

2025 SPECIAL ENROLLMENT PERIOD

# Enroller Workshop

FOR COVERED CALIFORNIA PARTNERS AND STAKEHOLDERS



April 2025

LET'S TALK  
**health**



**Presentation Published Date: April 29, 2025**

Disclaimer: The information contained in this presentation is valid as of the above date. It is intended to provide a snapshot of the current situation or data available at the time of the presentation. Please be aware that details may have changed following this date. We encourage you to consult the appropriate sources or contact us directly for the most up-to-date information.



# Agenda

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1. Covered California News
  2. Special Enrollment Period Updates
  3. Looking Ahead in 2026 and Consumer Retention
  4. Covered California for Small Business
  5. Enroller Portal and CalHEERS
  6. Enroller Tools and Resources
-



# Covered California News



# State Budget and Legislative Updates

FISCAL YEAR 2025-26



# Proposed Governor's Budget Appropriations for Covered California Fiscal Year 2025-26



Health Care Affordability Reserve Fund (HCARF)

~~\$165 Million~~  
**\$105 Million**

allocated for a financial assistance program.



HCARF – Striking Worker Benefit Program

~~\$2 Million~~  
**\$3 Million**

from HCARF for a benefit program supporting striking workers, with the additional increases up to \$3 Million, if needed as specified.



General Fund – California Premium Credit

**\$20.35 Million**

from the General Fund dedicated to providing a premium credit of \$1 per member, per month.



Loan from HCARF to General

~~\$100 Million~~  
**\$109 Million**

will be made from HCARF to the General Fund in Fiscal Year 2025-26.

# Tracking Federal & State Legislation

Covered California continues to monitor bills that address health care and state operations.

Topics of interest include cost sharing and benefit mandates, Essential Health Benefits, eligibility, privacy and artificial intelligence.

## New Proposed Federal Rules

On March 10, 2025 – Deferred Action for Childhood Arrivals (DACA) recipients' eligibility, open enrollment deadlines, special enrollment verifications, renewals, and agent/broker agreements.

**AB 1419 (Addis)** seeks to [build on](#) the Medi-Cal to Covered California Enrollment Program by [extending auto-plan selection to consumers](#) who apply for coverage through [counties](#) and are determined to be [eligible](#) for Covered California.



# Open Enrollment Highlights

2025 PLAN YEAR

# Marketing to Consumers

LOOKING BACK AT THE OPEN ENROLLMENT  
25 CAMPAIGN

# Strong Finish: Marketing Campaign Drove Enrollment Actions

Paid



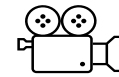
**1.6+ Billion**

*Impressions Served  
Reaching CA Adults  
(18-64) ~53x*



**6.4+ Million**

*Qualified Website  
Visits<sup>+</sup>*



**62+ Million**

*Video Views*



**~166K**

*Accounts Created  
from Digital Efforts*

Owned



**11+ Million**

*Direct Outreach to Enrollees\*  
(total email, direct mail, SMS)*



**41+ Million**

*Direct Outreach to Funnel  
(total email, direct mail, SMS -  
Prospective enrollees)*



**Email Open Rate\***

*Enrollees – 63%  
Funnel – 52%*

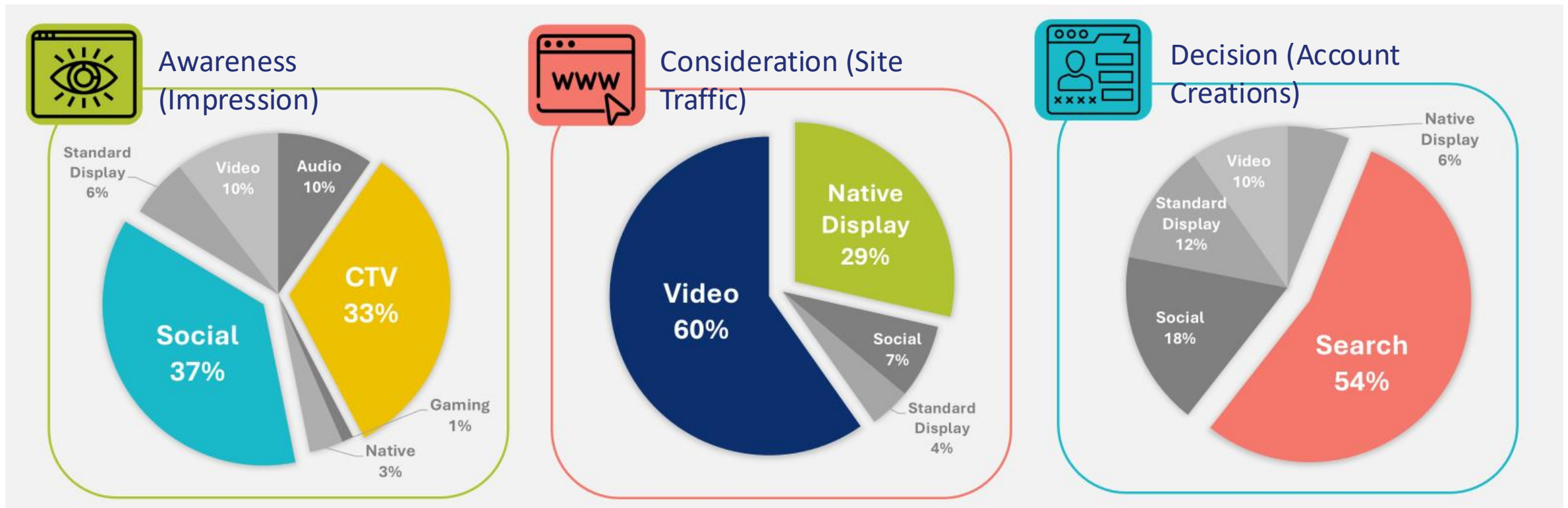


**~86K**

*Accounts Created*

# Digital Channels Helped Nudge Consumers Along Their Enrollment Journey

A diverse channel mix is necessary to engage prospective consumers along their enrollment journey as some channels excel in driving awareness metrics while others excel in driving conversions.

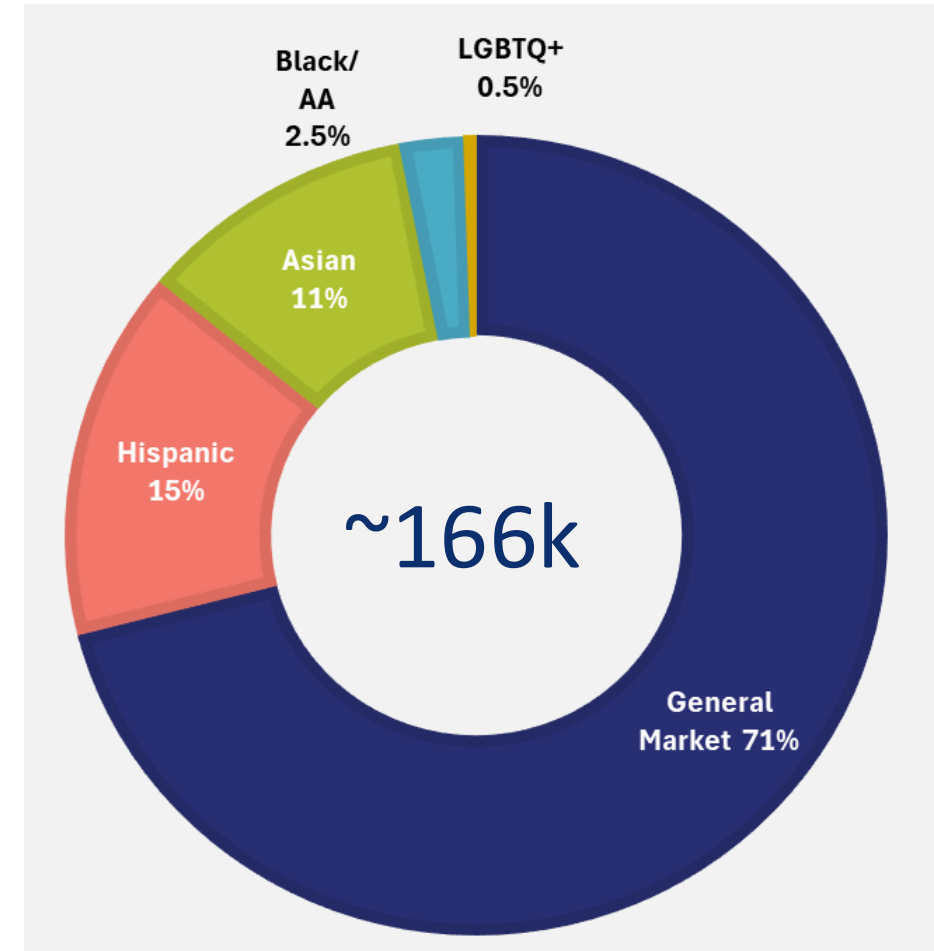


Account Creations are unique visitors in each channel buy that have clicked "submit" through the application process  
All channel share metrics are being reported based on the channel buy associated with the KPI

Special Enrollment Period Enroller Workshop | April 2025 | Outreach and Sales Division

# Impact of Campaigns on Account Creation

- General Market campaign contributed 71% of trackable Account Creations.
- Rest of the segments combined drove 29% of account creations.
- Paid search makes up for over half of account creations, indicating users in the smaller segments could have converted through English search ads.





# Post Campaign Research to Evaluate Advertising Recall to Help Inform Future Work

- Methodology: Quantitative online survey available in English and Spanish
- Fielding Period: February – March 2025
- Report: April 2025

## Audience Groups:

1. Uninsured, Subsidy Eligible (138% - 600% FPL)
2. Insured individuals:
  - Covered California members
  - Employer-Sponsored Insurance holders

## Research Goals:

- Assess OE25 :30 TV/Video ads to evaluate breakthrough
- Assess actions taken and/or changes in behavior
- Advertising impact on health insurance decision-making
- Inform future advertising efforts

# Communications and Public Relations Campaign

OPEN ENROLLMENT 2025: LET'S TALK  
HEALTH



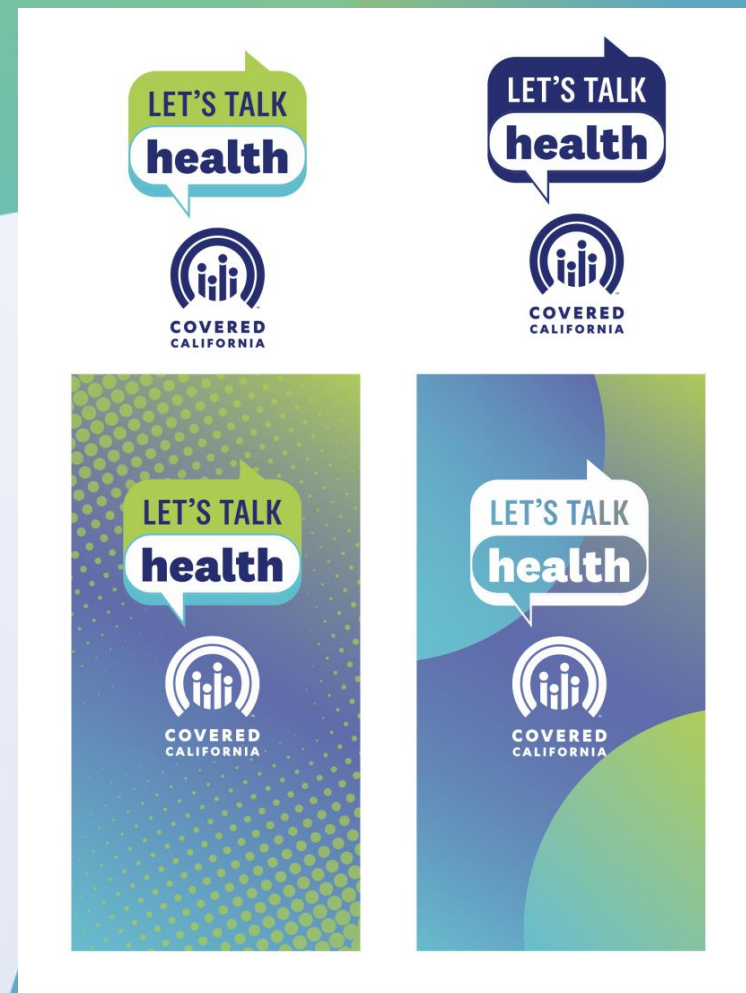
# 2025 Open Enrollment Let's Talk Health

## The Goal of the “Let’s Talk Health” Campaign

Covered California’s “Let’s Talk Health” initiative aimed to improve the health literacy of all Californians – especially the remaining uninsured – and engage them in conversation about health coverage, which can be complicated and confusing.

## Partnership with Clinicians and Libraries

In phase one, rolled out in 2025 Open Enrollment, we collaborated with health literacy clinicians to provide in-language, culturally resonate messaging and materials. We also partnered with the California State Library system to distribute materials, host media events, and partner on health literacy workshops.





# 2025 Open Enrollment Let's Talk Health

## Organic Social Media Campaign

Covered California's "Let's Talk Health" campaign was coordinated with marketing's social media calendar and amplified through the Let's Talk Health social press kit to various stakeholders, elected officials, and community-based organizations.

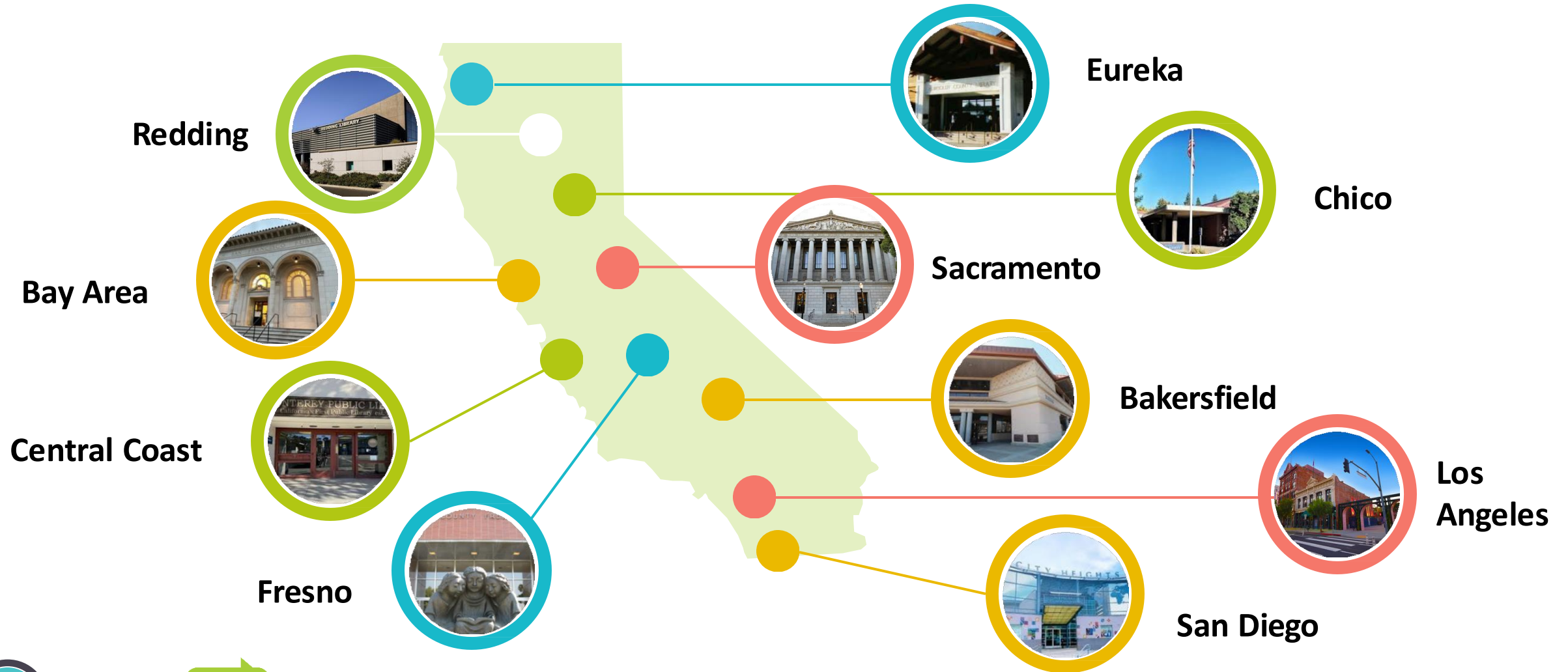
## Influencer Strategy

The Communications team partnered with influencers that culturally resonated with the diverse communities reflected across California. These influencers strategically supported marketing and communications campaigns with visibility and content creation at media events near influencer's communities.





# Statewide Media Events and Activity



# Earned Media and Events

## TO REACH THE REMAINING UNINSURED

Covered California executed a statewide media tour from San Diego to Redding including:

- Kickoff events in Sacramento, Fresno, Los Angeles, Redding, San Francisco, San Diego and Bakersfield
- Ethnic media events in Fresno, Los Angeles, San Francisco and also San Jose
- Deadline Events in San Diego, Fresno and Sacramento





# Earned Media and Events

## TO REACH THE REMAINING UNINSURED

These events were hosted at libraries, health centers, and directly in communities where the uninsured largely remain. Speakers included:

- Covered California executive team
- Elected officials
- Health literacy experts
- Clinicians and executive leadership in healthcare
- Librarian leadership
- Public health experts
- Leaders from community-based organizations









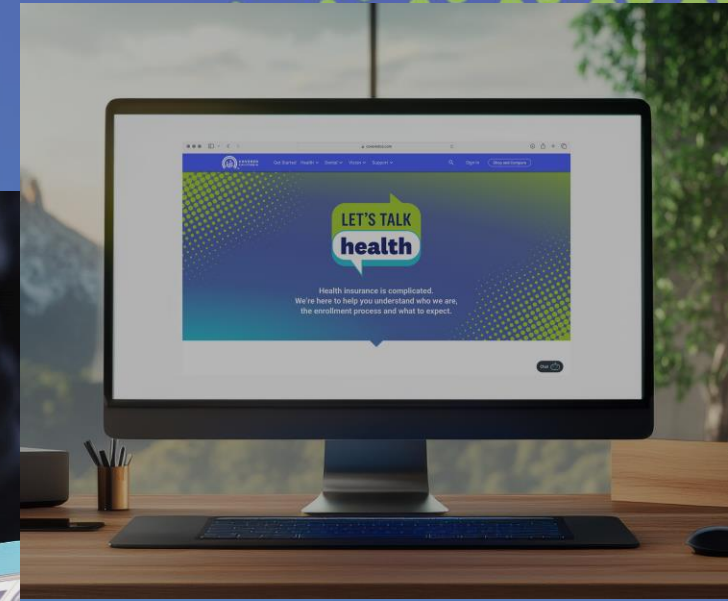
# Let's Talk Health

## OE25 LTH UPDATES

**Branded Multilingual Education Material** to develop strong consumer engagement.

**Let's Talk Health Website** is accessible in multiple languages.

**Let's Talk Health Social Press Kit** to provide stakeholders with the integrative marketing tools.

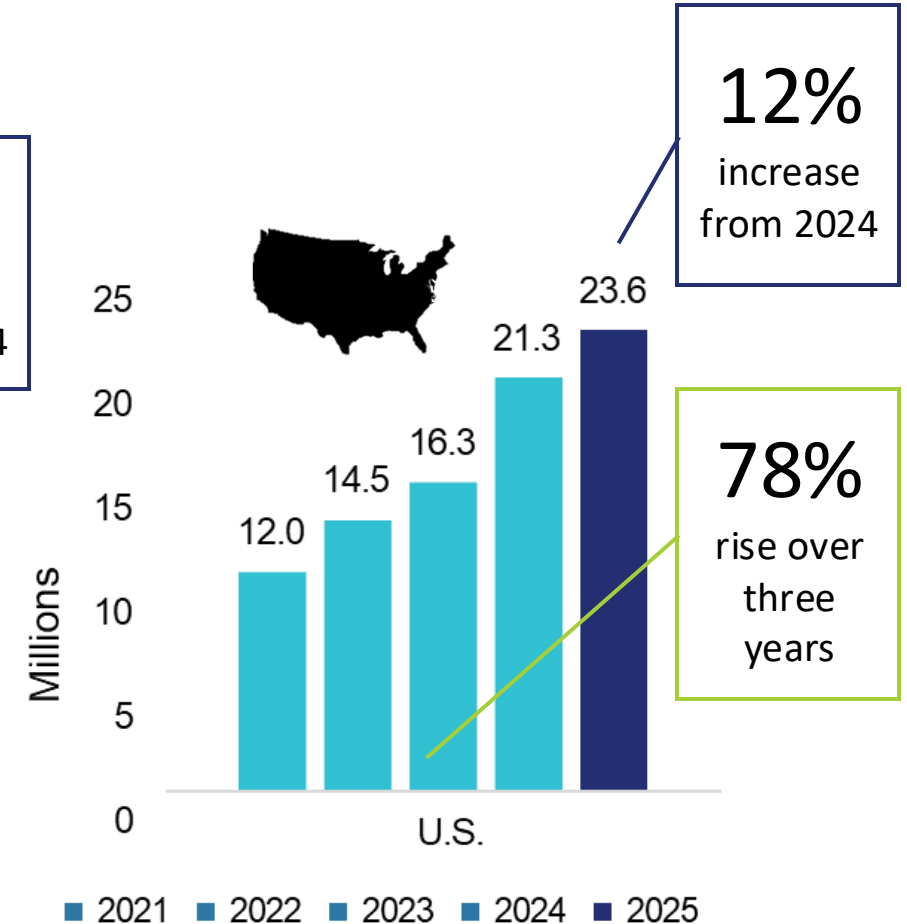
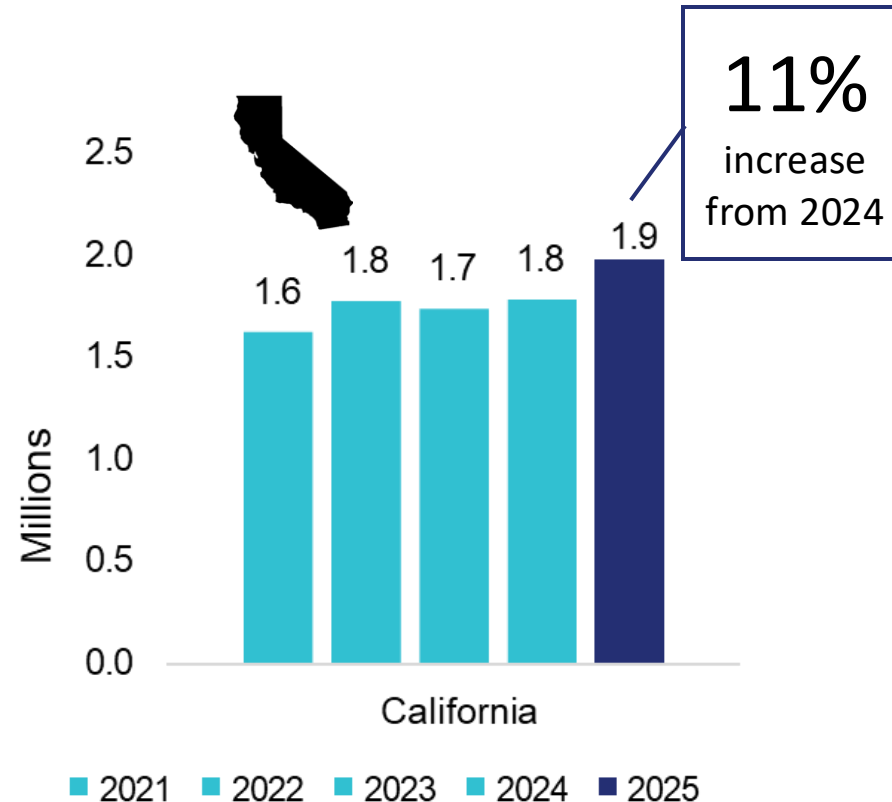


# Open Enrollment Sign-Ups

2025 PLAN YEAR DATA

# Marketplace Enrollment Increases Nationally

- Covered California Open Enrollment Surge – 1.9 Million for 2025
- Federal Marketplace Growth
- Federally-facilitated Marketplaces (FFM) Expansion



Net Marketplace Plan Selections: California and HealthCare.gov

Data from Centers for Medicare and Medicaid Services, Marketplace 2025 Open Enrollment Period Report: Final National Snapshot (January 15, 2025), available at: [Marketplace 2025 Open Enrollment Period Report: National Snapshot | CMS](#)

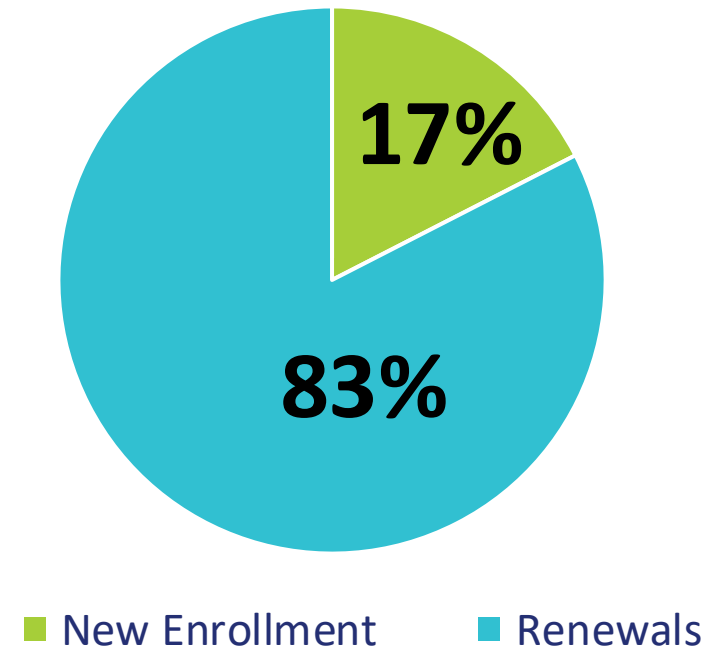
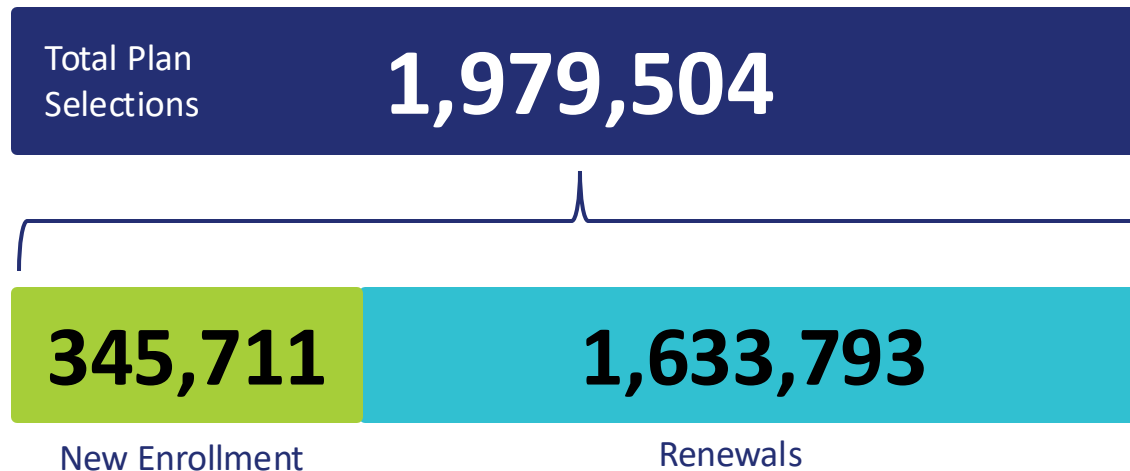


COVERED  
CALIFORNIA



# Covered California Reaches Landmark Achievement!

- More than **1.97** million Californians selected a Covered California plan for 2025.
- New sign-ups have increased by **13%** compared to last year.



Net plan selections through January 31st, 2025.



COVERED  
CALIFORNIA



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# Trends for New Sign-Ups - Income

	2024		2025		2025 v. 2024	
INCOME	Enrollees	Column %	Enrollees	Column %	Difference	% Change
150% FPL or less	33,640	11%	42,634	12%	8,994	27%
150% FPL to 200% FPL	78,540	26%	92,914	27%	14,374	18%
Grand Total*	306,390	100%	345,710	100%	39,320	13%

- Two in five new sign-ups had incomes under 200% of the Federal Poverty Level (FPL).
- Increasing from 112,200 in 2024 to 135,500 in 2025, a year-over-year increase of 21%.

\*Grand total net plan selections through January 31st, 2025. Data on the table does not include all levels of the trend mentioned.

# Trends for New Sign-Ups – Silver Tier

TIER	2024		2025		2025 v. 2024	
	Enrollees	Column %	Enrollees	Column %	Difference	% Change
Silver	185,380	61%	240,065	69%	54,685	29%
Grand Total*	306,390	100%	345,710	100%	39,320	13%

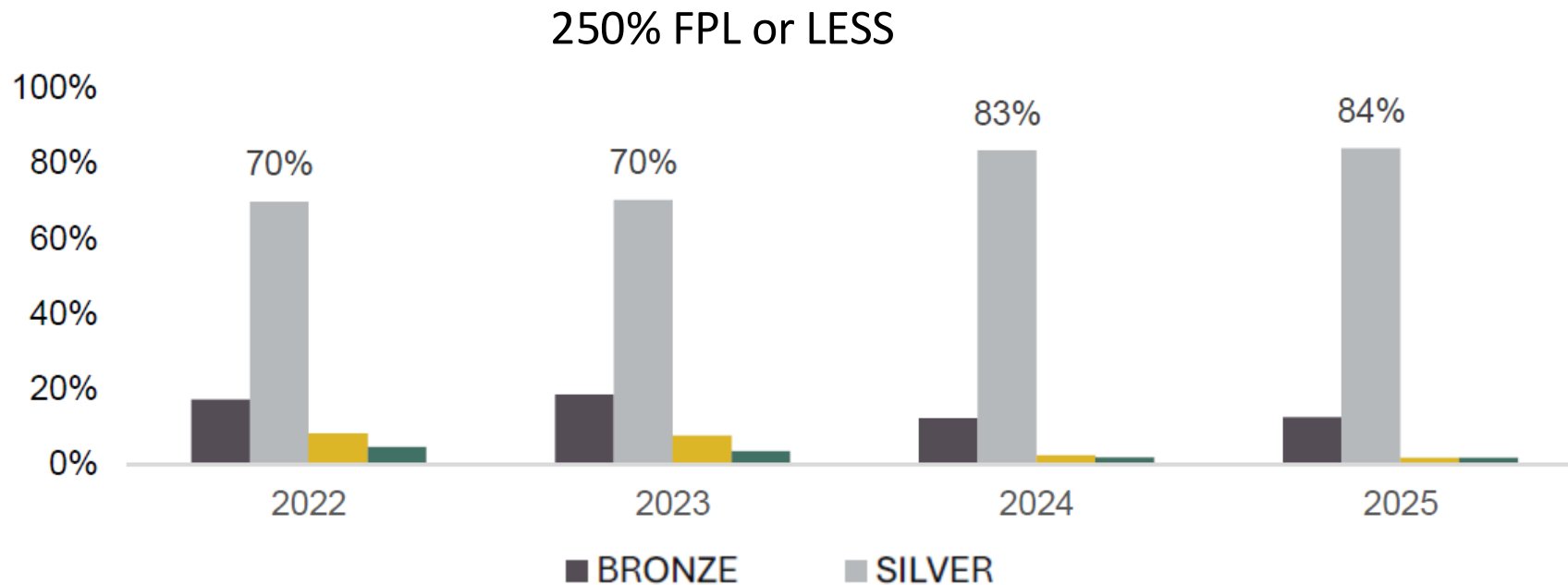
- Enrollment in Silver plans continues to increase, with Silver plans making up 69% of all new sign-ups, a 29% increase compared to last year.
- This increase reflects the extension of enhanced CSR benefits to all consumers regardless of income in 2025, as well as ongoing auto-enrollment of Medi-Cal transitioners into Silver plans.

\*Grand total net plan selections through January 31st, 2025. Data on the table does not include all levels of the trend mentioned.



