The information contained in this slide deck is accurate as of October 10, 2025. Please note that policies, procedures, and guidelines may be subject to change. For the most up-to-date information, please contact Covered California directly or visit our official website.

COVERED CALIFORNIA™

For the love of Californians

2026 Open Enrollment Period CalHEERS and Enroller Portal Webinar

AGENDA

Session 1: Enroller Portal Overview & Updates (85 min)

- Consumer Retention Workspace (New!)
- Storefront Application (New!)
- Navigating your Quick Links
- Enroller Portal Communications & Messaging

Break: (10 minutes)

Session 2: CalHEERS Overview & Updates (85 min)

- Application: Walk-through & Updates
- Reminders & Resources
- Questions & Comments

Introduction: Distribution Services Unit

The Outreach and Sales Division (OSD), Distribution Services Unit, plays a vital role in supporting Covered California's mission by ensuring seamless communication, efficient operations, and innovative solutions for external stakeholders and internal staff. Our team is dedicated to empowering our partners and stakeholders with the tools, resources, and information needed to better serve Californians. We achieve this through strategic communication, system enhancements, and operational support. Distribution Services Unit drives collaboration and continuous improvement across the division.

Enroller Portal

Overview & Updates

Consumer Retention Workspace (New!)

Walk-through

Consumer Retention Workspace (CRW)

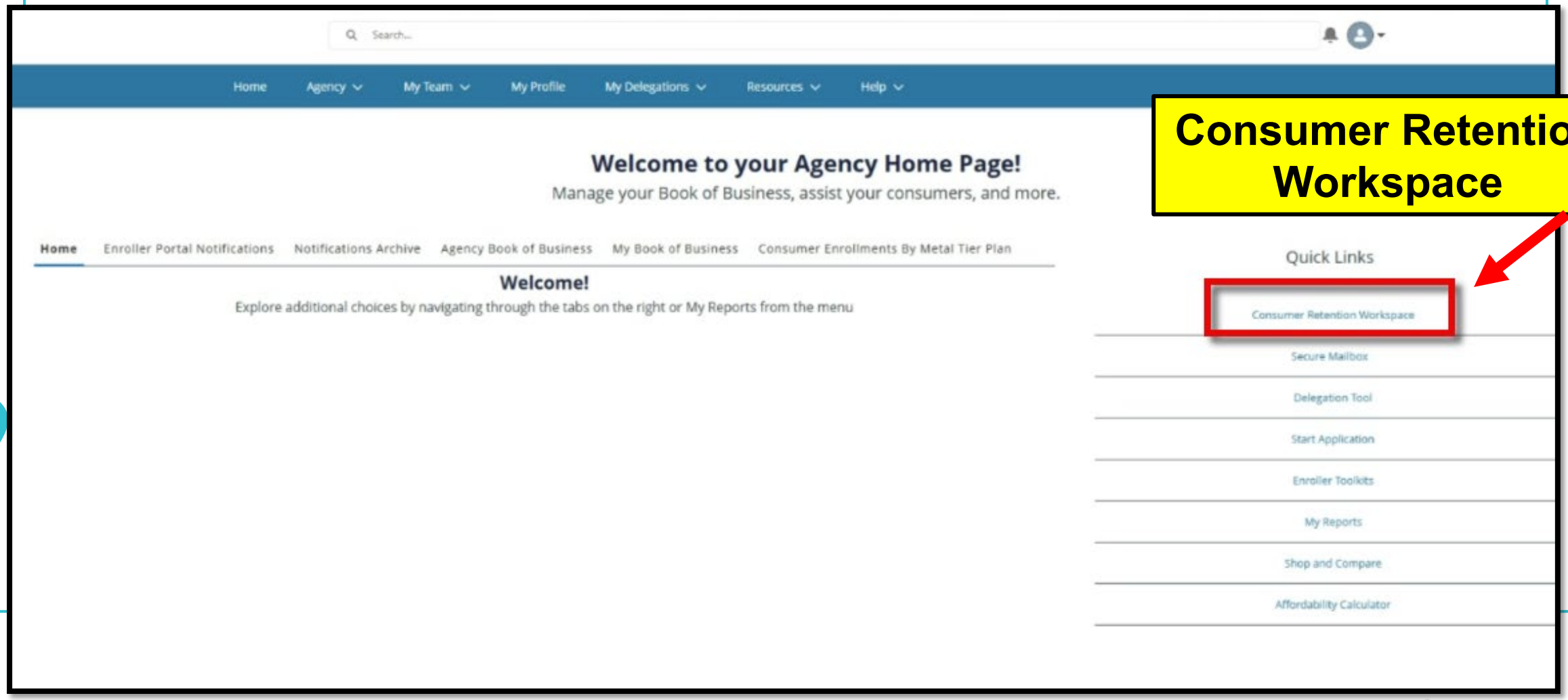
New Tool Alert!

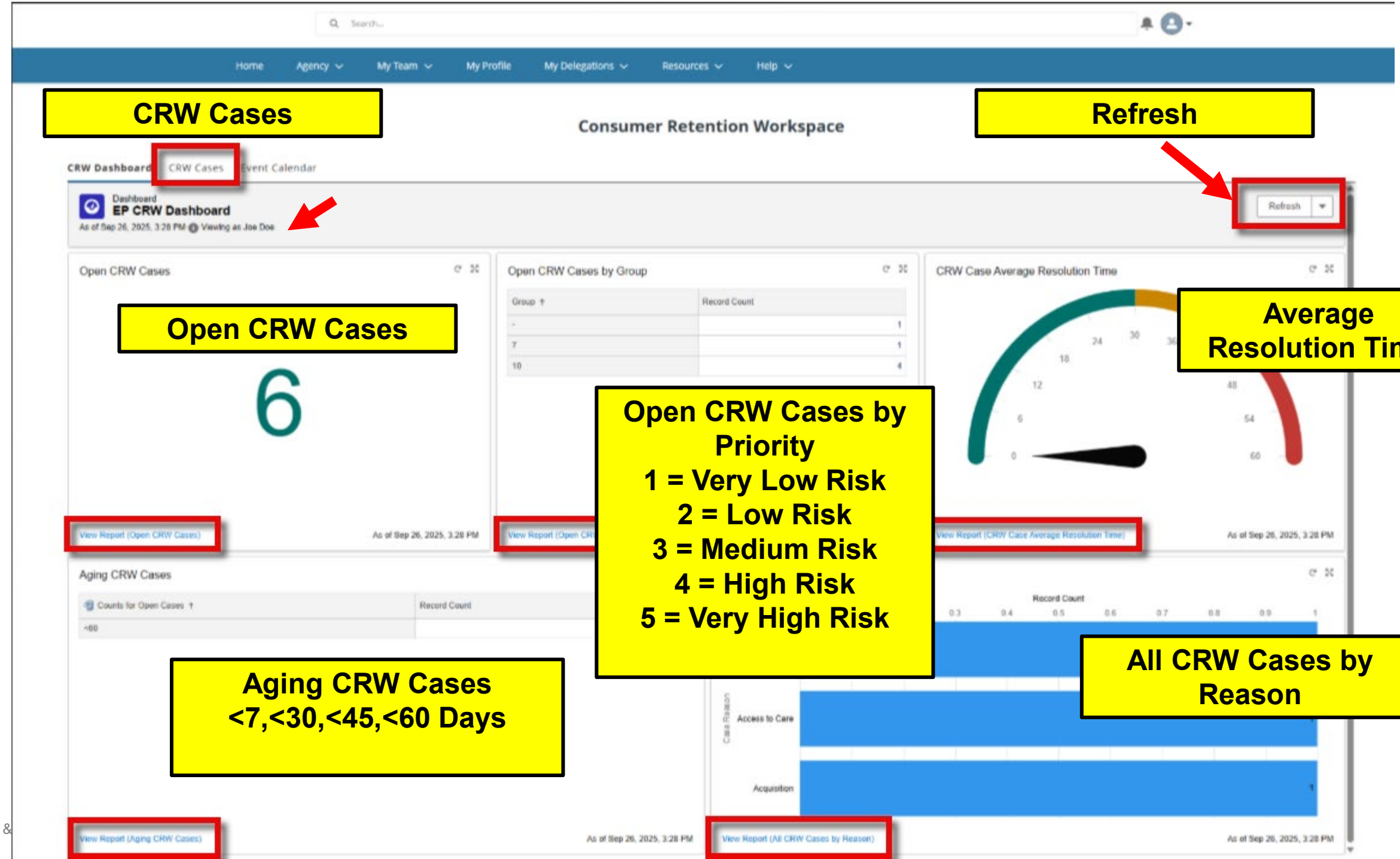
- **The Consumer Retention Workspace (CRW)** is a new tool in the Enroller Portal that **helps track and manage consumer renewals** for Plan Year 2026.
- It **identifies consumers** up for renewal, **ranked by risk** for not renewing, and provides a space for enrollers to **monitor and manage renewal** activities.

Consumer Retention Workspace (CRW): Objectives

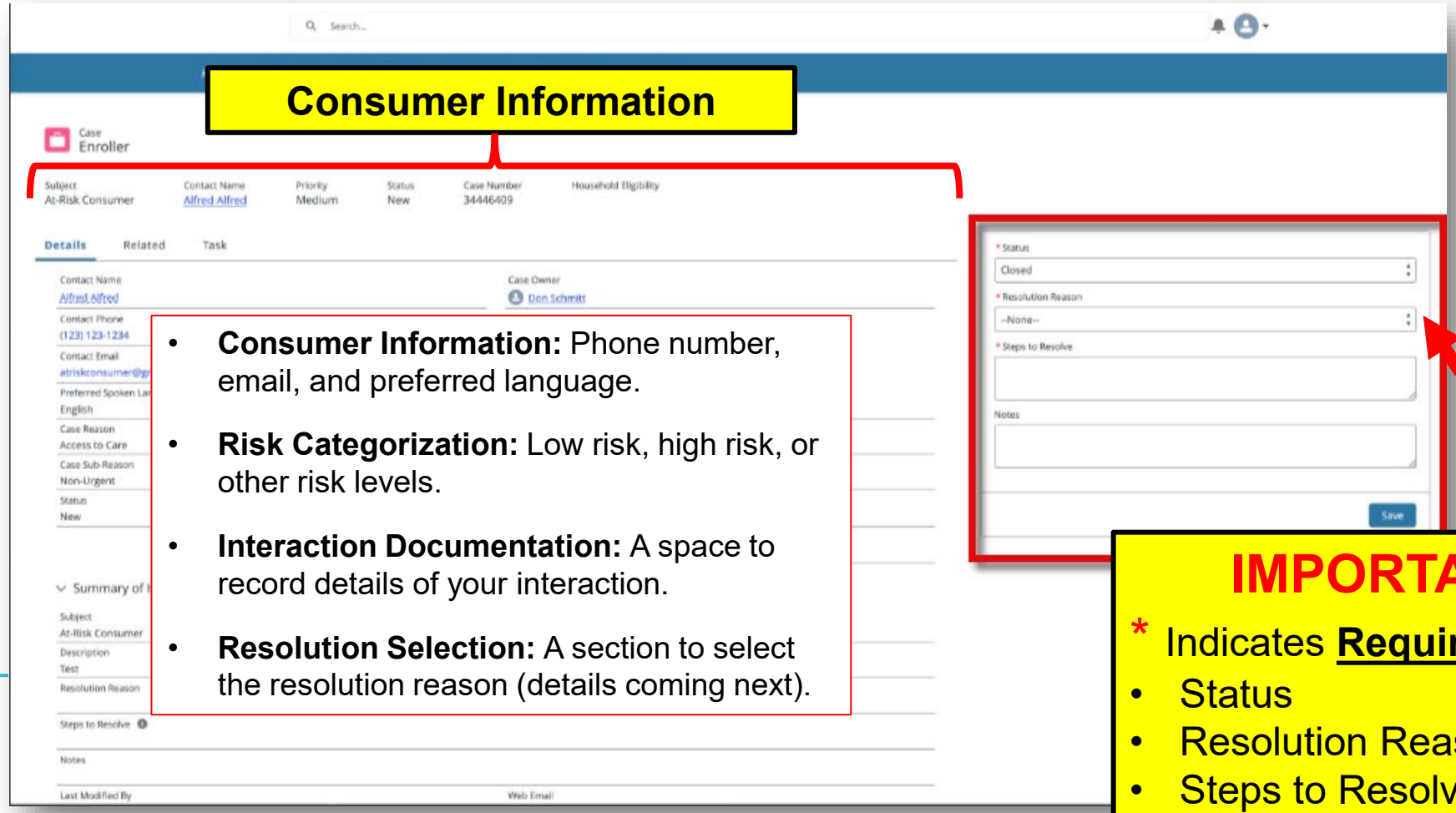
Identify Consumer Cases	• Covered California will **create cases for currently enrolled consumers** that need to renew.
Assign Risk Categories	• Cases will be assigned a risk category of their likelihood of renewing for 2026 plan year.
Track and Monitor Cases	• Enrollers could **access the Consumer Retention Workspace to track and monitor** renewal activities.
Access Reports for Agencies/Entities	• **Agency Managers and Entity Primary Contacts have access to reports** of all their enrollers CRW activities

Home Page Access: Quick Links




CRW Cases
Consumer Retention Workspace
Refresh
CRW Dashboard
CRW Cases
Event Calendar
Dashboard
EP CRW Dashboard
Refresh
Open CRW Cases
Open CRW Cases
6
Open CRW Cases by Group
Group
Record Count
CRW Case Average Resolution Time
Average Resolution Time
Open CRW Cases by Priority
1 = Very Low Risk
2 = Low Risk
3 = Medium Risk
4 = High Risk
5 = Very High Risk
Aging CRW Cases
Aging CRW Cases <7,<30,<45,<60 Days
All CRW Cases by Reason
Record Count
Access to Care
Acquisition
View Report (Open CRW Cases)
View Report (CRW Case Average Resolution Time)
View Report (Aging CRW Cases)
View Report (All CRW Cases by Reason)

Understanding Your Assigned Consumer Cases



- **Consumer Information:** Phone number, email, and preferred language.
- **Risk Categorization:** Low risk, high risk, or other risk levels.
- **Interaction Documentation:** A space to record details of your interaction.
- **Resolution Selection:** A section to select the resolution reason (details coming next).

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

And provide

Resolution Information

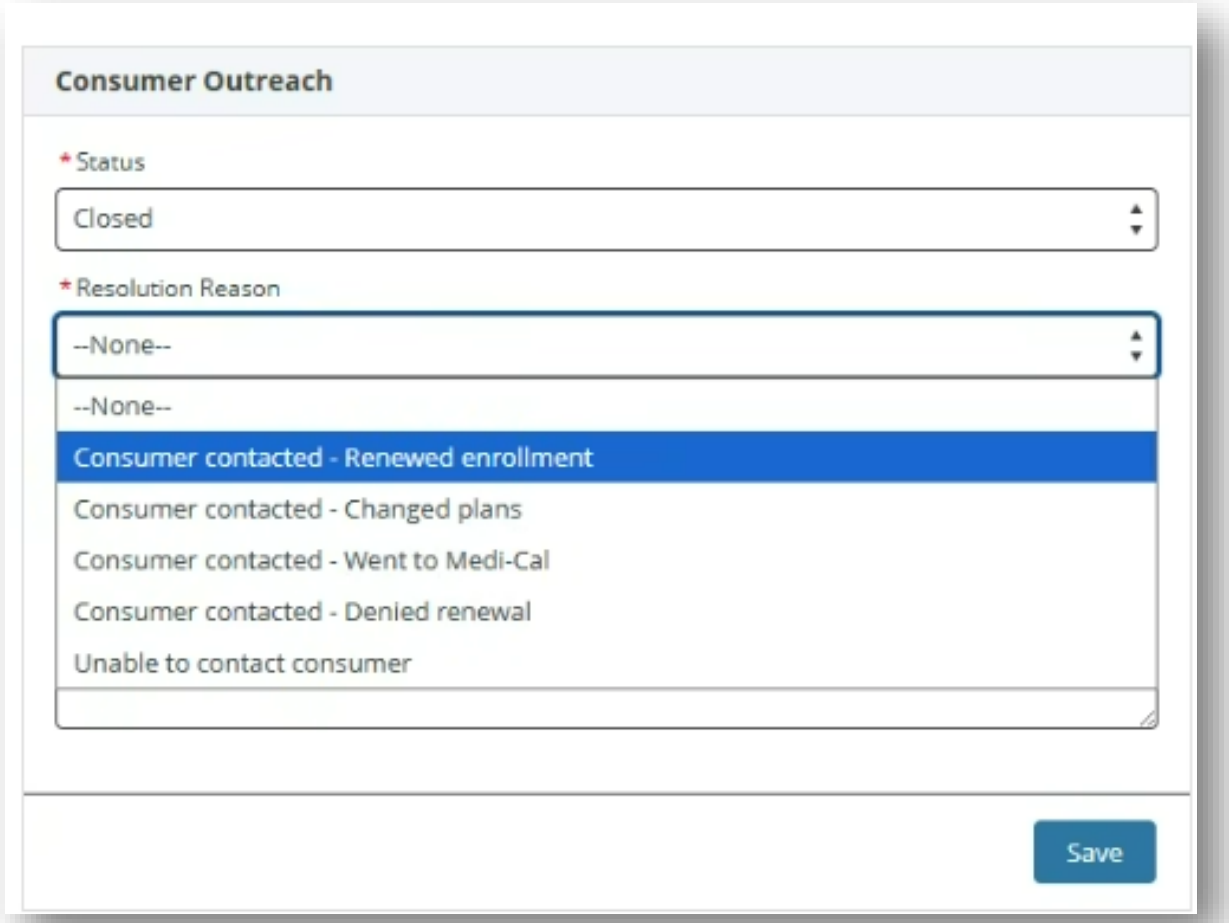
when closing the case.

IMPORTANT!

* Indicates **Required** Fields

- Status
- Resolution Reason
- Steps to Resolve

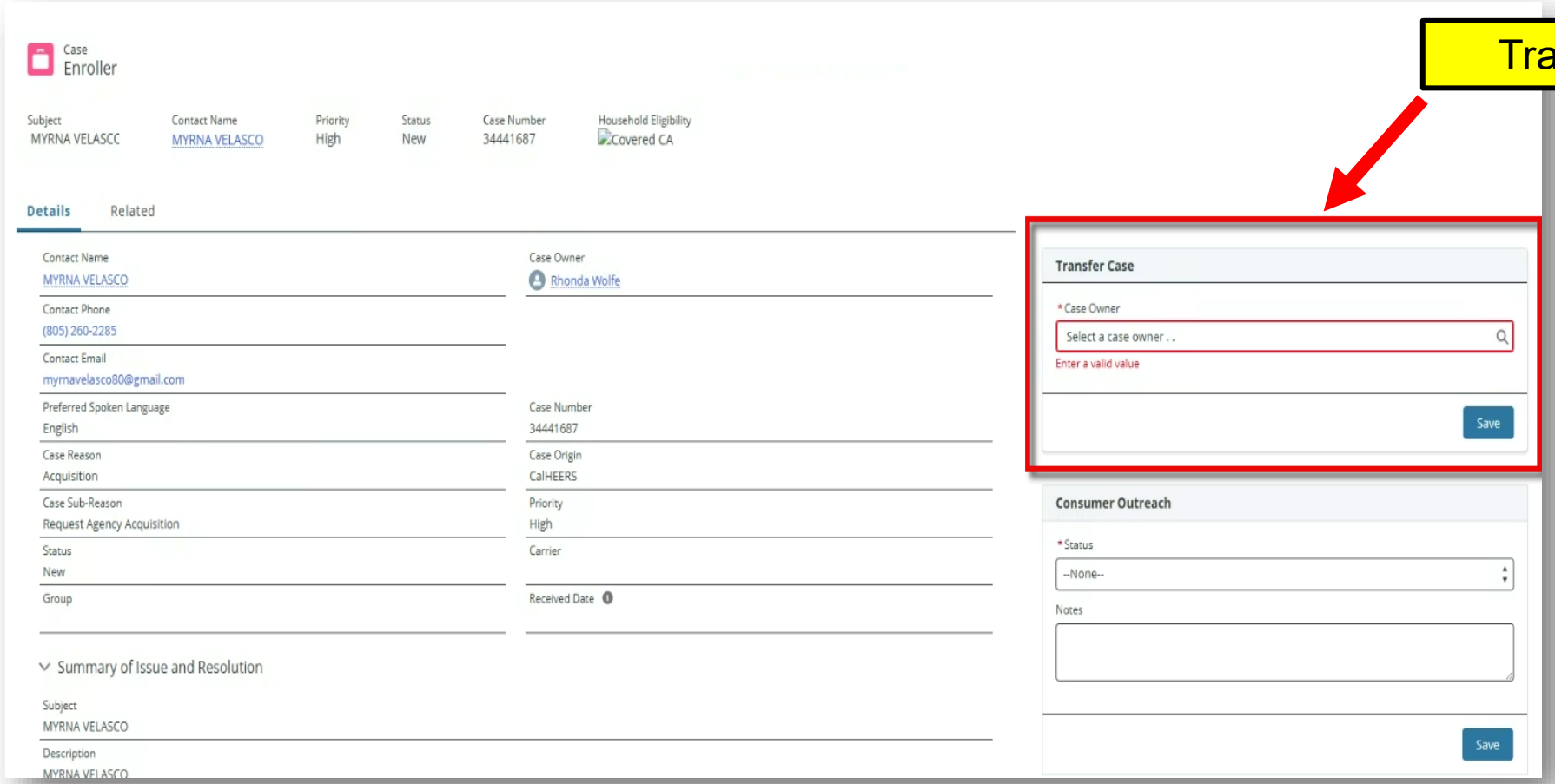
Closing Your Assigned Consumer Cases



Selecting a Resolution Reason

Enrollers must select the resolution reason that best fits the outcome of their outreach efforts.

