 'Closed'. The 'Resolution Reason' field is empty. The 'Transfer Case' section is also visible, with a 'Case Owner' dropdown menu set to 'Select a case owner ...'.



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Key Takeaways

- LPI consumers may face major changes to financial help beginning in 2027.
- CRW is the main workspace for identifying impacted consumers, documenting outreach, and tracking follow-up activity.
- Enrollers should review notices, verify case details, encourage consumers to review and update immigration documents and status when needed, and document outcomes clearly in CRW.