# Share of New Sign-Ups Enrolled in Silver – 250% FPL or Less

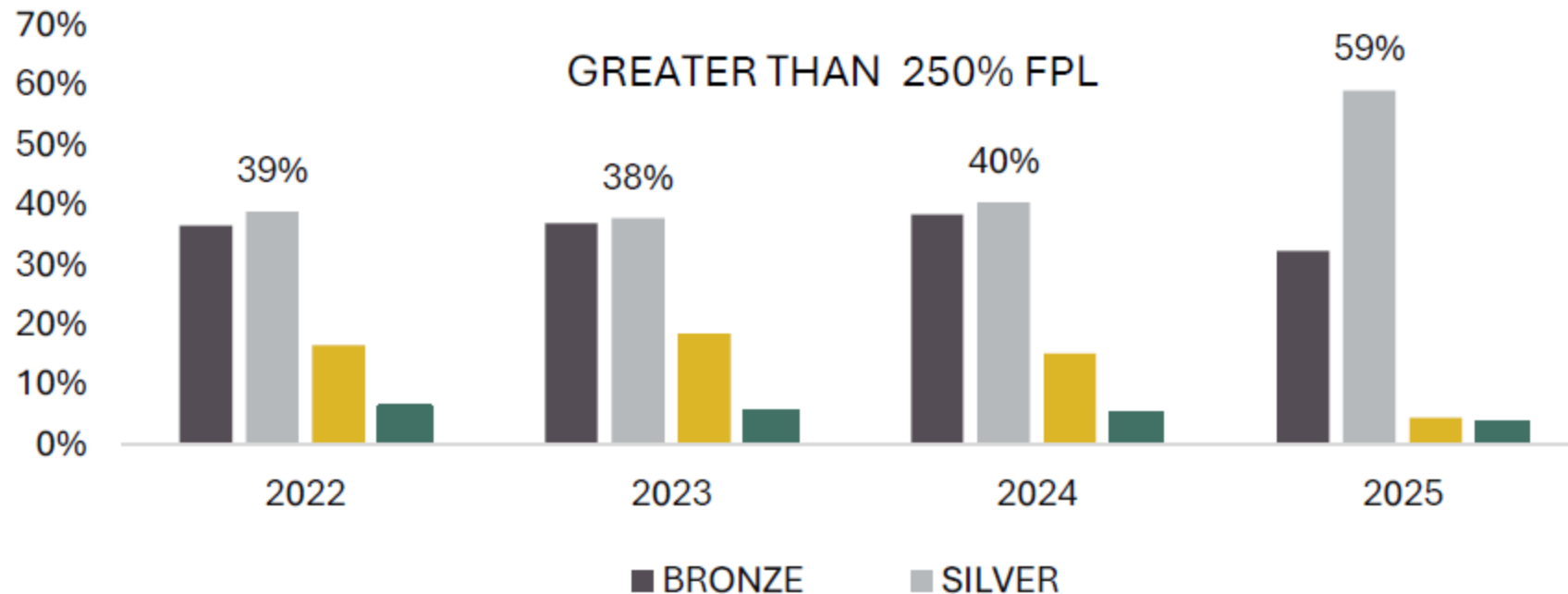
In 2025, 84% of new sign-ups with incomes below 250% FPL enrolled in an enhanced Silver plan.



Net plan selections through January 31st, 2025.

# Share of New Sign-Ups Enrolled in Silver – Greater than 250% FPL

Consumers with incomes over 250% were newly eligible for enhanced CSR benefits – with 59% choosing Silver in 2025 compared to 40% in the prior year.



Net plan selections through January 31st, 2025.

# Trends for New Sign-ups – Age

AGE	2024		2025		2025 v. 2024	
	Enrollees	Column %	Enrollees	Column %	Difference	% Change
Age 18 to 25	41,360	14%	49,193	14%	7,833	19%
Age 35 to 44	52,770	17%	62,164	18%	9,394	18%
<b>Grand Total*</b>	<b>306,390</b>	<b>100%</b>	<b>345,710</b>	<b>100%</b>	<b>39,320</b>	<b>13%</b>

- Age trends appear to be relatively stable compared to prior years, with the 18-25 and 35-44 age groups increasing relative to 2024.

\*Grand total net plan selections through January 31st, 2025. Data on the table does not include all levels of the trend mentioned.

# Trends for New Sign-Ups – Race/Ethnicity

	2024		2025		2025 v. 2024	
RACE / ETHNICITY	Enrollees	Column %	Enrollees	Column %	Difference	% Change
Latino	79,010	32%	97,043	35%	18,033	23%
Grand Total*	306,390	100%	345,710	100%	39,320	13%

- New sign-ups increased across all race/ethnicity groups, with the largest increases seen among Latino consumers – increasing by 18,033, or 23%, compared to 2024.

# Trends for New Sign-Ups – Language

- New sign-ups among Spanish speakers grew 20% in 2025 relative to 2024, compared to average growth of 13% for all new enrollees.
- Enrollment among other language groups, such as Mandarin and Russian speakers, also increased considerably.

Net plan selections through January 31st, 2025.

	2024		2025		2025 v. 2024	
LANGUAGE SPOKEN	Enrollees	Column %	Enrollees	Column %	Difference	% Change
(nonrespondent)	740	0%	755	0%	15	2%
Arabic	260	0%	248	0%	-12	-5%
Armenian	350	0%	312	0%	-38	-11%
Cambodian	70	0%	87	0%	17	24%
Cantonese	2,320	1%	1,953	1%	-367	-16%
English	260,270	85%	291,827	84%	31,557	12%
Farsi	330	0%	328	0%	-2	-1%
Hindi	180	0%	102	0%	-78	-43%
Hmong	20	0%	40	0%	20	100%
Korean	1,830	1%	1,444	0%	-386	-21%
Mandarin	9,370	3%	12,781	4%	3,411	36%
Punjabi	260	0%	326	0%	66	25%
Russian	990	0%	1,260	0%	270	27%
<b>Spanish</b>	<b>26,330</b>	<b>9%</b>	<b>31,580</b>	<b>9%</b>	<b>5,250</b>	<b>20%</b>
Tagalog	410	0%	417	0%	7	2%
Vietnamese	2,640	1%	2,251	1%	-389	-15%
<b>Grand Total</b>	<b>306,380</b>	<b>100%</b>	<b>345,710</b>	<b>100%</b>	<b>39,330</b>	<b>13%</b>

# Trends for New Sign-Ups – Regions

- Southern California Counties account for 59% of total new-sign ups.
- Other regions – including Sacramento, Monterey, and Central San Joaquin – had substantial enrollment growth in 2025.

	2024		2025		2025 v. 2024	
Rating Region	Enrollees	Column%	Enrollees	Column %	Difference	% Change
01 - Northern counties	10,187	3%	10,549	3%	362	4%
02 - North Bay counties	9,509	3%	10,859	3%	1,350	14%
03 - Sacramento Valley	16,392	5%	20,283	6%	3,891	24%
04 - San Francisco County	6,681	2%	7,483	2%	802	12%
05 - Contra Costa County	8,996	3%	9,855	3%	859	10%
06 - Alameda County	12,604	4%	14,365	4%	1,761	14%
7. - Santa Clara County	13,892	5%	15,318	4%	1,426	10%
8. - San Mateo County	5,653	2%	6,163	2%	510	9%
9. - Monterey Coast	4,911	2%	6,156	2%	1,245	25%
10 - San Joaquin Valley	14,217	5%	16,235	5%	2,018	14%
11 - Central San Joaquin	7,393	2%	10,638	3%	3,245	44%
12 - Central Coast	12,044	4%	13,191	4%	1,147	10%
13 - Eastern counties	2,108	1%	1,875	1%	-233	-11%
14 - Kern County	4,634	2%	5,595	2%	961	21%
15 - Los Angeles County, partial	38,653	13%	41,354	12%	2,701	7%
16 - Los Angeles County, partial	55,060	18%	56,077	16%	1,017	2%
17 - Inland Empire	30,747	10%	37,475	11%	6,728	22%
18 - Orange County	29,926	10%	31,091	9%	1,165	4%
19 - San Diego County	22,719	7%	31,149	9%	8,430	37%
<b>Grand Total</b>	<b>306,326</b>	<b>100%</b>	<b>345,711</b>	<b>100%</b>	<b>39,385</b>	<b>13%</b>

Net plan selections through January 31<sup>st</sup>, 2025.

# Trends for New Sign-Ups - Issuer

- New sign-ups with Inland Empire Health Plan, a new entrant in 2024, have doubled compared to last year.
- Some of the plans with the largest growth in new-sign ups in 2024, such as IEHP and Western Health, have large shares of Medi-Cal transitioners among their new enrollees (as much as 25-33%).



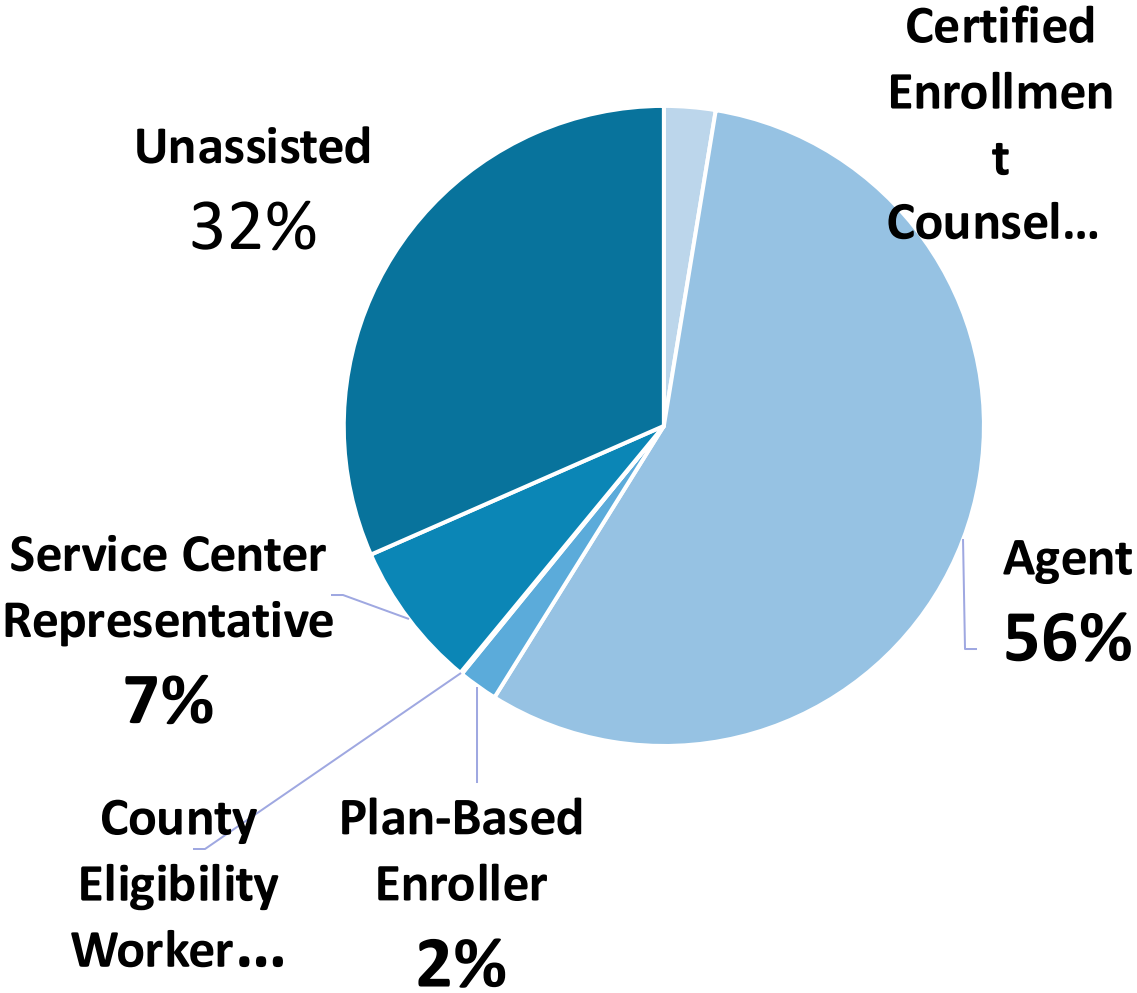
Net plan selections through January 31st, 2025.



# Trends for New Sign-ups – Service Channel

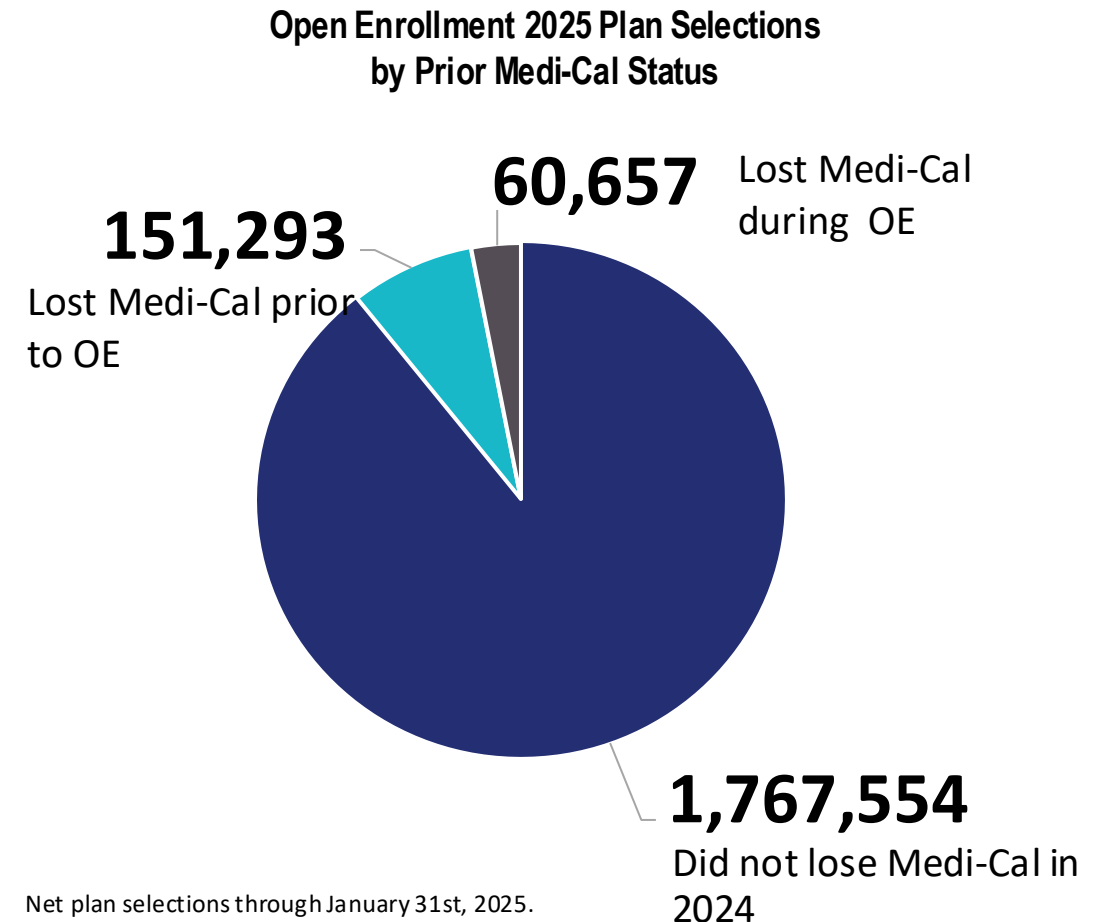
- Enrollment by Service Channel in 2025 shows an increase in the share of consumers who received assistance from agents.

SERVICE CHANNEL	2025		2025 v. 2024	
	Enrollees	Column %	Difference	% Change
Certified Enrollment Counselor	8,971	3%	2,051	30%
Certified Insurance Agent	194,578	56%	36,438	23%
Certified Plan-based Enroller	6,927	2%	2,077	43%
County Eligibility Worker	309	0%	89	40%
Service Center Representative	25,725	7%	2,285	10%
Unassisted	109,201	32%	-3,609	-3%
Grand Total	345,711	100%	39,331	13%



# Medi-Cal Transitioners Contribute to Year-Round Enrollment Growth

- Consumers moving from Medi-Cal to Covered California continue to increase enrollment throughout the year.
- More than 210,000 Open Enrollment consumers (11%) lost Medi-Cal at some point during the year or during the Open Enrollment period.
- About two-thirds of this group (151,293) lost Medi-Cal during the 2024 plan year, while another third (60,657) lost Medi-Cal during Open Enrollment.



# Deferred Action for Childhood Arrivals (DACA) Recipients Enrollment

- More than **2,100** DACA recipients enrolled in a Health Plan for 2025 during open enrollment.
- Nearly **3 in 5** DACA recipients used a Certified Enroller

**59%** Agents

**29%** Direct Enrollers

**7%** Service Center Representatives

**4%** Certified Enrollment Counselors



# Population Health Investments (PopHI)

OVERVIEW OF NEW PROGRAMS

# 2025 Population Health Investments

Centered on goal to improve health outcomes for Covered California enrollees

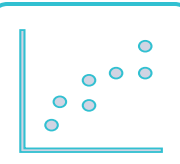
## GUIDING PRINCIPLES: USE OF FUNDS



**EQUITY FIRST:** Funds target regions or communities with the biggest health disparities.



**DIRECT IMPACT:** Funds lead to measurable improvements in health outcomes.



**EVIDENCE-BASED:** Funding decisions are grounded in proven strategies.



**ADDITIVE:** Funds used to advanced quality in underfunded arena.

## POPULATION HEALTH NEEDS ASSESSMENT

Shaped by extensive stakeholder engagement and focused on strategic health investments. A prioritized PopHI list was created through extensive engagement over 14 months.

1



Childhood Health and Wellness

2



Enhance Food Security

3



Equity and Practice Transformation

# Beyond Covered: Child Savings Account

**Receive college savings account  
payments for future  
educational opportunities.**

The Beyond Covered by Covered California: [Child Savings Account](#) program encourages families with California-born children under two years old to establish a financial foundation for their child's future.

**Started February 25, 2025, ending March 31,  
2026.**



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# Child Savings Account

## Overview

### Purpose

To **improve well-child visits and childhood immunization rates** for children under the age of two enrolled in Covered California, while helping families invest in their child's future.

### Eligibility

Children under 2 years old who are:

1. Enrolled in a Covered California Health Plan
2. Born in California
3. Registered for a CalKIDS account\*

\*Beyond Covered program is designed to assist parents/guardians with CalKIDS account registration.

**new!**

**BEYOND COVERED  
BY COVERED  
CALIFORNIA: CHILD  
SAVINGS ACCOUNT  
PROGRAM!**



### Benefits

Families can earn up to **\$1,000** for their CalKIDS savings account, which can be used for educational expenses.

#### Steps

- 1: **\$150** Program Consent and CalKIDS Registration
- 2 - 6: **\$100 Per** Primary Care Visit and Vaccine(s) at Specified Age
- 7 - 9: **\$150 Per** Flu Shot During Specified Time

# Beyond Covered: Grocery Support

## Receive assistance with food costs.

The Beyond Covered by Covered California: [Grocery Support Program](#) offers grocery assistance to Covered California members with chronic health conditions experiencing food insecurity. Eligible members enrolled in the program receive funds deposited onto a reloadable debit card to purchase food.

**Started February 5, 2025, ending March 31, 2026.**





# Grocery Support Overview

## Purpose

To help Covered California members **facing chronic health conditions and financial challenges access nutritious food** to help improve food security and health outcomes.

## Eligibility

Covered California members who:

1. Have a household income up to 250% of FPL
2. Have a chronic health issue
3. Are experiencing food insecurity



## Benefits

A reloadable debit card to purchase food, and either:

- **Monthly** payments will be loaded onto the debit card for 12 months, OR
- A **lump sum** payment will be loaded onto the debit card at the end of 12 months (equal to 12 monthly payments)

Funds are based on household size reported to Covered California at time of enrollment and may only be used to purchase fresh food, packaged food, baby food and non-alcoholic drinks.

# Grocery Support: What Members are Saying


“To whom it may concern:  
I would like to be considered for this program. We do not eat healthy and I have heart disease. Please let me know **what is required to qualify**. Best regards.  
Thank you!”

“I’m looking **to get more information** in regards to this help. My mother and I were displaced during the first and we’re in need of assistance.”

“Please **assist my family** to obtain the captioned support. We are in need to save every penny we can on food and lodging.”

“Wow! What an incredible program... I guess we are just waiting for a representative from Forward to reach out? Via Email? **How will we know we’ve been offered this opportunity?** I want to be sure not to miss any announcements, requests for information, etc.”

# Enroller Quick Guide: Beyond Covered Programs



## Beyond Covered Grocery Support Program Quick Guide for Enrollers

**Overview**

This document explains the Beyond Covered: Grocery Support Program, which provides additional support for enrollees who struggle with food insecurity.

**Grocery Support Program Overview**

The Beyond Covered: Grocery Support program offers grocery assistance to individuals and families experiencing food insecurity. Eligible enrollees in the program receive a reloadable debit card to purchase food. FORWARD, the organization Covered California is partnering with for this program, provides enrollment support in multiple languages to ensure accessibility.

Eligible enrollees will receive a reloadable debit card to purchase food. Enrollees will either receive \$80 per month for 12 months or a lump sum of \$960 at the end of the program.

- This benefit is per qualified enrollee in the household. Household size is determined based on tax filing data from Covered CA.
- FORWARD assigns eligible enrollees into monthly or annual groups. The enrollee does not select the frequency.
- Benefit amounts increase with household size.
- The card can be used at various grocery stores, restaurants, and food delivery services.

**Grocery Support Program Process**

**Note:** SCRs do not enroll individuals in Beyond Covered programs.

Covered California's partner, FORWARD handles all the program processes. The process steps are outlined below for information purposes. SCRs do not enroll individuals in these programs.

**Initial Contact**

A representative from FORWARD will reach out on behalf of Covered California via phone call, email, or text.

Identity and obtain consent

CA. Eligibility is based on

level (via Covered California

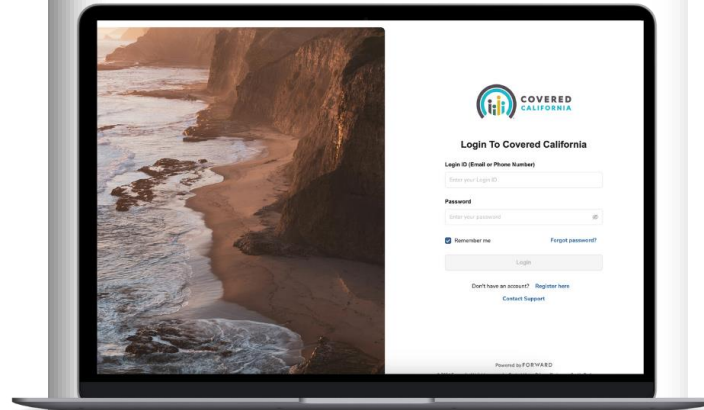
• **Note:** This program is exclusively for Covered CA enrollees. If the Covered CA enrollee is the Head of Household eligible for Covered CA programs, and other


Covered California  
Outreach and Sales Division  
[OutreachandSales@covered.ca.gov](mailto:OutreachandSales@covered.ca.gov)

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January 21, 2025

## Beyond Covered Grocery Support Program Guide





## Beyond Covered Child Savings Account Program Quick Guide for Enrollers

**Overview**

This document explains the Beyond Covered: Child Savings Account Program, which provides financial incentives for Covered California children under 2 to attend well-child visits and receive recommended vaccines.

**Child Savings Account (CSA) Program Overview**

The Beyond Covered: Child Savings Account program focuses on families with California-born children under two years old. It encourages families to establish a financial foundation for their child's future. Families can earn up to \$1,000 for their child's CalKIDS savings account by completing key health milestones such as well-child visits and vaccinations. This account can then be used for vocational schools, two-year colleges, or four-year colleges.

Eligible families can earn between \$100 and \$150 per milestone. Milestones are tied to the completion of recommended well-child visits and vaccines. Over 12 months, participants enrolled in the program can earn up to \$1,000.

- Payments are deposited directly into the child's CalKIDS account.
- Milestones include vaccines such as DTaP, Polio, HepB, MMR, and more, along with a bonus for the flu vaccine.

**Child Savings Account (CSA) Program Enrollment Process**

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**Initial Contact**

A representative from FORWARD will reach out on behalf of Covered California via phone call, email, or text.

- The FORWARD representative will reach out to the enrollee to continue

**Eligibility Screen**

Eligibility is based on

1. **Age:** The program is for children under 2 years old.
2. **Well-Child Visits:** The child must have received a receipt of vaccine according to California guidelines.

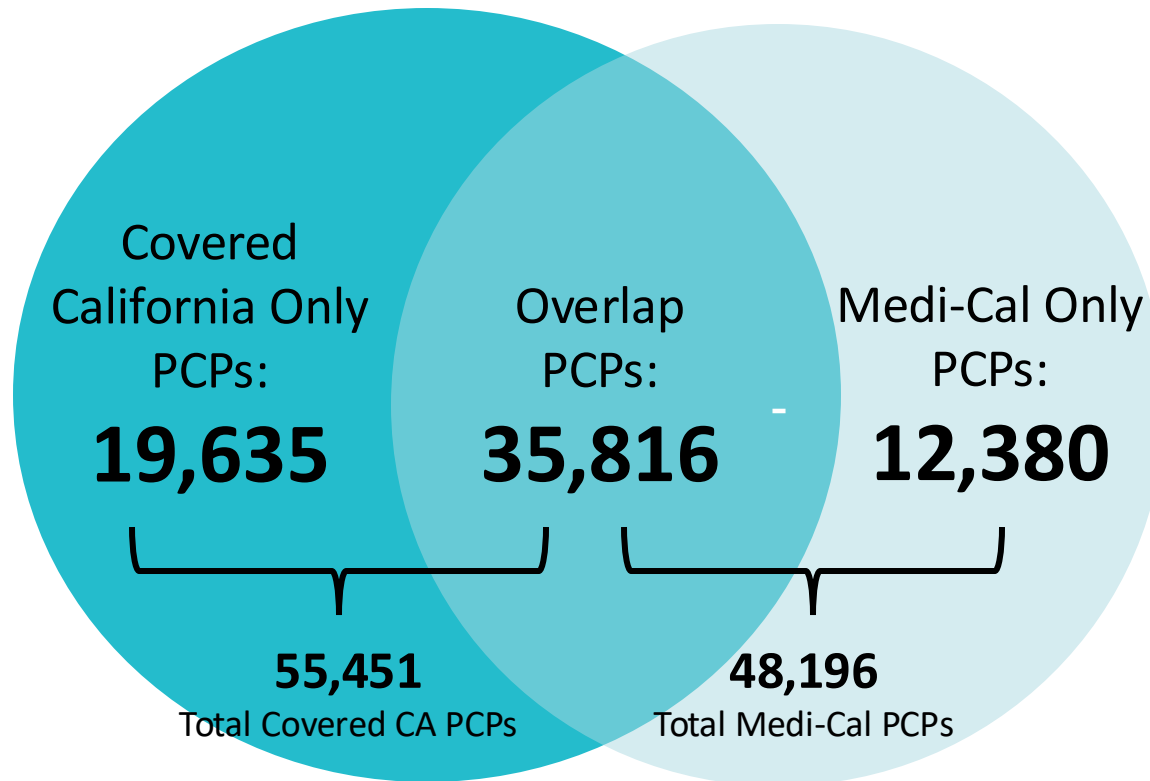
Covered California  
Outreach and Sales Division  
[OutreachandSales@covered.ca.gov](mailto:OutreachandSales@covered.ca.gov)

Page 1 of 4

January 21, 2025

## Beyond Covered Child Savings Account Program Guide

# Primary Care Provider Network Overlap



**74%** of all  
Medi-Cal Primary Care  
Providers are  
in-network for  
Covered California  
enrollees

*Analysis used the National Provider Identifier (NPI) Primary Care  
Provider data from the October 2023 Provider Files.*

# Equity and Practice Transformation (EPT)

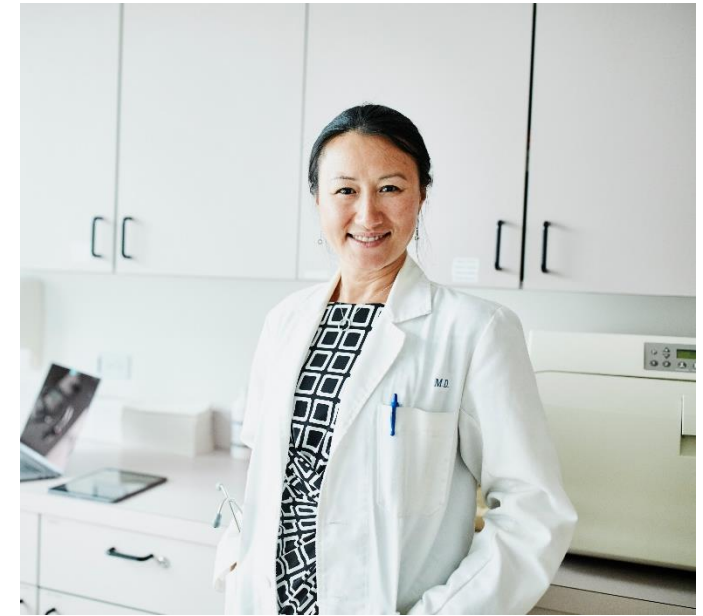
## Overview

### Purpose

To accelerate **population health management capabilities in practices** serving both Covered California and Medi-Cal enrollees. Started in February 2025.

### Eligibility

**30-40 practices** participating in EPT, who serve Covered California enrollees will receive enhanced support through tailored enhancements to EPT's technical assistance (TA) structure.



### Benefits

Practices selected to participate in enhanced TA structure will receive:

- High-Quality, **1:1 Subject Matter Experts Support**
- **Virtual Learning and Peer Engagement** through small group and 1:1 sessions
- **Advanced Data** Integration and Testing
- **Learning System** to distill insights from a diverse practice cohort and disseminate promising models to primary care practices across the state.





# Special Enrollment Period



# Updates and Reminders

WHAT YOU NEED TO KNOW

# Enrolling During the Special Enrollment Period



Consumers will need a Qualifying Life Event (QLE) to enroll in a plan.

- Most special-enrollment periods last 60 days from the date of the major life change.
- For most qualifying life events, your coverage will start on the first day of the following month after you select a plan.

MORE INFORMATION CAN BE FOUND HERE - [MAJOR LIFE CHANGES](#)

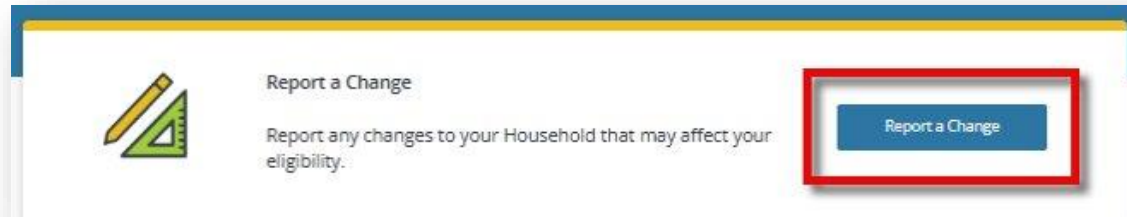


# Additional Qualifying Life Events

These are additional categories added recently to the standard QLE events.

QLE Title	Start Date of QLE	End Date of QLE
<b>DACA Recipient</b>	2/1/2025	12/31/2025
<b>Paid a Penalty for Not Having Health Coverage</b>	Date penalty was paid	60 days from date

# Important! Reporting Changes to Your Consumer Case



**Continuous Reporting:** Consumers must report any changes to their case throughout the year.

**Medi-Cal Eligibility:** Changes for those eligible for Medi-Cal or in households with a Medi-Cal member should be reported to the County.

## Enroller Resources:

- [Reporting changes to Covered California – YouTube](#)
- <https://www.coveredca.com/support/financial-help/income-changes/>

## Key Changes to Report:

- Marital status changes (Marriage or Divorce)
- Family size changes (Birth or Adoption)
- Income changes
- New health coverage (Employer/Medicare)
- Updates to address or contact information
- Changes in dependents
- Tax filing status adjustments
- Citizenship or immigration status updates
- Incarceration status changes
- Changes in American Indian or Alaska Native tribal status
- Corrections needed for name, date of birth, or Social Security number
- Any other changes affecting income and household size

# Periodic Data Matching (PDM)

**Periodic Data Matching** occurs **twice a year** to verify data sources for enrolled consumers to confirm the following:

- Consumer is **not newly eligible** for or **enrolled** in **Medicare**
- Consumer has not been reported as **Deceased**

Consumers may be **terminated from their coverage or lose financial assistance**, if they do not respond to Covered California's request for information.

## Required Steps:

1. **Contact** Covered California Consumer Service Center.
2. **Respond** on their CalHEERS home page under account alerts.