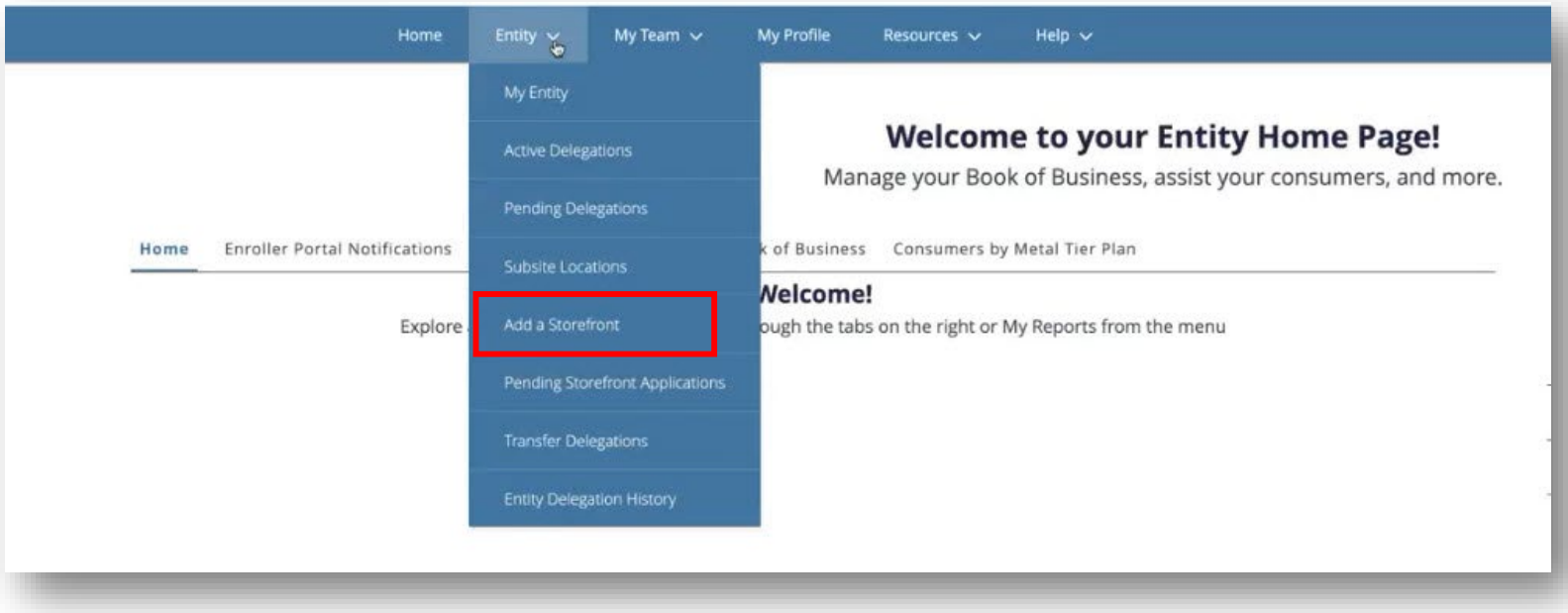
Reassigning CRW Cases



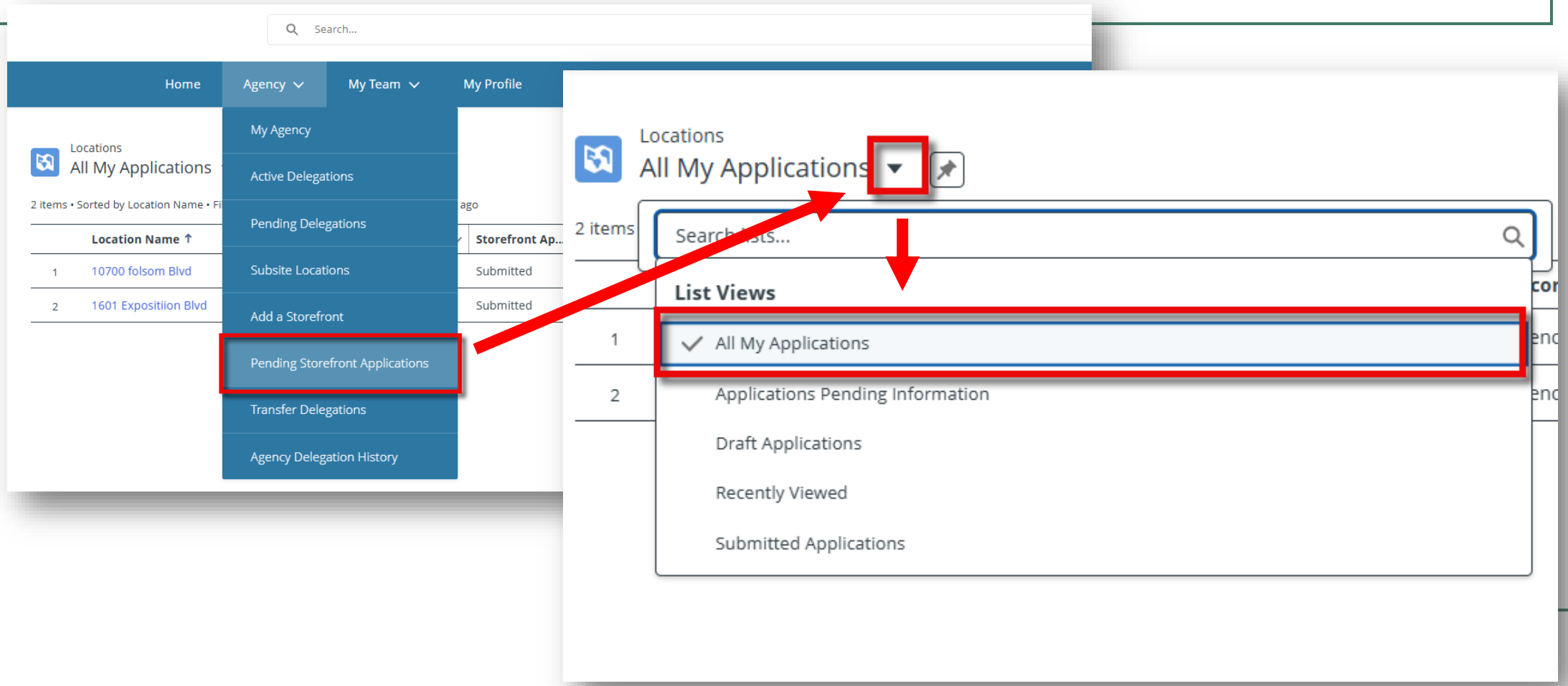
Agency Managers can **transfer** CRW cases to another **Agent Level 2** within the Agency to complete outreach

Storefront Application (New!)

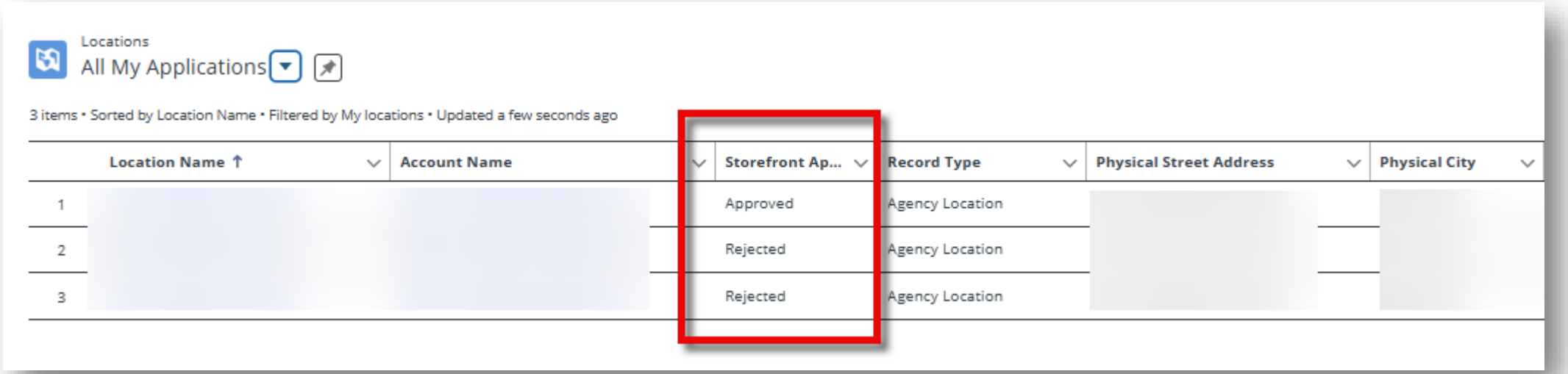
- The **Storefront application** process is now available in the Enroller Portal under the **"Add a Storefront"** option in the **Agency/Entity dropdown** menu.
- **Applications** can be submitted for **new or existing locations**.
- A detailed walkthrough is provided in the **Storefront Toolkit**.



Storefronts: Locate Pending Applications



Storefronts: Application Status

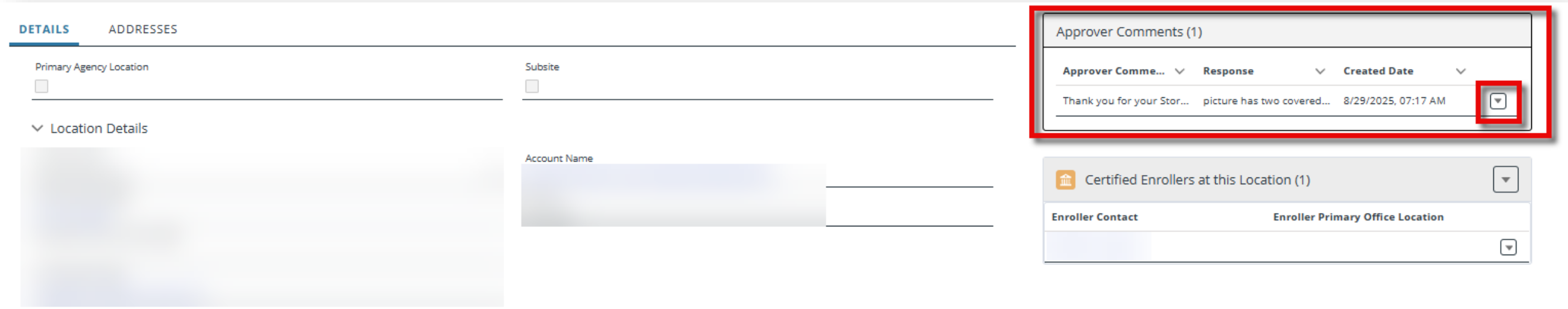


Application status can be found for all Storefront applications under “All My Applications”

Status: Approved, Rejected, Pending, Pending Information

Storefronts: Pending Information Requests

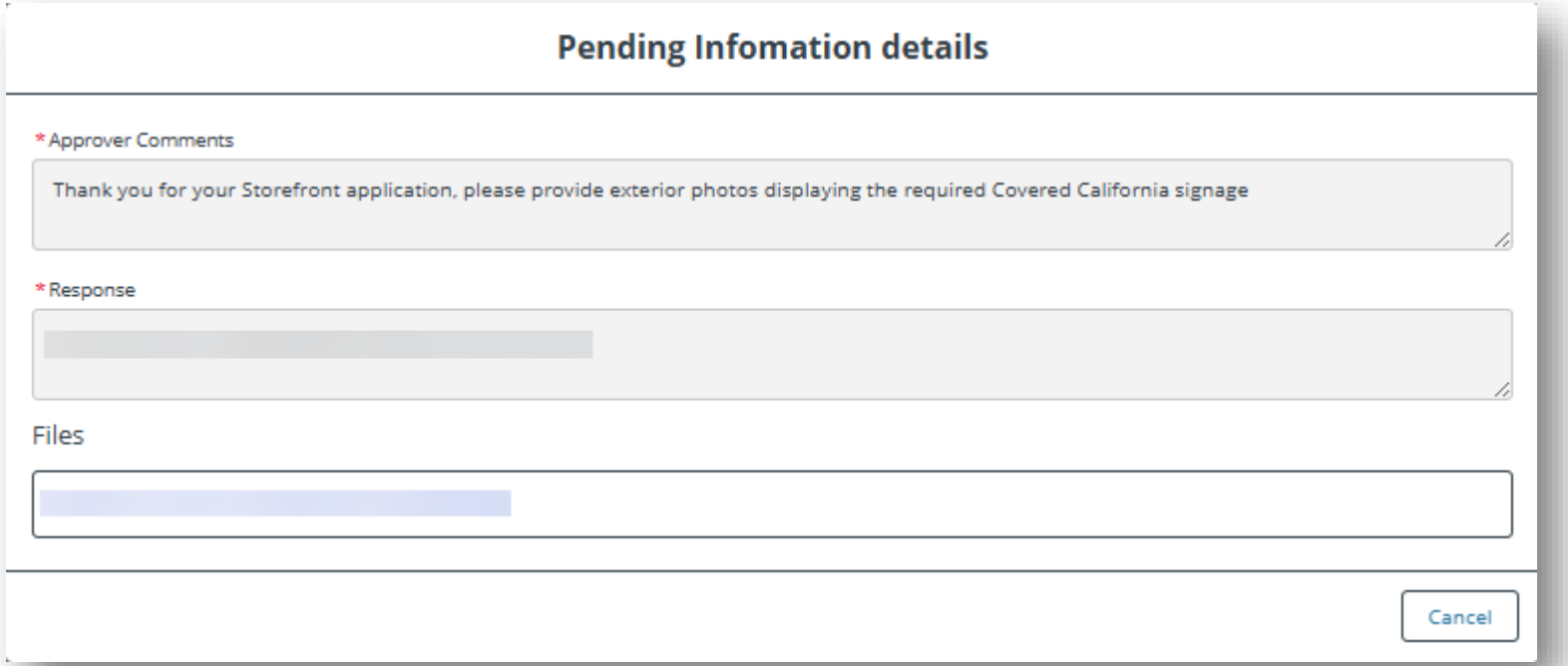
When Covered California needs more information or additional photos, your application will be placed in "**Pending Information**" status. You can respond to these requests here.



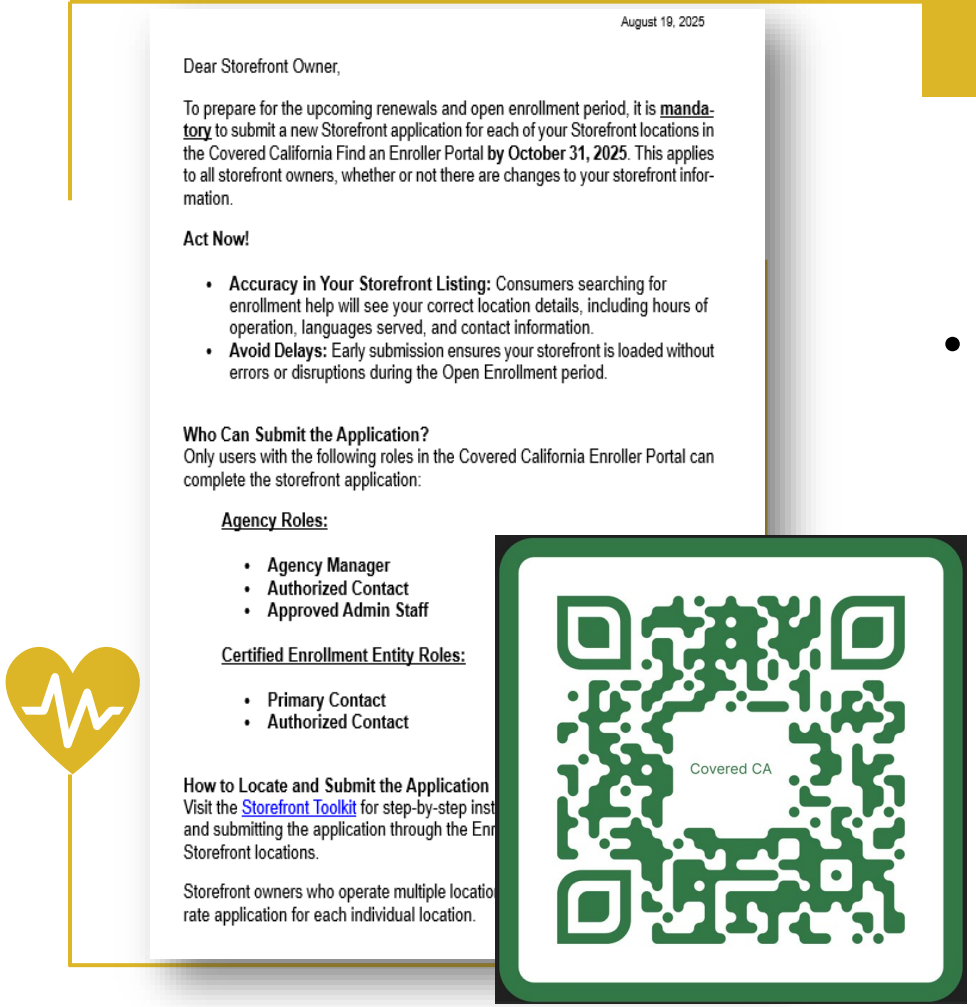
Storefronts: Responding to Pending Information Requests

Please respond to **Pending Information** requests as soon as possible.

Please note some information requests may require a file upload.



Make Sure Your Storefront is Ready for Open Enrollment



August 19, 2025

Dear Storefront Owner,

To prepare for the upcoming renewals and open enrollment period, it is **mandatory** to submit a new Storefront application for each of your Storefront locations in the Covered California Find an Enroller Portal **by October 31, 2025**. This applies to all storefront owners, whether or not there are changes to your storefront information.

Act Now!

- **Accuracy in Your Storefront Listing:** Consumers searching for enrollment help will see your correct location details, including hours of operation, languages served, and contact information.
- **Avoid Delays:** Early submission ensures your storefront is loaded without errors or disruptions during the Open Enrollment period.

Who Can Submit the Application?
Only users with the following roles in the Covered California Enroller Portal can complete the storefront application:

Agency Roles:

- Agency Manager
- Authorized Contact
- Approved Admin Staff

Certified Enrollment Entity Roles:

- Primary Contact
- Authorized Contact

How to Locate and Submit the Application
Visit the Storefront Toolkit for step-by-step inst
and submitting the application through the Enr
Storefront locations.

Storefront owners who operate multiple locatio
rate application for each individual location.

Covered CA

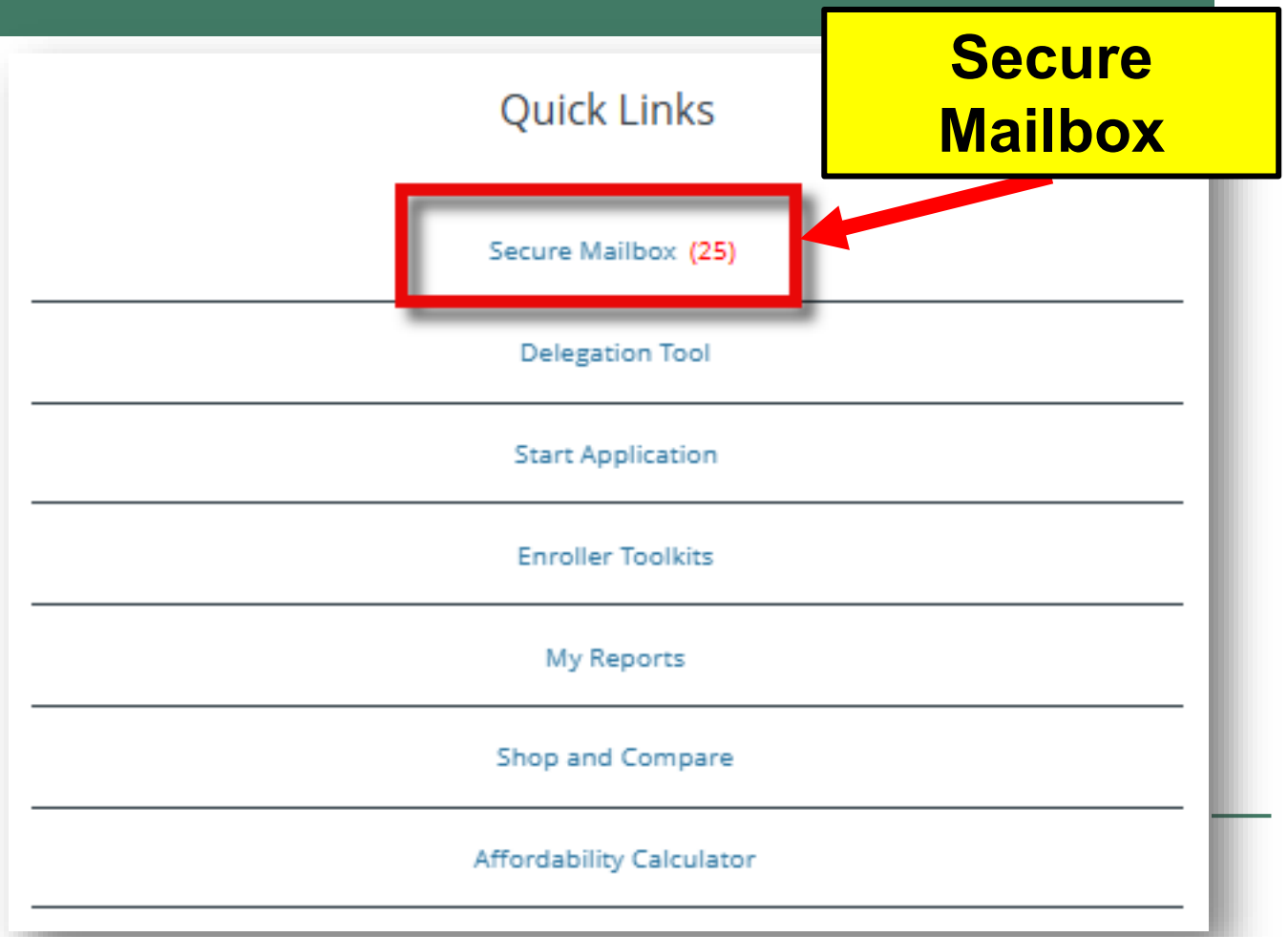
ATTENTION!