## ENROLLER BEST PRACTICES

- Check **Daily Summary Email** in your **Secure Mailbox** for **NOD70a** and **NOD70b** alerts.
- **Respond to Request for Information.**
- **Escalate requests to Reinstate or Restore financial assistance.**
- **DO NOT Re Enroll.**

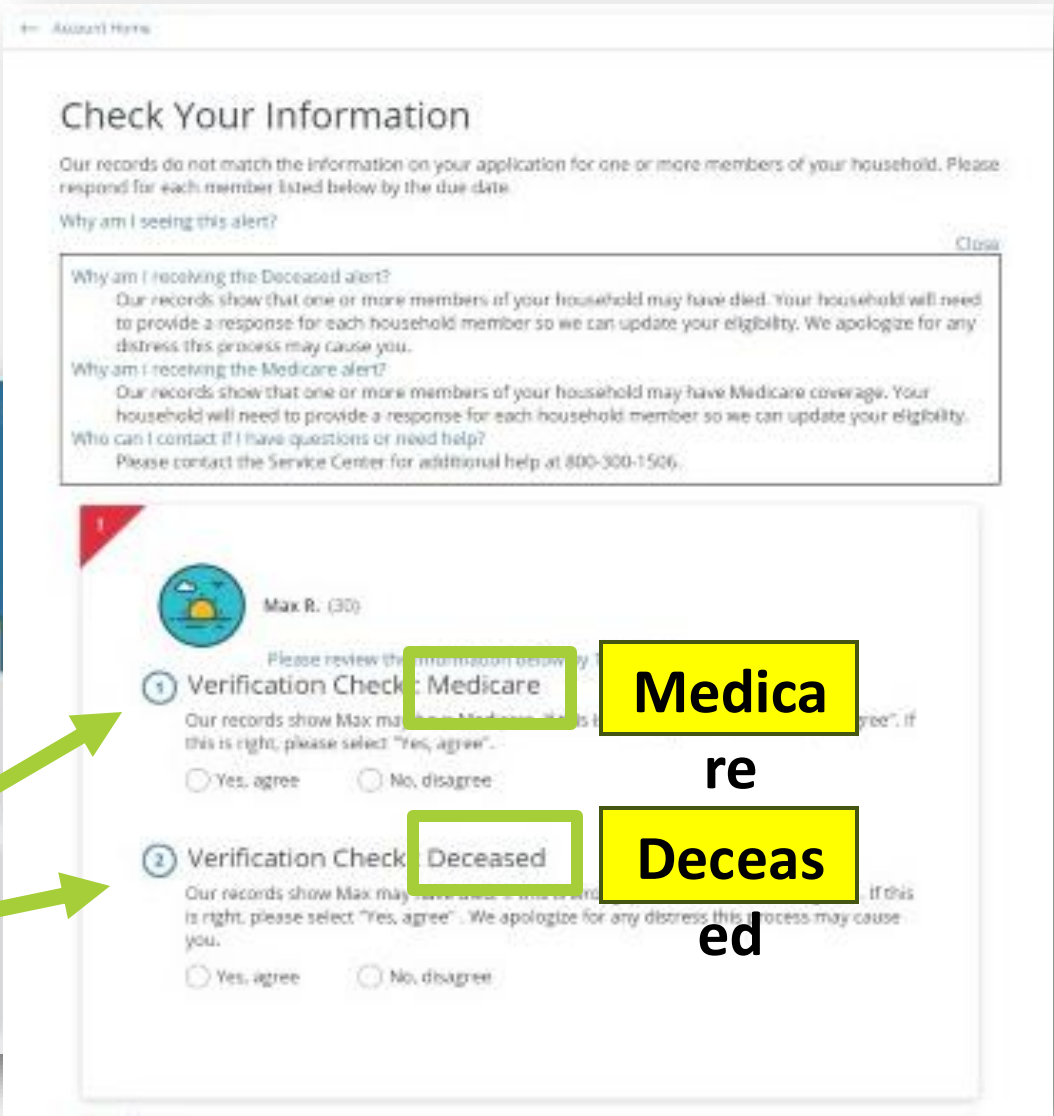
# PDM: Responding to Requests for Information

Navigate there from Application Home page

Account Alerts



The image shows the 'Application Home' page of the Covered California website. At the top, it says 'Welcome back, Max!' and 'Select Year: 2020 2021'. Below this is a 'Complete Coverage' section with a 'Choose Plan' button. At the bottom, there is an 'Account Alerts' section. A red arrow points to an alert that says 'Action Required by [redacted] household may be Deceased. Please click here to respond.' A yellow box with the text 'Action Required' is placed over this alert. A green arrow points from the 'Account Alerts' section to the 'Check Your Information' page on the right.



The image shows the 'Check Your Information' page. It has a title 'Check Your Information' and a subtitle 'Our records do not match the information on your application for one or more members of your household. Please respond for each member listed below by the due date.' Below this is a section 'Why am I seeing this alert?' with a 'Close' button. There are three alerts: 'Why am I receiving the Deceased alert?', 'Why am I receiving the Medicare alert?', and 'Who can I contact if I have questions or need help?'. The first alert says 'Our records show that one or more members of your household may have died. Your household will need to provide a response for each household member so we can update your eligibility. We apologize for any distress this process may cause you.' The second alert says 'Our records show that one or more members of your household may have Medicare coverage. Your household will need to provide a response for each household member so we can update your eligibility.' The third alert says 'Please contact the Service Center for additional help at 800-300-1506.' Below these alerts are two verification checks. The first is '1 Verification Check Medicare' with a green box around the word 'Medicare' and a yellow box with the text 'Medicare'. The second is '2 Verification Check Deceased' with a green box around the word 'Deceased' and a yellow box with the text 'Deceased'. Green arrows point from the 'Action Required' alert on the left to these two verification checks.

# Marketing

## STAYING CONNECTED DURING SPECIAL ENROLLMENT



# Recap – Wildfires Outreach: 2/1-3/8

Residents affected by the wildfires were able to access Special Enrollment, which began 60 days from the date the state of emergency was declared. This allowed affected residents to sign up for health coverage through March 8, 2025.

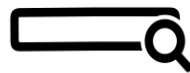
Outreach was geotargeted to the Los Angeles and Ventura counties as well as surrounding counties to get this important message out.



Social



Influencers



Paid Search



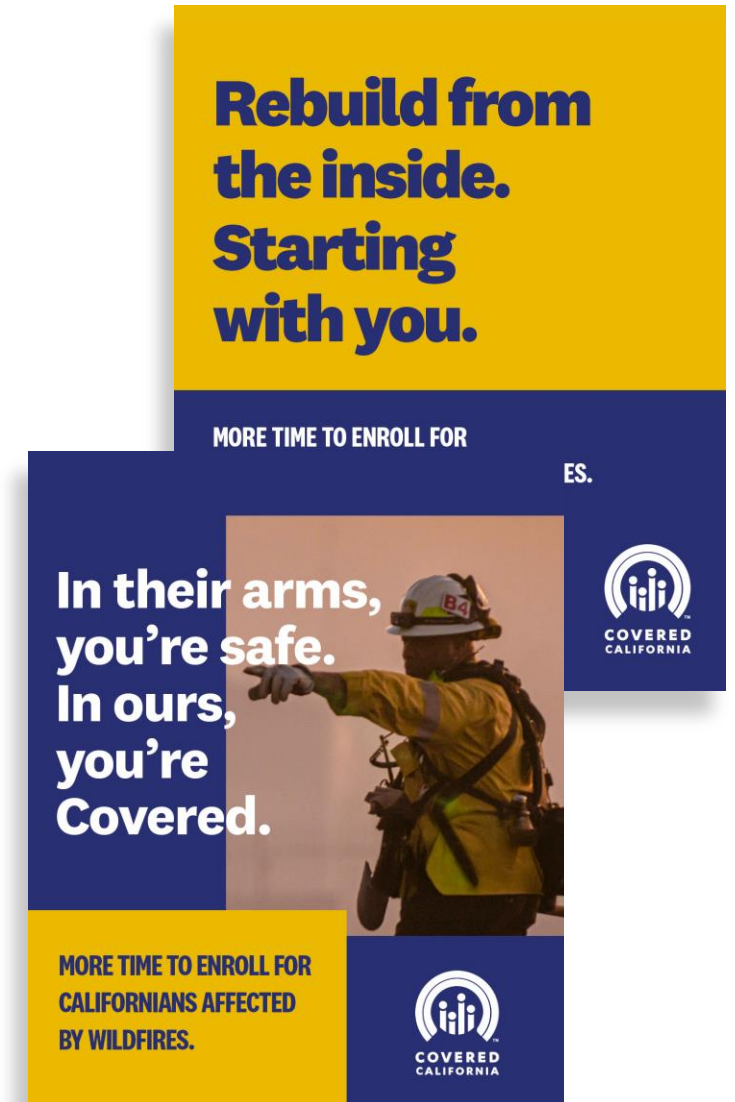
Native Display

 Multicultural

 Hispanic In-Language

 Asian In-Language

 Black/AA



# Digital & Social



SPONSORED BY COVERED CALIFORNIA

## Lost Your Health Insurance? Get Quality Coverage Now

Californians who've experienced loss of health coverage in the last 60 days can now apply for quality health insurance through Covered California

TAKE THE NEXT STEP  
to getting  
covered.

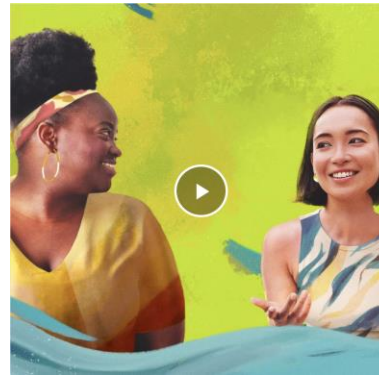
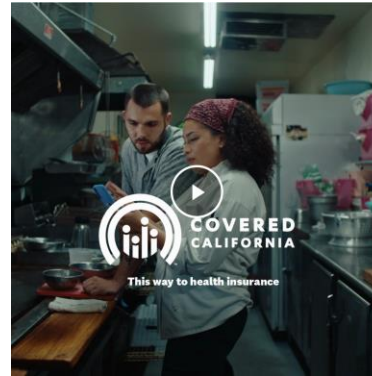
Create an account >



get free  
preventive  
care and  
more.

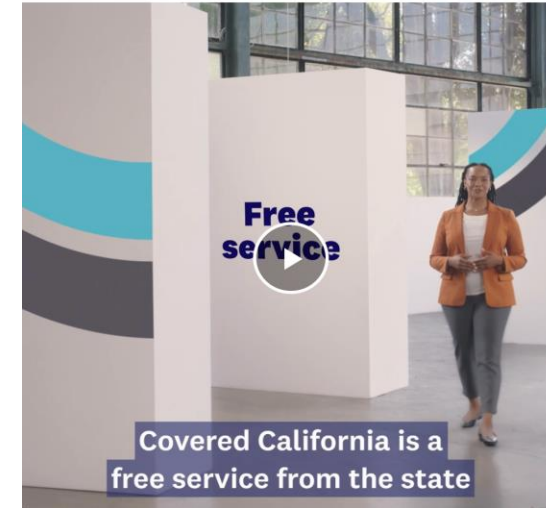


This way to  
health insurance >



Covered California  
Feb 12, 09:00 AM

Through special enrollment, get a health insurance plan with a \$0 annual deductible when you choose an Enhanced Silver plan!



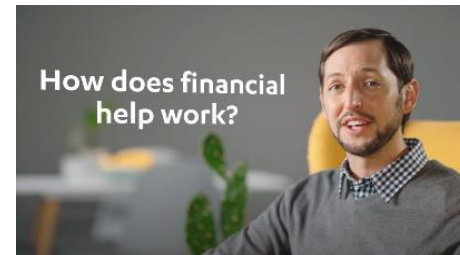
<https://www.coveredca.com/marketing-blog/young-adults-your-guide-to-affordable-health-insurance/>

**YOUNG ADULTS:**  
your guide to affordable  
health insurance



# Educational Videos

on [YouTube.com/CoveredCA](https://www.youtube.com/CoveredCA) in English, Spanish, Cantonese, Farsi, Korean, Mandarin and Vietnamese.



## Educational Videos

- Differences Between Covered California, Health Insurance Companies and Medi-Cal
- Enrolling in Health Insurance Through Covered California
- Get Financial Help Through Covered California
- Learn More About Correctly Reporting Your Income | Covered California
- Learn More About Financial Help | Covered California
- Learn More About Your Health Insurance Tax Document
- Reporting Changes to Covered California
- Understanding Health Insurance Terms | Covered California
- Welcome to Covered California
- What to Expect if Your Health Plan is Moved from Medi-Cal to Covered California
- Where to Get Answers to Your Questions About Covered California
- Your Medi-Cal is Ending. How to Keep/Change/Cancel your \$0 Covered California Health Insurance Plan
- Your Medi-Cal is Ending. How to Keep/Change/Cancel Your Covered California Health Insurance Plan.
- Your Medi-Cal is Ending. How to Enroll in A Covered California Health Plan.

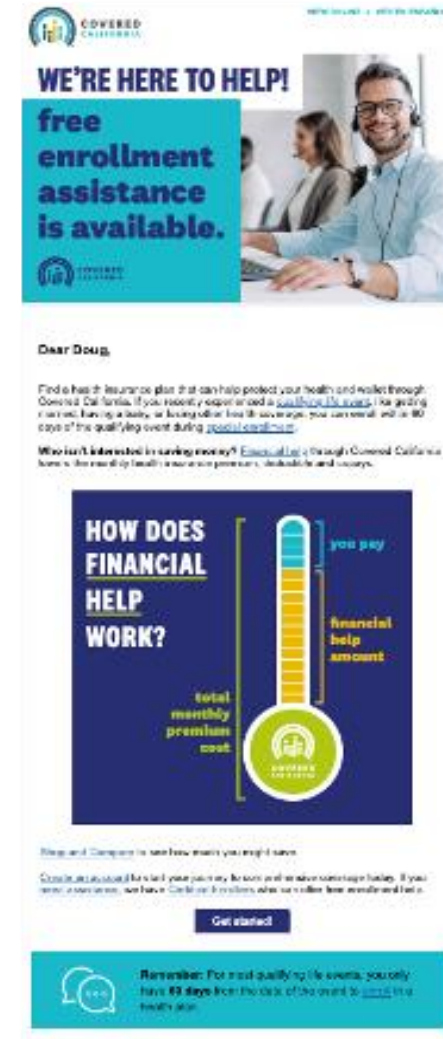


# Email/Direct Email/Text

## Core Audiences:

- Current members
- Former members
- Tax penalty payers
- EDD filers
- Medi-Cal to Covered California transitioners
- Interested prospects

Tailored messaging, including a call out  
*"If you have worked with a Certified Enroller in the past, you can contact that person."* as well as links to both help on demand and where to find Certified Enrollers in your area in email and direct mail.





# Duplicate Enrollments

OVERVIEW OF NEW PROCESS AND GUIDELINES



# Understanding Dual and Overlapping Enrollment

- **Dual Enrollment:** Simultaneous enrollment in two distinct health coverage programs (e.g., Covered California plan + Medi-Cal).
- **Overlapping Enrollment:** Concurrent enrollment coverage in two or more subsidized Covered California health plans.
- **Key Challenges:** Avoiding coverage gaps, unnecessary costs, and maximizing benefits.
- **Covered California's Response:** Implementing new processes to streamline enrollment, ensure seamless coverage, and protect consumers.

# Prior Process for Overlapping Coverage



## Identification

The Special Processing Unit (SPU) **proactively identifies members** with simultaneous enrollment in multiple subsidized plans.



## Initial Contact Attempt

SPU first attempts to **contact affected consumers by phone** to address the overlapping coverage.  
**Success rate:** Phone contact made with **~80%** of consumers.



## Secondary Contact Methods

For consumers **unreachable** by phone (~20%), SPU resorts to **emails and/or postal notices** to communicate.

# Overcoming Limitations and Finding Resolutions

## PRIOR LIMITATION:

If consumers remain unreachable after the attempts, the process halts due to Covered California's limited authority to resolve the overlap.

## UPDATED

### REGULATION:

The state regulations have been updated to grant Covered California the authority to act on cases even when the consumer cannot be contacted.

(10 CCR § 6496(g)(2)(C))

# New Manual Process for Handling Overlapping and Dual Enrollments



## Regular Monitoring

Generation of reports to identify potential dual or overlapping subsidized coverage and dual enrollments with Medi-Cal.



## Notification

Consumers identified with potential dual or overlapping coverage are sent a 30-day notice, urging immediate action to correct the issue.



## Follow - Up

Cases of consumers who fail to respond to the initial notice are escalated for further intervention.

# New Resolution for Overlapping and Dual Enrollments

## Path 1:

### Overlapping Subsidized Enrollments

#### SPU Involvement:

Assigned cases for direct consumer contact to resolve overlaps.

#### Unresolved Cases:

Subsidies removed from duplicates, maintaining a single subsidized enrollment.

## Path 2:

### Dual Enrollments with Medi-Cal

#### Collaboration with CalHEERS:

Cases involving dual enrollments are shared with CalHEERS.

#### Automated Process:

Deployed to remove the subsidy from the Covered California case, addressing the dual enrollment issue.



# Addressing Allowable Overlapping and Dual Enrollment Coverages

## Category 1

Enrollees in  
two or more  
unsubsidized  
Covered California  
health plans.

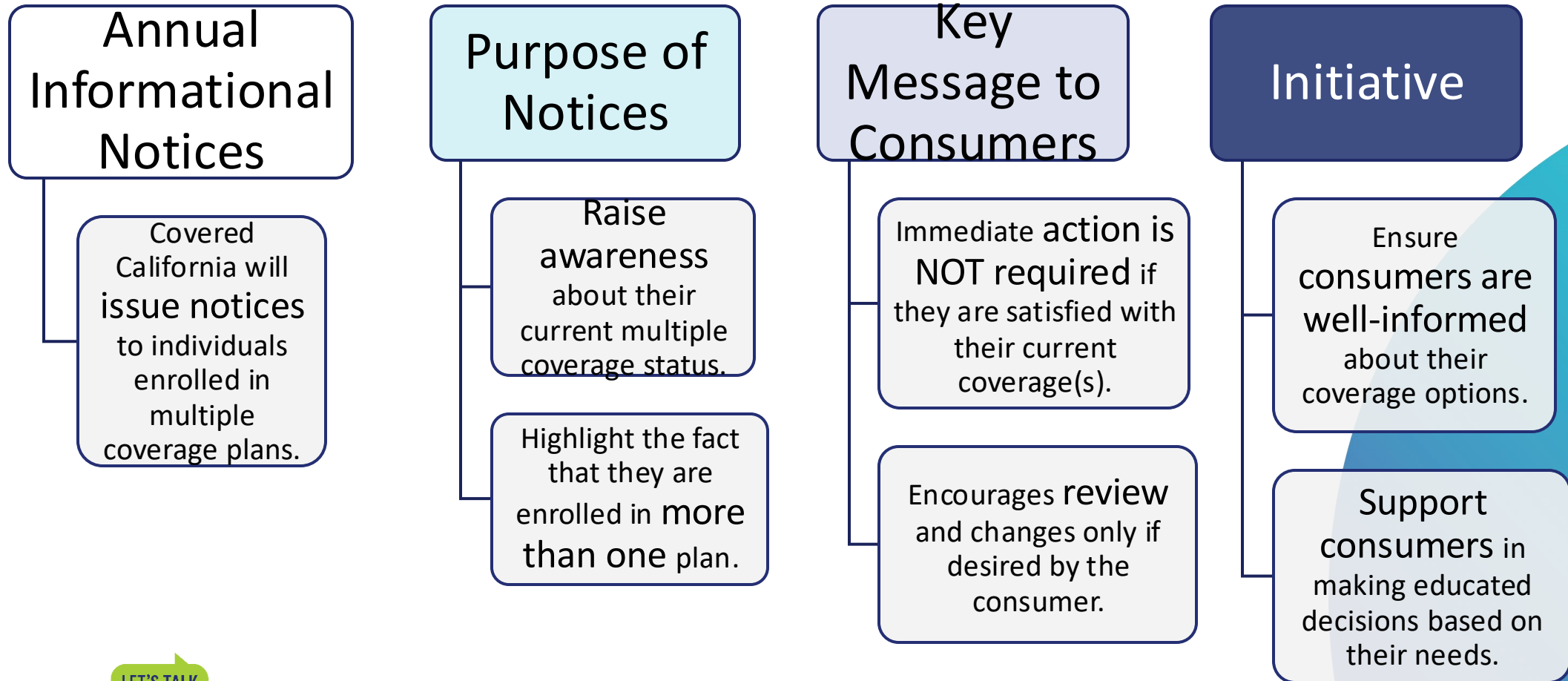
## Category 2

Individuals with  
both subsidized  
and unsubsidized  
Covered California  
coverage.

## Category 3

Those with  
unsubsidized  
Covered  
California  
coverage and  
Medi-Cal.

# Outreach to Allowable Overlapping and Dual Enrollment



# Tracking Overlapping and Dual Enrollments

Data as of 3/3/2025	Individuals	Cases
<b>Subsidized Enrollments</b>		
Overlapping Enrollment (sub CCA and sub CCA)	7,310	6,287
*Dual Enrollment (sub CCA and MC)	18,018	15,727
<b>Unsubsidized Enrollments</b>		
Overlapping Enrollment (unsub CCA and sub CCA)	977	863
Overlapping Enrollment (unsub CCA and unsub CCA)	393	321
Dual Enrollment (unsub CCA and MC)	8,139	7,345
<b>Subsidized and Unsubsidized Enrollments</b>		
<b>Total</b>	<b>34,837</b>	<b>30,543</b>

- Almost 35,000 individuals have overlapping or dual enrollments.
- Need to decrease the Subsidized Enrollments cases because they are receiving financial assistance.
- Bring awareness to the Unsubsidized population to ensure they are well-informed.

\*This data requires further validation.

sub: subsidized  
 unsub: unsubsidized  
 CCA: Covered California  
 MC: Medi-Cal

# 2025 Timeline and Milestones

TIMELINE		Q1			Q2			Q3			Q4		
POPULATIONS		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
	OVERLAPPING ENROLLMENTS			COHORT 1				COHORT 2			COHORT 3		
	DUAL ENROLLMENTS				COHORT 1				COHORT 2				
	MULTIPLE COVERAGES					COHORT 1							



# Looking Ahead in 2026 and Consumer Retention



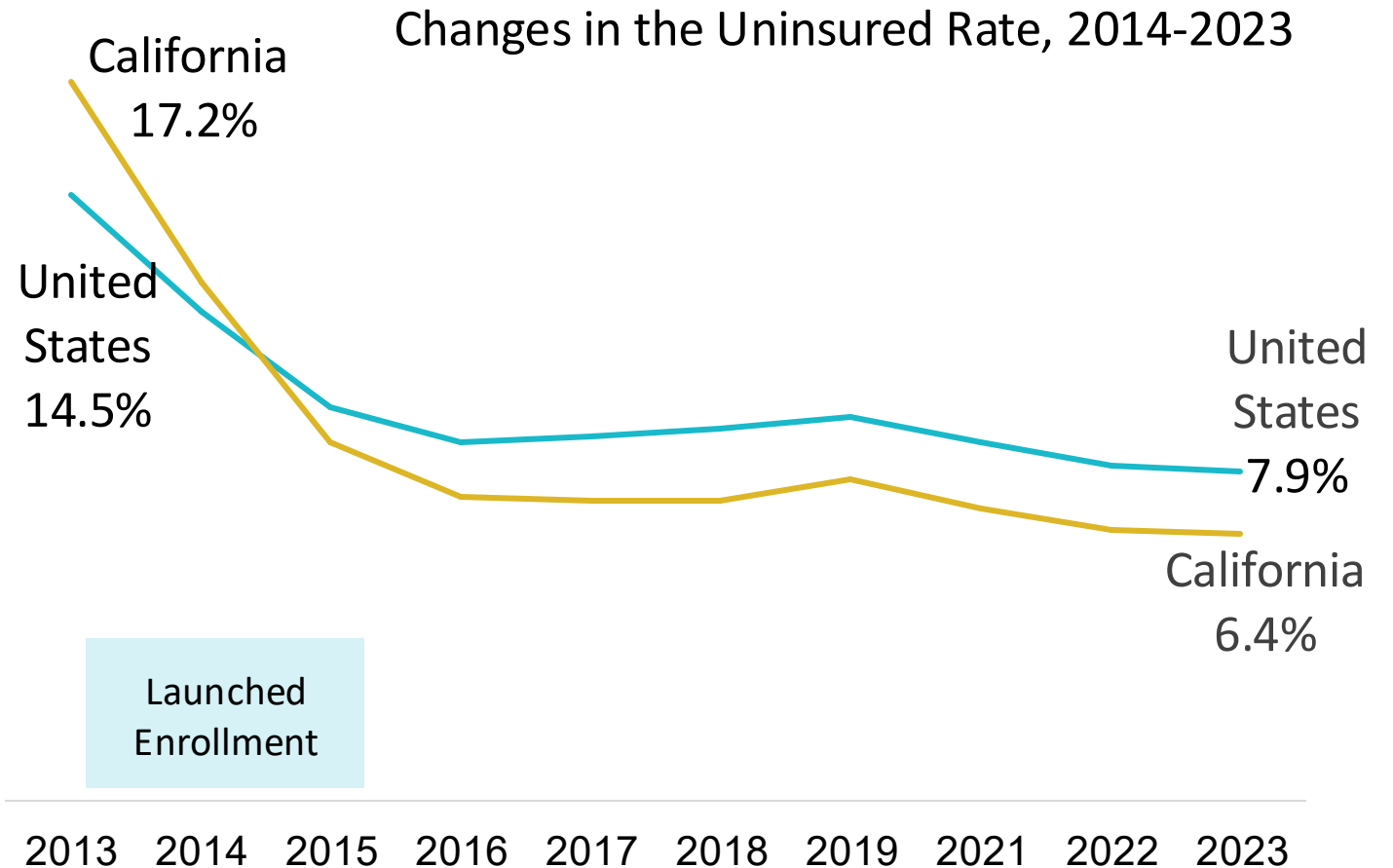


# Enhanced Premium Tax Credit

LOOKING AHEAD FOR 2026

# Connecting Californians with Coverage

- More than 6.3 million enrolled, or nearly 1 in 6, Californians have enrolled in marketplace coverage since Covered California launched in 2014.
- Corresponded with the nation's largest drop in the number of uninsured.
- The marketplaces serve many different consumer groups who do not have other sources of affordable coverage, including those losing Medicaid, self-employed individuals without employer coverage, or early retirees not yet eligible for Medicare.



# Expanded Affordability from the “Enhanced” Premium Tax Credit (ePTC)

## “ENHANCED” PREMIUM TAX CREDIT

- Increases the amount of financial help for all APTC-eligible consumers due to the Inflation Reduction Act.
- Eliminates the “subsidy cliff” for middle-income consumers above 400% FPL (Individuals earning over \$60,240 and families of four earning over \$124,800).

## SAVINGS FOR CONSUMERS

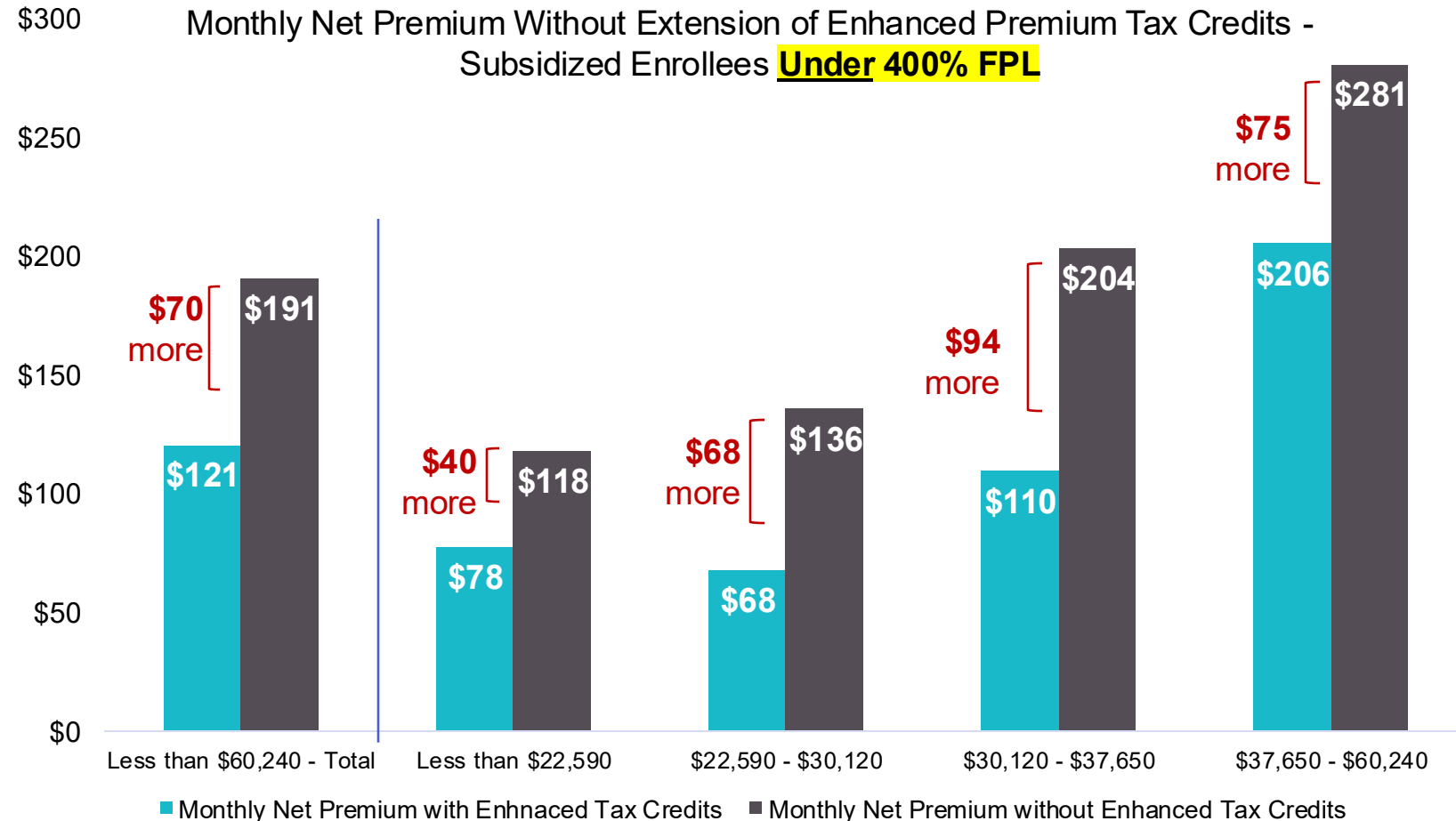
- On average, consumers saved an additional \$101 on premium costs each month.
- More than 170,000 middle-income enrollees are now receiving a tax credit for their coverage where previously no financial help was available.



Without Congressional action, the “enhanced” premium tax credit **will expire at the end of 2025.**

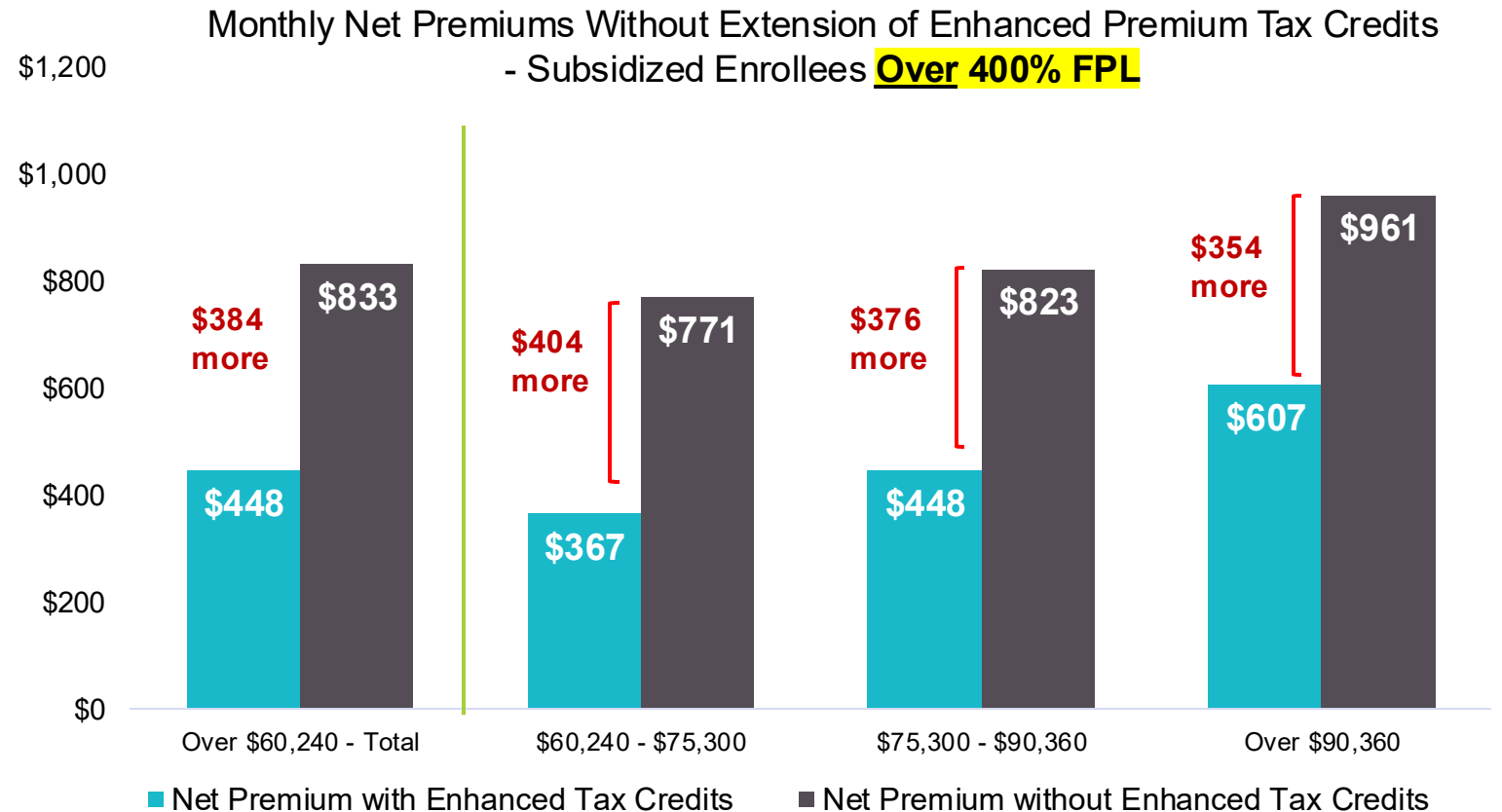
# Premiums will Increase if the Enhanced Premium Tax Credit Expires – **Under 400% FPL**

- Consumers with incomes less than 400% FPL (\$60,240 for an individual), could see, on average, a \$70 monthly increase in net premiums without the enhanced premium tax credit.
- Some consumers, who earn between \$22,590 and \$30,120 annually, could see their premium costs double from \$68 to \$136 per month.



# Premiums will Increase if the Enhanced Premium Tax Credit Expires – **Over 400% FPL**

- Without the extension of enhanced premium tax credit, middle income consumers will have to pay the full premium cost to retain coverage.
- More than 170,000 middle income Californians save an average of \$384 per month in premium costs due to the enhanced premium tax credit.

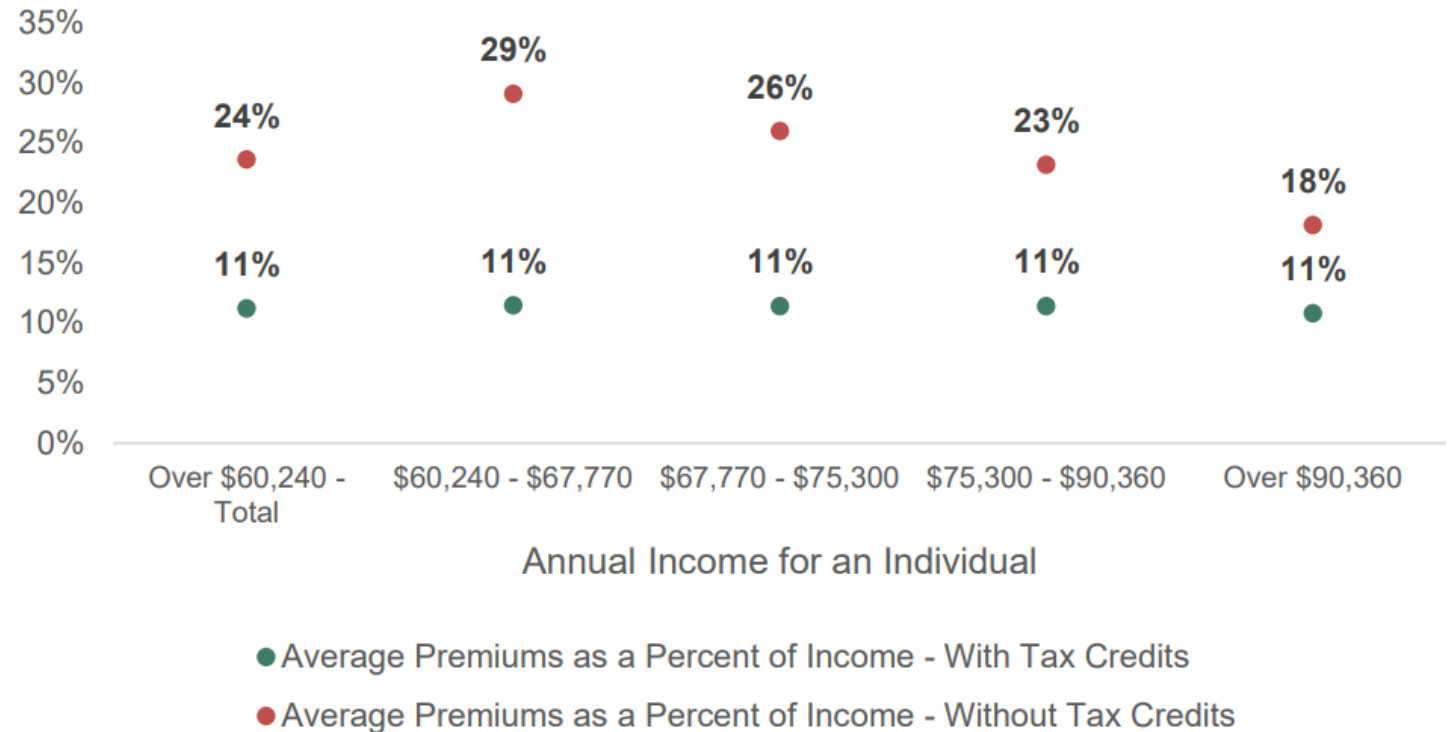




# Older Enrollees Could Pay More than a Quarter of Their Household Income

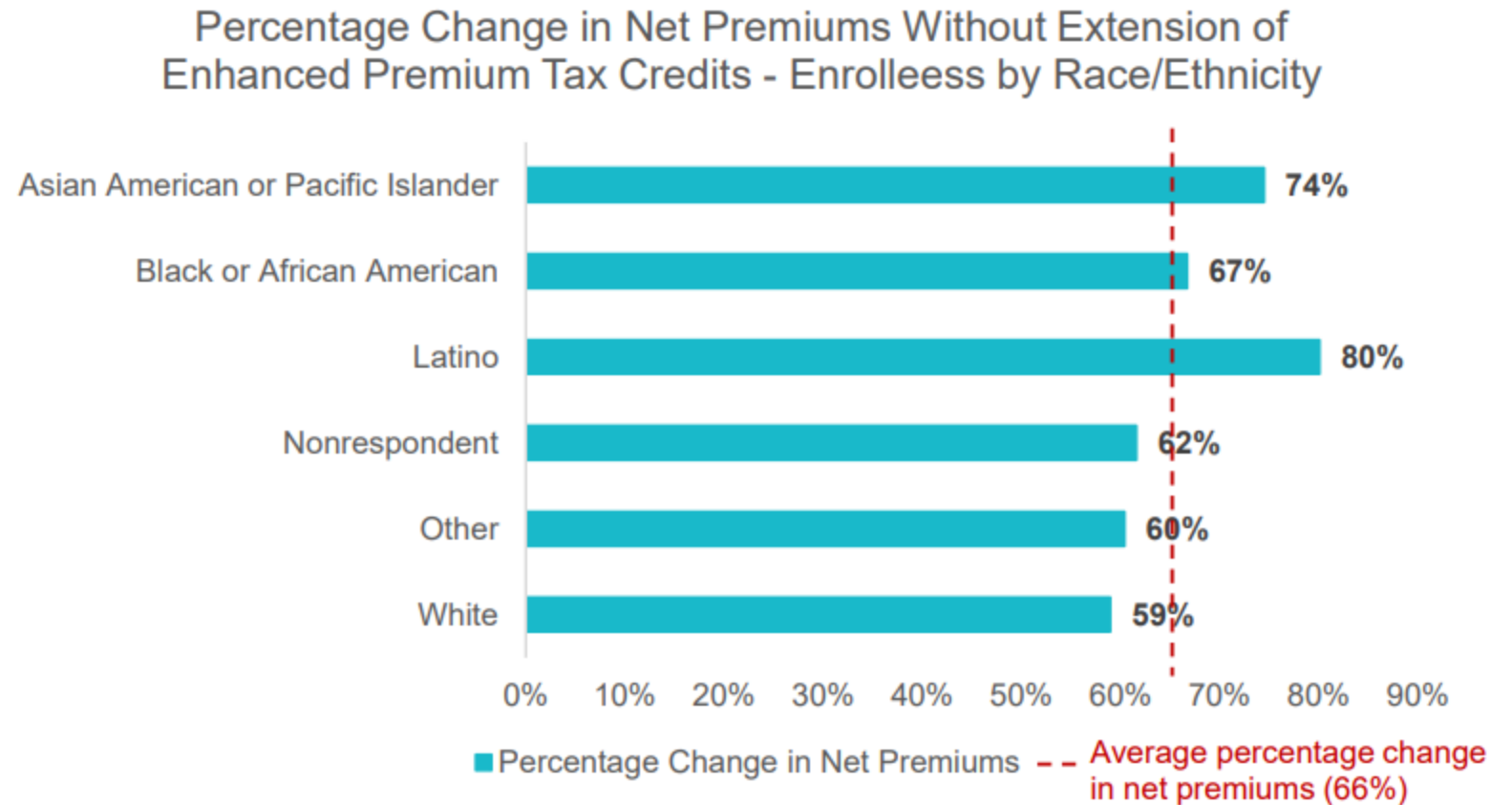
- Premiums are expected to double or more for enrollees ages 50-64 earning over 400% FPL, costing as much as \$1,112 per month.
- For some enrollees, this would consume as much as 29% of their annual income.

Average Premiums as a Percent of Income for Enrollees Ages 50-64 Earning Over \$60,240 Annually



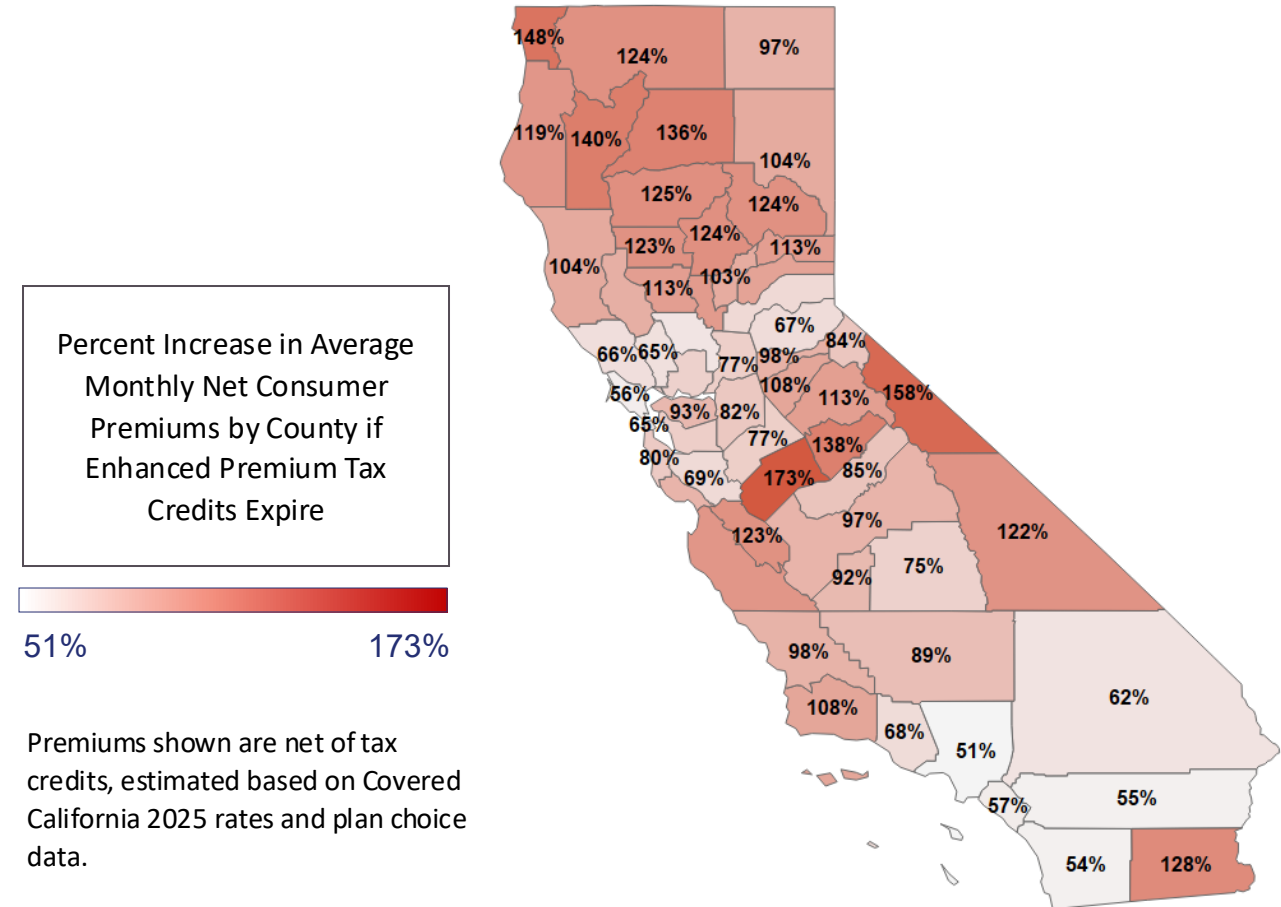
# Communities of Color Face Largest Increases in Premiums

- While Covered California enrollees face an average 66% increase, premiums will increase more for communities of color.
- Communities that had some of the highest gains in enrollment since 2020 will face the greatest threats to affordable coverage without the enhanced premium tax credit.



# Premium Expected to Increase Statewide without Enhanced Tax Credits

- On average, Californians across the state will see their monthly premiums increase by 66%.
- However, counties such as Imperial, Humboldt, and Shasta will see average premiums more than double without the enhanced premium tax credit.
- In Merced county, enrollee premiums are anticipated to increase up to 173%.



Source: Snapshot of January 2025 Covered California among individuals receiving monthly APTC.

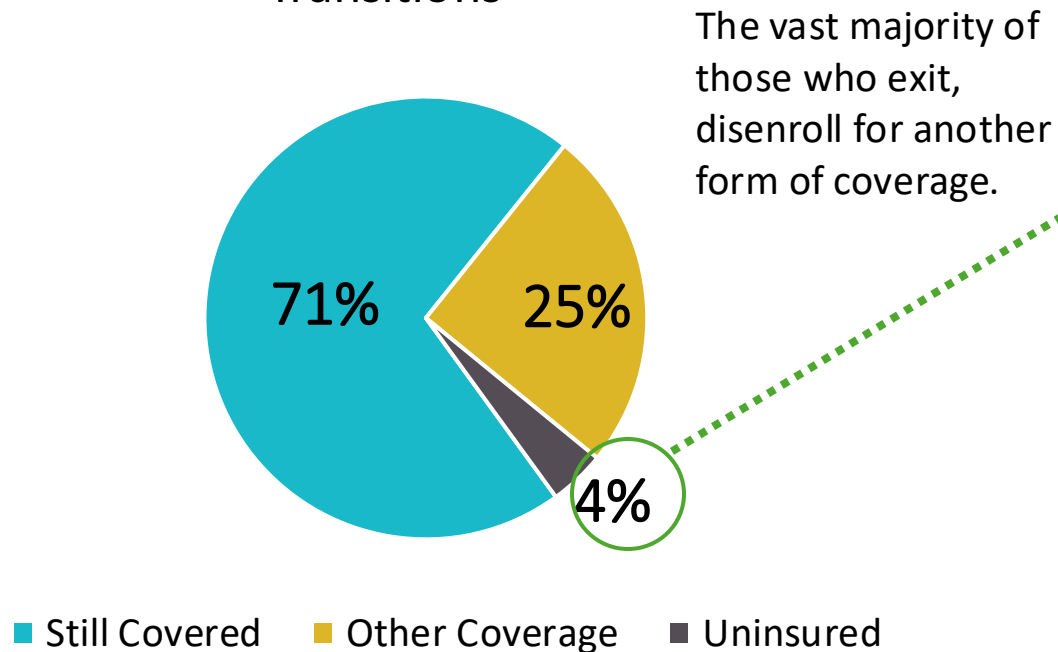


# Enhancing Consumer Retention and Renewal Strategies

KEEPING CALIFORNIANS COVERED FOR 2026

# Focus on Those Who Need it Most

2023 California's Health Coverage Transitions



Source: [February 2025 Board Meeting Executive Presentation](#)

## OUR FOCUS

DEFINING OUR TARGET AUDIENCE: ANALYZING DISENROLLMENT TRENDS

*Sample Personas:*



Under the age of 35, New Member, Low Utilizer



Living in a County with a 100%+ premium increase



Single Plan Holder, Community of Color



# Proposed Retention Risk Factors

## DISENROLLMENT RISK ATTRIBUTES

### COVERAGE

No Other Likely Source of Coverage =  
High Risk

### UTILIZATION

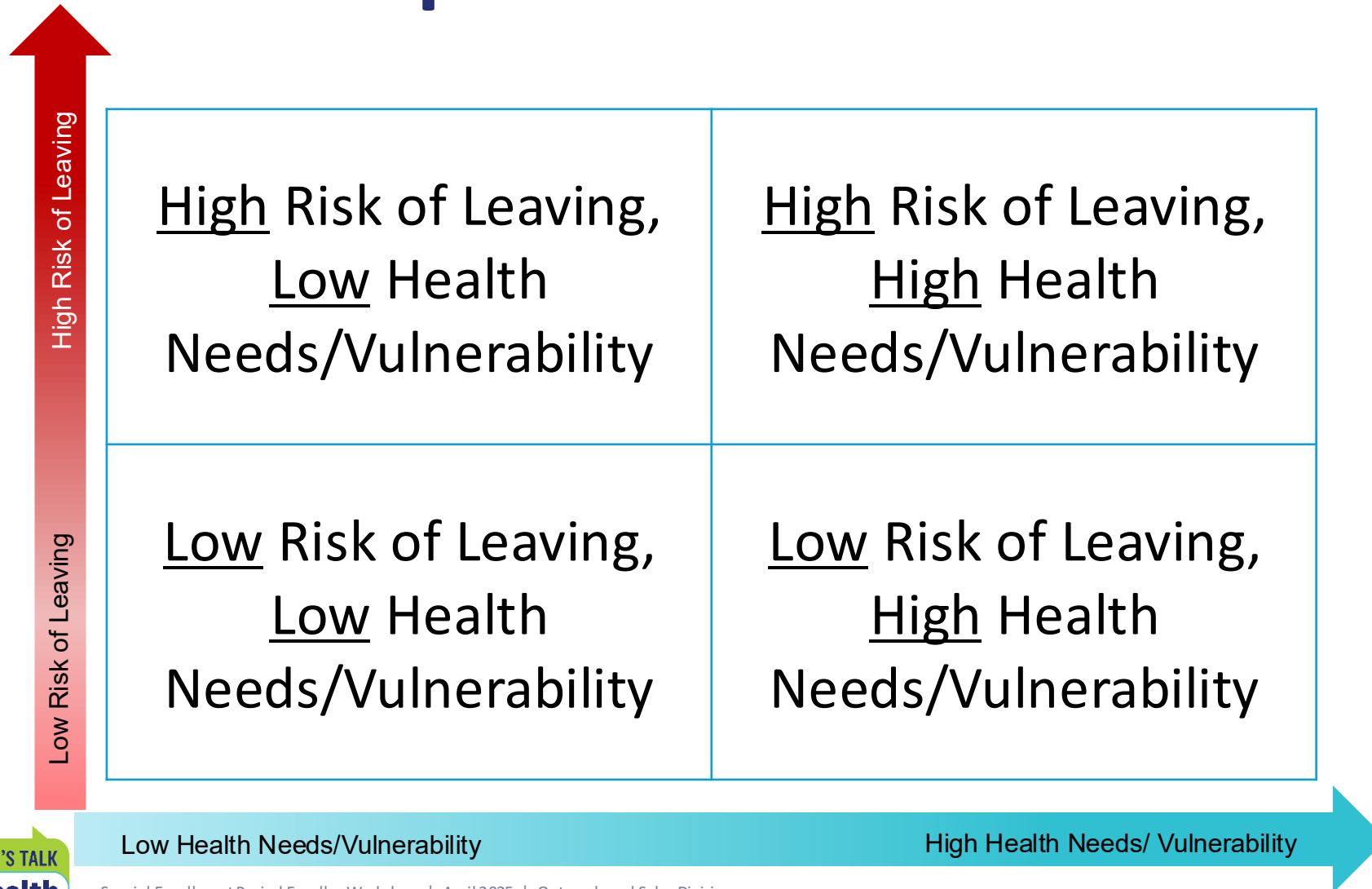
Low Utilization = High Risk

### COST

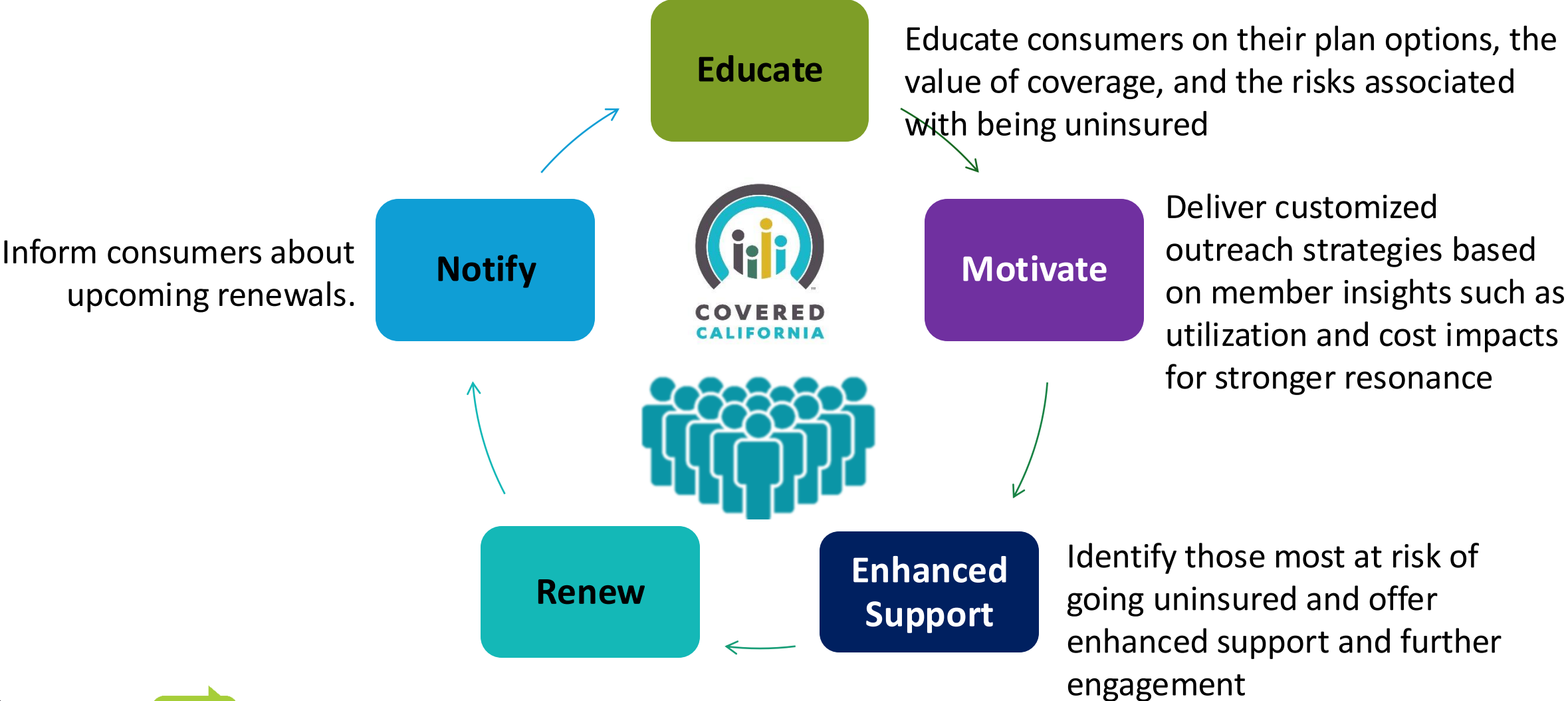
High-Cost Increase = High Risk

- Member satisfaction metrics also will be considered, pending data availability
- How these attributes translate to a members Risk Profile

# Using Risk Scores for Segment Target Populations Proposal



# Key Steps in Health Coverage Retention



# Enroller Role and Impact



## EDUCATE

Provide clear information on the benefits of timely renewal.



## ASSIST

Help navigate the renewal process, addressing any consumer concerns.



## FOLLOW-UP

Ensure consumers complete their renewal and understand their coverage.

# Proposed Resources for Enrollers

## DATA

Renewal/Retention File

## TECHNOLOGY

Enroller Portal Enhancement  
Service Center Support  
CoveredCA.com  
On-Demand Help

## CONSUMER OUTREACH and COMMUNICATION

Toolkits  
Educational Videos  
Marketing Ads  
Collateral Materials  
Consumer Notices

## ENROLLER EDUCATION

Training Modules  
Toolkits and Guides  
Storefront Support



# More to Come!

## TAILORED COMMUNICATION

Personalized communication tailored to consumer needs.

## TOUCHPOINTS

Regular check-ins leading up to the renewal period.

## REMINDERS AND ALERTS

Utilizing reminders and alerts to keep renewals on track.

# Sharing the Real Impacts and Moving Forward Together

## CASE STUDIES

highlighting successful renewal assistance.

## REAL STORIES

testimonials from consumers and enrollers on the renewal process.

## TACTICS

for enrollers to begin implementing strategies.

## ENCOURAGEMENT

to utilize available resources and support for maximum impact.

# Questions?

# Break

10 MINUTES



# Covered California for Small Business

# CCSB Membership

- 8,995 enrolled groups
- 77,728 enrolled members
- Average group size of 8.6 members



blue  
california



KAISER  
PERMANENTE®

SHARP  
HEALTH PLAN

DELTA DENTAL®



# CCSB Advantages

## MULTI-CARRIER PORTFOLIO

- Featuring Kaiser Permanente, Sharp Health Plan, Blue Shield of California

## EXCLUSIVE TAX CREDIT

- Lower the cost of coverage for qualifying small businesses

## EASY ADMINISTRATION

- Simple to understand quote, consolidated applications and ONE CONSOLIDATED BILL
- No admin fees, no billing fees, no late fees

## RELAXED PARTICIPATION

- 70% of eligible employees enrolled with valid waiver

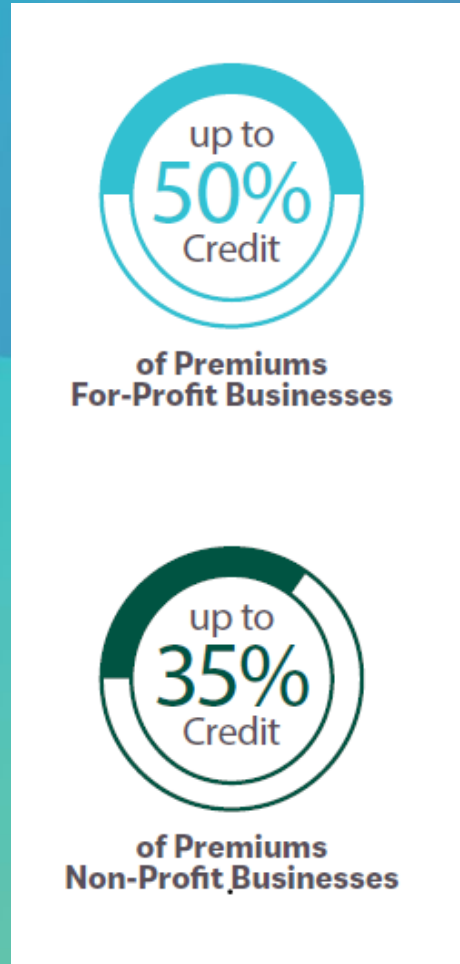
## OUT OF STATE EMPLOYEE COVERAGE

- Remote employees can access Blue Shield Bluecard

## GREAT FOR STARTUPS

- As little as two weeks of payroll

# Exclusive Tax Credit



**Number of Employees:** The business must have less than 25 full-time equivalent employees

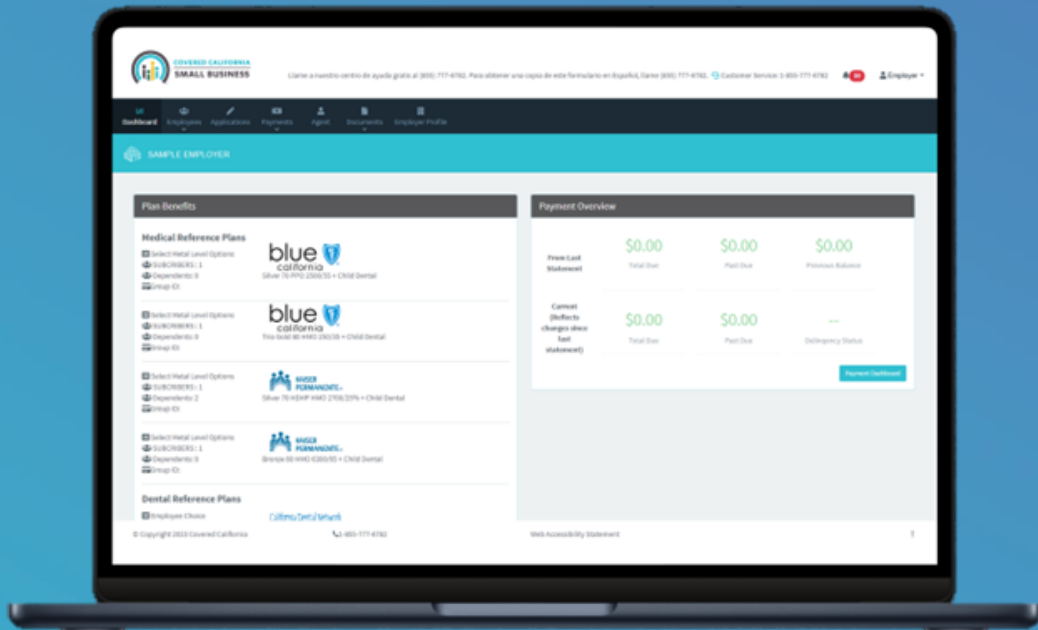
**Average Wage of Employees:** The employees must have an average annual wage of less than \$65,000 per year

**Employer-Paid Premium:** The employer must contribute at least 50% of the cost of insurance for each employee

**Tax Credit applied for two consecutive years**

# MyCCSB Portal

Manage your policy and employees online



- Easy self-serve employee Adds, Terms and Changes
  - Up to 30 days retroactively!
- View carrier subscriber IDs online.
- Invite new hires to enroll online and compare options
- One-time and Auto-Pay Feature for Employers
- Real-time Account Balances
- View previous invoices, payments, letters and notices
- View all employer details such as reference plan, contribution, COBRA status, addresses and contact information
- Ability to have a secondary account login for employers
- Cal-COBRA packets available electronically and mailed
- Employee Census export tool
- And much more!

# Broker Bonus Program

a partnership  
that pays

**In addition to the standard 5% commission:**

- Bonus Period: 7/1/2025 – 1/1/2026
- Qualification: Must write 3 or more groups during the bonus period to qualify.
- Enhanced Bonus: Secure 6 or more groups, and receive a 50% increase on all bonuses!
- Inclusion: Business acquired via partnering General Agencies is eligible.

Group Size (Enrolled Employees)	Bonus Per Group (3 Groups / 6+ Groups)
51 – 100	\$ 8,000 / \$12,000
26 – 50	\$ 4,000 / \$6,000
11 – 25	\$ 2,000 / \$3,000
5 – 10	\$ 1,000 / \$1,500

# New Business and Renewal Submission



BEERE&PURVES



---

## Submission Options

Online: [MyCCSB.com](https://MyCCSB.com)

Email: [CCSBeligibility@Covered.CA.gov](mailto:CCSBeligibility@Covered.CA.gov)



# Contact Us for Support



## CCSB Sales

- (844) 332-8384 | [SmallBusiness@Covered.CA.gov](mailto:SmallBusiness@Covered.CA.gov)

## Agent Service Center

- (855) 777-6782 | [Agents@Covered.CA.gov](mailto:Agents@Covered.CA.gov)  
Option 1 for English or 2 for Spanish  
Then 1 for Agents, then 2 for the Call Center

## Case Submission and Eligibility

- [CCSBeligibility@Covered.CA.gov](mailto:CCSBeligibility@Covered.CA.gov)

## Quotes

- [CCSBquotes@Covered.CA.gov](mailto:CCSBquotes@Covered.CA.gov)





# Enroller Portal



# Multi Factor Authentication (MFA)

NEW REQUIREMENTS

# Multi Factor Authentication (MFA)

## What is it?

Multi Factor Authentication is a requirement of **Minimum Acceptable Risk Standards for Exchanges (MARS-E)** standards.

## Who does it affect?

Everyone!

- **Enroller** User Roles 
- Covered California **Staff** 
- **Consumers** – **COMING SOON!**

**Verification  
Method:  
Email Address &  
Phone Number**

### Verification Method

Choose how you want Covered California to verify your identity. Please select a verification option.

What should I choose?