- Covered California Storefront Owners who applied before May 2025:
  - A **NEW Storefront Application must be submitted by October 31, 2025** to keep your storefront active and visible in the Find a Local Enroller tool.
  - **Check your email for instructions**. For more information, visit the Storefront Toolkit here: https://hbex.coveredca.com/toolkit/downloads/Storefront_Toolkit.pdf

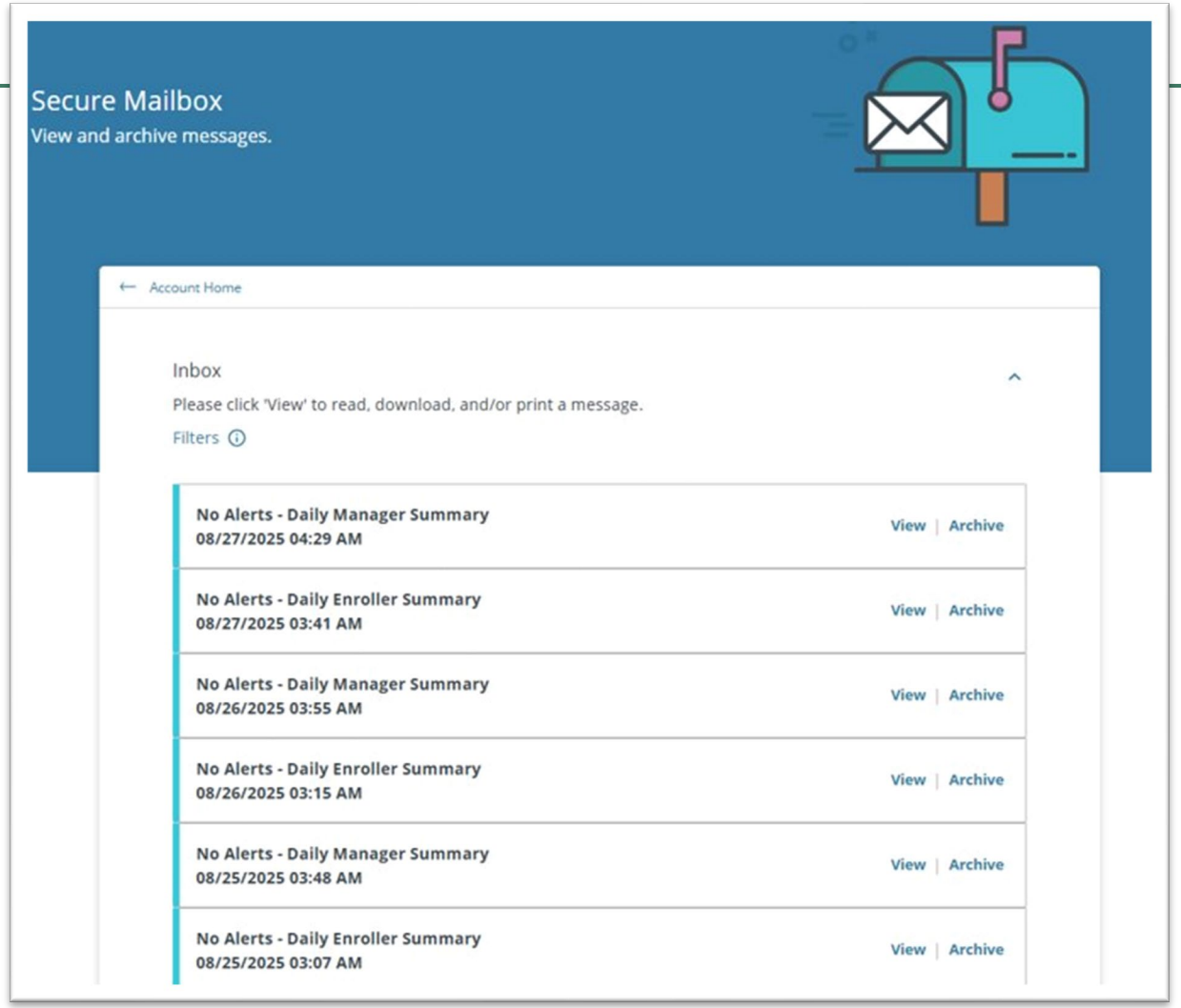
Navigating your Quick Links

Secure Mailbox

- Your **Daily Summary Email** is available daily in your **Secure Mailbox** from your portal **Home Page**.
- **Agency Managers and Primary Contacts** also receive the Daily Manager Summary.



Daily Summary Email



Subject Lines:

Daily Summary
Daily Manager Summary
No Alerts Daily Summary
No Alerts Daily Manager Summary

- Daily Summary Emails

Daily Summary Notification Topics and Frequency

Notification Topic	Frequency
Binder Payment Pending	Every 7 Days while enrollment is Pending
Consent Valid Thru	8/1, 9/1, 10/1 Only
Actions Requested for Consumer	Daily Alert until resolved
NOD Notice	One Time alert when notice is generated
Enrollment Canceled	One Time alert
Enrollment Terminated	One Time alert
Medicare Aged Out	Daily Alert until resolved
Enrollment Updates Pending	Daily Alert until resolved

Information in your Daily Summary Email

HBX_Case_ID	Enrollment Year	First_Name	Last_Name	Home_Phone	Cell_Phone	Household_Email	Notification_Topic
5000000011	2025	John	Smith	916 555-8888	916 888-5555	John.Smith@invalid.com	Binder Payment Pending
5000000012	2025	Lynn	Miller	510 777-6655	510 355-8888	Lynn.miller@invalid.com	Enrollment Terminated
5000000013	2025	James	Johnson	415 333-2222	415 777-8888	James.Johnson@invalid.c	NOD03
5000000014	2025	Nick	Long	530 444-5555	530 999-7777	nick.long@invalid.com	Consent Valid Thru

Consumer Case Number

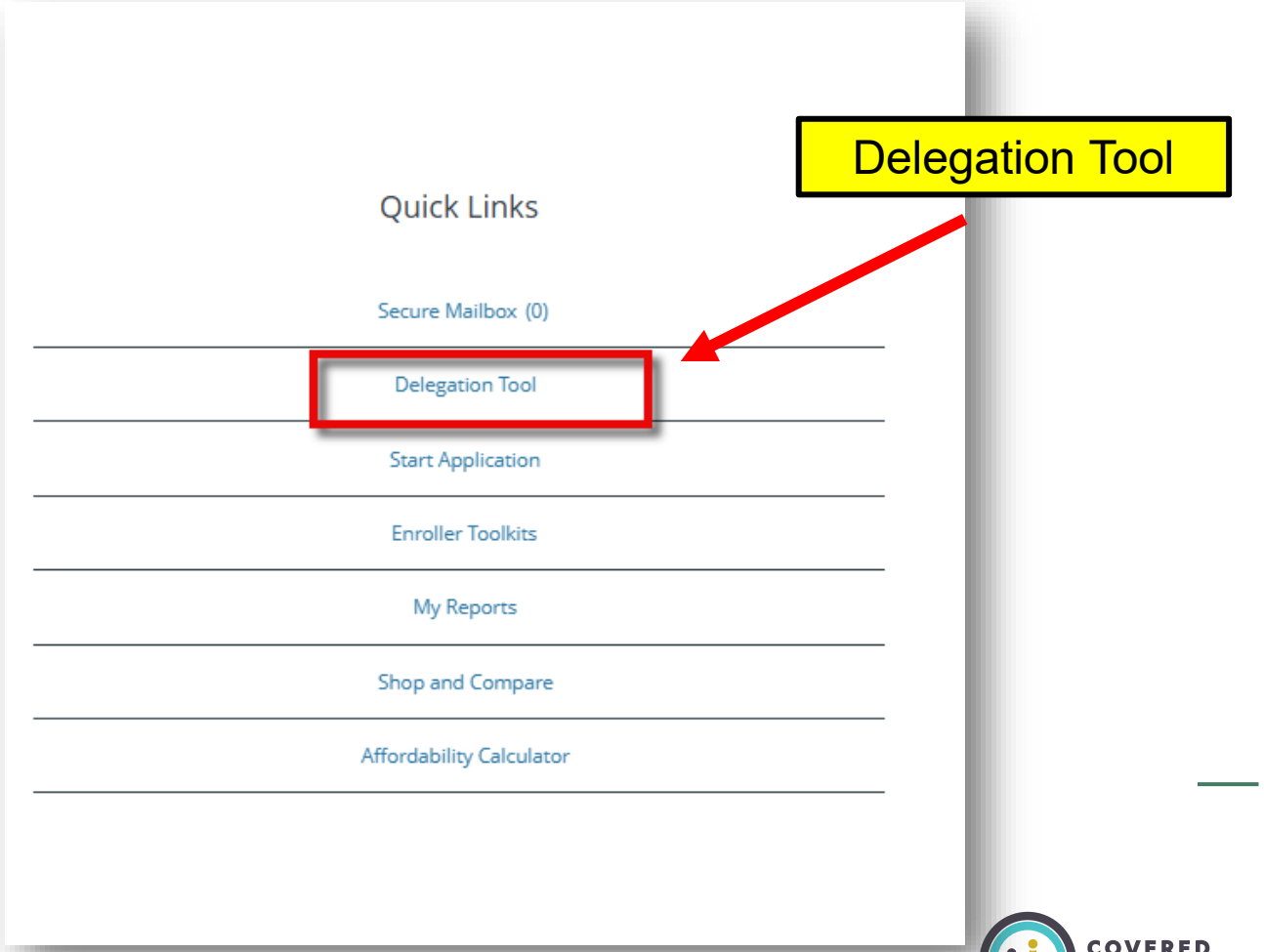
Consumer Contact Information

Notification Topic

For more information:
https://hbex.coveredca.com/toolkit/pdfs/Daily_Summary_Email_Notices_Description_Guide.pdf

Delegation Tool

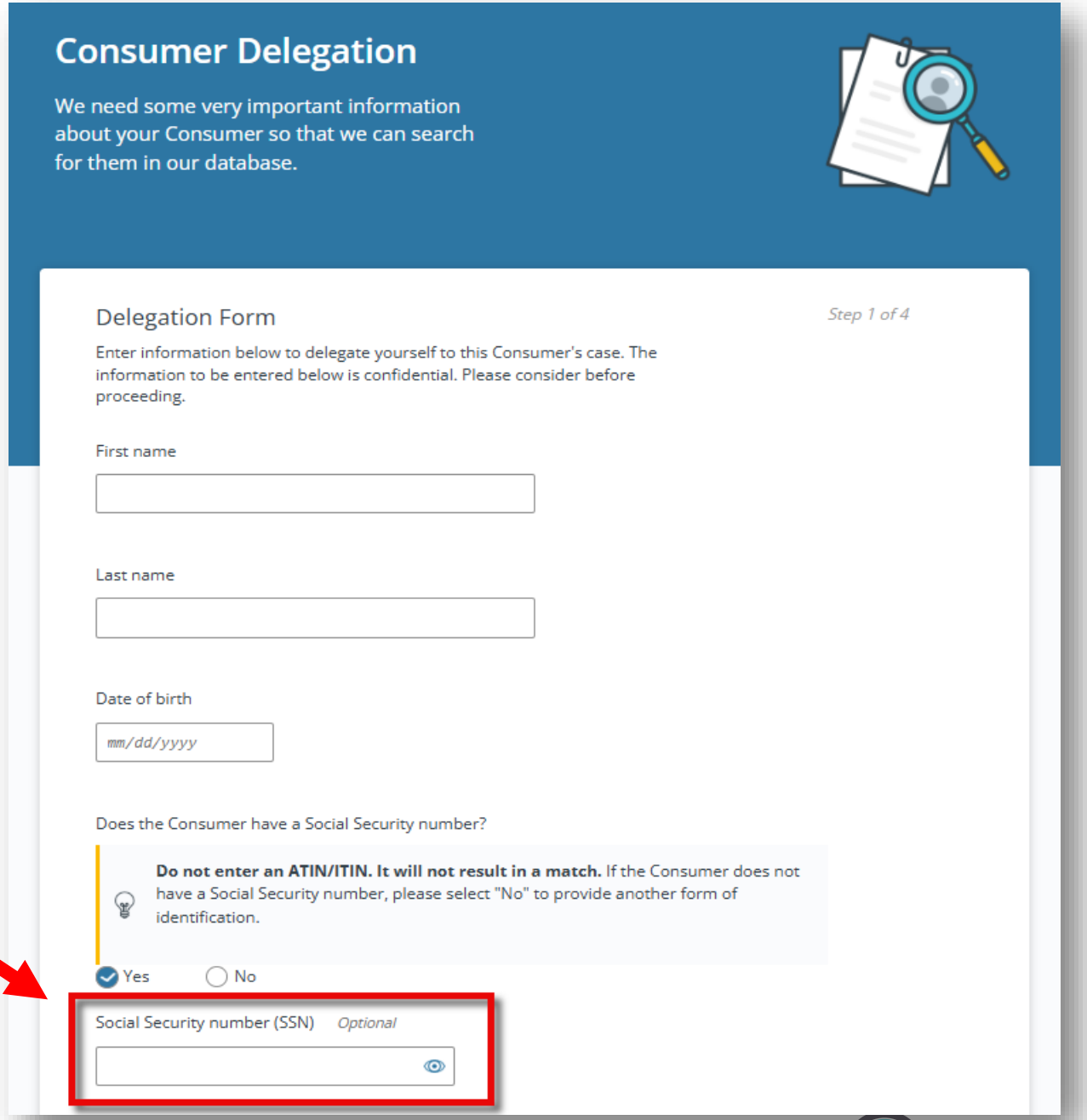
- Allows a self-serve delegation transaction without the aid of Covered California Staff
- Serves as a preliminary search of CalHEERS
- Acts as a method of collecting consumer consent for delegation



Delegation Tool: Step 1

Identifying the Consumer

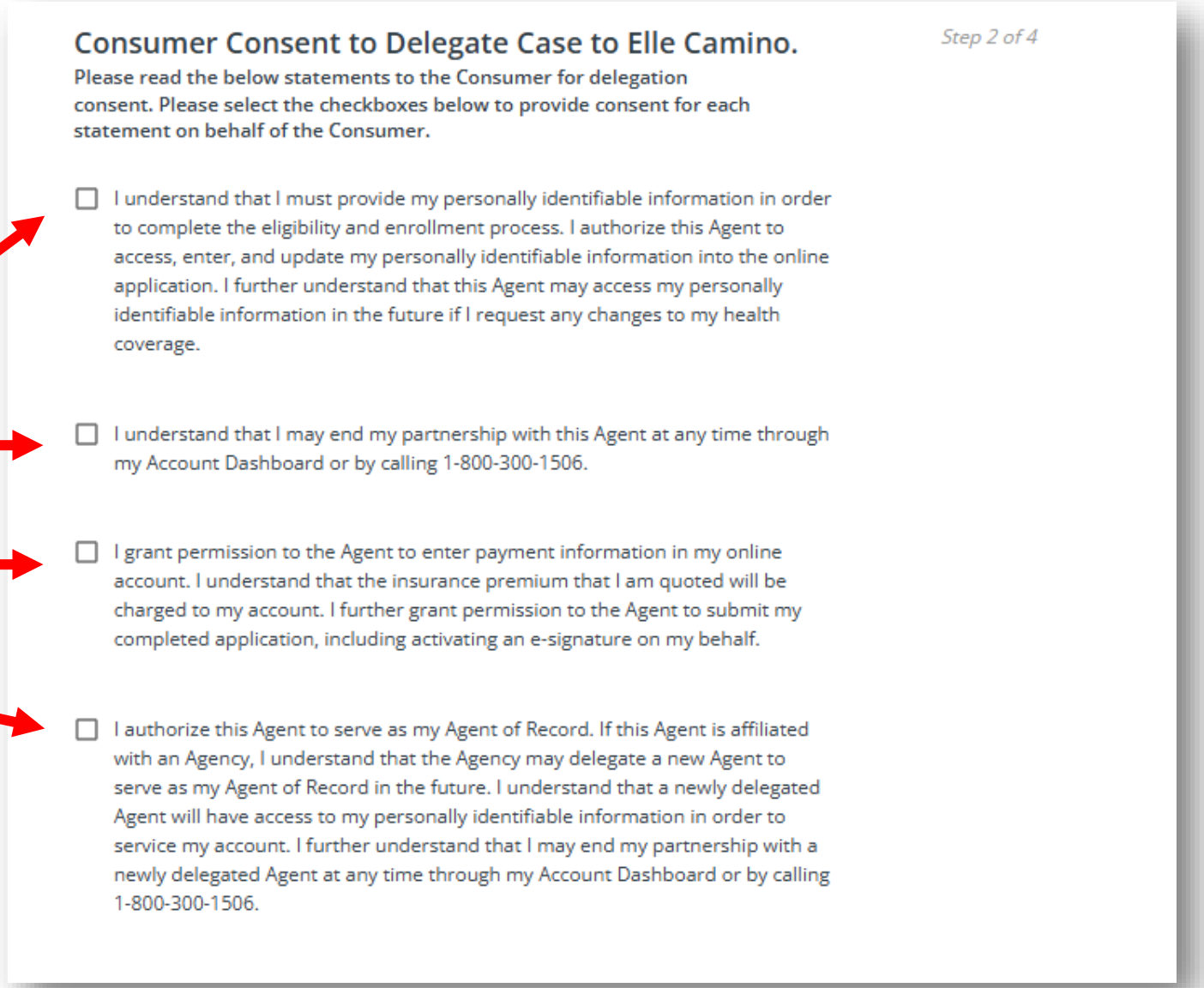
For best results always include the consumers Social Security Number in the search criteria



Delegation Tool: Step 2

Disclaimers

Enrollers should always read through **all** delegation disclaimers and ensure consumers understand.



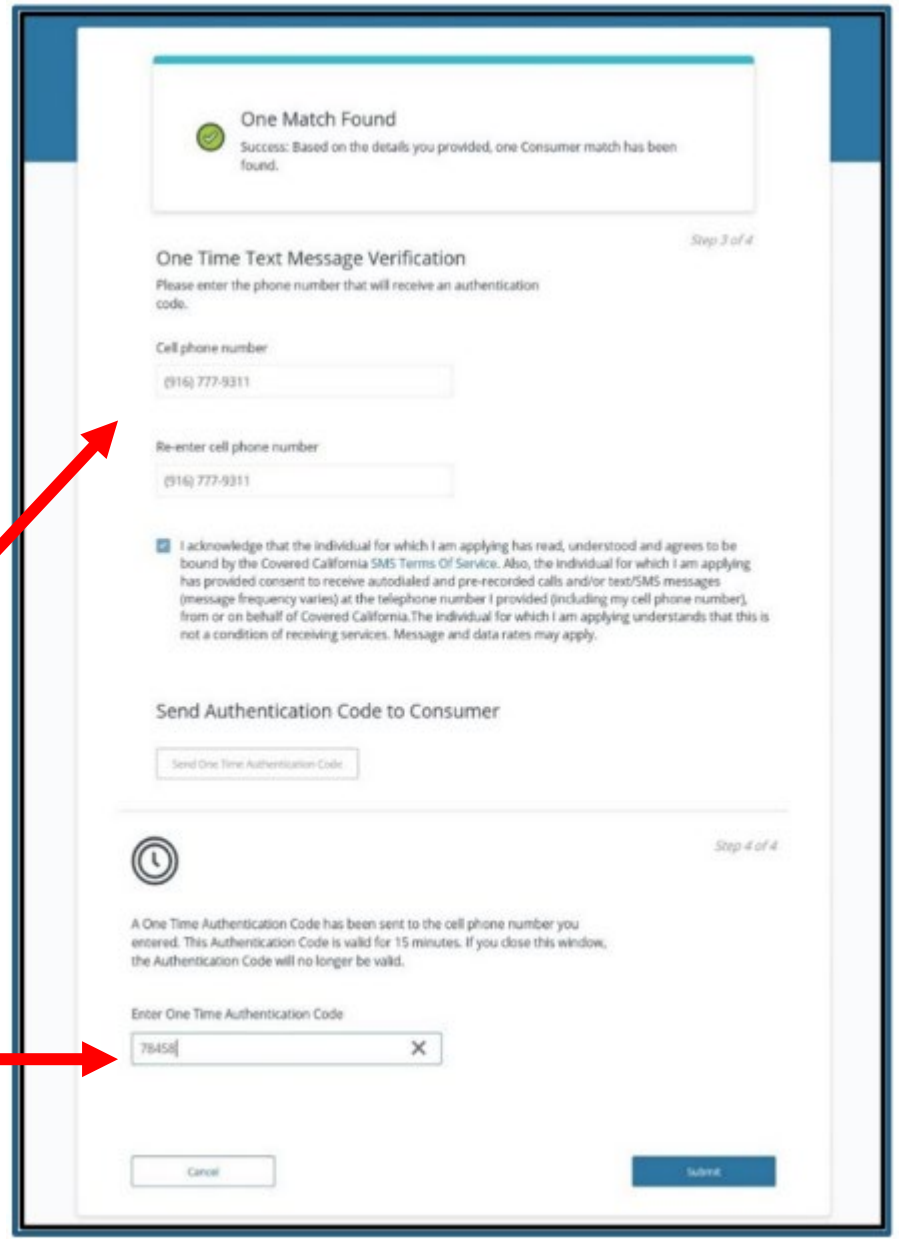
Delegation Tool: Step 3

Search Results – One Match Found

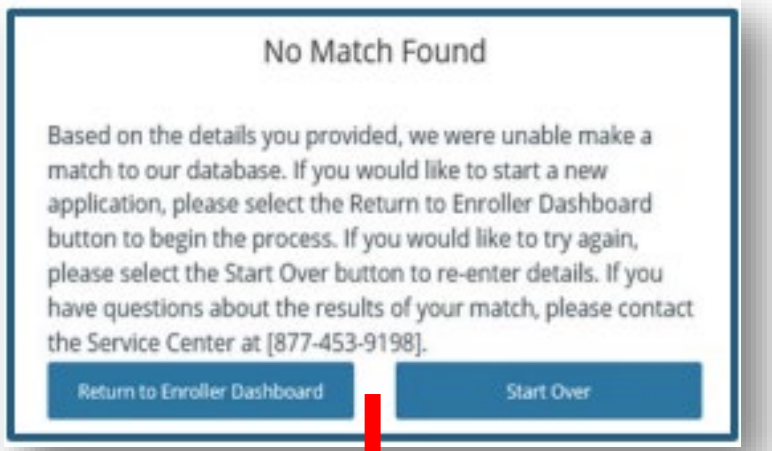
The consumer has been located, and you are able to proceed with delegation.

Enter the **Consumers** Cell Phone Number to receive the one-time passcode

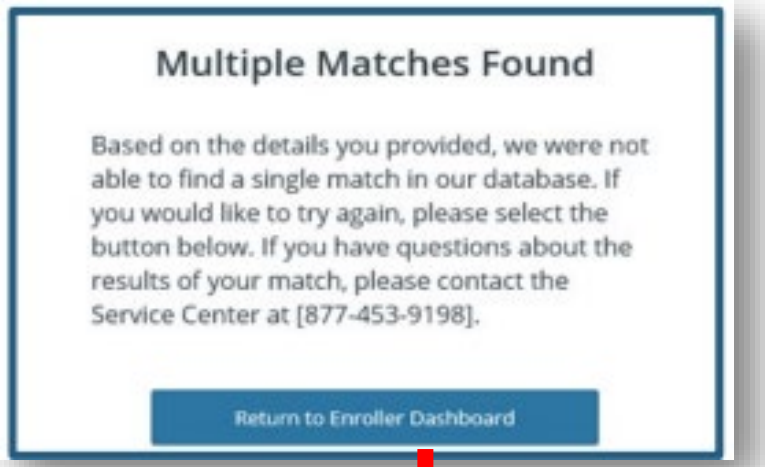
Delegation will be processed when you enter the one-time passcode provided by the consumer here:



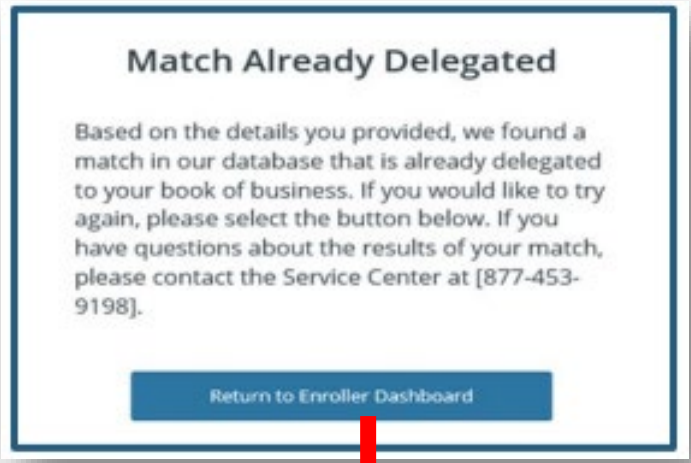
Delegation Tool: Additional Search Results



Explanation:
We are unable to locate this consumer on an existing case.
Action:
you should initiate a new application.



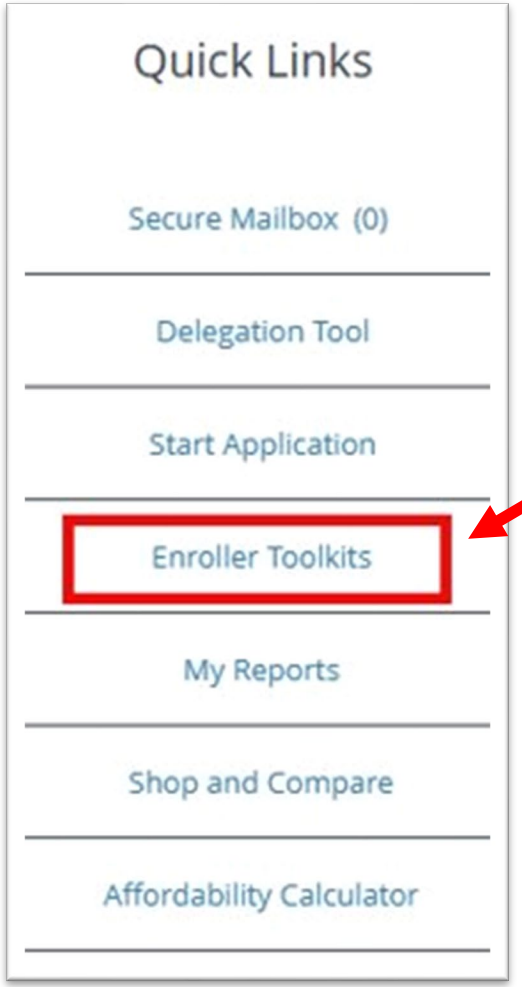
Explanation:
This consumer has more than one case, Covered California must review to identify the accurate case.
Action:
Please call the Service Center.



Explanation:
This consumer is already delegated to you.
Action:
Please review your active consumers to find this consumers case.

Enroller Toolkits

- ✓ Toolkits can be found in your **Enroller Portal "Quick Links"** for easier access.
- ✓ The **Toolkits page and the Downloads section are now searchable** for quick access to the resource you need.



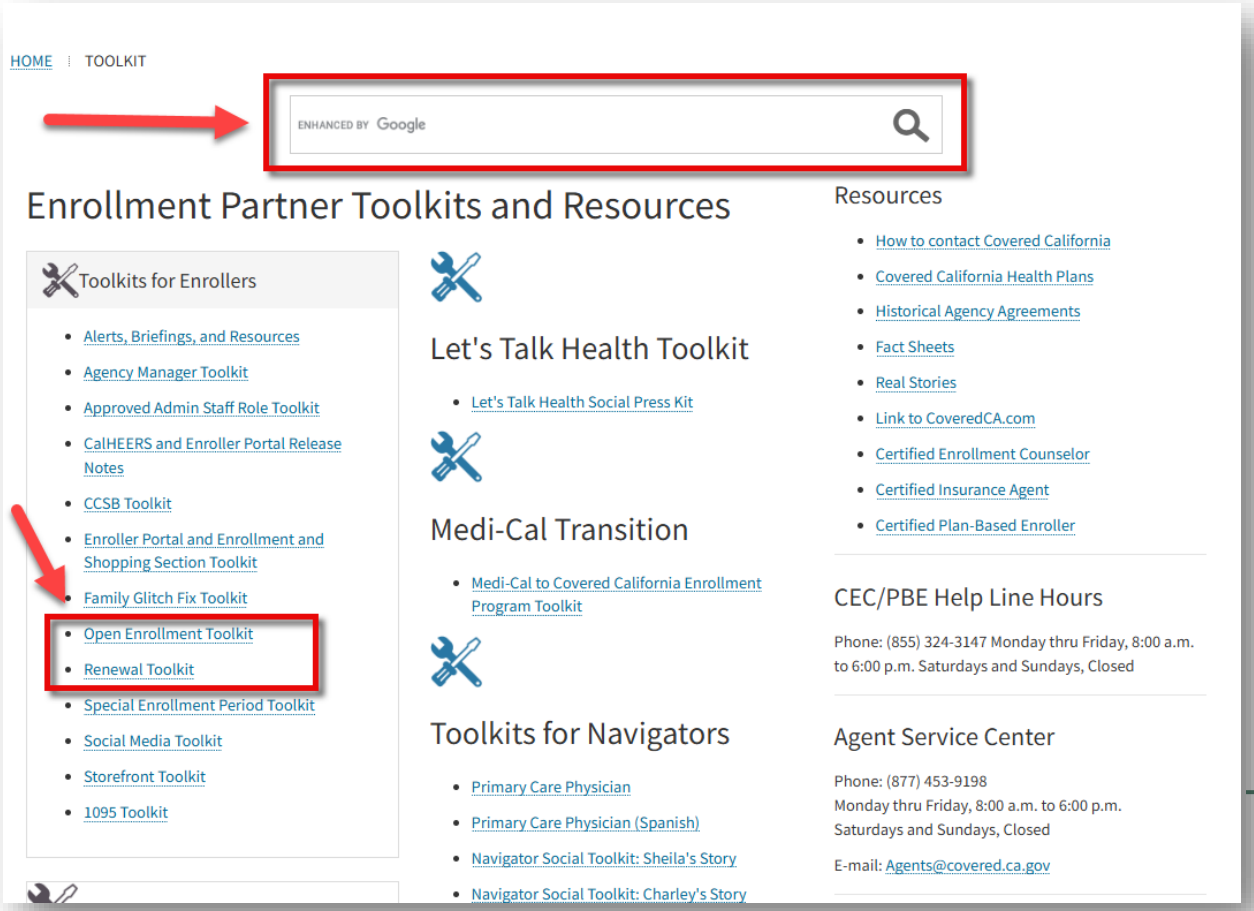
Enroller Toolkits: New Feature

New Feature: Search the Toolkits for quick access to information!

Toolkits are your one-stop shop for job aids, guides, and release notes.

Coming Soon…

OE and Renewal Toolkit Updates



Enroller Toolkits: Examples

Enrollment Partner Toolkits and Resources

Open Enrollment Toolkit

Overview

Open Enrollment is the time of year when everyone can apply for a plan through Covered California, typically from November to January. Use the information and resources below to support consumers through the enrollment process. Check back frequently for updates.

NOTE: For renewal resources, view the Renewal Toolkit here.

Open Enrollment

Resource	Type	Description
Single Streamlined Application	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).
Open Enrollment 2025 Kickoff Events Slide Deck	Slide Deck	Slides presentation for the 2025 Open Enrollment Statewide Kickoff Meeting. Amended as of 2/19/2025.
Add an Event	Portal	Link to request to add an event to the Covered California Events page so consumers can attend enrollment events in their community.
Open Enrollment Collateral	Portal	Link to downloadable PDFs of Covered California's collateral materials.

Approved Admin Staff Role Toolkit

Overview

To manage their agency, Agency Managers may add staff to their Agency to assist with consumer support, application entry, and other administrative functions. In the Agency Portal, this new support staff role is referred to as Approved Admin Staff.

Note: The Agency Manger determines the level designation (Level 1 & 2) during the creation of the Approved Admin profile.

Resources include information to assist Approved Admin Staff with online application support, managing Agency delegations (Level 2 only), creating new profiles for Agents (Level 2 only), and much more.

Check back frequently for updates.

Approved Admin Support

Resource	Type	Description
Approved Admin Staff Role Overview for Level 1 & 2	Quick Guide	Overview of Admin Staff Level 1 & 2 access in their CalHEERS portal.
Acting on Behalf of an Agent for Approved Admin Staff	Job Aid	Instructions for Admin Staff, Level 1 & 2 to assist any consumers delegated to an Agent within the Agency.
Transferring Consumers within an Agency for Approved Admin Staff – Level 2	Quick Guide	Instructions for Admin Staff, Level 2, to transfer consumer delegations between Agents with the Agency.
Add a New Agent to an Agency for Approved Admin Staff - Level 2	Job Aid	Instructions for Admin Staff, Level 2, to add new Agents to the Agency. Also, provide steps to guide new Agents through the CalHEERS account creation process.

Agency Manager Toolkit

Overview

Agency Managers act in an administrative and operational role for an agency and must be a certified and licensed insurance agent. This Toolkit is for Covered California's Agency Mangers to review resources to assist in navigating the Agency Portal.

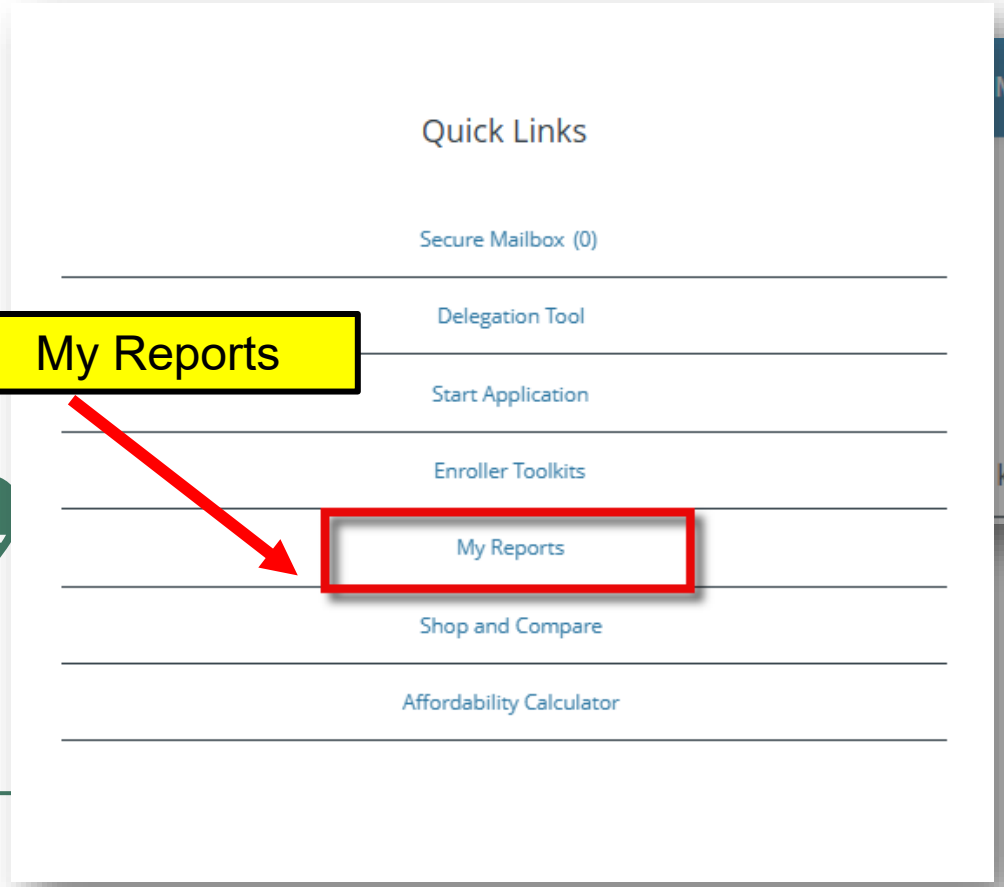
Resources include information to assist Agency Managers Level I and II, Authorized Signers, Agents Level I and II, and Approved Admin Staff (based on user role permissions) with viewing and exporting a Book of Business, transferring delegated consumers within the agency, adding new agents and Admin Staff to the agency, and much more.

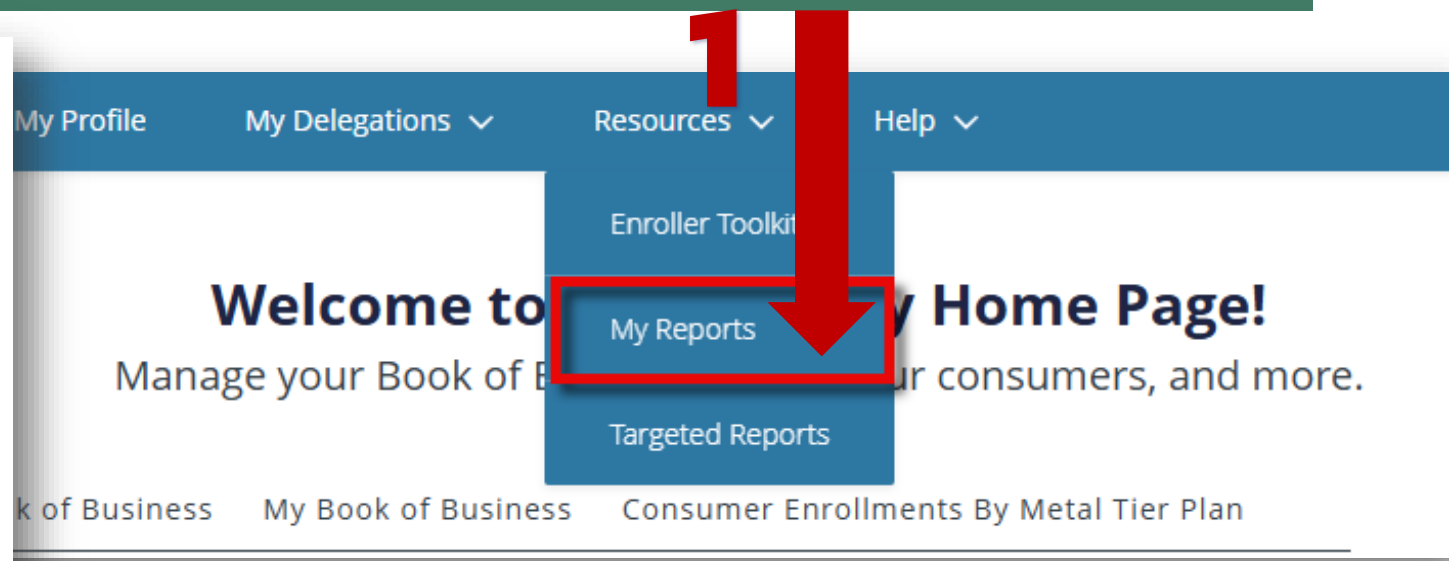
Check back frequently for updates.

Agency Support

Resource	Type	Description
Enroller Portal for Agency Users	Task Guide	Introduces Agency Managers, Agents, Authorized Signers, and Approved Admin Staff to the information and tasks they have access to through the Agency Portal.
Agency Manager Portal Walkthrough	Video	Demonstration of the Enroller Portal for Agency Roles.
Agency Manager Portal	Quick Guide	Information for Agency Managers on the Admin Staff Role in the Agency Portal.
Add a New Agent to an Agency	Job Aid	Instructions for Agency Managers to add new Agents in their Agency Portal.
Agency Certification Onboarding	Quick Guide	Onboarding instructions for Sole Proprietors, Corporations, and Partnerships that want to become Certified Insurance Agents with Covered California.
Downline Agent Onboarding	Quick Guide	Instructions for Agency Managers and Authorized Signers to complete the process of adding a downline Agent to their Agency and outlines the steps that the Downline Agent must take to become Certified.