☐ Send a One Time Passcode to my email address: @covered.ca.gov

☐ Send a One Time Passcode text message to my cell phone number: (•••)•••-

*Please note that standard text message rate applies.*

Continue

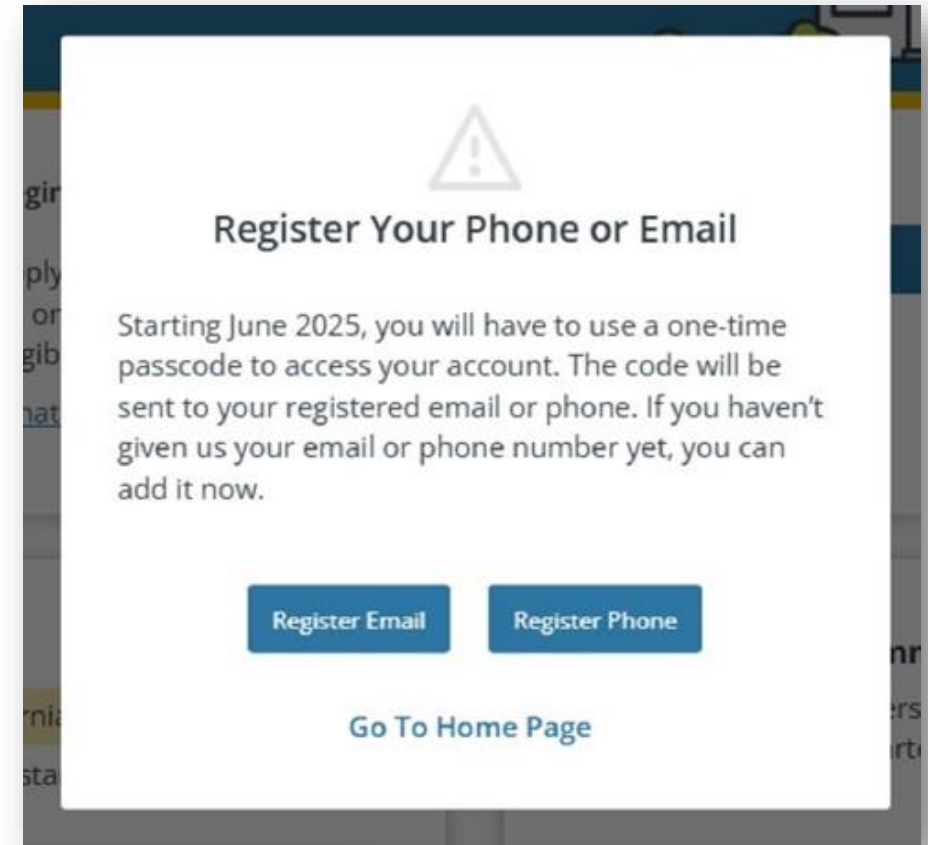
# Enhanced Security with One-Time Passcode (OTP)

## Security Questions Removed:

- February 2025 – Removed for Enrollers
- June 2025 – Removed for your Consumers

Registration Requirement: ALL users must register at an email address or a cell phone number for account verification, enhancing security measures.

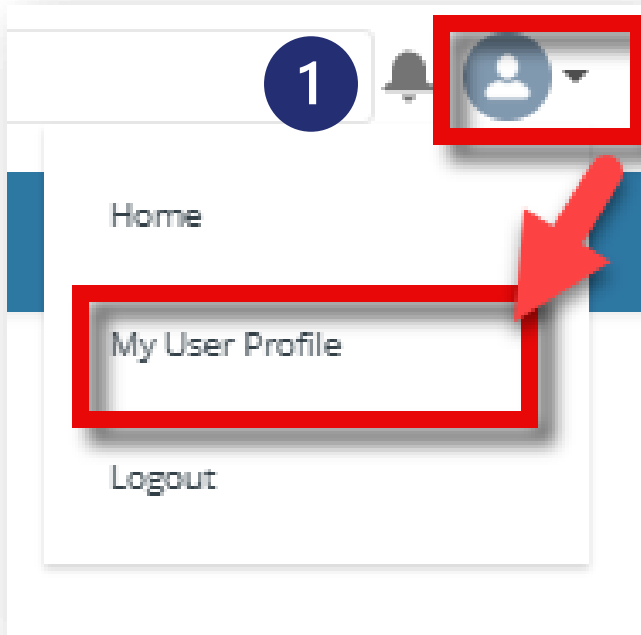
Consumer Home Page Notification: A Banner Notification and pop-up will display for users that have **NOT** registered a cell phone or email.



**Action Required:** Users previously relying on security questions are now required to register an Email or Cell Phone Number for enhanced account security.

# Setting Up or Editing your MFA

## 1 My User Profile



## 2 Navigate to My Security Profile



# Setting Up or Editing your MFA

3

## Register Your Account

3

### Register Your Account

Set up one of the following verification methods to register your account before you start your application.

If you forget your username, password, or need to view your tax forms, you must register your email address or cell phone number to access your account.

Email



Cell Phone Number

*Standard text message rate applies.*



Remove | Edit

Remove | Edit

Save & Continue

Email

Cell Phone Number

Remove |

Edit

Remove |

Edit





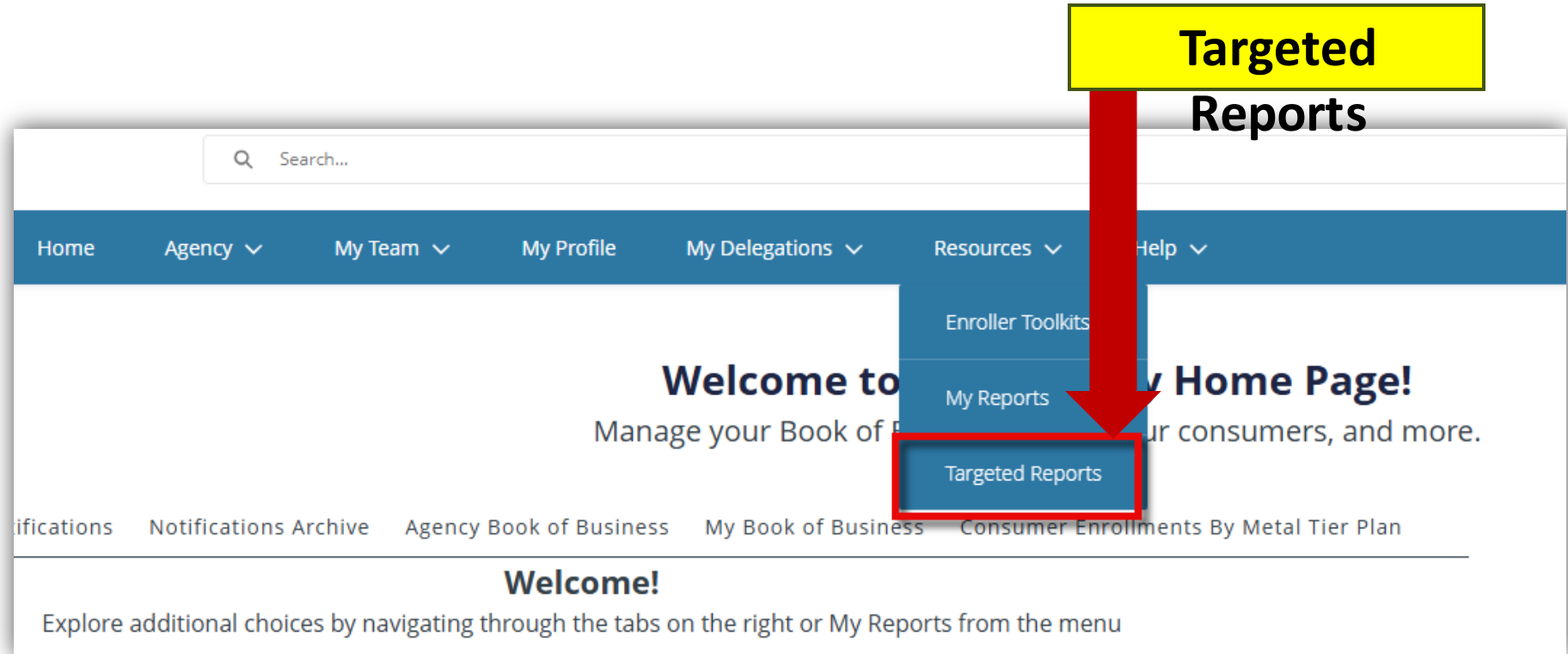
# Enroller Portal Reports

HOW TO GET AND USE THE DATA

# View and Export Targeted Reports

Enrollers will be able to view and export the following targeted reports:

- Delegations lost
- Consumer cases by carrier
- Active consumers only



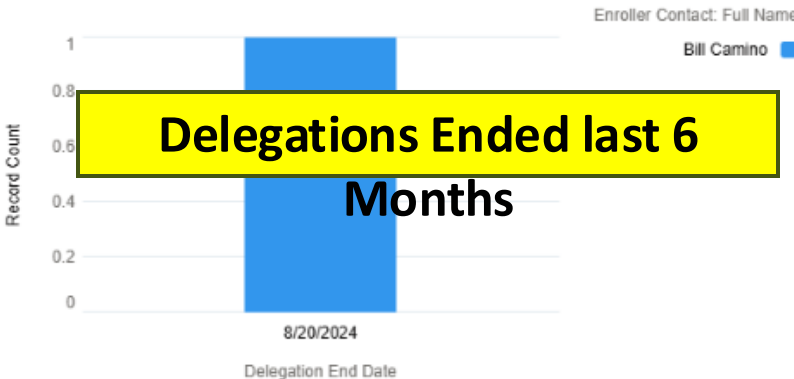
# Enroller Dashboard

## Delegations Ended This Month

We can't draw this chart because there is no data.

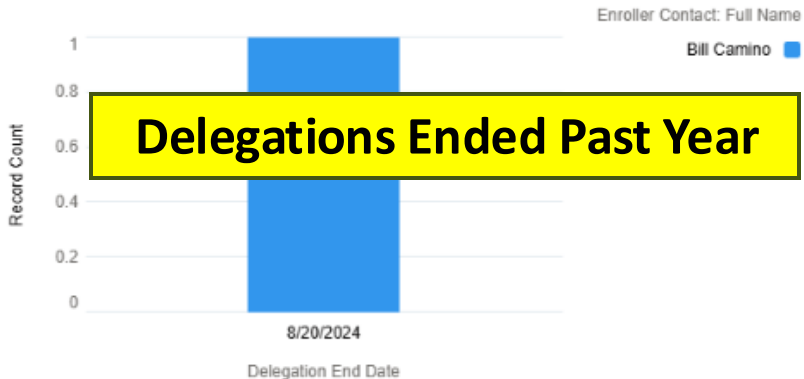
[View Report \(Delegations Ended this Month\)](#)

## Delegations Ended last 6 Months



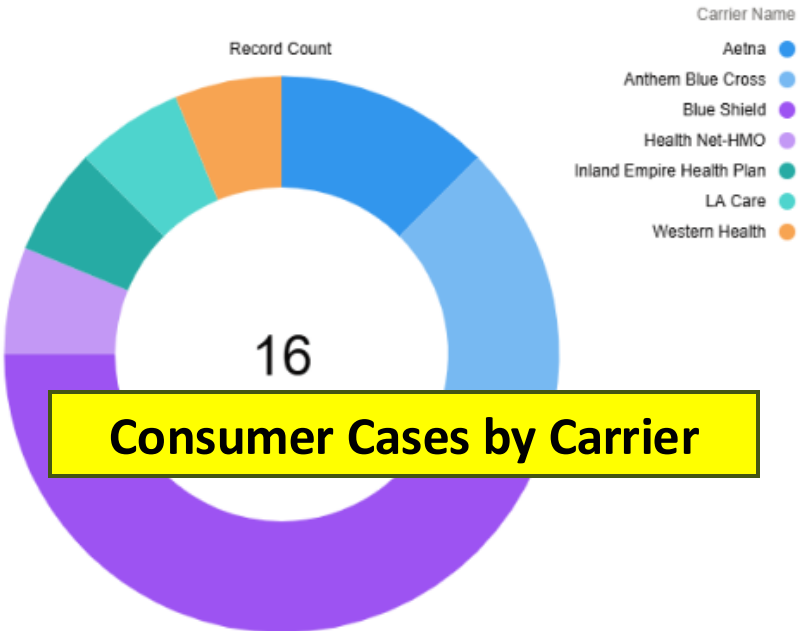
[View Report \(Delegations Ended Last 6 Months\)](#)

## Delegations Ended Past Year



[View Report \(Delegations Ended Past Year\)](#)

## Consumer Cases by Carrier



[View Report \(Consumer Cases by Carrier\)](#)

## Active Consumer Cases

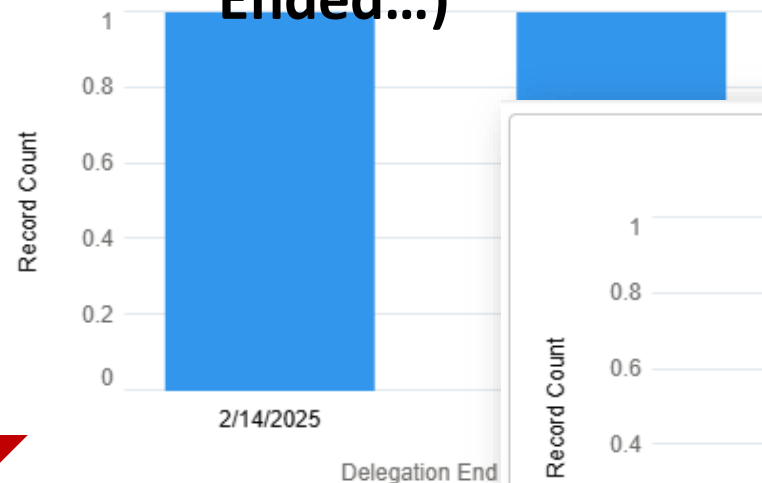
Contact Application N...	Consumer ...	Enroller ...	CalHEERS Case/Applica...	Pla...	Carrier Name	Effective Sta...	Effective En...	Enrollment ...	Household Address
1357049806-2024	Jane doe	Elle Camino	5193166845	Health	Anthem Blue Cross	7/1/2024	12/31/2024	PENDING	1601 Exposition Blvd, Sacramento, CA 95815
1357049808-2024	Jason Fritz	Elle Camino	5193166847	Health	Aetna	7/1/2024	12/31/2024	PENDING	6020 N Blackstone Ave, Fresno, CA 93710
1357049809-2024	Billy Banks	Elle Camino	5193166848	Health	Blue Shield	7/1/2024	12/31/2024	PENDING	3651 Lake Tahoe Blvd, South Lake Tahoe, CA 96
1357049809-2024	Bert Banks	Elle Camino	5193166848	Health	Blue Shield	7/1/2024	12/31/2024	PENDING	3651 Lake Tahoe Blvd, South Lake Tahoe, CA 96
1357049809-2024	Becky Banks	Elle Camino	5193166848	Health	Blue Shield	7/1/2024	12/31/2024	PENDING	3651 Lake Tahoe Blvd, South Lake Tahoe, CA 96
1357049809-2024	Beth Banks	Elle Camino	5193166848	Health	Blue Shield	7/1/2024	12/31/2024	PENDING	3651 Lake Tahoe Blvd, South Lake Tahoe, CA 96
1357049813-2024	AA Person	Bill Camino	5193166852	Health	Western Health	7/1/2024	12/31/2024	PENDING	6650 Hembree Ln, Windsor, CA 95492
1357049814-2024	Bee Smith	Stu Camino	5193166853	Health	Blue Shield	7/1/2024	12/31/2024	PENDING	2500 Daniels St, Manteca, CA 95337
1357049815-2024	Jimmy Craig	Bill Camino	5193166855	Health	Inland Empire Health Plan	7/1/2024	12/31/2024	PENDING	2875 Santa Maria Way, Santa Maria, CA 93455
1357049815-2024	Jenny Craig	Bill Camino	5193166855	Health	Inland Empire Health Plan	7/1/2024	12/31/2024	PENDING	2875 Santa Maria Way, Santa Maria, CA 93455
1357049819-2024	Aaron Vendil	Stu Camino	5193166858	Health	Inland Empire Health Plan	7/1/2024	12/31/2024	PENDING	78932 CA-111, a Quinta, CA 92253
1357049820-2024	Tina Phillips	Stu Camino	5193166859	Health	Blue Shield	7/1/2024	12/31/2024	PENDING	370 M St, Crescent City, CA 95531
1357049841-2024	Nettie Anthony	Elle Camino	5193166877	Health	Blue Shield	7/1/2024	12/31/2024	PENDING	1802 Fort Jones Rd, Yreka, CA 96097

## Active Consumer Cases

[View Report \(Active Consumer Cases\)](#)

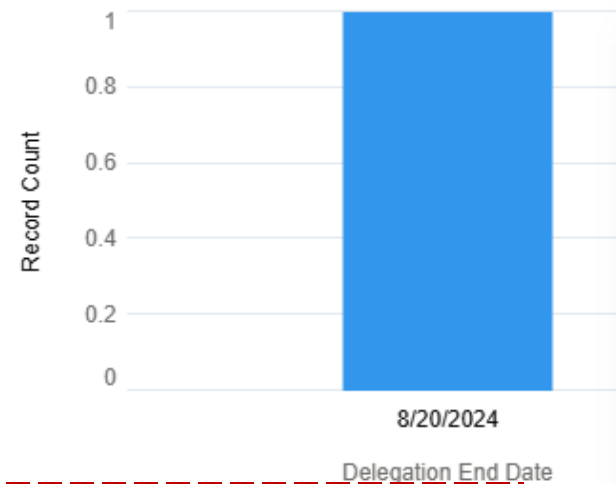
# Delegations Ended Reports

**View Report (Delegations Ended...)**



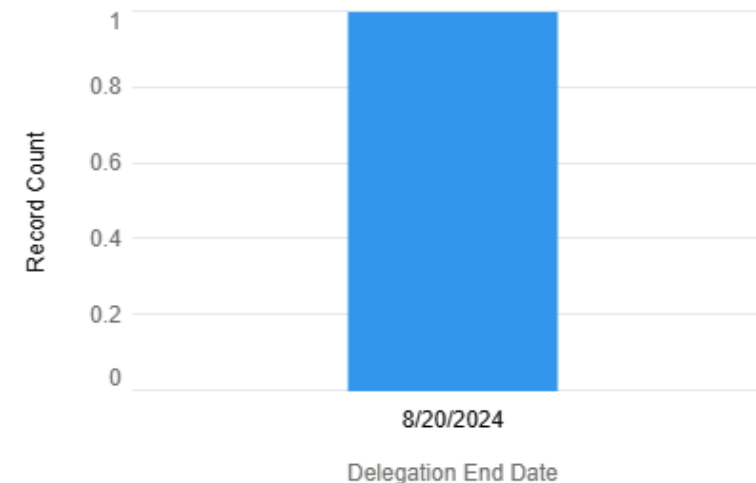
[View Report \(Delegations Ended this Month\)](#)

**This Month**



[View Report \(Delegations Ended Last 6 Months\)](#)

**Last 6 Months**



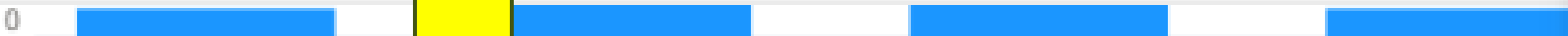
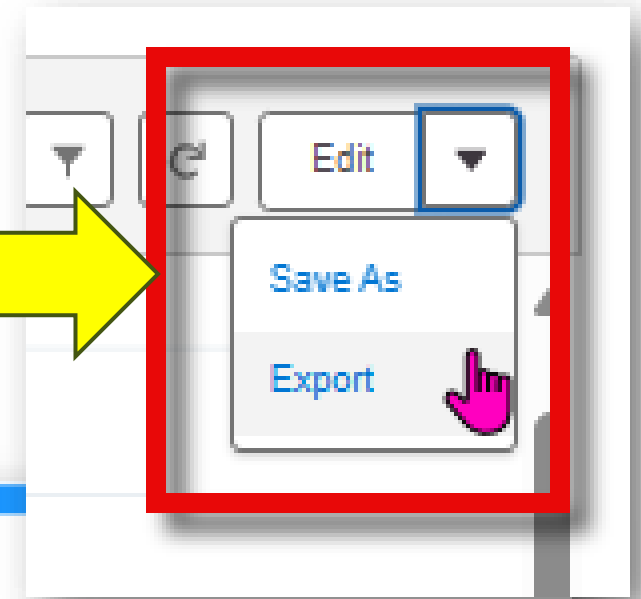
[View Report \(Delegations Ended Past Year\)](#)

**Past Year**

# Delegations Ended Report: Past Year

- Delegations End Date
- Enroller Contact Full Name
- Delegation History Name
- Consumer Contact
- Reason for End

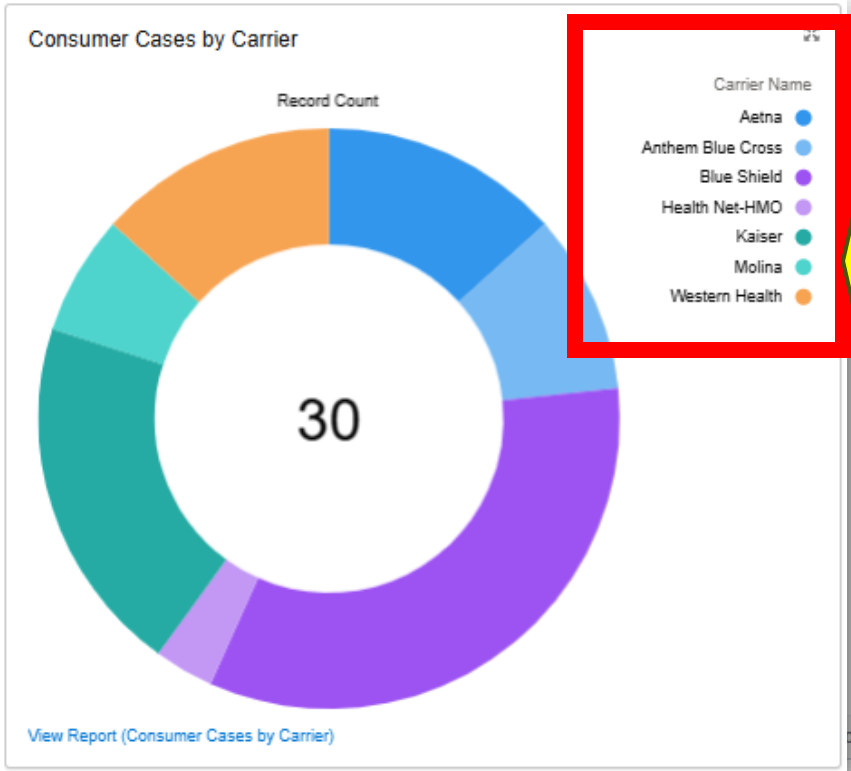
- Save the Report
- Export the Report



A yellow arrow points from the first list to the table header, and another yellow arrow points from the second list to the 'Export' button in the screenshot.

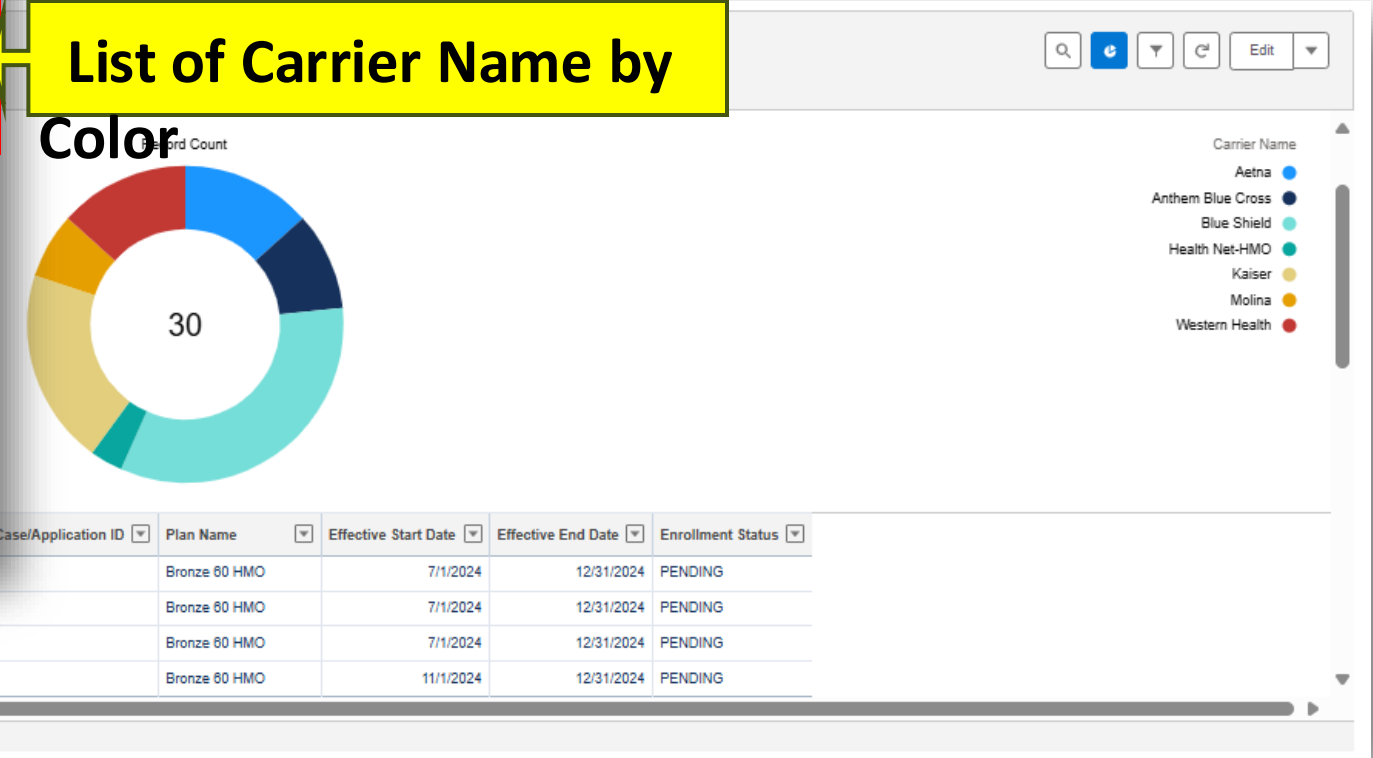
<input type="checkbox"/> Delegation End Date ↑ ▾	Enroller Contact: Full Name ↑ ▾	Delegation History Name ▾	Consumer Contact ▾	Reason for End ▾
<input type="checkbox"/> 8/27/2024 (1)	Tim Test (1)	DH-2121473	Wesley Wright	Consumer requested cancellation
Subtotal				

# Consumer Cases by Carrier Report



- Shows consumer enrollment by carrier
- Can be exported and filtered as needed

List of Carrier Name by Color





# Active Consumer Cases: Field Titles

Active Consumer Cases

Contact Application Na...	Consumer ...	Enroller C...	CalHEERS Case/Applicati...	Plan...	Carrier Name	Effective Start...	Effective End...	Enrollment ...	Household Address
1357049734-2024	Jason Jones	Timmy Test	5193166800	Health	Kaiser	7/1/2024	12/31/2024	PENDING	1601 Exposition Blvd, Sacramento, CA 9581
1357049762-2024	One Parent	Timmy Test	5193166821	Health			12/31/2024	PENDING	301 E Bidwell St, Folsom, CA 95630
1357049762-2024	two parent	Timmy Test	5193166821					PENDING	301 E Bidwell St, Folsom, CA 95630
1357049762-2024	three child parent	Timmy Test	5193166821					PENDING	301 E Bidwell St, Folsom, CA 95630
1357049762-2024	two child parent	Timmy Test	5193166821					PENDING	301 E Bidwell St, Folsom, CA 95630
1357049762-2024	one child parent	Timmy Test	5193166821					PENDING	301 E Bidwell St, Folsom, CA 95630
1357049764-2024	Mike Mitchel	Tina Test	5193166823					PENDING	13401 Folsom Blvd, Hanford, CA 93230
1357049764-2025	Mike Mitchel	Tina Test	5193166823					PENDING	13401 Folsom Blvd, Hanford, CA 93230
1357049764-2025	Mich Mitchell	Tina Test	5193166823					PENDING	13401 Folsom Blvd, Hanford, CA 93230
1357049765-2024	Ashley Banks	Tina Test	5193166824					PENDING	1601 Exposition Blvd, Sacramento, CA 9581
1357049765-2024	Alex Banks	Tina Test	5193166824					PENDING	1601 Exposition Blvd, Sacramento, CA 9581
1357049765-2024	Aidan Banks	Tina Test	5193166824					PENDING	1601 Exposition Blvd, Sacramento, CA 9581
1357049765-2024	Adam Banks	Tina Test	5193166824					PENDING	1601 Exposition Blvd, Sacramento, CA 9581

[View Report \(Active Consumer Cases\)](#)

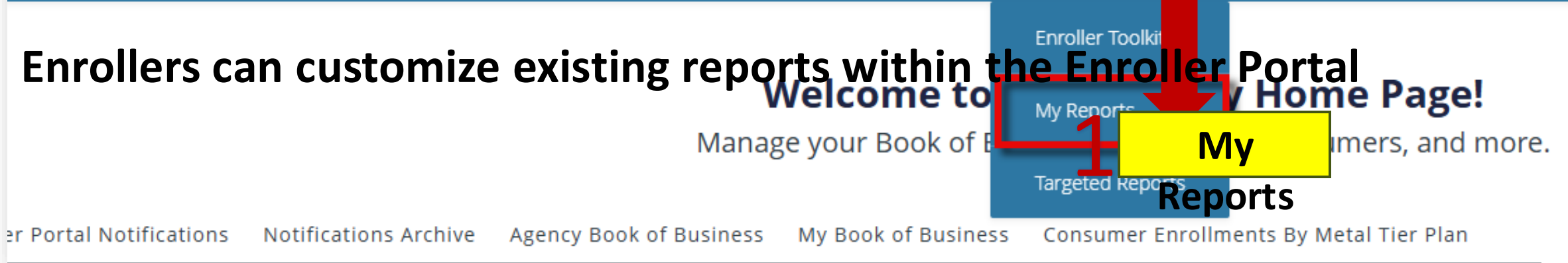
- Application Number
- Consumer Name
- Enroller Name
- CalHEERS Case ID
- Plan Product Type
- Carrier Name
- Effective Start Date
- Effective End Date
- Enrollment
- Household Address

# How to Customize My Reports

BOOK OF BUSINESS EXAMPLE


# Enroller Portal Home Page: My Reports

Enrollers can customize existing reports within the Enroller Portal



# Edit the Report

[Home](#) [Agency](#) [My Team](#) [My Profile](#) [My Delegations](#) [Resources](#) [Help](#)

 Report: Contact Application and Enrollees  
**My Book of Business**

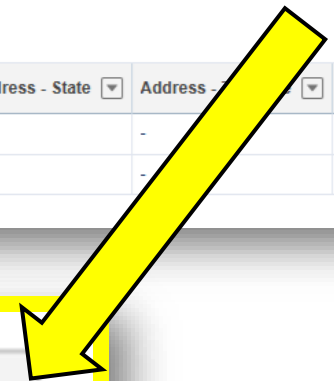
[Add Chart](#)  [Edit](#)

Total Records  
2


<input type="checkbox"/> CalHEERS Case ID ↑	Year of Application	First Name	Middle Name	Last Name	Customer DOB	SSN Last 4	Residence Address Line 1	Residence Address Line 2	Address - City	Address - State	Address - Zip	Customer Phone
<input type="checkbox"/> - (2)	2023	jane	-	smith	3/1/1981	-	-	-	-	-	-	-
	2025	Mike	-	Williams	1/1/1980	-	-	-	-	-	-	-

[Add Chart](#)  [Edit](#)

3



# Sample Report: My Book of Business



Home

Agency ▾

My Team ▾

My Profile

My Delegations ▾

Resources ▾

Help ▾

Reports

Recent

4 items

REPORTS

Recent

Created by Me

Private Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Report Name	Description ▾	Folder	Created By	Created On
My Book of Business		Book of Business Report	Vinay Bhatia	4/28/2023, 8:01 AM
Copy of My Book of Business		Private Reports	Bob Smith	2/14/2025, 12:00 PM
Copy of Book of Business by Enroller		Private Reports	Bob Smith	2/14/2025, 2:00 PM
Book of Business by Enroller Contact		Book of Business Report	Vinay Bhatia	4/28/2023, 8:01 AM

# Choose Your Fields

Select  
“Outline”  
display the list  
of columns.

Remove  
“Columns”  
here as  
needed.

**4**

**5**

REPORT ▼  
My Book of Business ✎ Contact Application and Enrollees

Previewing a limited number of records. Run the report to see everything.

CalHEERS Case ID	Year of Application	First Name	Middle Name	Last Name	Customer DOB	SSN Last 4	Residence Address
- (2)	2023	jane	-	smith	3/1/1981	-	-
	2025	Mike	-	Williams	1/1/1980	-	-

**Outline**

**Groups**

GROUP ROWS

Add group...

CalHEERS Case ID

**GROUP COLUMNS**

Add group...

**Columns**

Add column...

Year of Application

First Name

Middle Name

Last Name

Customer DOB

SSN Last 4

Residence Address Line 1

Residence Address Line 2

Year of Application

First Name

Middle Name

Last Name

Customer DOB

SSN Last 4

Residence Address Line 1

Residence Address Line 2



# Filter Your Content

6



Home Agency ▾ My Team ▾ My Profile My Delegations ▾ Resources ▾ Help ▾

REPORT ▾  
My Book of Business Contact Application and Enrollees

Previewing a limited number of records. Run the report to see everything.

CONTACT APPLICATIONS Case ID ▾	Year of Application ▾	First Name ▾	Middle Name ▾	Last Name ▾	Customer DOB ▾	SSN
- (2)	2023	jane	-	smith	3/1/1981	-
	2025					

**Filters** ▾ 2

Add filter...