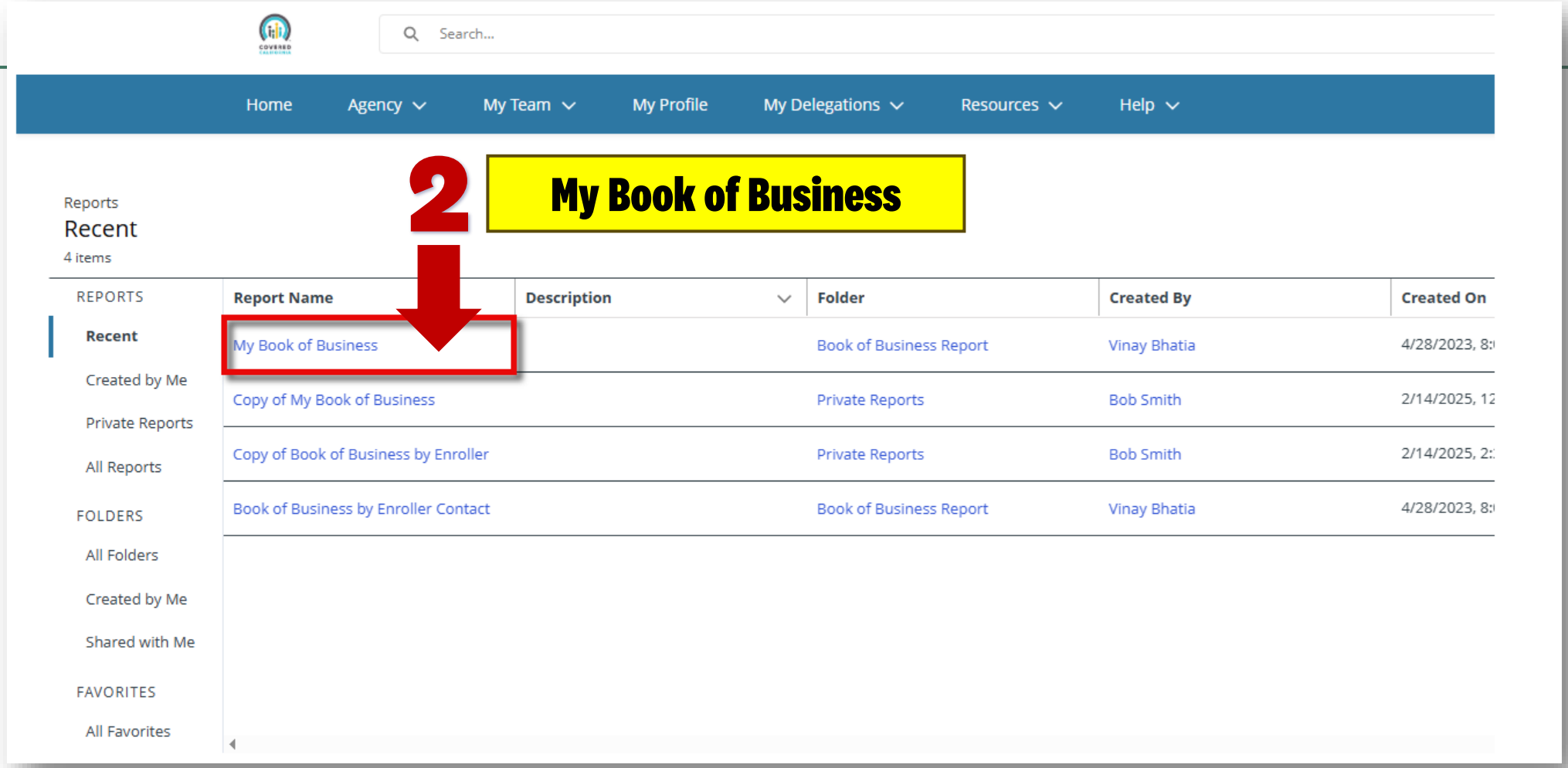
My Reports





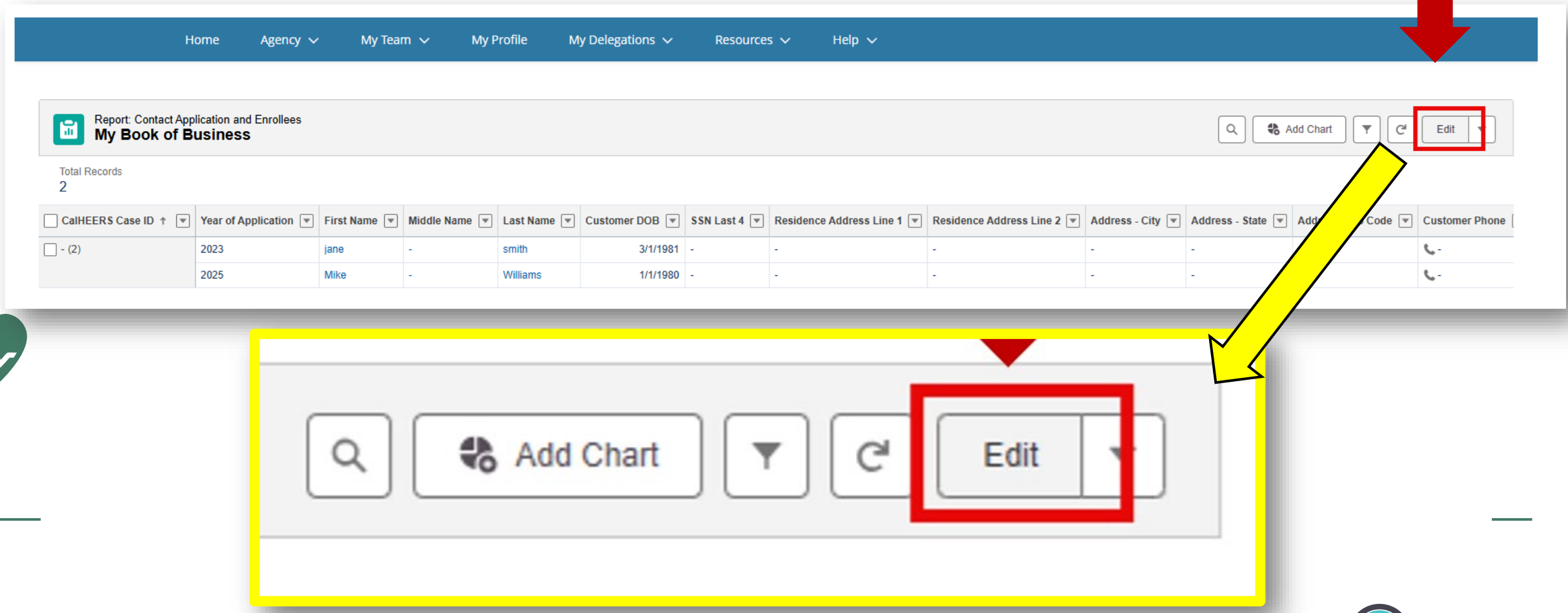
- ✓ **View** Reports
- ✓ **Export** your reports
- ✓ **Customize** and **Edit** your reports

Sample Report: My Book of Business



Editing Your Report

3



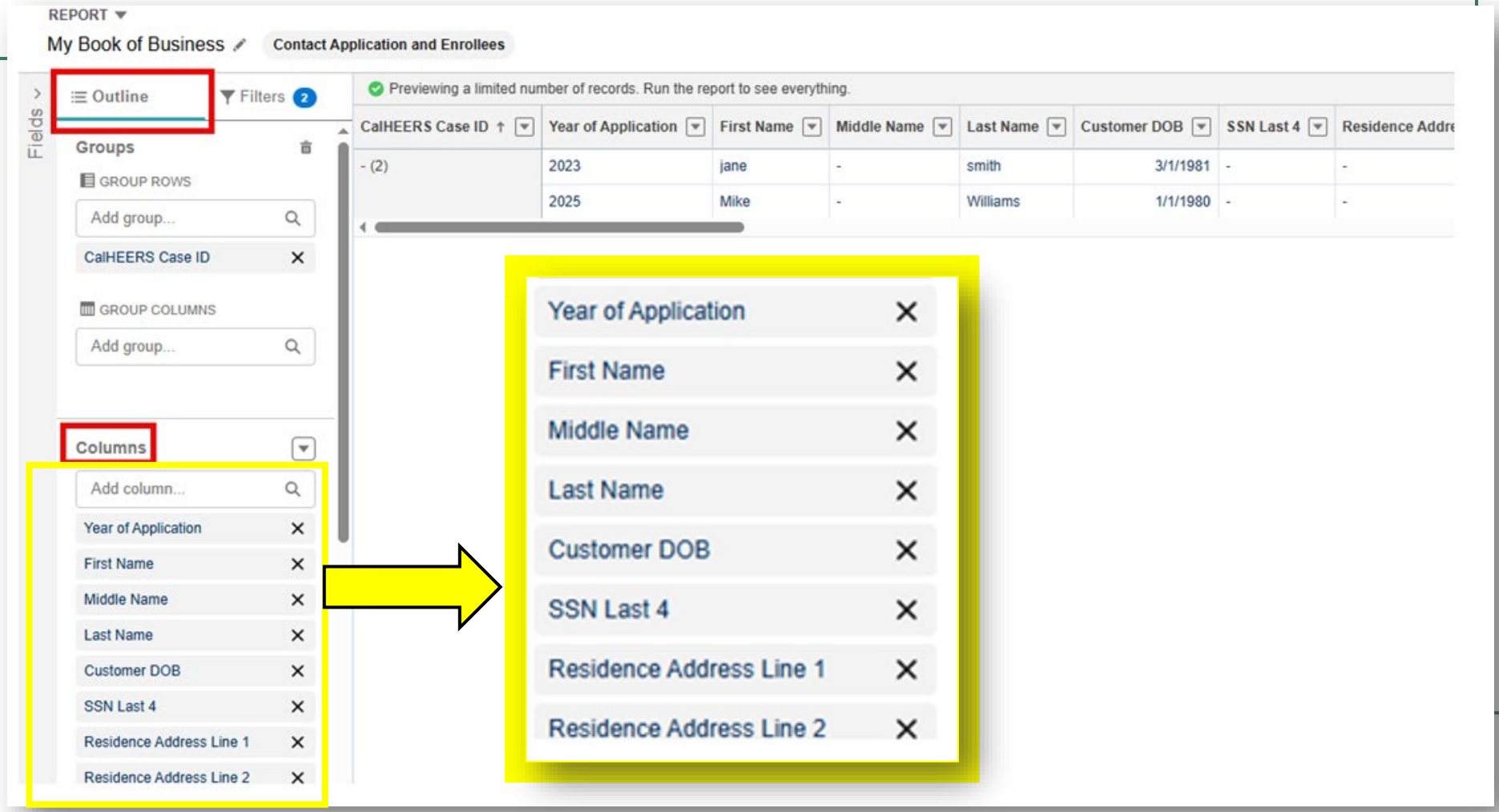
My Reports: Choose Your Fields

4 ➡

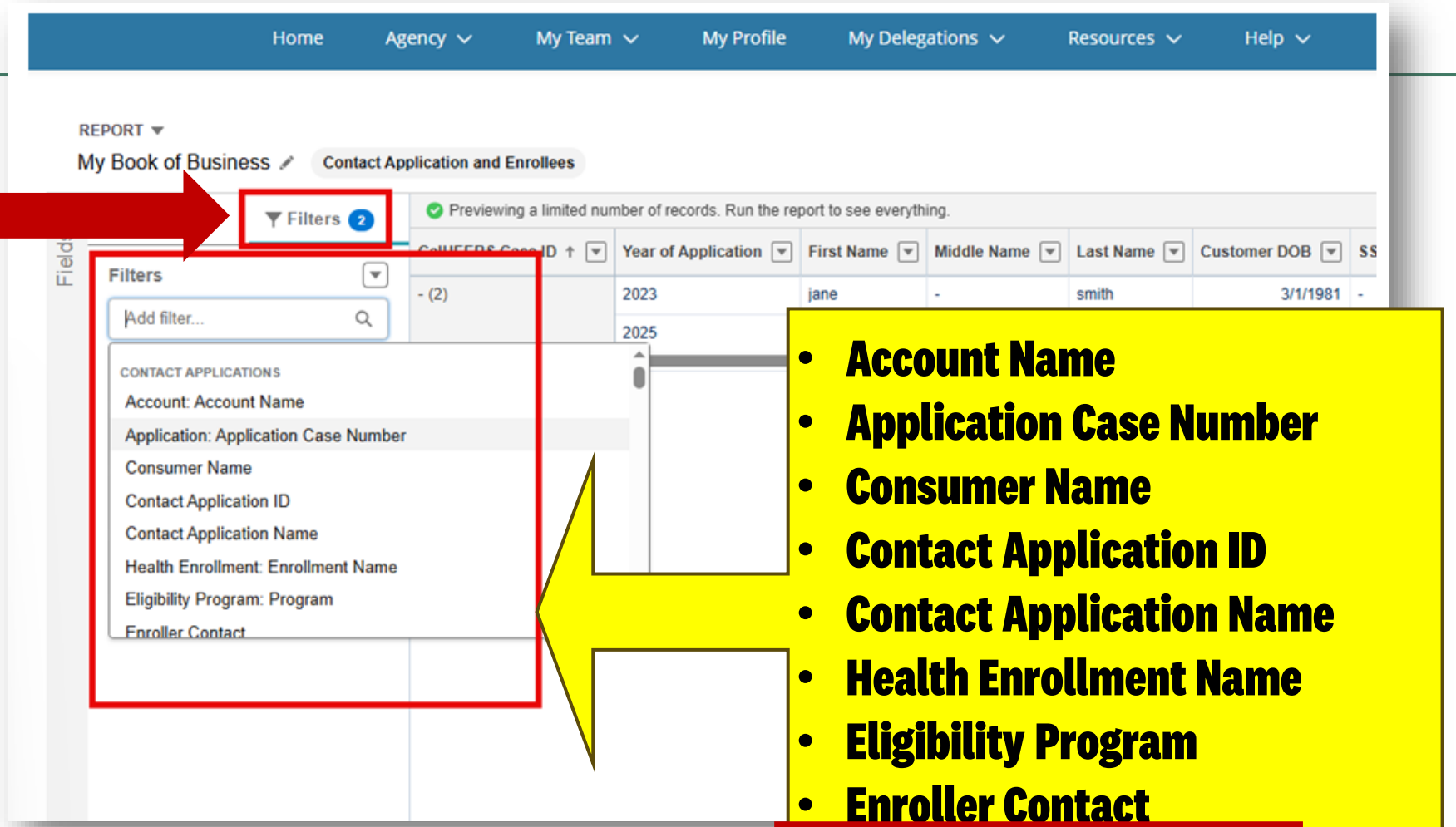
Select "Outline" display the list of columns.

5 ➡

Remove "Columns" here as needed.

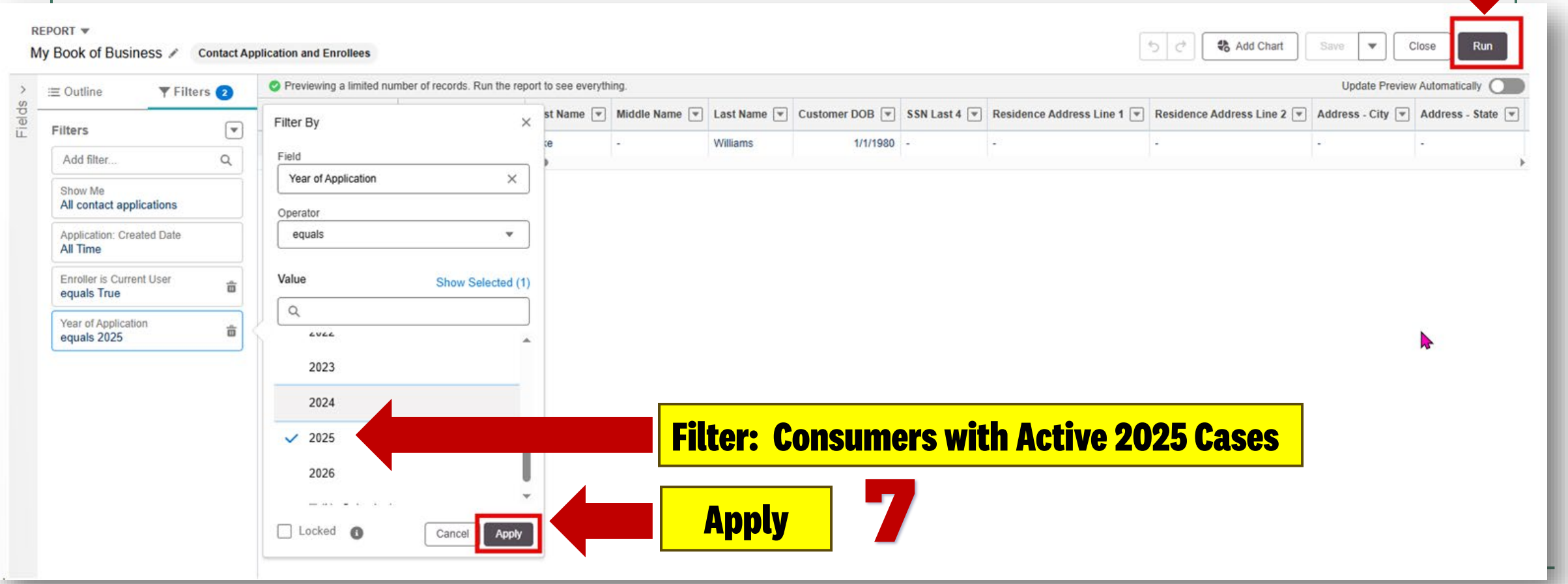


My Reports: Filter Your Content



Run Your Customized Report

8 Run

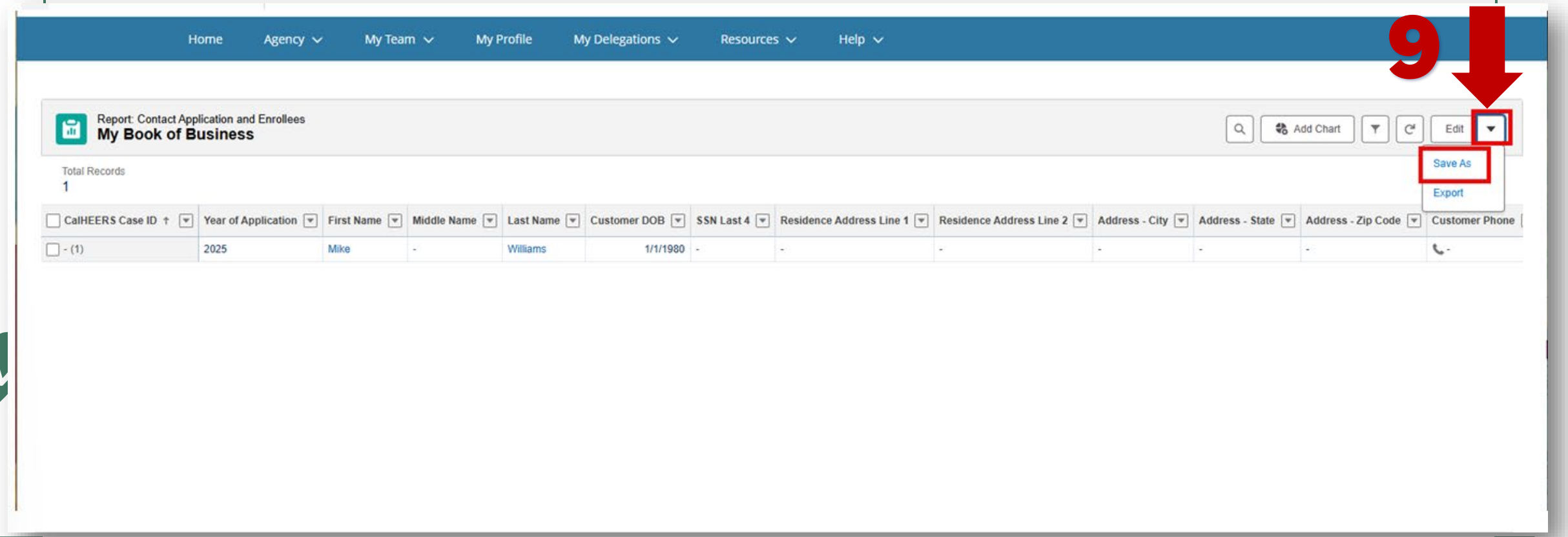


Filter: Consumers with Active 2025 Cases

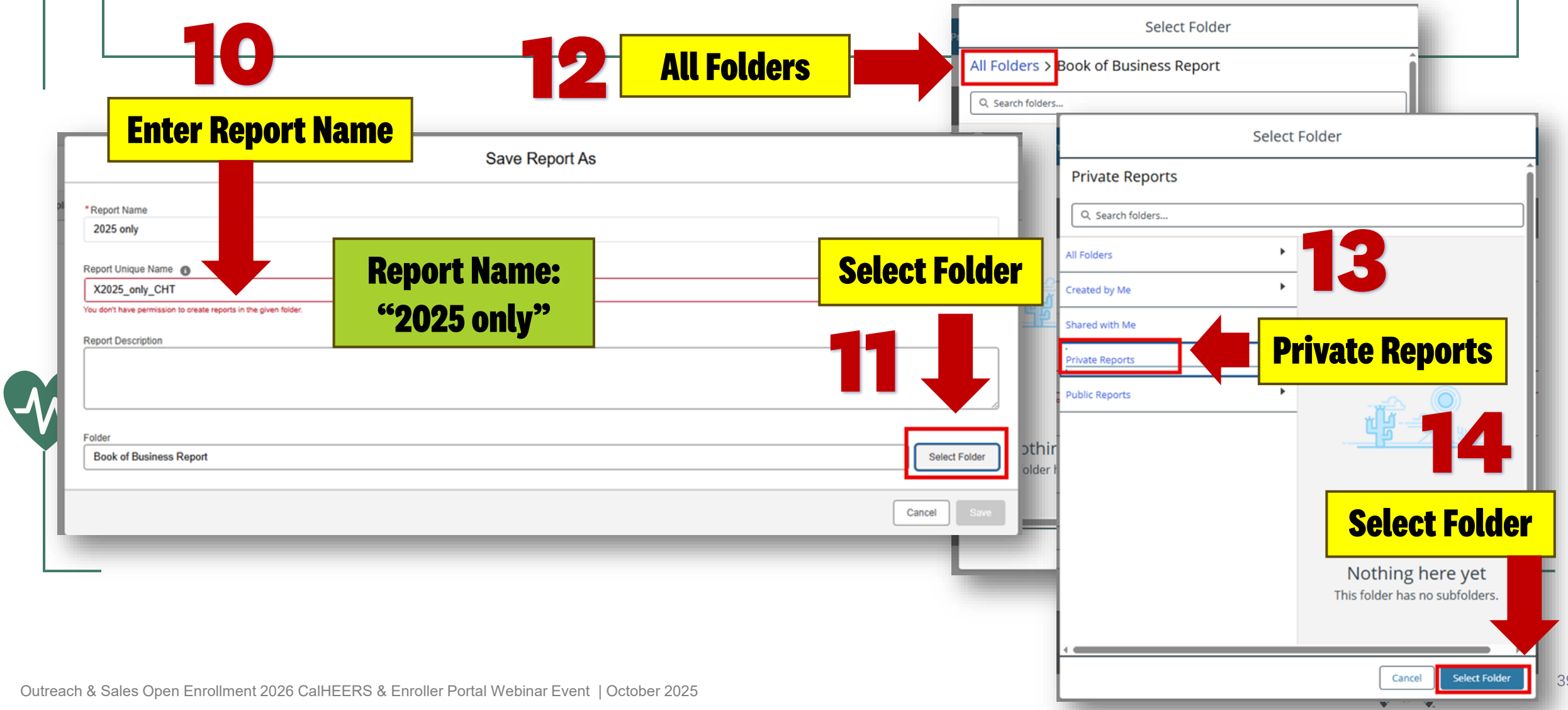
Apply 7

Save Your Customized Report 1 of 2

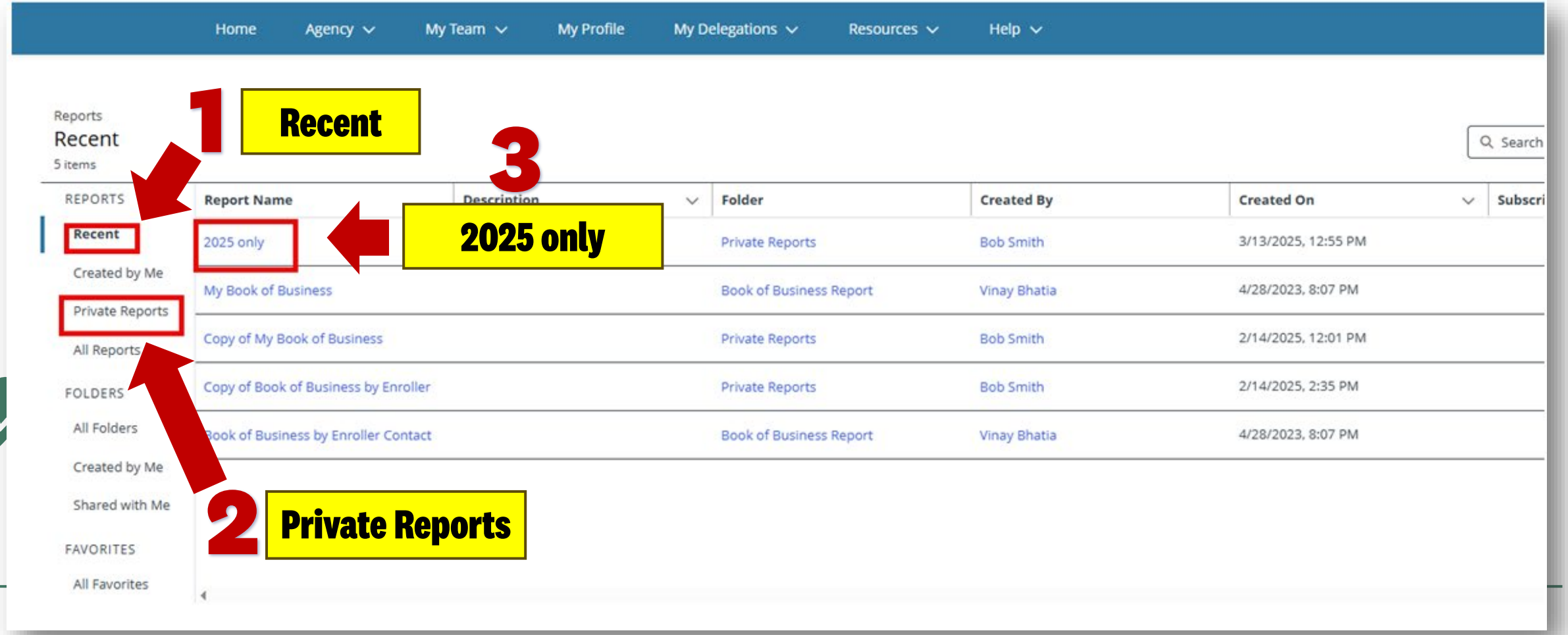
Save As



Save Your Customized Report 2 of 2



Access Your Saved Reports

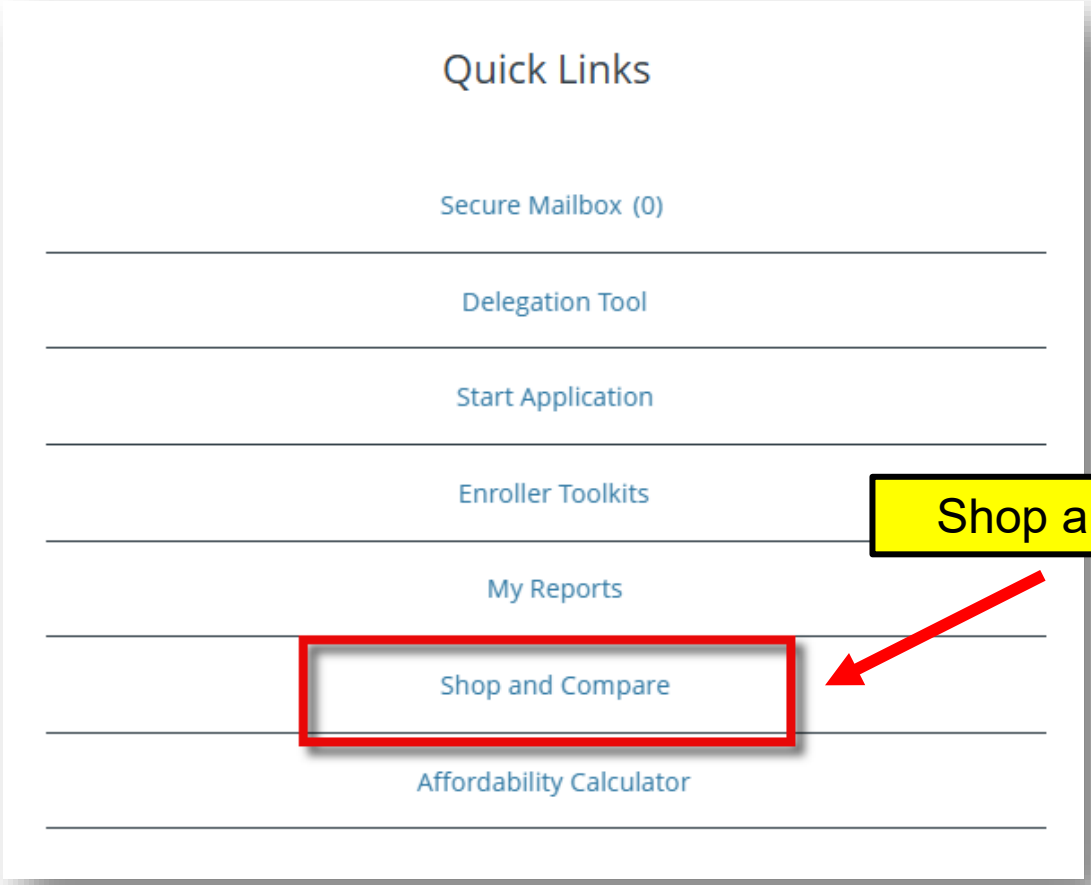


Shop and Compare: Enroller Portal Access

Access a logged in version of Shop and Compare through the Enroller Portal

Benefits of enroller portal Shop and Compare version:

- Quick access to Shop and Compare
- Shop and Compare Printable Page will populate delegated enroller contact information



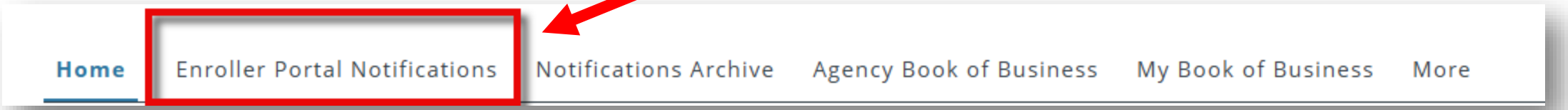
Shop and Compare: Delegated Enroller Information

Enroller Name
Enroller License/Certification Number
Enroller Phone Number
Enroller Email Address

Communications: Enroller Portal

Covered California may communicate via messaging within the Enroller Portal.

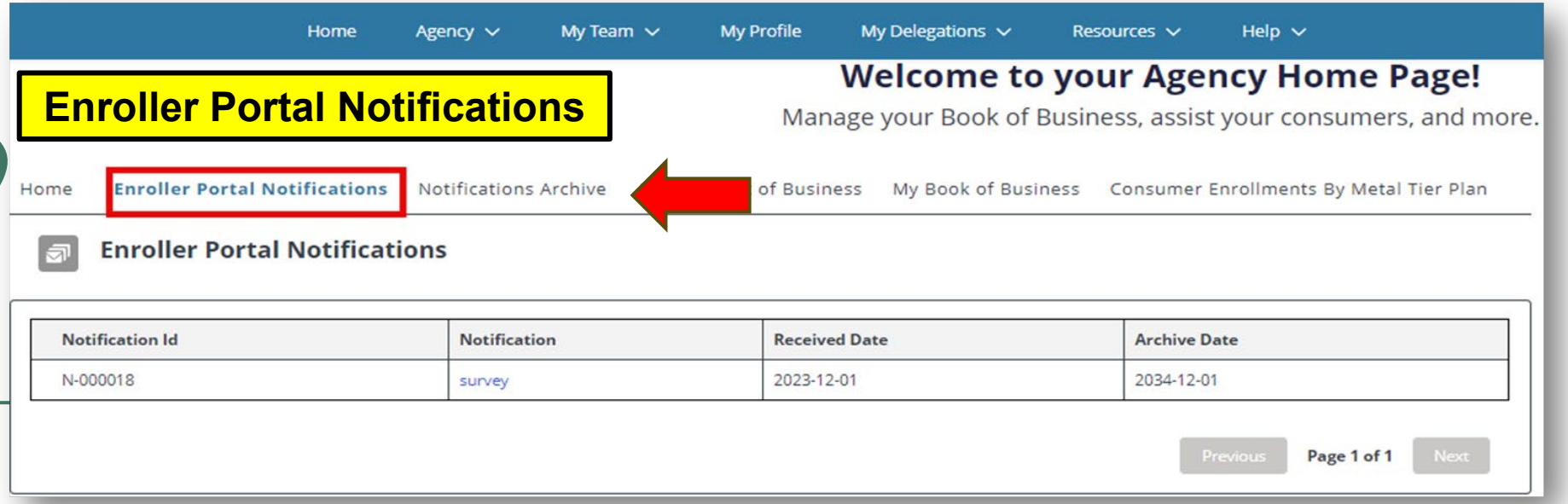
Enroller Portal Notifications



Bell Notifications

Enroller Portal Notifications

Clicking the **Enroller Portal Notification** tab displays the Agency and Entity users' active notifications sent by Outreach and Sales. The most recent notification displays at the top of the list.



Check here daily for quick updates and reminders from Covered California Such as:

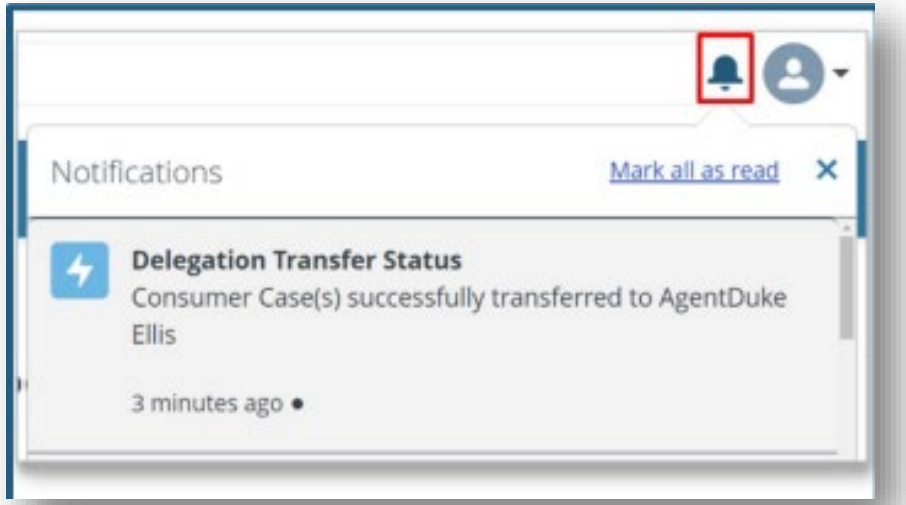
- **Outage reminders**
- **Urgent updates**
- **New release notes**
- **Event notifications**

Bell Notifications

Bell notifications populate in the top right corner of your Enroller Portal for specific transactions

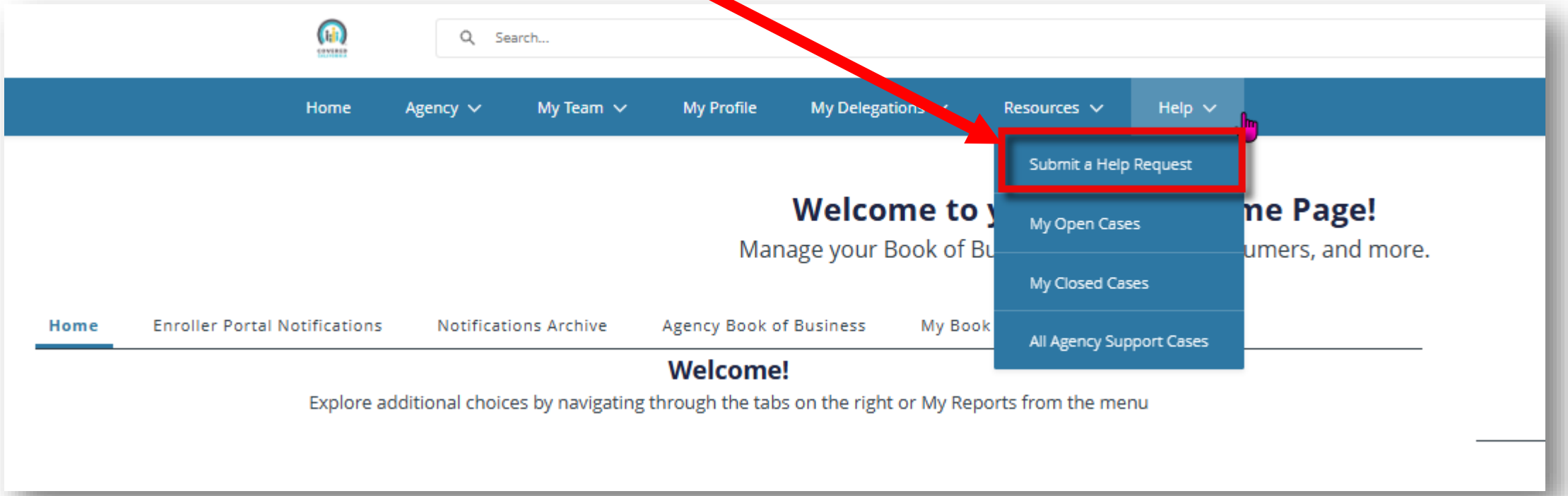
Including:

- ✓ **Pending Delegations**
- ✓ **Delegation Transfer Status**
- ✓ **Error Messaging**
- ✓**System Outage**
- ✓**Holiday Closures**
- ✓**Custom Messaging**



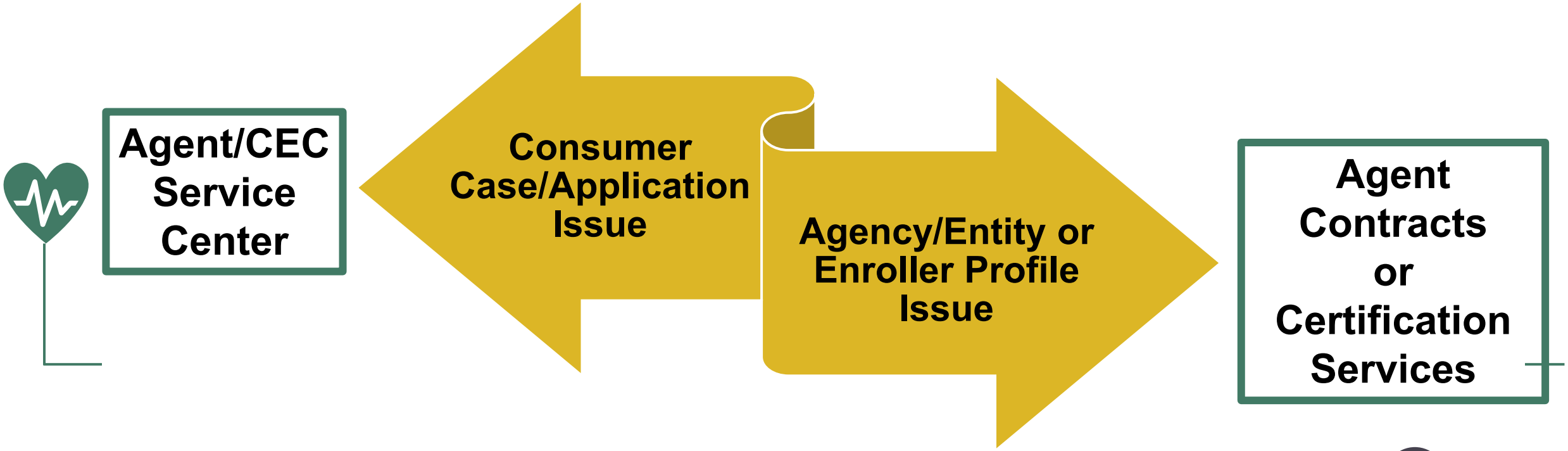
Help Request Feature

Enrollers can **submit a Help Request** in their portal any time!



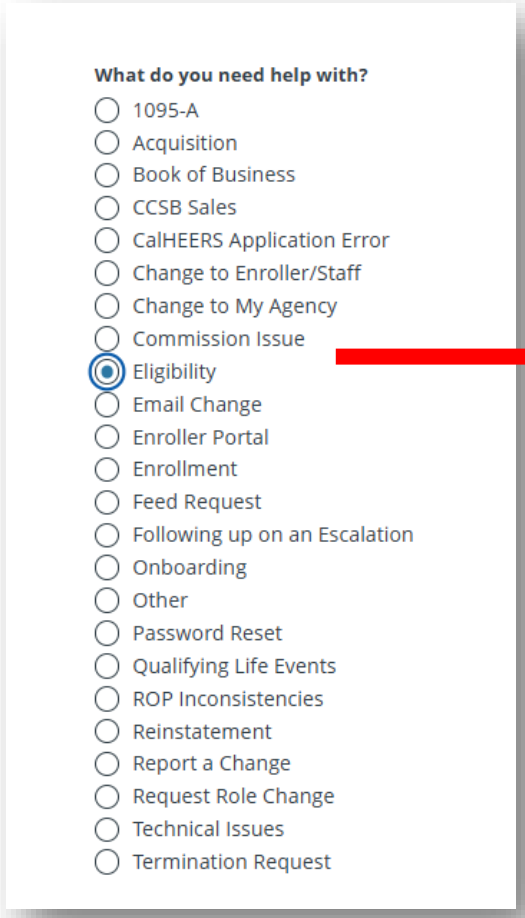
Best Practices for Submitting a Help Request

Choose the appropriate **category** to ensure cases will be **routed to the correct team** for processing.



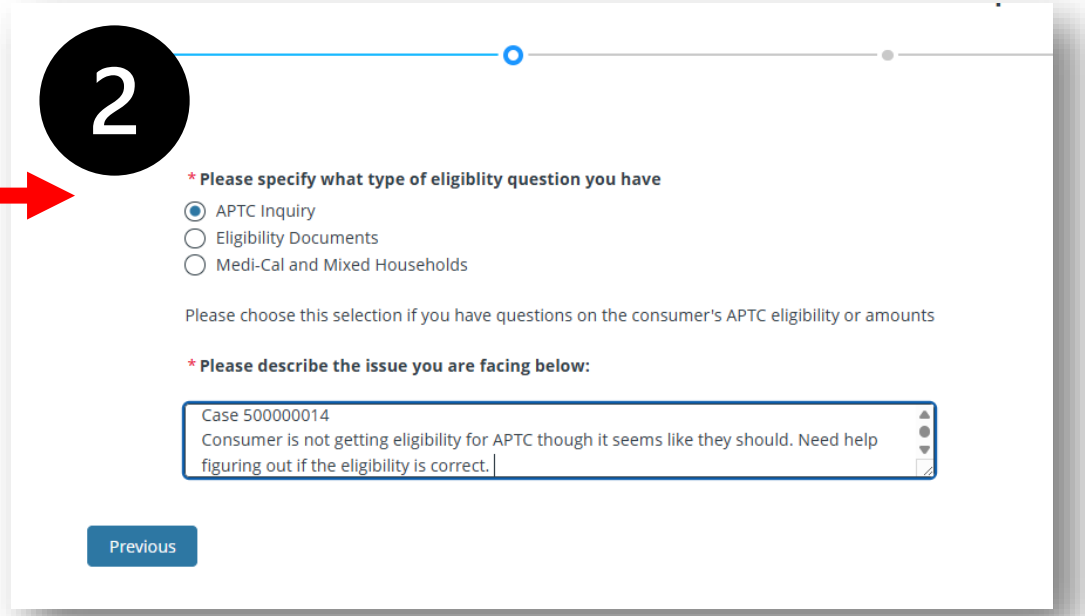
Creating a Help Request

1



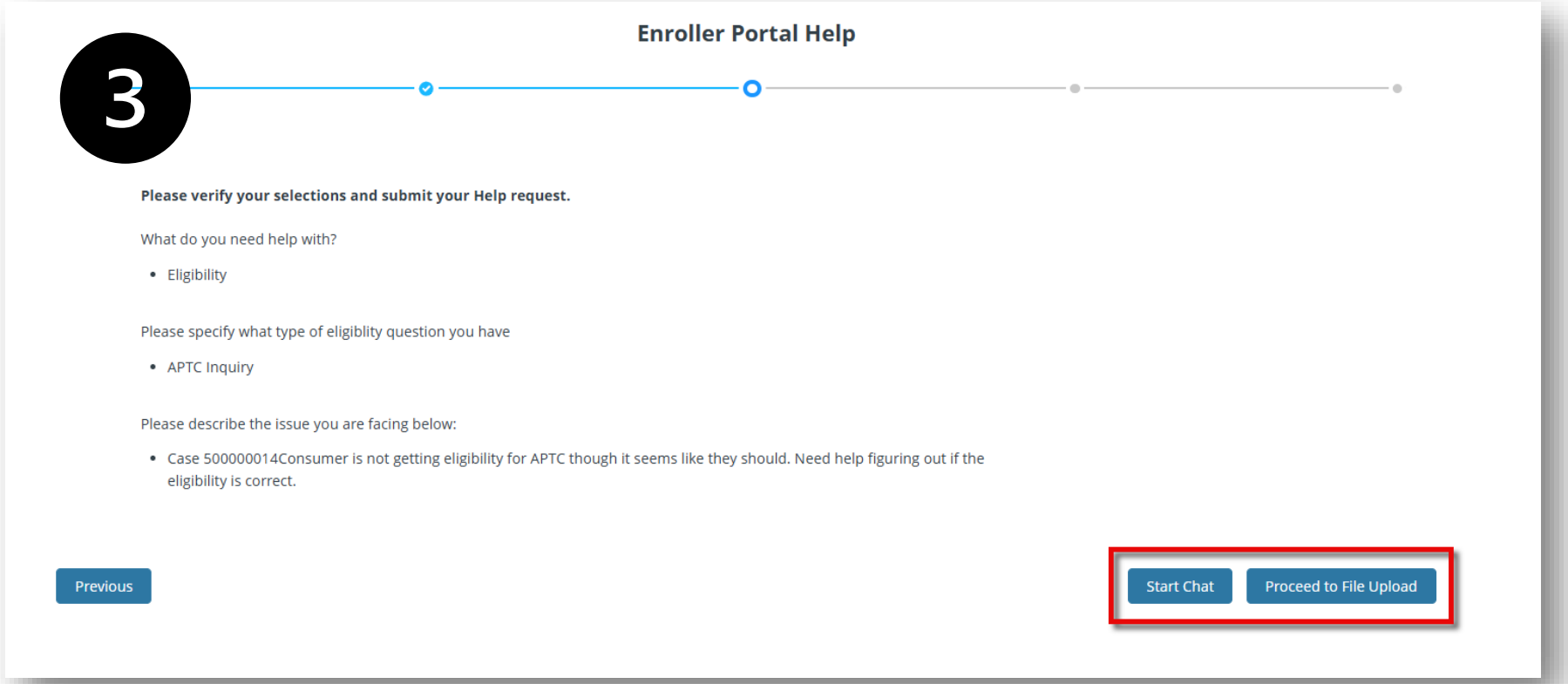
Step 1: Select a **topic** that best describes the issue
Step 2: Provide additional **information** and **details**