CONTACT APPLICATIONS

- Account: Account Name
- Application: Application Case Number
- Consumer Name
- Contact Application ID
- Contact Application Name
- Health Enrollment: Enrollment Name
- Eligibility Program: Program
- Enroller Contact

- Account Name
- Application Case Number
- Consumer Name
- Contact Application ID
- Contact Application Name
- Health Enrollment Name
- Eligibility Program
- Enroller Contact
- Year of Application

# Run Your Customized Report

8

Run

The screenshot shows a web application interface for generating reports. At the top, there's a 'REPORT' dropdown and a breadcrumb 'My Book of Business > Contact Application and Enrollees'. On the right, there are buttons for 'Add Chart', 'Save', 'Close', and 'Run'. The 'Run' button is highlighted with a red box and a red arrow pointing to it from the 'Run' text above. On the left, there's a 'Filters' panel with a list of filters: 'Add filter...', 'Show Me All contact applications', 'Application: Created Date All Time', 'Enroller is Current User equals True', and 'Year of Application equals 2025'. A 'Filter By' dialog box is open, showing 'Field: Year of Application', 'Operator: equals', and 'Value: 2025'. The '2025' option is selected with a checkmark. A red arrow points from the 'Filter: Consumers with Active 2025 Cases Apply' text to the '2025' selection. Another red arrow points from the 'Cases Apply' text to the 'Apply' button in the dialog box. The 'Apply' button is also highlighted with a red box. Below the dialog box, there's a 'Locked' checkbox and 'Cancel' and 'Apply' buttons. The 'Apply' button is highlighted with a red box. The background shows a table with columns: 'First Name', 'Middle Name', 'Last Name', 'Customer DOB', 'SSN Last 4', 'Residence Address Line 1', 'Residence Address Line 2', 'Address - City', and 'Address - State'. A single row is visible with the last name 'Williams' and DOB '1/1/1980'.

REPORT ▼  
My Book of Business > Contact Application and Enrollees

Buttons: Add Chart, Save, Close, Run

Filters:

- Add filter...
- Show Me All contact applications
- Application: Created Date All Time
- Enroller is Current User equals True
- Year of Application equals 2025

Filter By dialog:

- Field: Year of Application
- Operator: equals
- Value: 2025 (selected)
- Buttons: Cancel, Apply

Table:

First Name	Middle Name	Last Name	Customer DOB	SSN Last 4	Residence Address Line 1	Residence Address Line 2	Address - City	Address - State
		Williams	1/1/1980					

Filter: Consumers with Active 2025

Cases Apply

7

# Save Your Customized Report 1 of 2

Save As

HomeAgency ▼My Team ▼My ProfileMy Delegations ▼Resources ▼Help ▼

Report: Contact Application and Enrollees

My Book of Business

Search

Add Chart

Filter

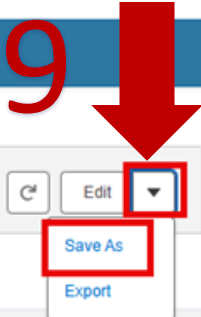
Refresh

Edit

Total Records

1

<input type="checkbox"/> CalHEERS Case ID ↑	<input type="checkbox"/> Year of Application	<input type="checkbox"/> First Name	<input type="checkbox"/> Middle Name	<input type="checkbox"/> Last Name	<input type="checkbox"/> Customer DOB	<input type="checkbox"/> SSN Last 4	<input type="checkbox"/> Residence Address Line 1	<input type="checkbox"/> Residence Address Line 2	<input type="checkbox"/> Address - City	<input type="checkbox"/> Address - State	<input type="checkbox"/> Address - Zip Code	<input type="checkbox"/> Customer Phone
<input type="checkbox"/> - (1)	2025	Mike	-	Williams	1/1/1980	-	-	-	-	-	-	📞 -



# Save Your Customized Report 2 of 2

**10** Enter Report Name

**12** All Folders

**11** Select Folder

**13** Private Reports

**14** Select Folder

Report Name: "2025 only"

Book of Business Report

Private Reports

Select Folder

Cancel Save

Cancel Select Folder

COVERED CALIFORNIA

LET'S TALK health

Special Enrollment Period Enroller Workshop | April 2025 | Outreach and Sales Division

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# Access Your Saved Reports

Home

Agency

My Team

My Profile

My Delegations

Resources

Help

Reports

Recent

5 items

REPORTS

Recent

Created by Me

Private Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Report Name

2025 only

My Book of Business

Copy of My Book of Business

Copy of Book of Business by Enroller

Book of Business by Enroller Contact

Description

Private Reports

Book of Business Report

Private Reports

Private Reports

Book of Business Report

Created By

Bob Smith

Vinay Bhatia

Bob Smith

Bob Smith

Vinay Bhatia

Created On

3/13/2025, 12:55 PM

4/28/2023, 8:07 PM

2/14/2025, 12:01 PM

2/14/2025, 2:35 PM

4/28/2023, 8:07 PM

Subscri

1

Recent

3

2025 only

2

Private Reports

# How to Access My Daily Emails

STAY INFORMED WITH DAILY SUMMARY  
EMAILS



# Stay Informed with Your Daily Summary Emails

## DAILY UPDATES

A summary email will be sent out every day to keep you informed about the status of cases in your Book of Business (BoB).

## EFFICIENT COMMUNICATION

This daily summary email ensures you're always up-to-date with the latest case developments, allowing for timely actions and decisions.



## EMAIL SUBJECT LINE

- Alerts Present: When there are cases that trigger alerts, the email will detail these notifications.
- No Alerts: If there are no cases in your BoB triggering any alerts for the day, the subject line of the email will simply state “No Alerts”.

# Access Your Daily Summary Emails

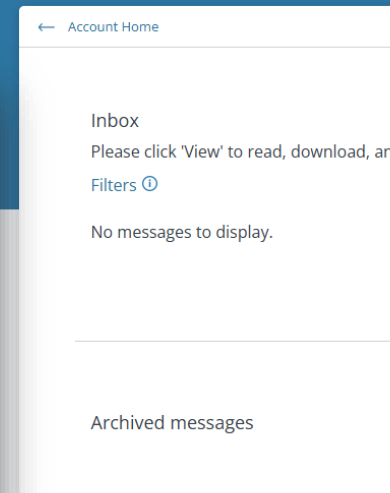
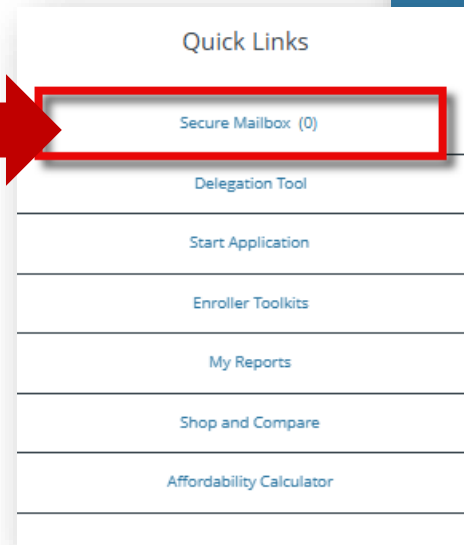
## QUICK LINKS:

For easy access, navigate to your Quick Links where you'll find the pathway to your Secure Mailbox.

## SECURE MAILBOX:

Securely stores your daily summary emails.

**Secure Mailbox (0)**



- **Enrollments in Pending Status (Binder Payment Needed)**
- **Enrollments that were cancelled or terminated**
- **New Enrollment via Auto Plan Selections for your Medi-Cal Transitioners**
- **Consumers that need to provide documents for Reasonable Opportunity Period**

# Daily Summary Email New Fields

## NEW CONSUMER CASE FIELDS

1. Household First Name
2. Household Last Name
3. Household Home
4. Household Cell Phone
5. Household Email

## RESOURCE GUIDE

[https://hbex.coveredca.com/toolkit/pdfs/Daily\\_Summary\\_Email\\_Notices\\_Description\\_Guide.pdf](https://hbex.coveredca.com/toolkit/pdfs/Daily_Summary_Email_Notices_Description_Guide.pdf)

	B	C	D	E	F	G	H	I	J	K	L
1	ENROLLMENT_YEAR	HOUSEHOLD_FIRST_NAME	HOUSEHOLD_LAST_NAME	HOUSEHOLD_HOME_PHONE_NUMBER	HOUSEHOLD_CELL_PHONE_NUMBER	HOUSEHOLD_EMAIL	NOTIFICATION_TOPIC	AGENT_NAME	AGENT_LICENSE_NUM		
2	2025	JAMES	SMITH	916 555-1212	916 555-9999	JAMES.SMITH@INVALID.COM	NOD01	MARY JONES	410000		
3	2025	MARCI	DARCY	916 887-8523	916 445-6987	M.DARCY@INVALID.COM	BINDER PAYMENT PENDIN	MARY JONES	410000		
4											
5											
6											



# Latest on CalHEERS



# CalHEERS Release

FEBRUARY 2025

# Consumers Moving Out of Region

CALHEERS 25.2 RELEASE



# Simplifying Coverage for Movers

NEW  
MESSAGING  
AND UPDATE  
PLAN BUTTON

RED ALERT  
BANNERS

STREAMLINED  
NAVIGATION TO  
ENROLLMENT  
DASHBOARD

# Consumers Moving Out of Region Application

## Key Updates



Improving the process for users to update health and dental plans easily when they move to a different region.

### CALL TO ACTION BUTTONS

Alerts users to update plans with a new "Update Plan" or "Choose Plan" button.

### ALERTS AND BANNER MESSAGING

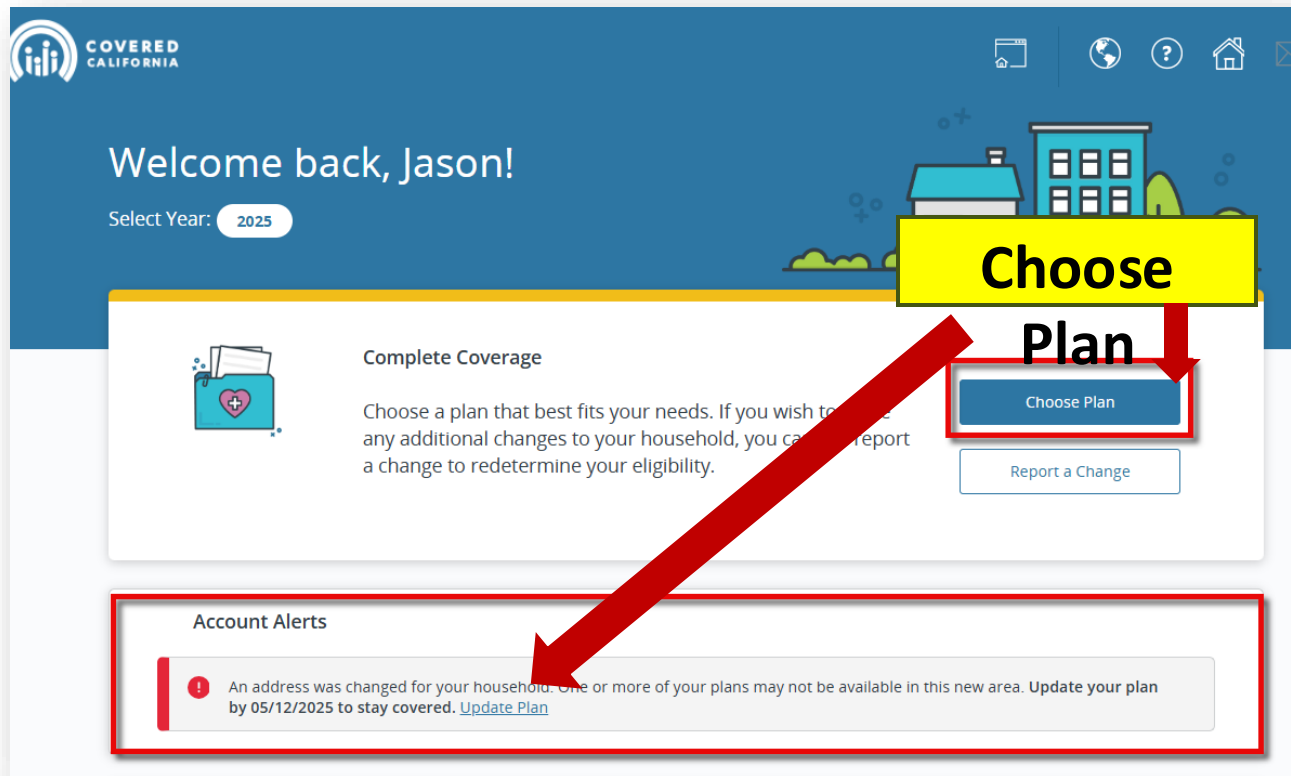
Improved messaging highlighted in multiple areas of the consumer home page, eligibility results, account alerts and enrollment dashboard.

### NAVIGATION

Features prompts to navigate to the Enrollment Dashboard from all messaging.

# “Update Plan” vs. “Choose Plan” Buttons

## Consumer Home Page



**LOCATION-BASED ACTIONS:** Buttons change based on your new address, guiding you to the next step.

### “Update Plan”

- Your current plan remains available.
- Updates your address with the carrier; may update premiums based on new pricing region.

### "Choose Plan"

- Your current plan is not available at the new address.
- You're prompted to select a new plan, avoiding coverage lapses.

# New Red Alert Banner for Plan Updates

**Red Alert Banner:** Located in the Account Alerts on the Consumer Home page, featuring an **"Update Plan" link** for quick access.

## Action Needed:

- Clicking **"Update Plan" link** to go straight to the Enrollment Dashboard.
- Look for the **"Update Plan" link** in the "Actions Needed" column too.

The screenshot shows the 'Household Summary' page for Jason F. (51 yrs). A yellow box labeled 'Update Plan' with a red arrow points to a red-bordered alert banner at the bottom of the page. The banner contains a red exclamation mark icon and the text: 'An address was changed for your household. One or more of your plans may not be available in this new area. Update your plan by 05/12/2025 to stay covered.' Another red arrow points from the yellow box to a red-bordered button labeled 'Urgent Update Plan' in the 'Actions Needed' column. The page also displays household members, program eligibility (Covered California), and contact information.

# New Red Alert for Plan Updates in Full Details

**Red Alert Banner:** Now featured in the Household Member (HHM)'s Next Steps section, alerting you with a visible **"Update Plan" button**.

**Quick Navigation:** A simple click on the **"Update Plan" button** directs you to the Enrollment Dashboard for immediate action.

The screenshot displays the 'Eligibility Results Page' for a user named Jason F., who is 51 years old. The page features a blue header with a '< Go Back' button and the user's name and age. Below the header, the user's name 'Jason F.' is displayed, along with an 'Eligibility Start Date 04/01/2025'. A table lists the user's programs and their statuses: 'Covered California Plan' (Eligible), 'Financial Help' (Conditionally Eligible), and 'Enhanced Silver Benefits' (Discontinued). Each row has a 'Quick Link' to 'Jump to this section'. A yellow banner with the text 'Update Plan' and a red arrow pointing down to a blue 'Update Plan' button is overlaid on the right side of the page. Below the banner, the 'Jason's Next Steps' section contains two alerts: a red alert about updating the health plan by 05/12/2025 due to an address change, and a yellow alert about providing documents by 04/15/2025 to avoid losing financial help. The yellow alert includes a link to 'Upload Documents'.

Program	Status	Quick Link
Covered California Plan	Eligible	<a href="#">Jump to this section</a>
Financial Help	Conditionally Eligible	<a href="#">Jump to this section</a>
Enhanced Silver Benefits	Discontinued	<a href="#">Jump to this section</a>

**Update Plan**

**Jason's Next Steps**

- Update health plan by 05/12/2025.**  
Jason's address was updated, and their current plan may not be available in this new area. Update health plan by 05/12/2025 to stay covered.
- You must provide the following documents by 04/15/2025 or risk losing financial help.**
  - Proof of Minimum Essential Coverage[Upload Documents](#)

# Enhanced “Update Plan” Alert on Enrollment Dashboard

**Red Alert Banner:** Now displayed on the [Health/Dental] Plans tab, within the Enrollment Dashboard.

**“Update Plan” Button:**

- Located on the [Health/Dental] Plans tiles, direct link to making necessary plan changes.
- Clicking it takes you straight to the "Choose a [Health/Dental] Plan" page, where you can select a new plan.

The screenshot displays the Enrollment Dashboard interface. On the left, the 'Your Agent' section lists 'Elle Camino' with contact information and a 'Manage Delegates' link. Below this is the 'Update your household information' section with a 'Report a Change' link, and 'Quick links' for 'Documents & Correspondence'. The main content area is divided into 'Health Plans' and 'Dental Plans' tabs. A red alert banner is prominently displayed at the top of the 'Health Plans' tab, stating: 'An address was changed for your household. Your plan may not be available in this new area. Update your health plan by 05/12/2025 to stay covered.' Below the alert, the 'Group 1' enrollment status is shown as 'Pending'. A yellow callout box with the text 'Update Plan' and a red arrow points to the 'Update Plan' button located in the bottom right corner of the 'Health Plans' tile. The tile also displays the Aetna Silver 70 HMO plan details, including a monthly premium of \$504.23. To the right of the tile, a summary section shows 'Expected coverage dates' (01/01/2025 - 12/31/2025), 'Current CSR Level' (CS1), 'Covered household members' (Jason Fritz, 51 years old), 'Monthly premium' breakdown (Premium before savings: \$588.42/mo, Savings: -\$84.19/mo, APTC: -\$83.19/mo, CA Premium Credit: -\$1.00/mo), and 'Amount you pay' (\$504.23/mo).

Enrollment Dashboard Updates



# Enrollment Dashboard

CALHEERS 25.2 RELEASE

# Update to Premium Date Information

**Premium Effective Date:** A new field has been added to ensure you know exactly when the displayed premium amount started applying.

## Label Name Change:

- The label "**Premium start date**" has been updated to "**Premium effective date**" on both Health Plans and Dental Plans tabs across several important pages, including:
  - Enrollment Dashboard**
  - Enrollment History**
  - Enrollments**

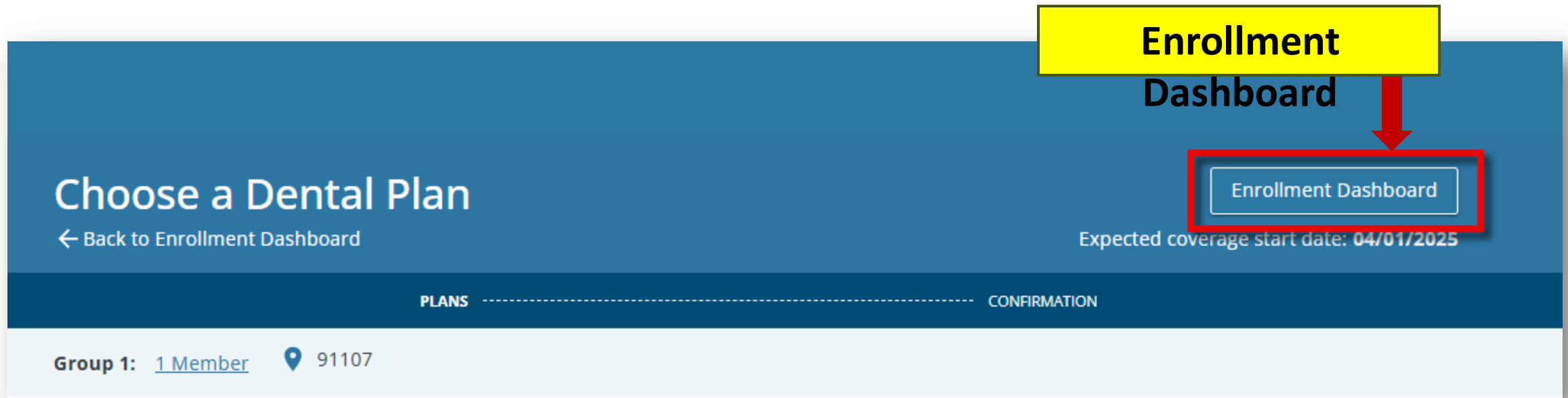
The screenshot displays the 'Enrollment Dashboard' for a user named Elle Camino. The dashboard is divided into two main sections: 'Enrollment Dashboard' and 'Enrollment History'. The 'Enrollment Dashboard' section is further divided into 'Your Agent' and 'Health Plans' (with a red exclamation mark icon). The 'Health Plans' section shows a plan for Aetna Silver 70 HMO with a monthly premium of \$504.23. A red box highlights the 'Premium effective date' field, which shows '01/01/2025'. A red arrow points from a yellow box with the text 'Now labeled, "Premium effective date"' to the highlighted field. Below the plan details, there is a section for 'Coverage dates' (01/01/2025 - 03/31/2025), 'Policy ID' (16451), 'Current CSR Level' (CS1), and 'Covered household members' (Jason Fritz, 51 years old). A warning icon indicates that coverage will be ending soon for one or more household members. The 'Monthly premium' section shows the premium before savings (\$588.42/mo) and savings (\$84.19/mo), resulting in a net premium of \$504.23/mo. The 'Advance Premium Tax Credit (APTC)' section shows a credit of \$83.19/mo, and the 'CA Premium Credit' section shows a credit of \$1.00/mo.

Field	Value
Premium effective date	01/01/2025
Coverage dates	01/01/2025 - 03/31/2025
Policy ID	16451
Current CSR Level	CS1
Covered household members	Jason Fritz (51 years old) (Subscriber)
Monthly premium	\$504.23 /mo
Advance Premium Tax Credit (APTC)	-\$83.19 /mo
CA Premium Credit	-\$1.00 /mo

# “Enrollment Dashboard” Button for Easy Navigation

**New:** An **“Enrollment Dashboard”** button has been added to the shopping flow, allowing for a quick return to the dashboard.

**Where You’ll See It:** Visible during both the "Choose a Dental Plan" and "Choose a Health Plan" shopping flows, ensuring a straightforward way to navigate back.



# Consumer Notification Options

CALHEERS 25.2 RELEASE

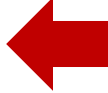
# Alternate Formats for Receiving Notifications

**What are Alternative Formats?**

Alternative Formats are for those who need printed communications in a format such as Braille, large print, audio electronic, or data electronic format.

- **Large print** documents have bigger letters, numbers, and pictures to make it easier for people with low vision to read. They are printed in much larger fonts than regular documents.
- **Audio electronic format** is a recording of someone reading a document out loud. You can listen to it using headphones, speakers, or other devices.
- **Data electronic format** is the electronic versions of a printed document that can be read on a computer, smartphone, tablet, or other electronic devices.
- **Braille** is a system of raised dots that people who are blind or visually impaired can touch with their fingers to read.

[Close](#)

**Add Household Member**  **Add Household Member** [Cancel](#)

Does Frank need future communications about their eligibility to be sent in an alternative format? *Optional*  
*If you skip this question or select "No" you will get future communications in the regular printed format.*

[What are alternative formats?](#)

☐ No

☒ Yes

Which of the following alternative formats does Frank need future communications sent in?  
*If you have questions or need a format not listed please call (916) 440-7370.*

☐ Large print

☐ Audio electronic format

☐ Data electronic format

☐ Braille

[Back](#) [Next](#)

# Extra Messaging for Braille

Which of the following alternative formats does Frank need future communications sent in?

*If you have questions or need a format not listed please call (916) 440-7370.*

- ☐ Large print
- ☐ Audio electronic format
- ☐ Data electronic format
- ☒ Braille



Braille is only available in English or Spanish. If your preferred language is not English or Spanish, your notices will be sent in English Braille.



# New Search Feature: Alternative Format Field

**New Field:** Alternative Format field in search results on Documents and Correspondence page.

**When Activated:** Visible upon selecting an Alternative Format.

**Purpose:** Simplifies finding documents in preferred formats.

**Availability:** Live for all users.

The screenshot displays the 'Documents and Correspondence' interface. It includes sections for 'Mailing Address Status' (with 'Deliverable' selected), 'Upload Document', and 'Preferred Contact Method' (set to 'Mail'). Below these is a search bar and a table of documents. The table has columns for 'DOCUMENT NAME', 'DATE', and 'Eligibility'. One document is listed: 'Eligibility Notice - Initial Determination'. Below the table, the 'Deliverable Status' is 'Mailed', 'Uploaded By' is 'System', and 'Document Type' is 'INDIVIDUAL NOTICE'. The 'Alternative Format: Audio electronic format' field is highlighted in a red box. A yellow callout box with a red arrow points to this field, containing the text 'Alternative Format: Audio electronic format'.

# Updates to Medi-Cal Section on “See Full Details” Page

The screenshot shows a web interface for Medi-Cal eligibility. At the top, it says 'Medi-Cal Eligible'. Below this, it says 'Ava, you are Eligible for Medi-Cal:'. There is a paragraph of text about the Benefits Identification Card (BIC) and a link to 'contact your local county office'. Below this, it says 'Ava is eligible for Medi-Cal.' There are two buttons: 'Show More Details' and 'Get Confirmation Letter'. Both buttons are highlighted with red boxes. A yellow box with the text 'Show More Details' and a red arrow points to the 'Show More Details' button. Another yellow box with the text 'Get Confirmation Letter' and a red arrow points to the 'Get Confirmation Letter' button. Below the 'Get Confirmation Letter' button, there is a paragraph of text about requesting an Eligibility Confirmation Letter and a link to 'contact your local county office'.

**Medi-Cal** *Eligible*

Ava, you are Eligible for Medi-Cal:

If you have never been issued a Benefits Identification Card (BIC), one will be mailed to you soon. Your local county office will contact you if they need more information, or you can [contact your local county office](#) if you have questions.

Ava is eligible for Medi-Cal.

**Show More Details**

Request an Eligibility Confirmation Letter

If you have an urgent medical need in the next 10 days request an Eligibility Confirmation Letter to use for your doctor or pharmacy.

**Get Confirmation Letter**

Your local county office will contact you if they need more information, or you can contact your [local county office](#) if you have questions.

**Messaging Reorganization:** For more straightforward communication.

**Eligibility Confirmation Letter:** New section for easy requests of eligibility confirmation letters directly through the **"Get Confirmation Letter"** button.

**Eligibility Check:** Button action checks eligibility with Medi-Cal, displaying:

- A Medi-Cal Eligibility Confirmation Letter if within 30 days of issuance.
- One of four specific popups for different scenarios.



COVERED  
CALIFORNIA



Special Enrollment Period Enroller Workshop | April 2025 | Outreach and Sales Division

# Updated Medi-Cal Eligibility Letter

**Updated Messaging:** Clear, concise communication for better understanding.

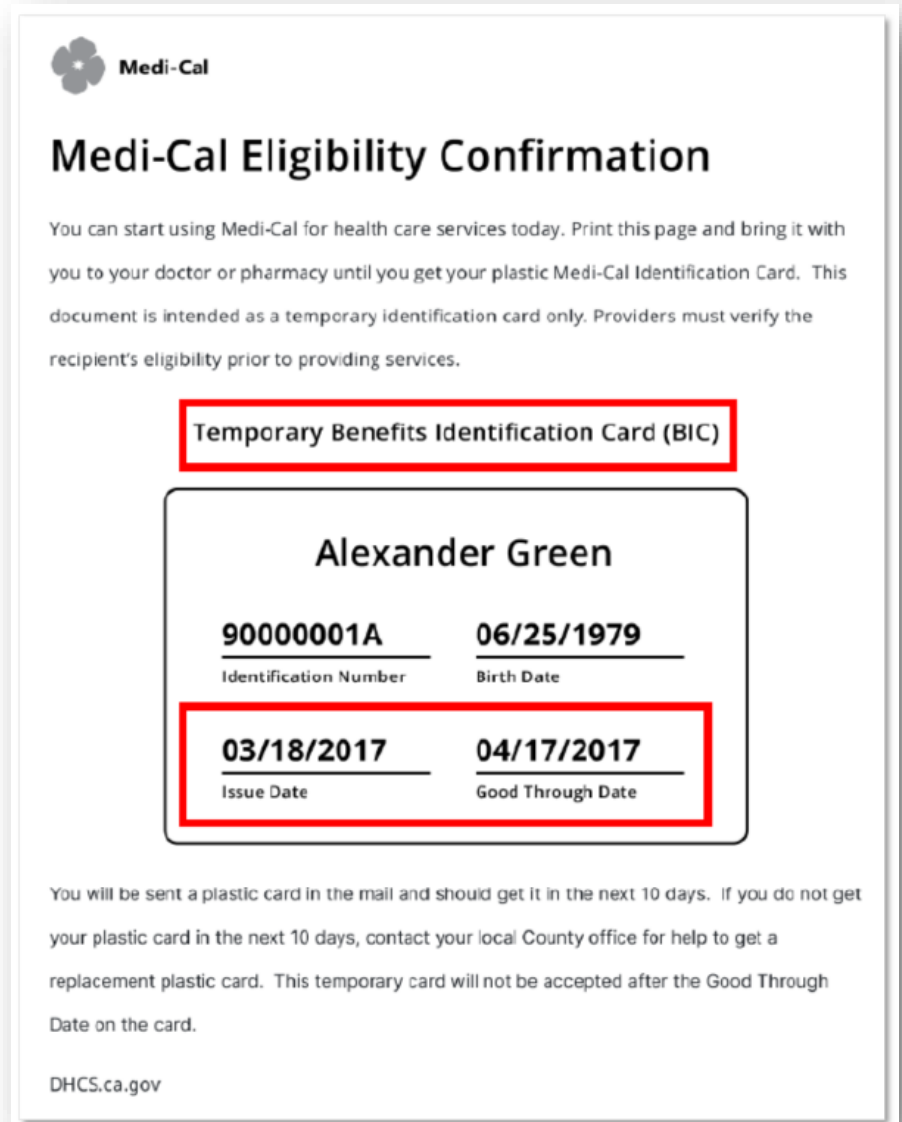
**New Temporary Benefits Identification Card (BIC) Heading**

**Issue Date:** Displays the initial date of the confirmation letter is requested, MEDS confirms Medi-Cal eligibility, and the letter is generated.

**Good Through Date:** Displays a date 30 days from the issue date, ensuring temporary coverage is clear.

**Updated Birth Date:** Displays the full birth date for identification.

**Document Access:** Once generated, the confirmation letter is readily available in the "Documents and Correspondence" section for



The image shows a sample of a Medi-Cal Eligibility Confirmation letter. At the top left is the Medi-Cal logo. The title is "Medi-Cal Eligibility Confirmation". Below the title is a paragraph explaining that the recipient can start using Medi-Cal for health care services today and should print this page to bring to their doctor or pharmacy until they receive their plastic Medi-Cal Identification Card. The letter is intended as a temporary identification card only, and providers must verify the recipient's eligibility prior to providing services. Below this text is a red-bordered box containing the heading "Temporary Benefits Identification Card (BIC)". Underneath this is another box containing the recipient's name, "Alexander Green", and four fields: "Identification Number" (90000001A), "Birth Date" (06/25/1979), "Issue Date" (03/18/2017), and "Good Through Date" (04/17/2017). The "Issue Date" and "Good Through Date" fields are highlighted with a red border. Below this box is a paragraph stating that the recipient will be sent a plastic card in the mail and should get it in the next 10 days. If they do not get it, they should contact their local County office for help to get a replacement plastic card. This temporary card will not be accepted after the Good Through Date on the card. At the bottom left is the URL "DHCS.ca.gov".

**Medi-Cal**

## Medi-Cal Eligibility Confirmation

You can start using Medi-Cal for health care services today. Print this page and bring it with you to your doctor or pharmacy until you get your plastic Medi-Cal Identification Card. This document is intended as a temporary identification card only. Providers must verify the recipient's eligibility prior to providing services.

**Temporary Benefits Identification Card (BIC)**

**Alexander Green**

<b>90000001A</b> Identification Number	<b>06/25/1979</b> Birth Date
<b>03/18/2017</b> Issue Date	<b>04/17/2017</b> Good Through Date

You will be sent a plastic card in the mail and should get it in the next 10 days. If you do not get your plastic card in the next 10 days, contact your local County office for help to get a replacement plastic card. This temporary card will not be accepted after the Good Through Date on the card.