2

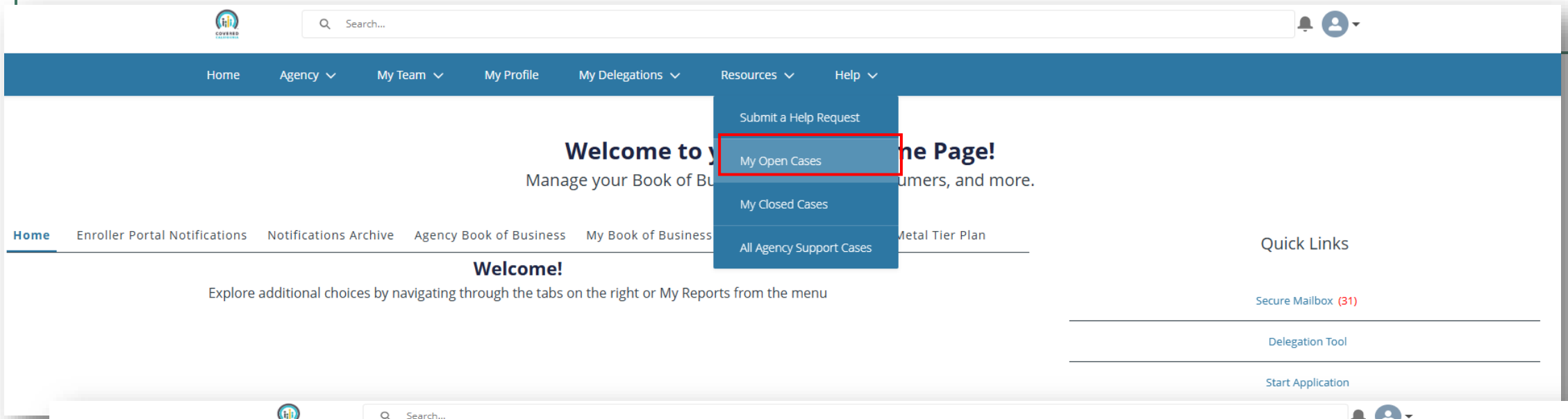


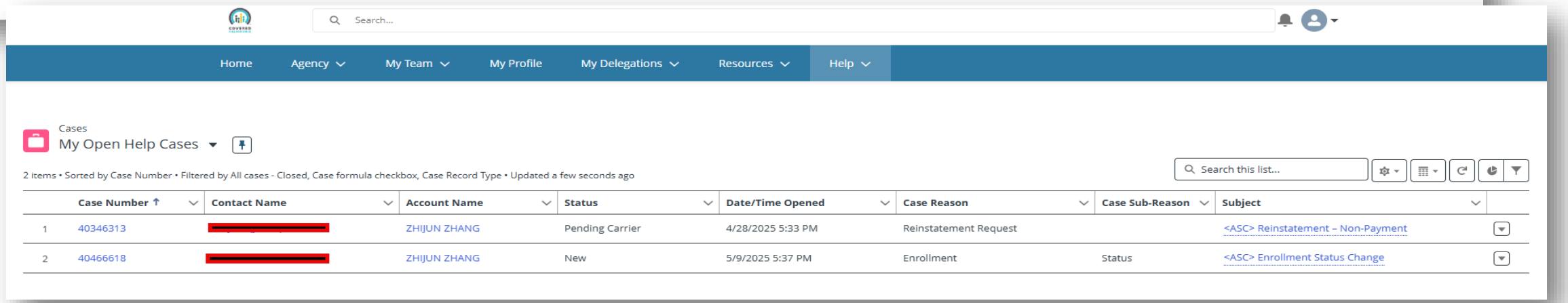
Help Request: Review and Submit

Step 3:
Review and **submit**.
If applicable, **upload** files



Help Request: Access Open Cases





Enroller Portal Demo

Quick Guide:

Enroller Portal Overview

CalHEERS

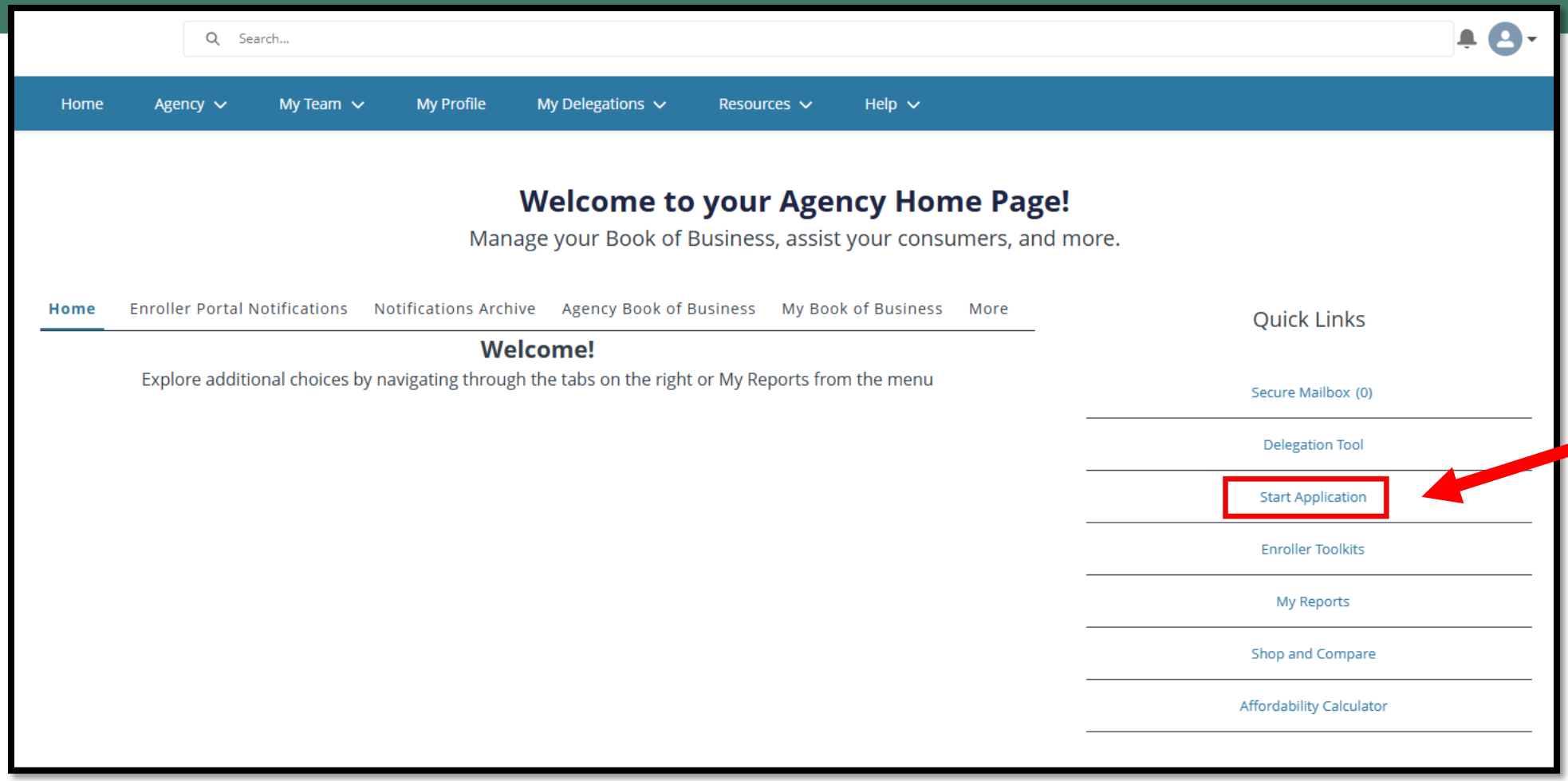
Single Streamlined Application

Demo Application

Job Aid:

Single Streamlined Application Job Aid for Enrollers

Start New Application



Welcome Page!

Important Dates section

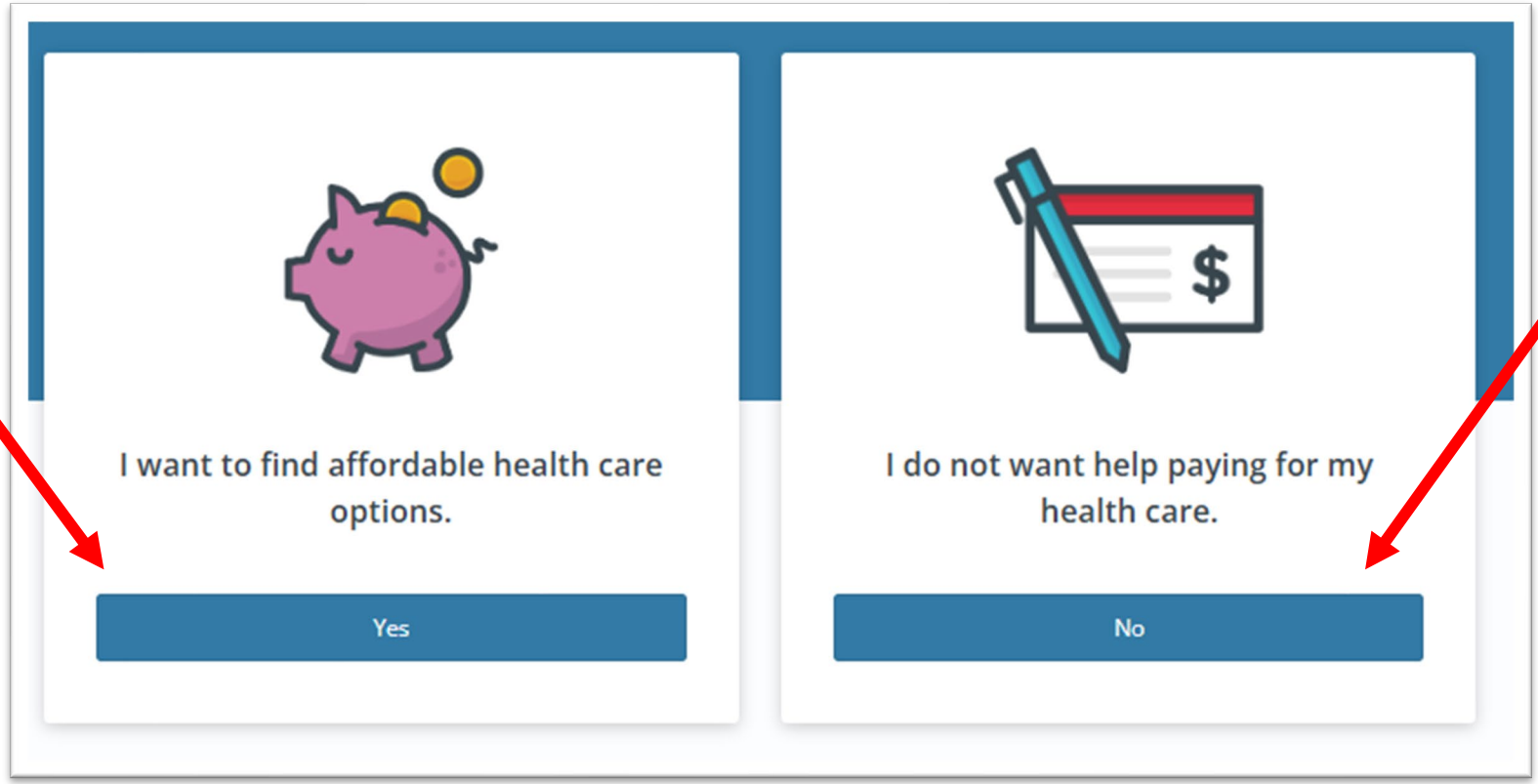
Begin a new application here

Financial Help Options

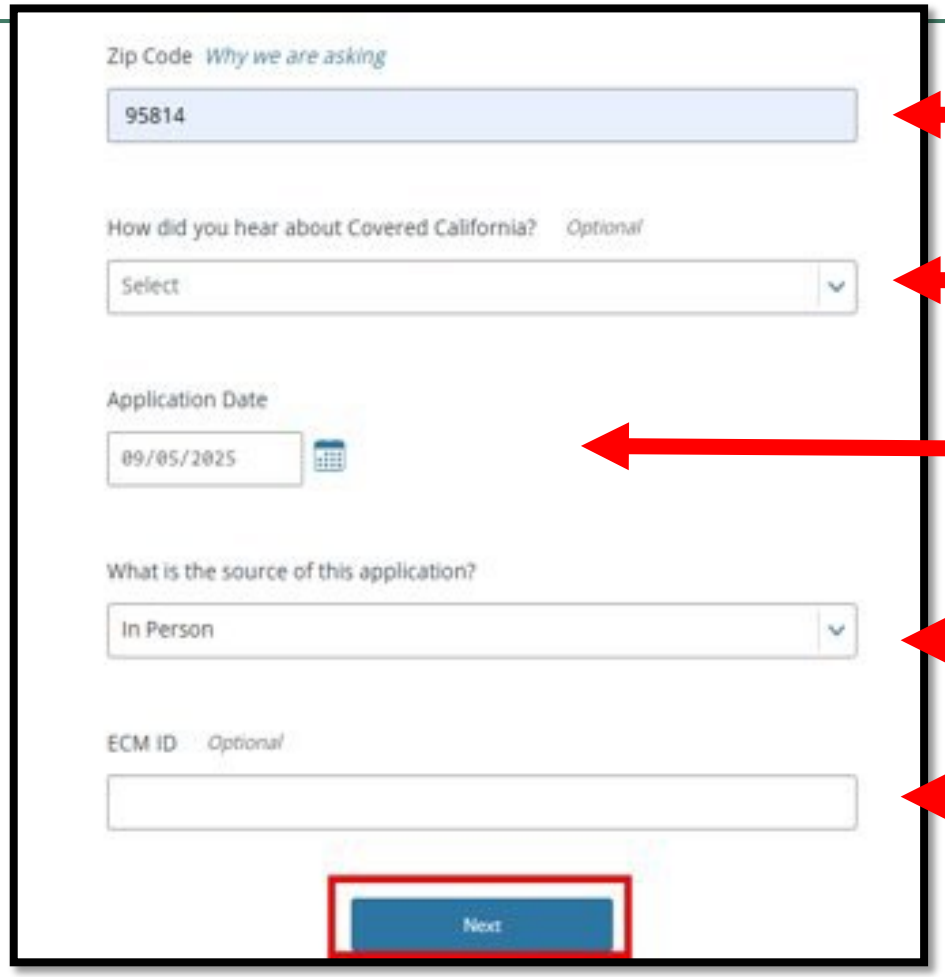
Financial Help section provides applicants the option to apply and determine eligibility for financial support.

Subsidized Application

Unsubsidized Application



Introduction Section



ZIP Code – ensures consumer lives in California

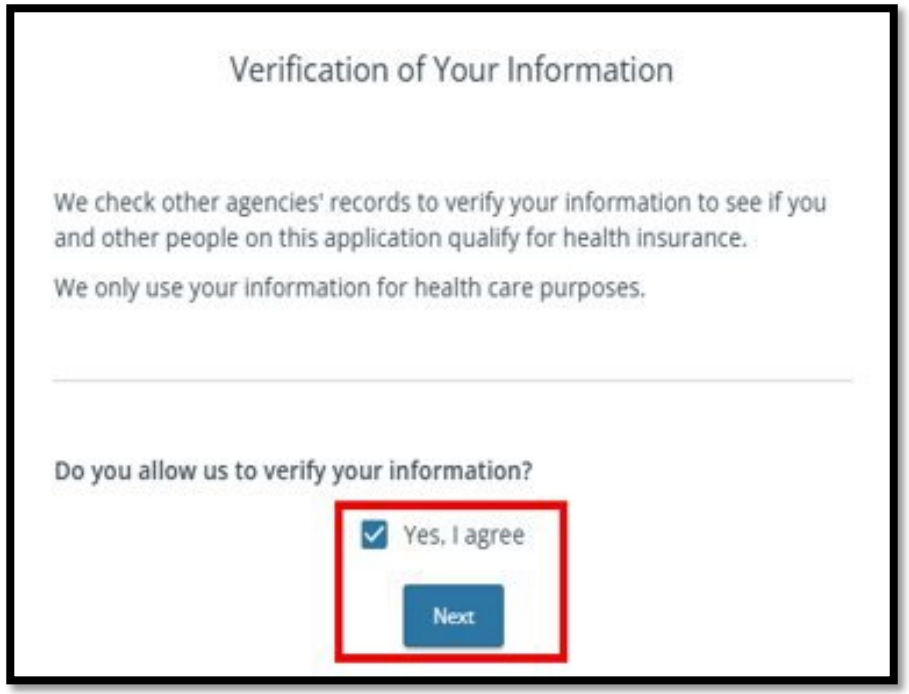
Optional: How did you hear about Covered California

Application Date

Source of application drop down menu

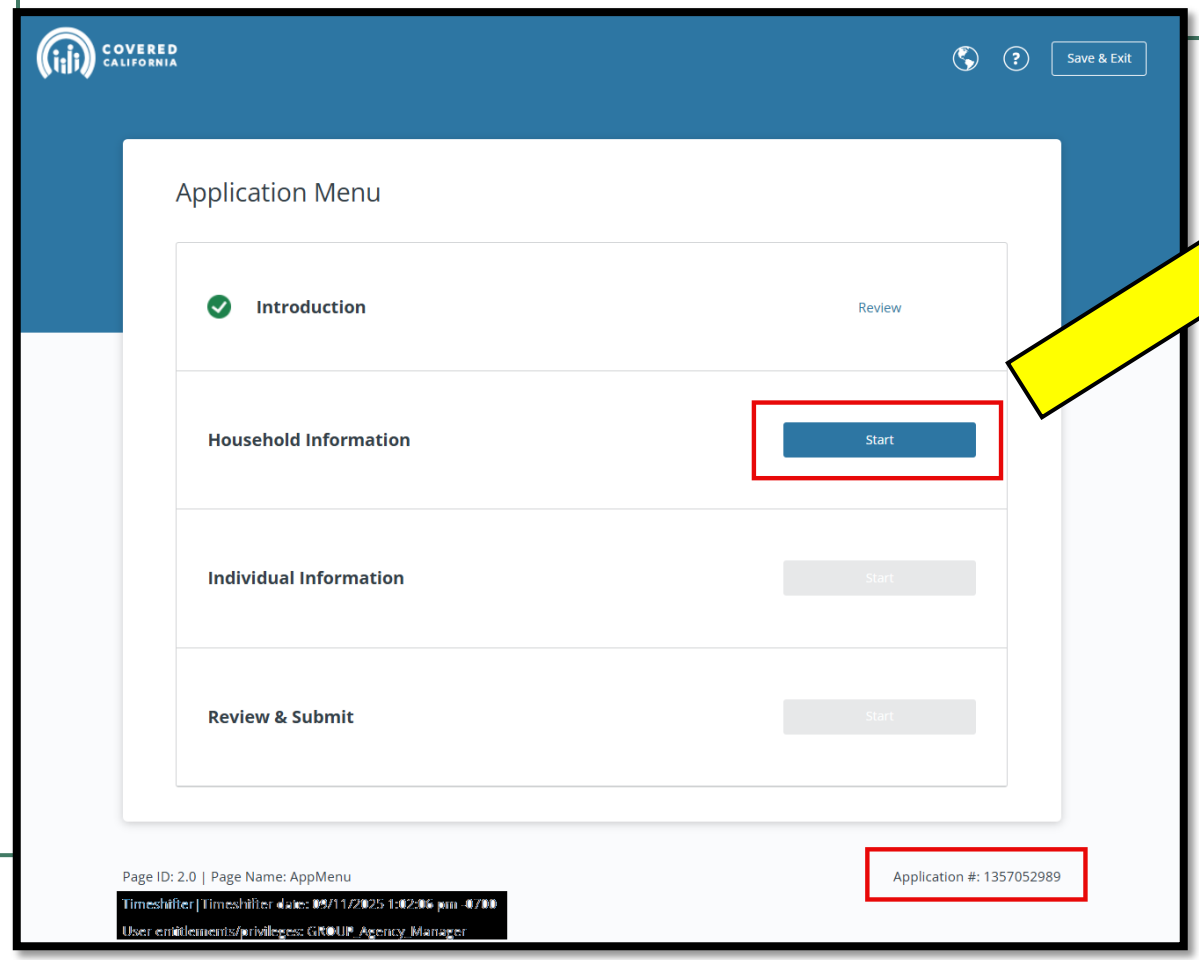
ECM ID – **Internal CCA Staff field only**