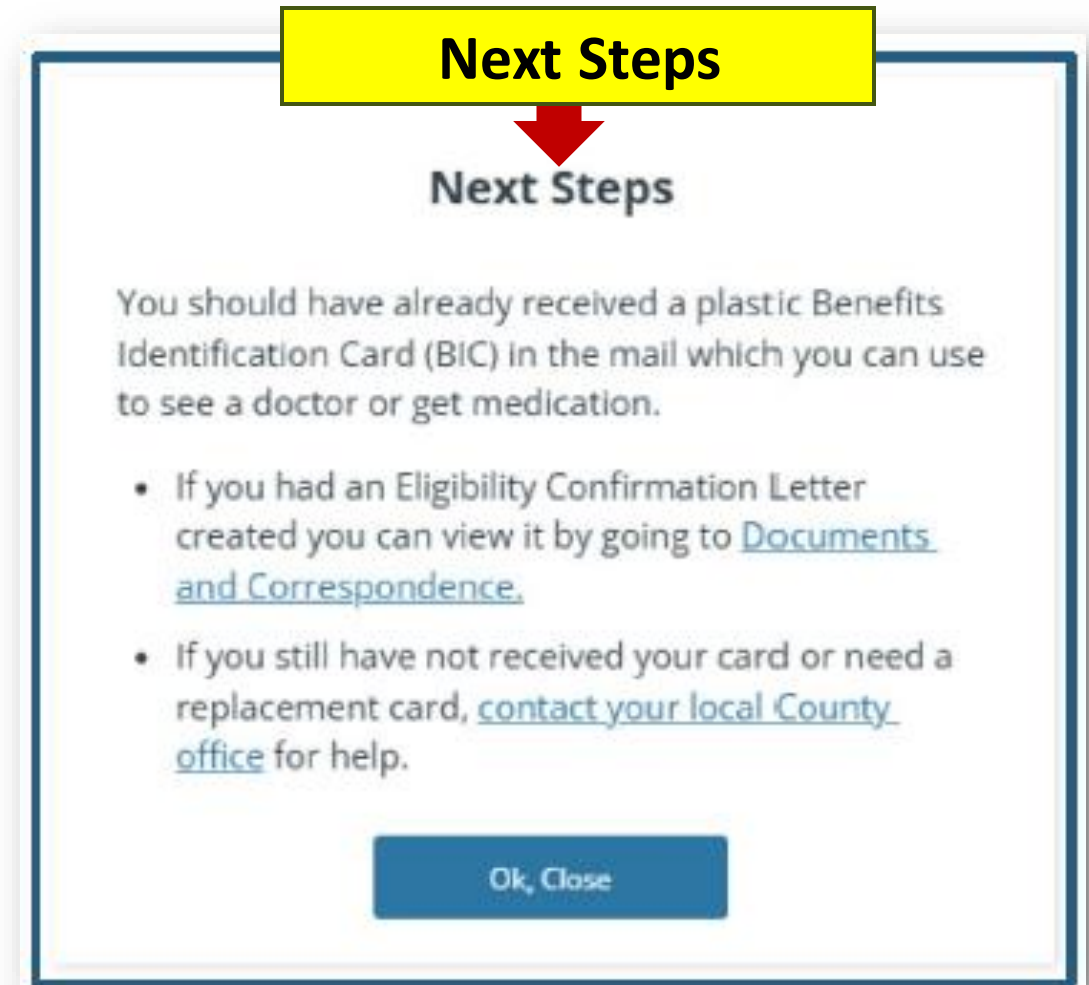
DHCS.ca.gov

# Get “Confirmation Letter” Functionality

## Trigger Conditions for “Next Steps” Pop Up:

- **“Good Through Date Passed”** When the validity period indicated on the Medi-Cal Confirmation Letter has expired.
- **“Beyond 30 Days Post-BRE”** More than 30 days have elapsed since the last Benefits Re-Evaluation (BRE) run.

**Dynamic Display:** The **“Next Steps”** popup automatically appears under these specific conditions when a consumer clicks the **“Get Confirmation Letter”** button, guiding them on what to do next.

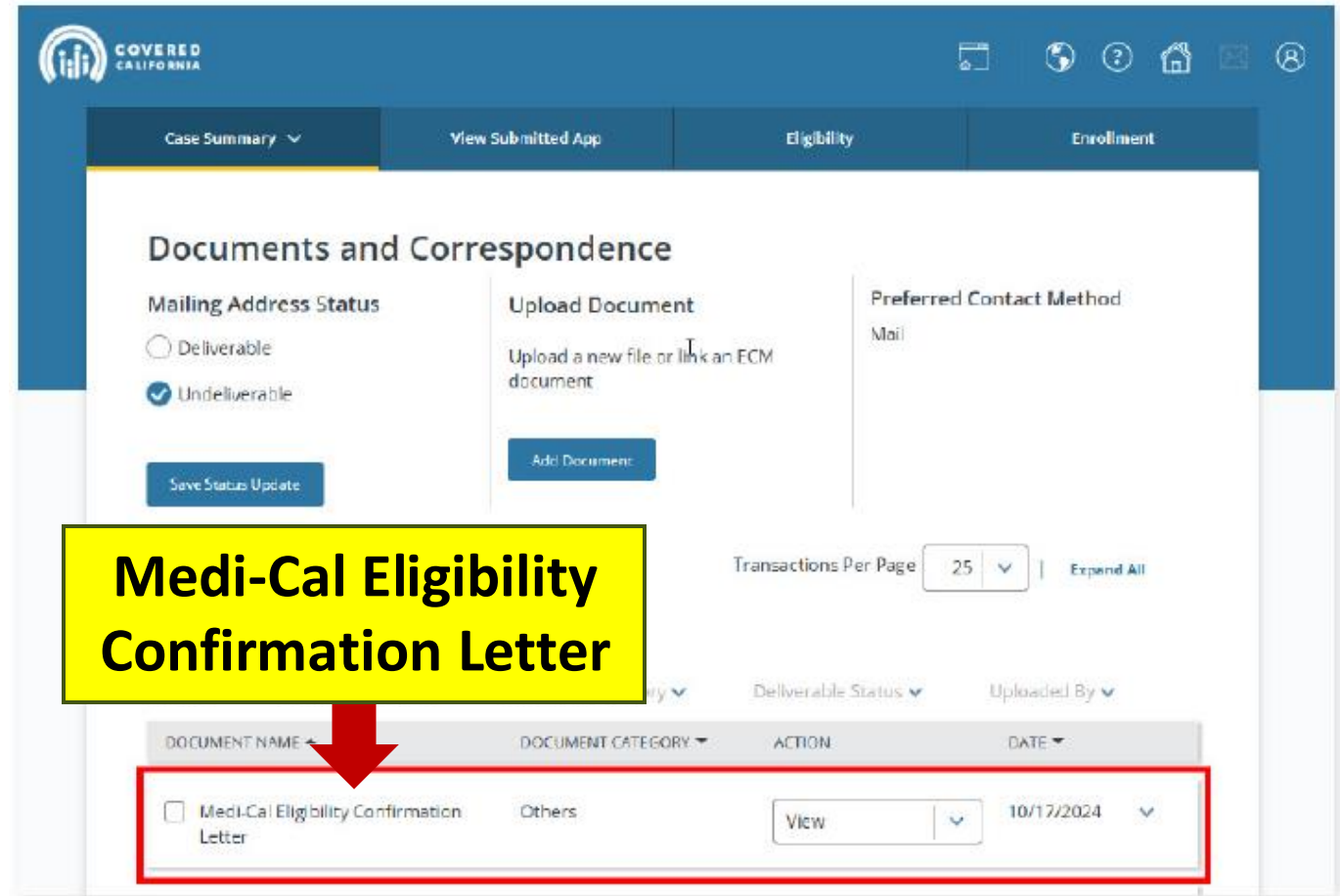


# Enhanced Access to Medi-Cal Confirmation Letter

Now Available Actions for the Medi-Cal Eligibility Confirmation Letter :

- **View**
- **Download**
- **Reprint**

Location: All these options are accessible from the "**Documents and Correspondence**" page.



**Medi-Cal Eligibility Confirmation Letter**

DOCUMENT NAME	DOCUMENT CATEGORY	ACTION	DATE
<input type="checkbox"/> Medi-Cal Eligibility Confirmation Letter	Others	<a href="#">View</a>	10/17/2024

# Shop and Compare and Plan Shopping New Features

CALHEERS 25.2 RELEASE



# New Printable Cost Estimate Page



Enables printing of the **Shop and Compare** page and **shopping page** for both logged-in and anonymous users, as well as during the Enrollment Shopping flow.

## Health Plan Details

← Back to Choose a Health Plan

Expected coverage start date: 03/01/2025

PREFERENCES HEALTH DENTAL APPLY

Group 1: 1 Member 95670 \$63,500

Print Page Summary

Print Page Summary

Kaiser  
Silver 73 HMO  
SILVER  
Choose Plan

Quick Navigation

Key costs and features

Monthly premium

Estimated yearly cost

### Key Costs and Features

This summary shows the health plan's coverage and costs. For more details, use the left-side menu or the Summary of Benefits and Coverage (SBC).  
[Download the Summary of Benefits and Coverage \(SBC\)](#) | [View the plan brochure](#)

Monthly premium	\$454.75 /month
Yearly deductible ⓘ	\$0 /year
Out-of-pocket maximum ⓘ	\$6,100 /year



## Choose Your Categories

This estimate summary can help you choose the best plan. Check the categories that are important to you. These will be included on the document you can print or save.

### Included Information

#### Key Costs & Features

- Monthly premium
- Yearly deductible
- Out-of-pocket maximum
- Primary care visit
- Mental and behavioral health visits and outpatient services
- Generic prescription drugs
- Plan type
- Health Savings Account (HSA) eligible

### Optional Content

#### Household Information

- ZIP code, county, and annual income
- Estimated financial help
- Members applying for coverage
- Members not applying for coverage

#### Preferences & Filters

- Healthcare preferences
- Filters added

#### Overall Quality Rating

- Getting the right care
- Member's care experience
- Member's plan service experience

#### Yearly Deductible and Out-of-Pocket Costs

- Yearly deductible
- Prescription drug deductible
- Out-of-pocket maximum
- Max cost per prescription

Cancel

Print Preview

# Customize the Printable Page

- Users can customize which information will be printed.
- Key Costs and Features will always be included:

#### Key Costs & Features

- Monthly premium
- Yearly deductible
- Out-of-pocket maximum
- Primary care visit
- Mental and behavioral health visits and outpatient services
- Generic prescription drugs
- Plan type
- Health Savings Account (HSA) eligible

**Key Cost & Features**

# Compare Plans and Print Summary Page

Enrollers can create a printable page from the **Compare Plans** page for up to three plans side-by-side.

**Compare Health Plans**  
← Back to Choose a Health Plan Expected coverage start date: 03/01/2025

✓ PREFERENCES HEALTH DENTAL APPLY

Group 1: 1 Member 95670 \$75,000

Preferences ▾  
Print Page Summary

**aetnaCVSHealth.**  
Aetna Health of California Inc.

Silver 73 HMO

SILVER

Choose Plan

Plan Details

**western health**  
Western Health

Silver 73 HMO

SILVER

Choose Plan

Plan Details

**Key Costs and Features**

Monthly premium	\$531.25 /month Extra Savings	\$466.78 /month Extra Savings
Yearly deductible ⓘ	\$0 /year	\$0 /year
Out-of-pocket maximum ⓘ	\$6,100 /year	\$6,100 /year

**Print Page Summary**

# Plan Shopping Flow: Logged In Experience

Your Agency /  
Entity Name &  
Contact Info

## Information Includes:


- Agency Name
- Enroller Name and License
- Enroller Contact Information
- Household Information
- Estimated Financial Help
- Eligibility Information
- Healthcare Preference
- Plan Information

Coverage Year: 2025


**Health Plan Details**

Agency/Entity: [Agency/Entity Name]  
Enroller: [Enroller Name]  
License: [XXXXXXXX]

Email: john.j.doe@covered.ca.gov  
Phone: XXX-XXX-XXXX

 **ZIP Code:** 95815  
**County:** Sacramento County  
**Annual Income:** \$40,000

**Estimated Financial Help**  
**\$344.95/month**  
Choose a plan by 04/29/2025 to start your coverage on 03/01/2025.

 **1 Household Members Applying** for Coverage


**Jak Marquez**  
Head of household  
Age: 34

**Eligibility Status:**  
Eligible

**Program Eligibility:**  
Covered CA  
Financial Help  
Enhanced Silver Benefits

**Healthcare Preferences**  
Medical Service Use: **Medium**  
Prescription Drug Use: **Medium**

**Filters Added**  
**Metal Tiers**  
Silver  
Silver CSR

 **Blue Shield**  
Silver 73 Trio HMO

# Shop and Compare Flow: Logged In Experience

## Information Includes:

- Agency/Entity Name
- Enroller Name and License
- Enroller Email/Phone
- Anonymous Household Information
- Estimated Financial Help
- Potential Eligibility Information
- Healthcare Preference
- Plan Information

**Your Agency /  
Entity Name &  
Contact Info**

Coverage Year: [YYYY]

### Health Plan Details

Agency/Entity: [Agency/Entity Name]

Enroller: [Enroller Name]

License: [XXXXXXXX]

Email: john.j.doe@covered.ca.gov

Phone: XXX-XXX-XXXX

**i** NOTE: This is only an estimate using the information you gave us about your household size, ZIP code and income and will change if the information you gave us changes. Covered California offers financial help to lower the cost of health plan premiums if you qualify. You will need to submit an application to see your actual eligibility and savings.

### Household Information



ZIP Code: 94416

Annual Income: \$35,999

#### Estimated Financial Help

**\$200/month**

Choose a plan by [Plan Selection Due Date] to start your coverage on [Earliest Plan Start Date].

### [#] Household Members Applying for Coverage

[Person #]

Age: [32]

Pregnant?: [Yes/No]

Blind or Disabled: [Yes/No]

Potential Eligibility:

[Covered CA]

[Financial Help]

[Enhanced Silver Benefits]

[Person #]

Age: [32]

Pregnant?: [Yes/No]

Blind or Disabled: [Yes/No]

Potential Eligibility:

[Covered CA]

[Financial Help]

[Enhanced Silver Benefits]

# Shop and Compare Flow: Logged In Access

The screenshot shows the 'Agency Home Page' interface. At the top, there is a navigation bar with links: Home, Agency, My Team, My Profile, My Delegations, Resources, and Help. Below this, a welcome message reads 'Welcome to your Agency Home Page! Manage your Book of Business, assist your consumers, and more.' A secondary navigation bar includes links like Home, Enroller Portal Notifications, Notifications Archive, Agency Book of Business, My Book of Business, and Consumer Enrollments By Metal Tier Plan. The main content area features a 'Welcome!' message and a prompt to explore additional choices. On the right, a 'Quick Links' section lists various tools and reports. A yellow box with the text 'Shop and Compare' has a red arrow pointing to the 'Shop and Compare' link in the Quick Links section, which is highlighted with a red border.

**Shop and Compare**

Quick Links

- Secure Mailbox (178)
- Delegation Tool
- Start Application
- Enroller Toolkits
- My Reports
- Shop and Compare**
- Affordability Calculator

# CoveredCA.Com Shop and Compare Anonymous Experience

## Information Includes:

- **NO** Enroller Name and Contact Information
- General Household Information only
- Estimated Financial Help
- Potential Eligibility
- Healthcare Preferences
- Plan Information

Coverage Year: 2025

**Health Plan Details**

NOTE: This is only an estimate using the information you gave us about your household size, ZIP code and income and will change if the information you gave us changes. Covered California offers financial help to lower the cost of health plan premiums if you qualify. You will need to submit an application to see your actual eligibility and savings.

**Household Information**

 ZIP Code: 95670  
Annual Income: \$63,500

**Estimated Financial Help**  
**\$150.72/month**  
Choose a plan by 02/28/2025 to start your coverage on 03/01/2025.

**1 Household Members Applying for Coverage**

**Person 1**  
Age: 40  
Pregnant?: No  
Blind or disabled: No

**Potential Eligibility:**  
Lower Monthly Premium and Lower Out of Pocket Costs

**Healthcare Preferences**  
Medical Service Use: **Medium**  
Prescription Drug Use: **Medium**

**Filters Added**  
**Metal Tiers**  
Silver  
Silver CSR

 **Western Health**  
Silver 73 HMO



# CalHEERS Future Release

ANTICIPATED IN JUNE 2025



# Identity Verification Processes

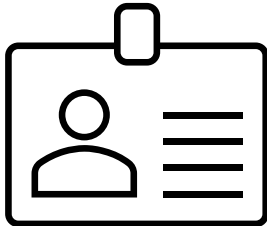
IDENTITY DOCUMENT PROOFING AND REMOTE IDENTITY  
PROOFING UPDATES

# Identity Proofing Methods

Identity Proofing is a legally required step in the application process that all users must complete.

## Identity Proofing (IDP)

Verifying the Primary Contact's Identity with use of identity documents.

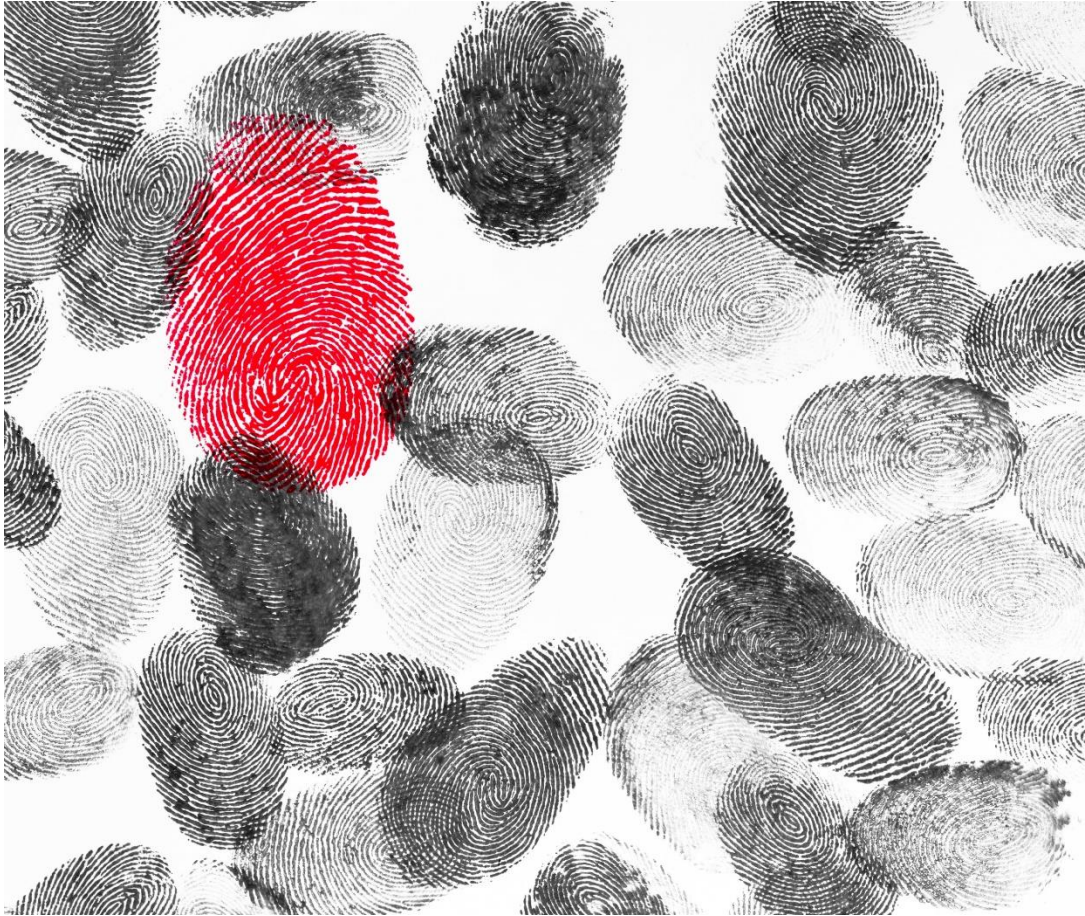


## Remote Identity Proofing (RIDP)

Verifying the Primary Contact's Identity through an alternate method without identity documents.

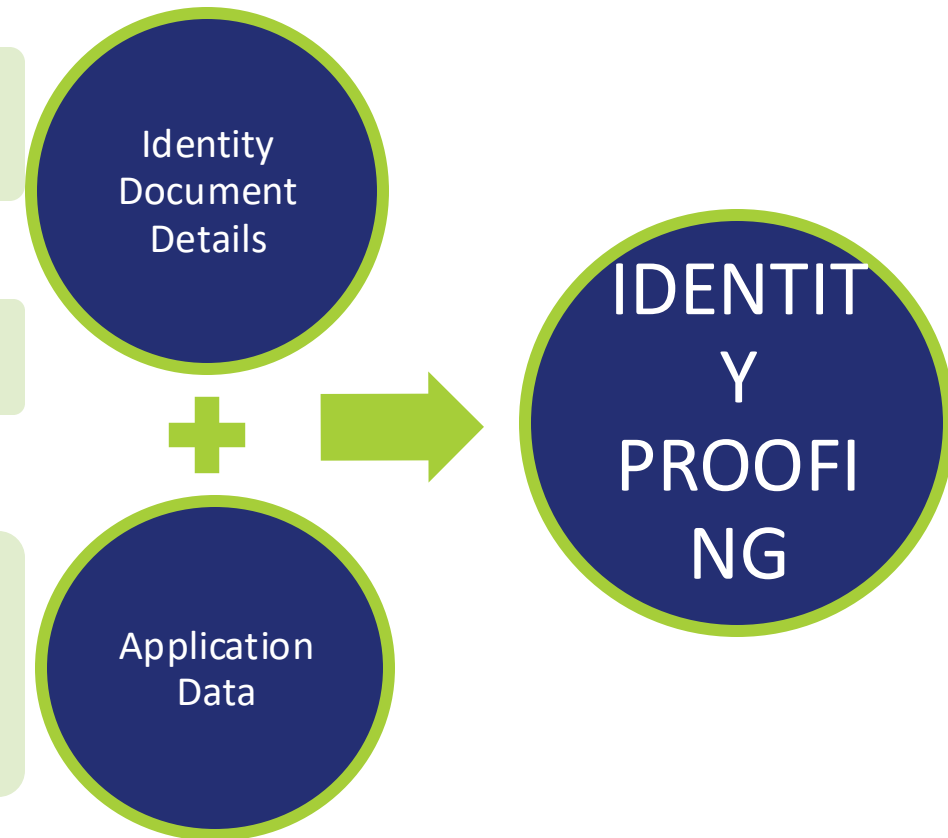
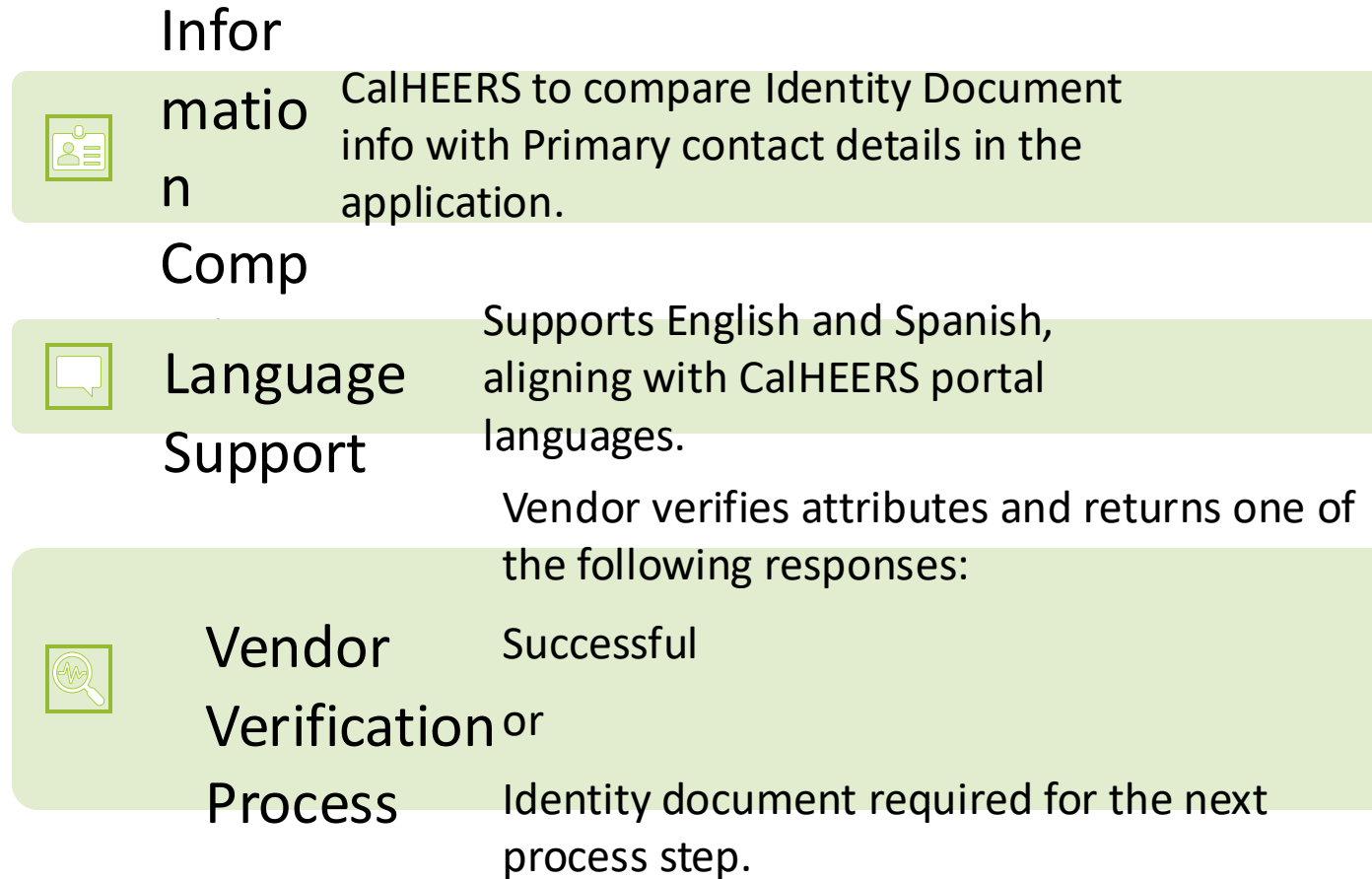


# Identity Proofing (IDP): **Current Process**



- Current function: Allows unverified documents to be uploaded
- Application Process: Allows continuation as long as document upload was successful

# Future Identity Proofing (IDP) for All Users



# Remote Identity Proofing (RIDP): **Current Process**

## Current State

- **Identity Questions:** Using questions generated by Experian to verify consumers identity.
- **Abandon Rate:** Higher because consumers are unable to answer questions correctly or do not have history with Experian.
- **Compliance and Security Standards:** Does not meet.

# Future Remote Identity Proofing (RIDP) for All Users



## Information Comparison

CalHEERS will compare identity databases with the **Primary contact information** entered in the application. Removing Identity Questions



## Language Support

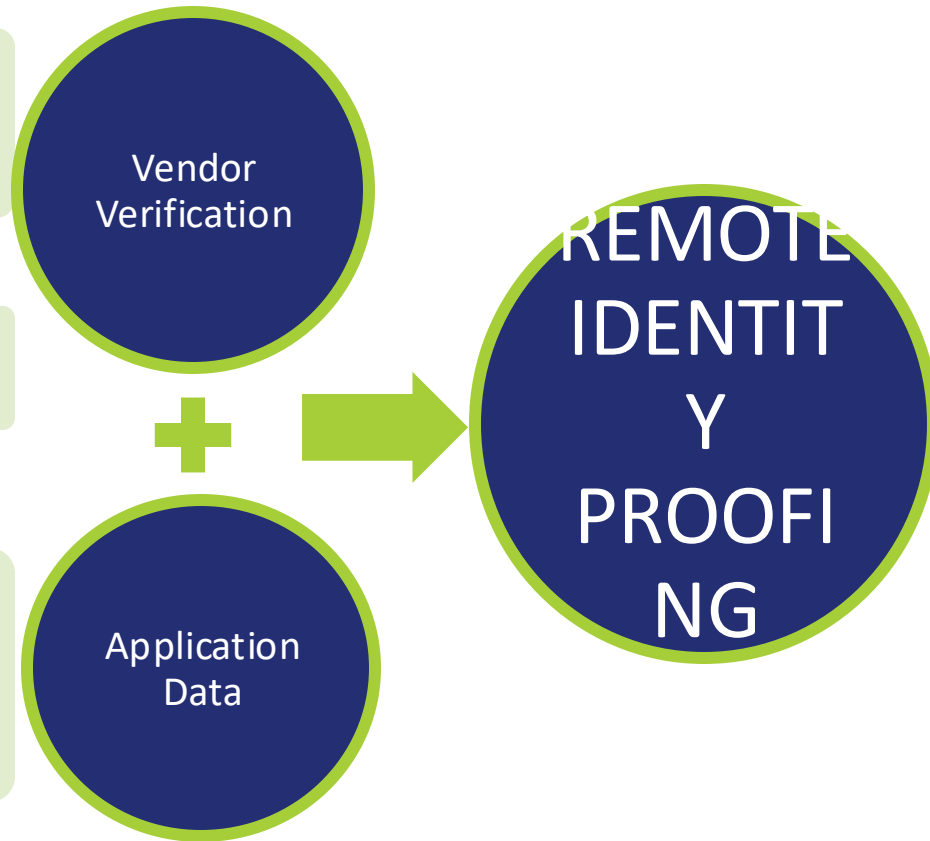
Supports English and Spanish, aligning with CalHEERS portal languages.



## Vendor Verification Process

Vendor verification of attributes will return a response of either:

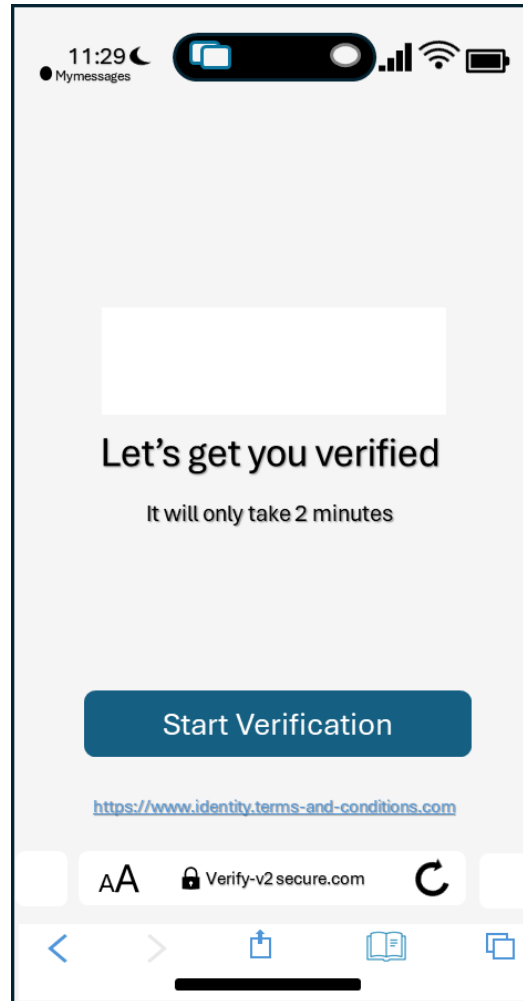
- Successful
- Identity document needed for next step of process
- **Note: Consumer can self-serve for unsuccessful match via text**



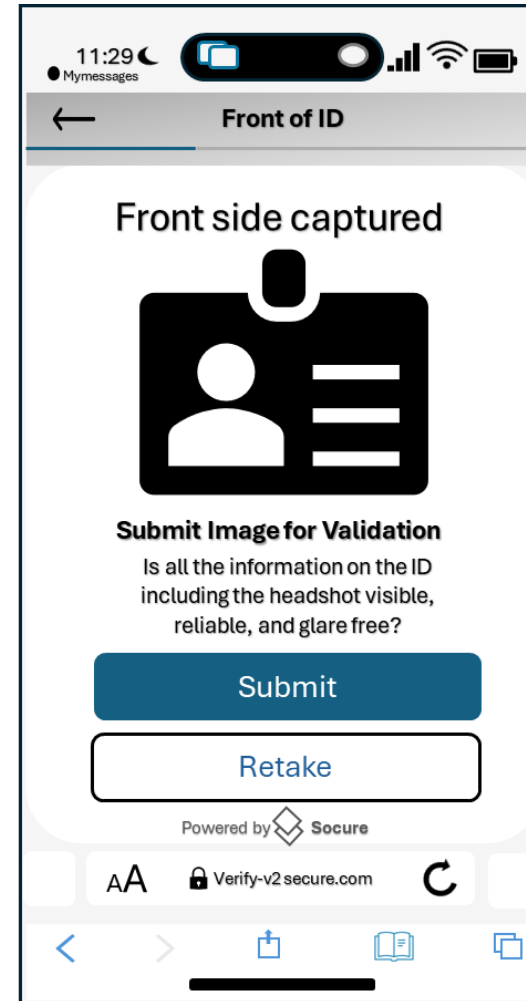


# Consumer Self-Serve Functionality for Unsuccessful Data Match

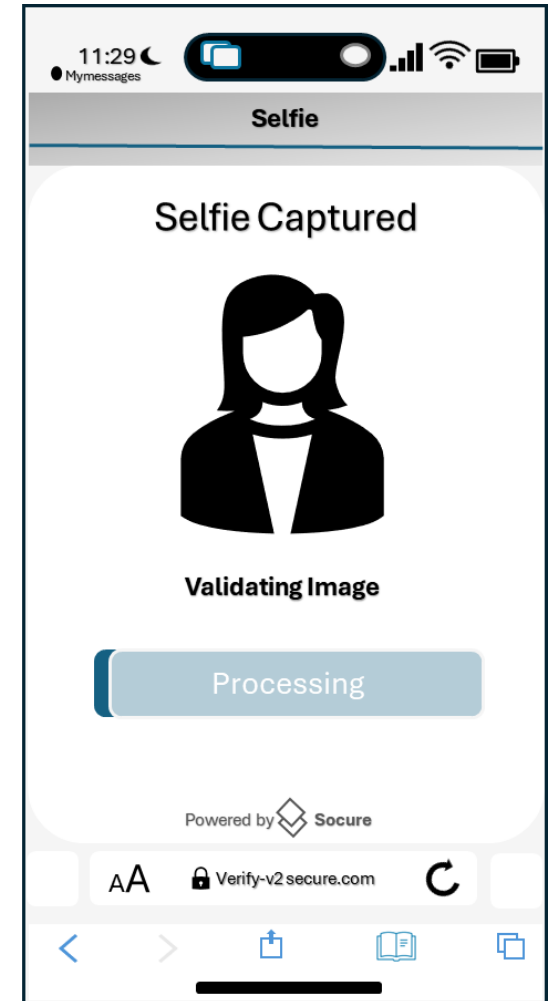
1



2

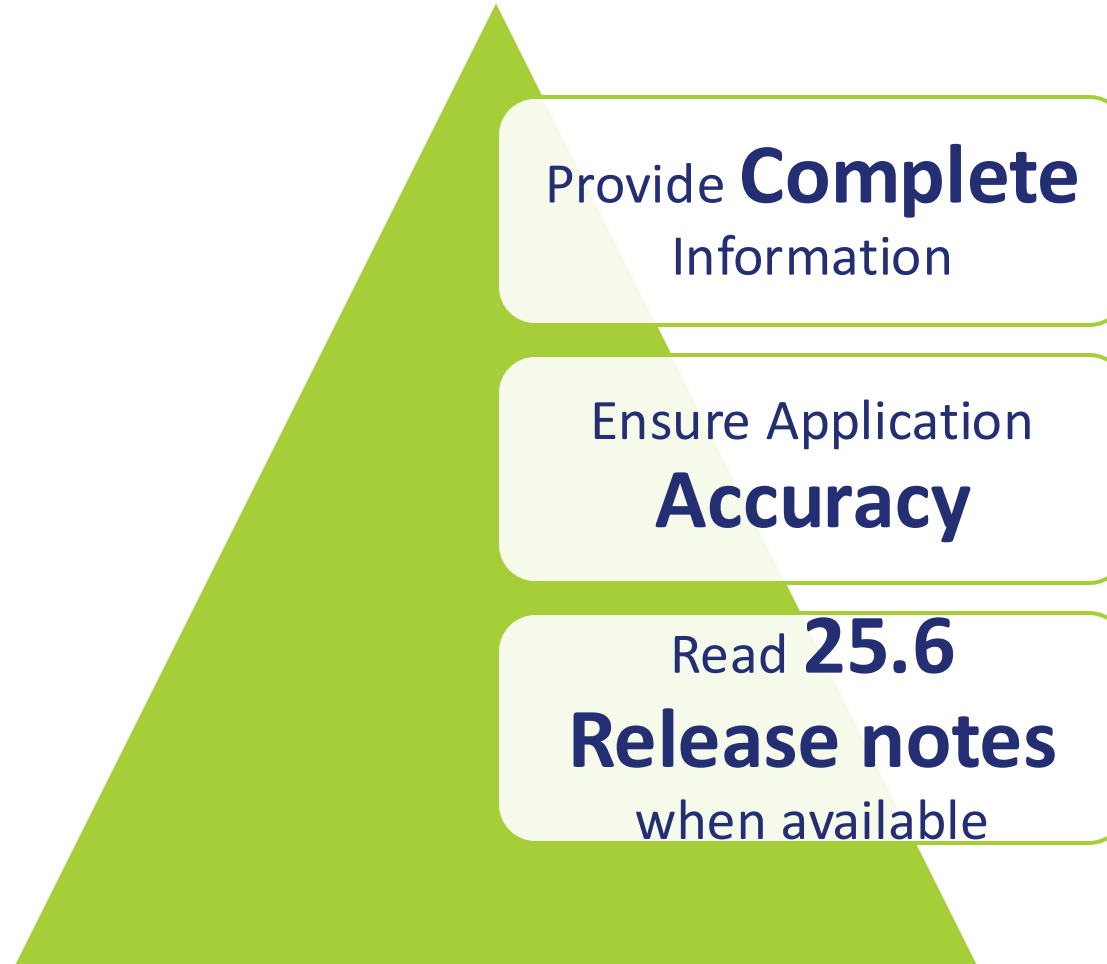


3





# Tips for Successful IDP and RIDP





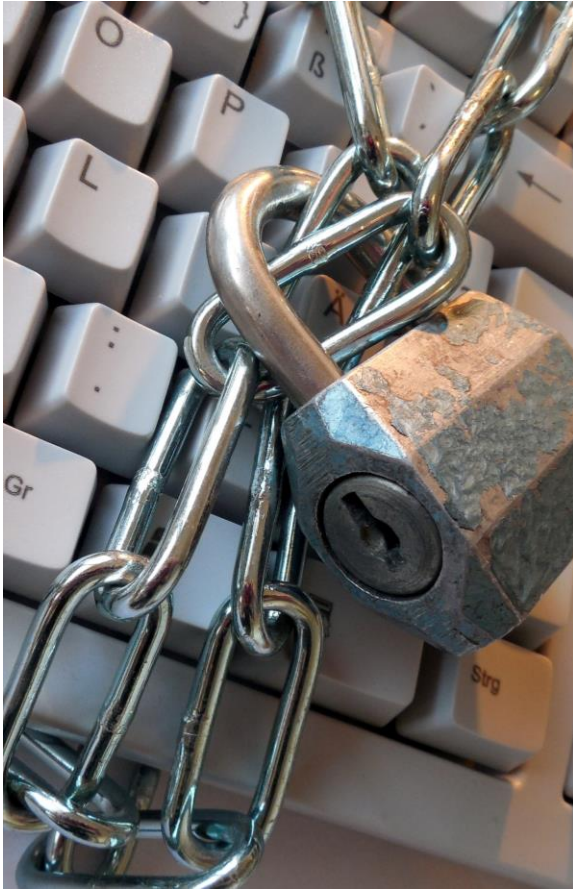
# Enroller Tools and Resources



# Enroller Tips and Best Practices

WHAT YOU SHOULD KNOW

# Protecting Consumer Privacy at Covered California



**Data Encryption:** Ensures data is secure both when transmitted and stored.

**Access Controls:** Limits information access to authorized personnel only.

**Legal Compliance:** Adheres to state and federal privacy laws like HIPAA and California Consumer Privacy Act (CCPA).

**Regular Audits:** Ongoing security audits to mitigate risks.

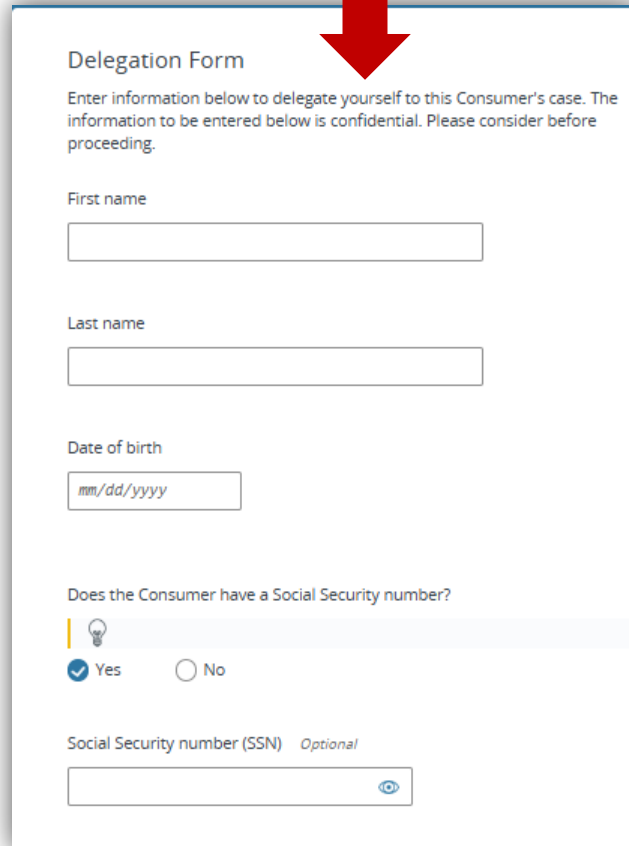
**Consumer Education:** Offers guidance to consumers on protecting their personal information.

**Incident Response Plan:** Efficient strategy for data breach response and notification to individuals affected.

View or download a copy of the Covered California Privacy Policy or Terms of Use:  
[Covered California Privacy Policy](#) (PDF) [Covered California Terms of Use](#) (PDF)

# Enrollers Using the Delegation Tool

## Delegation Form



Delegation Form

Enter information below to delegate yourself to this Consumer's case. The information to be entered below is confidential. Please consider before proceeding.

First name

Last name

Date of birth

Does the Consumer have a Social Security number?

☒ Yes ☐ No

Social Security number (SSN) *Optional*

**Consumer Authorization:** Option to delegate a Certified Enroller for help in the application and enrollment process through CalHEERS.

**Consent Requirement:** Mandatory direct, written consumer consent for delegation, as per contract and state regulations.

**Monitoring and Compliance:** Accelerated Delegation Requests are tracked and analyzed for any irregularities. Investigations launched for suspicious activities.

**Consequences of Misuse:** Certified Enrollers misusing the tool risk losing their certification and business with Covered California.

**Guidance:** A brief guide on how to use the [Delegation Tool](#) effectively.



# Using Covered California Tools and Resources

GET THE HELP YOU NEED



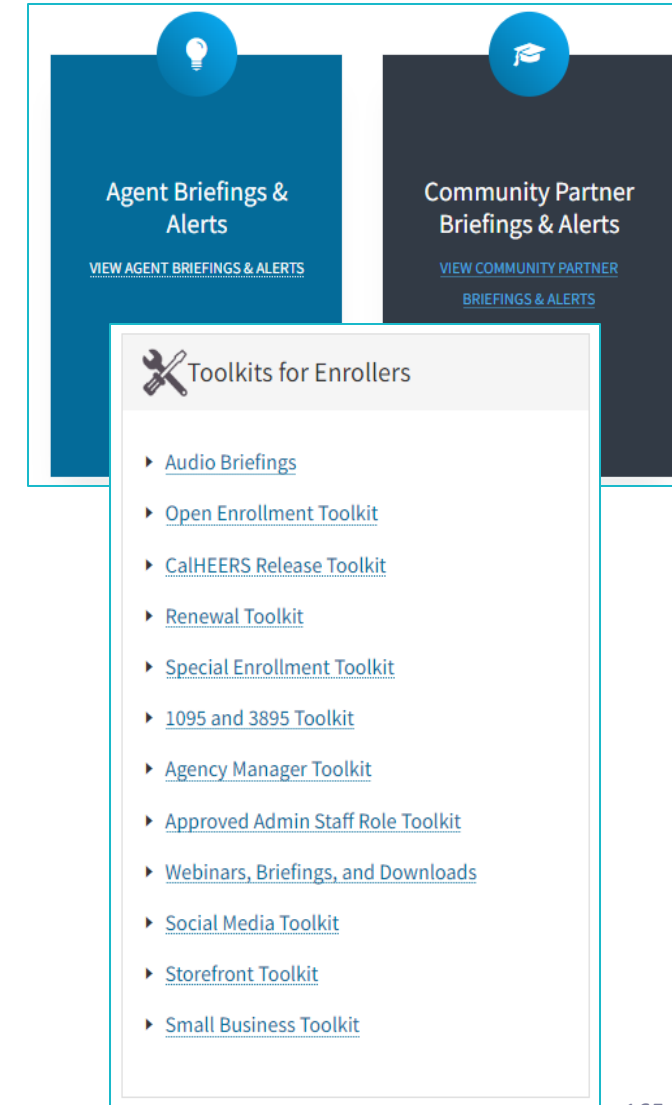
# Maximizing Enroller Efficiency: Alerts, Messages, and Best Practices

**Purpose of Alerts and Messages:** Provide crucial updates and information to enhance support for Covered California consumers.

**Content of Updates:** Includes special announcements, policy changes, system updates (application and enroller portal), important dates (Renewals, Open Enrollment, Special Enrollment periods), and enroller resources.

## Best Practices for Enrollers:

- **Email Organization:** Create a dedicated folder for Enroller Alert Emails; utilize keyword searches for specific topics.
- **Resource Access:** Bookmark the “Enrollment Partner Toolkit” webpage for quick reference.






# Special Enrollment Toolkit

Toolkits can be found in your Enroller Portal “Quick Links” for easier access.

A “one-stop shop” guide with resource links for 2025 Sign-up information and resources to support Covered California members through the renew and new enrollment process.

- Quick Guides
- Job Aids
- Webinars
- Plan Information
- FPL chart
- Sample Consumer Notices
- Many more!



## Special Enrollment Period Toolkit

**Overview**

Consumers can enroll in a Covered California health plan or change their current plan only during Open Enrollment unless they experience a Qualifying Life Event (QLE) – this is called a Special Enrollment Period (SEP). During this period, Certified Enrollers may assist all consumers eligible for a Special Enrollment; they cannot complete new or in-progress applications without a defined Qualifying Life Event.

Below is a list of resources Certified Enrollers can use to find information on Qualifying Life Events, Special Enrollment Verification, Health, Dental and Vision Plan information, as well as resources to support Covered California consumers.

Check back frequently for updates.

Special Enrollment Period Resources		
Resource	Type	Description
<a href="#">Special Enrollment Period Job Aid</a>	Job Aid	Walkthrough of the online application for the Special Enrollment Period.
<a href="#">Special Enrollment Period Verification</a>	Quick Guide	Information on Covered California's Special Enrollment Period Verification process and how to assist consumers with Special Enrollment verification needs.
<a href="#">Special Enrollment Period FAQ</a>	Frequently Asked Questions	Commonly asked questions and answers regarding the Special Enrollment Period.
<a href="#">Continuity of Care</a>	Guide	Guide to explain the Continuity of Care rule that triggers a Special Enrollment Period.
<a href="#">Healthcare Stipend</a>	Quick Guide	Information about health care stipends available to qualified individuals.
<a href="#">Single Streamlined Application</a>	Job Aid	Provides an overview of the Single Streamlined Application, with a focus on highlighting features and pages for Certified Insurance Agents (Agents), Certified Enrollment Counselors (CECs), and Plan Based Enrollers (PBEs).

Covered California  
Outreach and Sales Division  
[OutreachandSales@covered.ca.gov](mailto:OutreachandSales@covered.ca.gov)

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## Special Enrollment Period Toolkit

Resource	Type	Description
<a href="#">Covered California Plan Selector</a>	Tool	How to assist consumers with reviewing, selecting and enrolling in a Covered California Qualified Health Plan (QHP).
<a href="#">2025 Health, Dental, and Vision Plans Design</a>	Handout	Handout to provide to consumers explaining the standard benefits and medical costs per member.
<a href="#">2025 Health, Dental, and Vision Plans Pricing</a>	Recording and Slide Deck	Recording and Slide Deck for the 2025 Health, Dental, and Vision Plans webinar.
<a href="#">2025 Regional Rates by County</a>	Recording and Slide Deck	Covered California plan rates by county for plan year 2025.
<a href="#">2025 Regional Rates by County</a>	Recording and Slide Deck	Covered California plan rates by county for plan year 2025.
<a href="#">Link to website outlining dental insurance plans</a>	Link	Link to website outlining dental insurance plans according to metal tier for health insurance plans.

# Leveraging the Social Media Toolkit for Effective Outreach

## New Social Media Toolkit

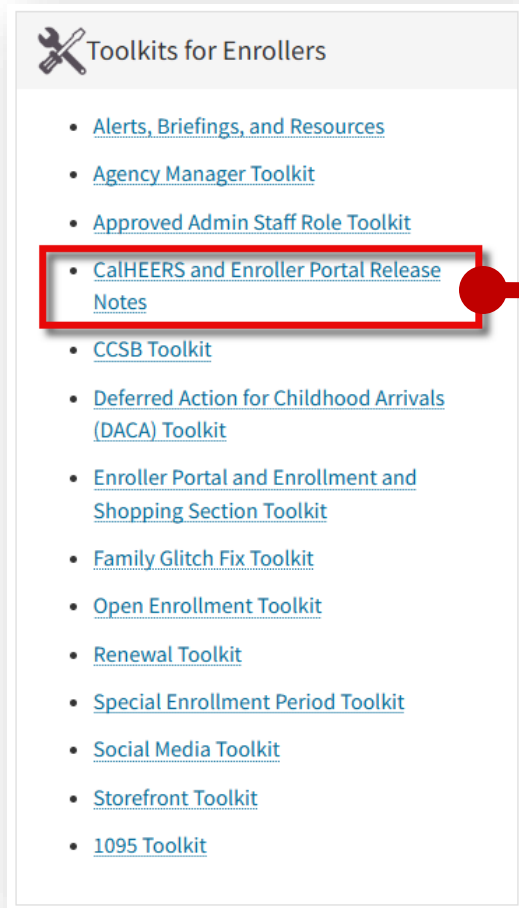
Access logos, digital banners, shareable images, and sample posts designed for promoting Covered California on social media.

**Get Tips** on posting messages and images, and Videos-Reels to your social media channels.



Follow and tag "**@CovCA**" on these channels: Facebook, Instagram, X, and LinkedIn

# Read the CalHEERS and Enroller Portal Release Notes

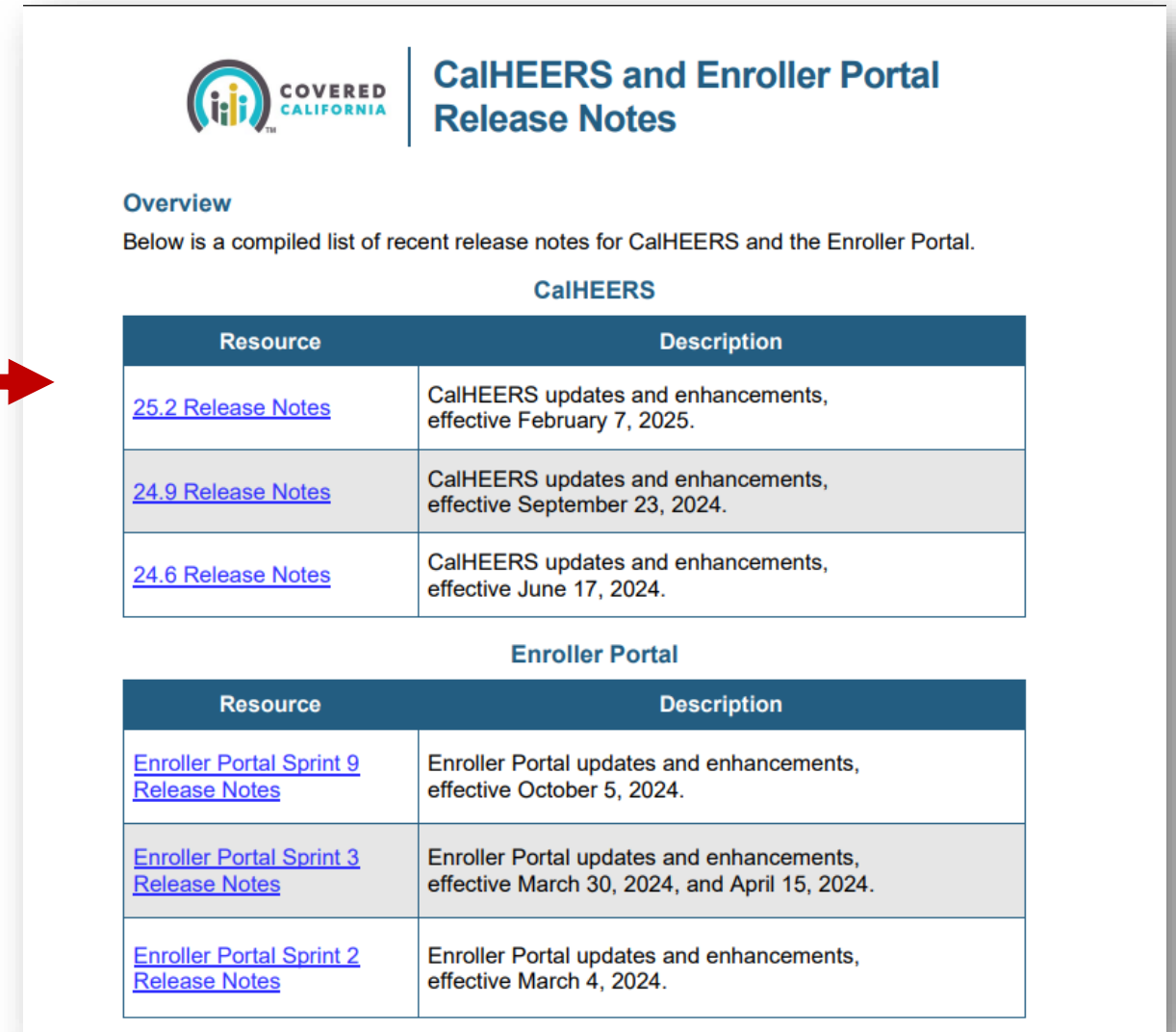



**Toolkits for Enrollers**

- [Alerts, Briefings, and Resources](#)
- [Agency Manager Toolkit](#)
- [Approved Admin Staff Role Toolkit](#)
- [CalHEERS and Enroller Portal Release Notes](#)
- [CCSB Toolkit](#)
- [Deferred Action for Childhood Arrivals \(DACA\) Toolkit](#)
- [Enroller Portal and Enrollment and Shopping Section Toolkit](#)
- [Family Glitch Fix Toolkit](#)
- [Open Enrollment Toolkit](#)
- [Renewal Toolkit](#)
- [Special Enrollment Period Toolkit](#)
- [Social Media Toolkit](#)
- [Storefront Toolkit](#)
- [1095 Toolkit](#)

## CalHEERS and Enroller Portal Release Notes

Check here for all information about system updates!



 **CalHEERS and Enroller Portal Release Notes**

**Overview**

Below is a compiled list of recent release notes for CalHEERS and the Enroller Portal.

**CalHEERS**

Resource	Description
<a href="#">25.2 Release Notes</a>	CalHEERS updates and enhancements, effective February 7, 2025.
<a href="#">24.9 Release Notes</a>	CalHEERS updates and enhancements, effective September 23, 2024.
<a href="#">24.6 Release Notes</a>	CalHEERS updates and enhancements, effective June 17, 2024.

**Enroller Portal**

Resource	Description
<a href="#">Enroller Portal Sprint 9 Release Notes</a>	Enroller Portal updates and enhancements, effective October 5, 2024.
<a href="#">Enroller Portal Sprint 3 Release Notes</a>	Enroller Portal updates and enhancements, effective March 30, 2024, and April 15, 2024.
<a href="#">Enroller Portal Sprint 2 Release Notes</a>	Enroller Portal updates and enhancements, effective March 4, 2024.

# Understanding Immigration Documents

- Search on CoveredCA.com for “acceptable documentation”
- Review and understand the documents
- View samples of the acceptable documents

1

Acceptable documentation

Search results for **acceptable documentation**  
32 Results

◀ Back

**Documents to Confirm Eligibility**  
View the list of acceptable documents needed to confirm your eligibility for health insurance....

2

This screenshot shows the search results for 'acceptable documentation' on CoveredCA.com. A red box highlights the search term 'acceptable documentation' in the search bar. A red arrow points from the search bar to the 'Documents to Confirm Eligibility' link in the results. A large red number '1' is in the top left, and a large red number '2' is in the bottom right.

**Documents to Confirm Eligibility**

Covered California compares the information you enter on your application with government data sources or information you've provided before. If the data is inconsistent, we ask you to [submit documents to confirm the new information](#).

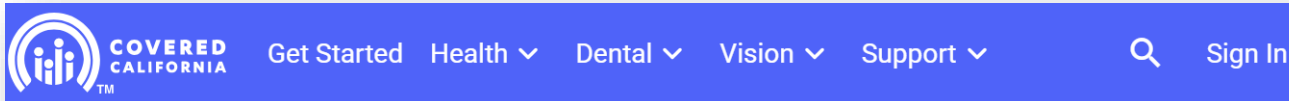
SSN# Social Security Number	Identity	Citizenship
Immigration Status	3	Immigration Status
Minimum Essential Coverage	American Indian or Alaskan Native	Deceased Status

3

Immigration Status

This screenshot shows the 'Documents to Confirm Eligibility' page. A red dashed box highlights the 'Immigration Status' document. A red arrow points from the 'Immigration Status' document to the 'Immigration Status' link in the results. A large red number '3' is in the middle right. A yellow box with the text 'Immigration Status' is in the bottom right.

# Tips for Finding Document Information



Home / Documents to Confirm Eligibility / Proof of Immigration Status or Lawful Presence

## Proof of Immigration Status or Lawful Presence

Both lawfully present and not lawfully present individuals can apply through Covered California to see if they are eligible for a health plan through Covered California or Medi-Cal.

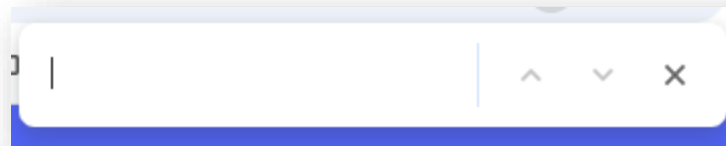
Submit a copy of one of the following documents.

Click on BLUE document name for photo example and additional information and document examples

2. Asylees. *For pending applicants for Asylum, go to #23 of this section.*

- Arrival/Departure Record (I-94) (with stamp showing grant of asylum, "Asylee" or "§208").
- Arrival/Departure Record (I-94) in foreign passport (with stamp showing grant of asylum, "Asylee" or "§208").
- Order granting asylum by USCIS, DHS, immigration judge, Board of Immigration Appeals, or federal court.
- **Employment Authorization Document (Card) (I-766) (annotated "A5")**
- Refugee Travel Document (I-571).
- Permanent Resident Card, "Green Card" (I-551).

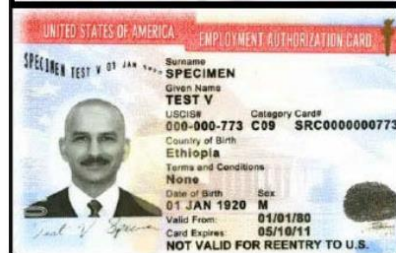
Quick Search Shortcut: Press CTRL + F to open the search box in your document or web browser.



5



# Sample Employment Authorization Document (Card)



ALIEN REGISTRATION NUMBER

CARD NUMBER

CATEGORY CODE

EXPIRATION DATE

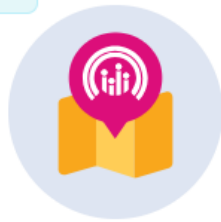
Additional Document Resource:

<https://www.healthcare.gov/help/immigration-document-types/>

# Find an Enroller Tool

CONNECTING CALIFORNIANS WITH ENROLLMENT HELP

Featuring Storefronts



## Find a Local Enroller

Visit an enroller in your area who can walk you through your health plan options.

[Find an Enroller](#) →

A screenshot of the Covered California website. The top navigation bar is blue with the Covered California logo and links for 'Get Started', 'Health', 'Dental', 'Vision', 'Support', 'Sign In', and 'Shop and Compare'. Below the navigation bar, there's a search bar with 'Sacramento, CA, USA' entered. To the right of the search bar is a 'Map' button. Below the search bar, there's a section titled 'Free enrollment help near you' with a search bar containing 'Sacramento, CA, USA'. Below this is a list of results showing '261 Results' and 'Showing 1-9'. The first result is 'Wayne Wong Insurance Agency' with a green dot indicating it is 'Open'. The second result is 'Cost-U-Less Insurance Center' with a red dot indicating it is 'Closed'. At the bottom of the results section, there's a 'Get answers fast.' section with a photo of a man and a 'Get a Call Back' button. The right side of the screenshot shows a map of Sacramento, CA, with various enroller locations marked with red and green dots.



# Advanced Search Functionality

ADVANCED SEARCH feature helps Consumers find the best possible Enroller for help near them!

**Free enrollment help near you**

Sacramento, CA, USA

**Advanced Search**

For your convenience, we're listing Covered California Storefront locations first  
[Why is this?](#)

**Advanced Search**

**Advanced Search**

📍 Enter Location

Sacramento, CA, USA

📏 Choose Distance

5 mi 10 mi 20 mi 50 mi 100 mi Statewide

🌐 Choose Languages

English Arabic American Sign Language Armenian Cantonese Farsi Hindi Hmong Khmer Korean Lao Mandarin Punjabi Russian Spanish Tagalog Vietnamese

🔍 Search by Enroller Name

Enter Enroller Name

🏢 Search by Business Name

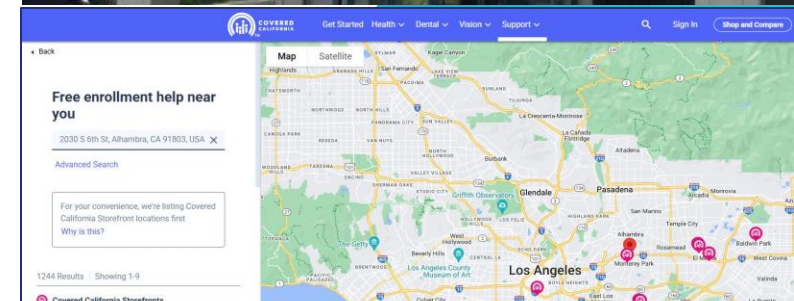
Enter Business Name

# Maximize Your Impact: Open a Covered California Storefront

**550**  
Storefront  
Locations\*

**Accessibility:** 95% of Californians are just a 15-minute drive away from a Covered California storefront, ensuring high accessibility for potential enrollees.

**Proven Success:** Agents operating storefronts contribute to 45% of all Covered California enrollments, highlighting the effectiveness and potential of having a physical presence.



Certified Enrollers with an office location that meets the requirements of a storefront can apply today! Click on the link here:

[https://hbex.coveredca.com/toolkit/storefronts/Storefront\\_Toolkit.pdf](https://hbex.coveredca.com/toolkit/storefronts/Storefront_Toolkit.pdf)



**Storefront**  
APPLICATION



\*Data as of March 2025

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Special Enrollment Period Enroller Workshop | April 2025 | Outreach and Sales Division

# Storefront Program Enhancements

## Management Upgrades

Streamlined operations for better efficiency.

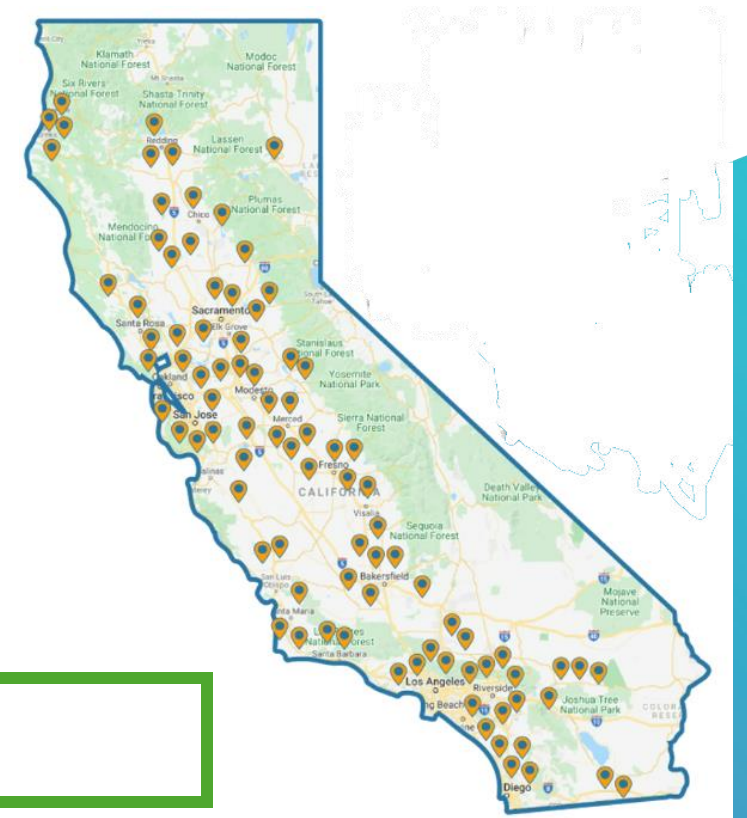
## Verification Enhancements

Improved process for faster, reliable verification.

## Increased Engagement

Initiatives to boost community interaction.

**New Storefront Application  
Coming Soon!**



# SEP Workshop Takeaways!

## Covered California News

- OE Marketing Campaign
- Let's Talk Health Events and Materials
- Open Enrollment Trends
- Population Health Investments

## Special Enrollment Period

- Qualifying Life Events
- Efforts to Decrease Duplicates
- Ongoing Marketing Efforts

## Looking Ahead

- Potential Changes to the Enhanced Premium Tax Credit
- Retention Strategies

## System Changes for CalHEERS and Enroller Portal

- Helping Consumers that move
- Printable Estimate Page
- Alternative Formats
- Identity Proofing

## Resources

- Toolkits, Job Aids, and Release Notes
- Help with immigration documents
- Storefronts

# Thank you!

Email: [kickoffevents@covered.ca.gov](mailto:kickoffevents@covered.ca.gov)



LET'S TALK  
**health**



All materials and handouts for today's sessions are available digitally at the end of this month.