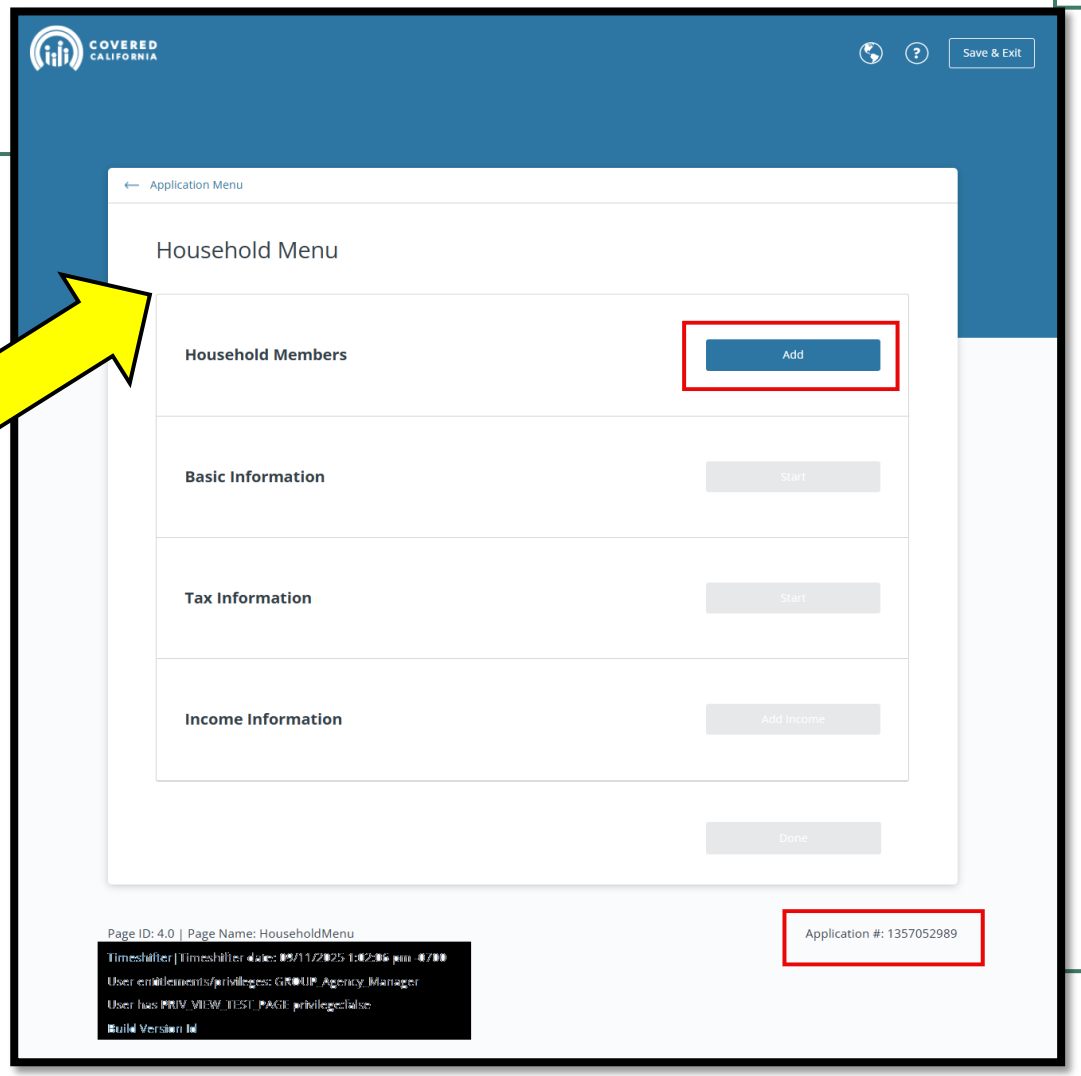
Verification of Your Information



Consumer must agree to allow Covered California to use electronic data sources in order to determine if they are eligible for Covered California Programs.

Application Menu





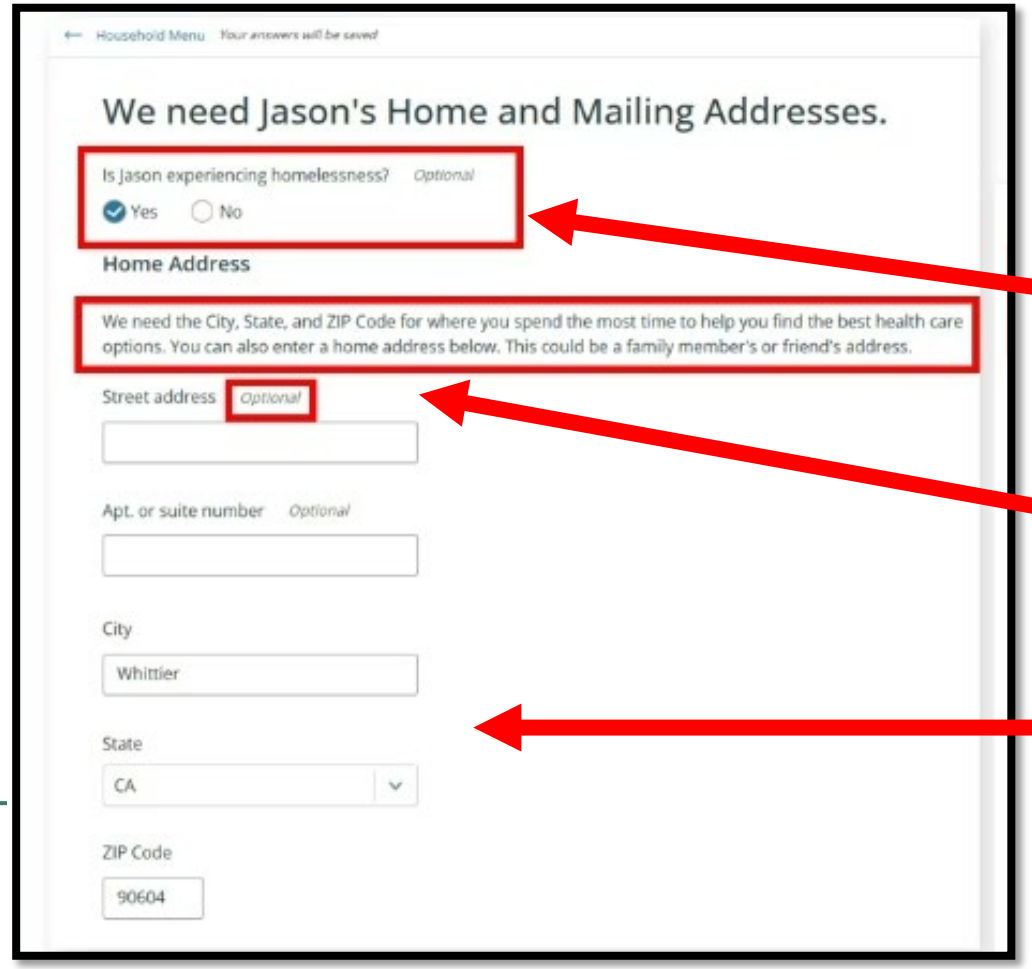
Add Household Member: Additional Questions

- Gender Question
- Marital Status

Optional questions:

- Phone: Home, Cell or Work
- Email
- Language: Written and spoken
- Alternative Formats
- Race
- Optional Sex and Gender questions

Primary Contact: NEW Home / Mailing Address Guidance for Unhoused Consumers



New question added in the home address section:

- **"Is (consumer name) experiencing homelessness?"**

For consumers answering "**yes**" the street address fields are now optional.

Consumers are asked to provide the **City, State**, and **ZIP Code** where they spend the most time.

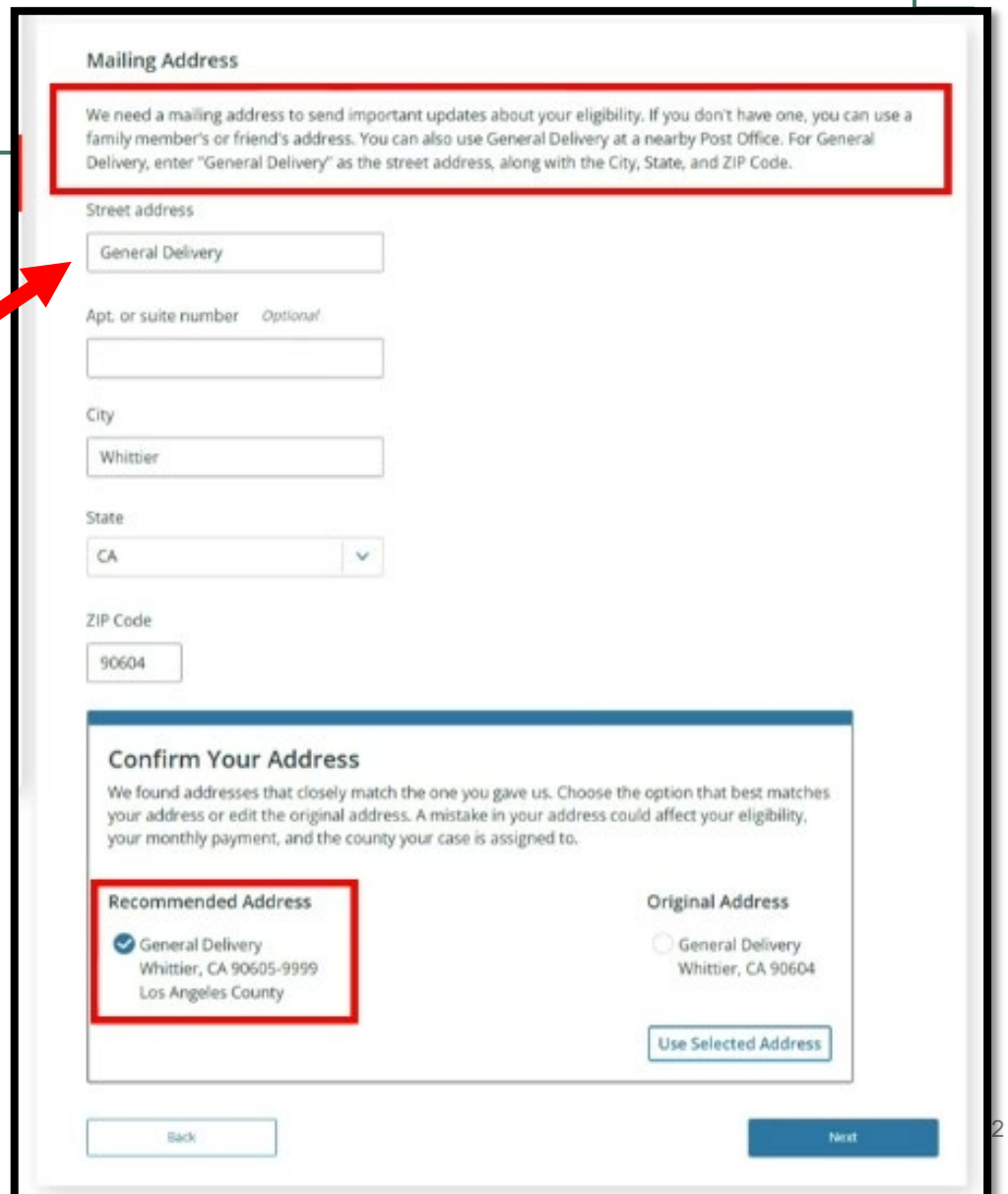
Mailing Address Guidance for Unhoused Consumers

Users will be prompted to provide a mailing address with instructions for using **General Delivery**

Enter Mailing Address as:

- General Delivery
- City
- State
- ZIP Code

Enrollers must **never** use an Agent/Entity business address in place of a consumer's mailing address.



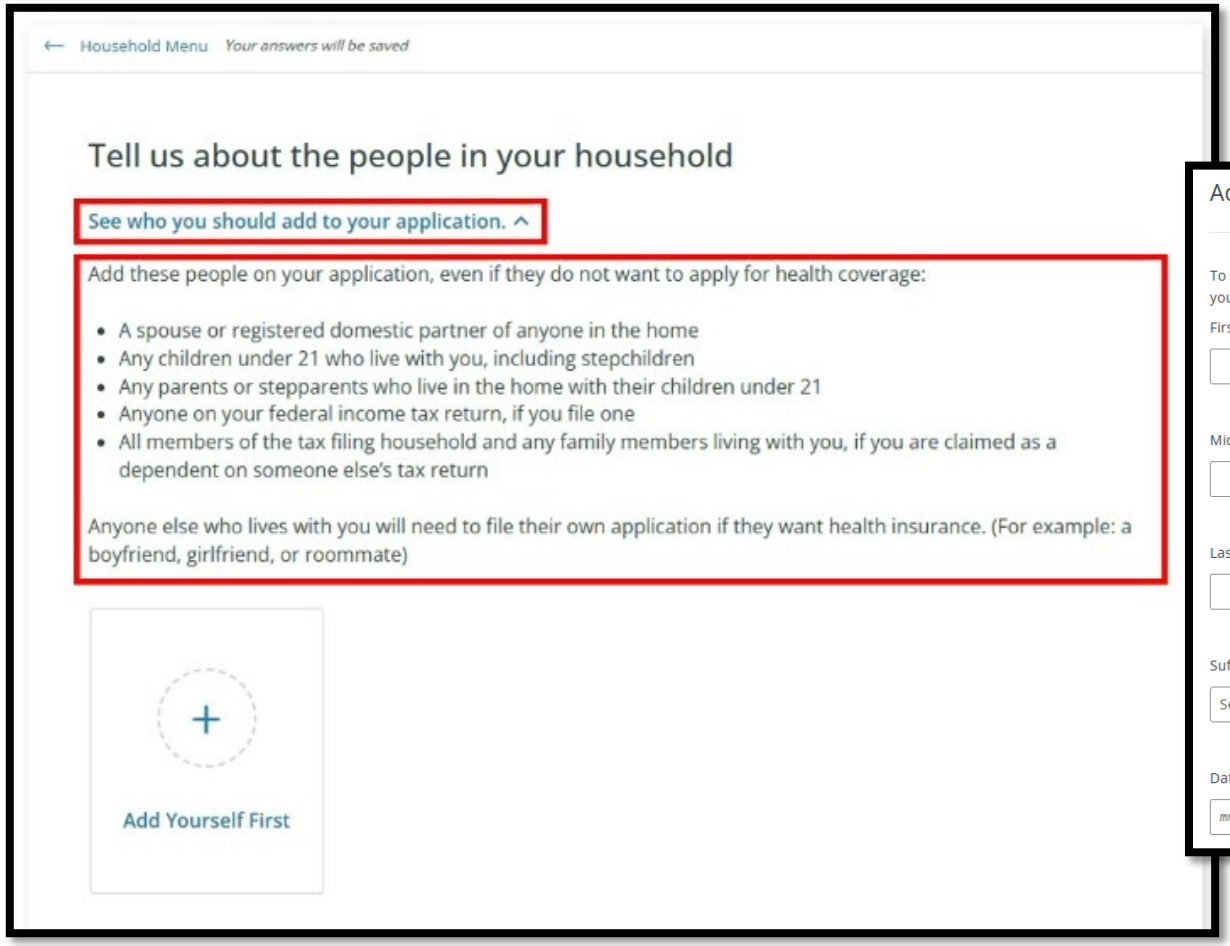
Household Menu: Add New Member

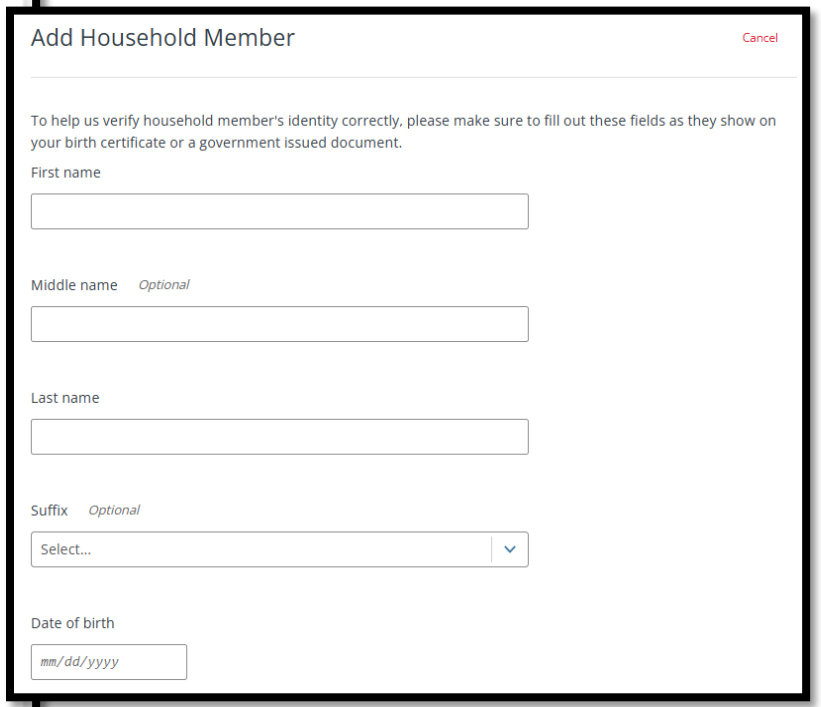
- After the optional questions you will **“Add”** additional household members.
- If there are no other household members you can select the **“Done”.**

Household Menu: Updated Guidance

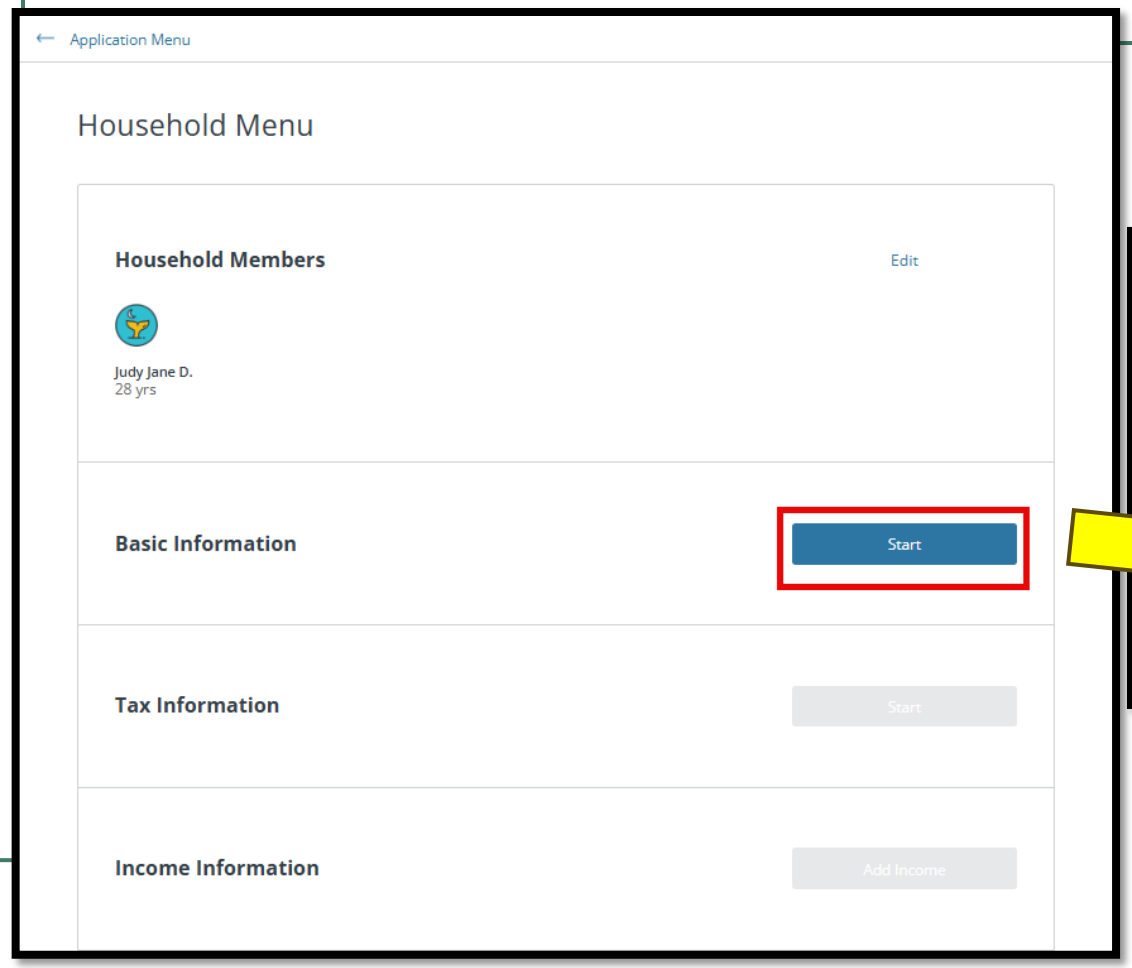
Additional Guidance has been added to the "**Household Section**"

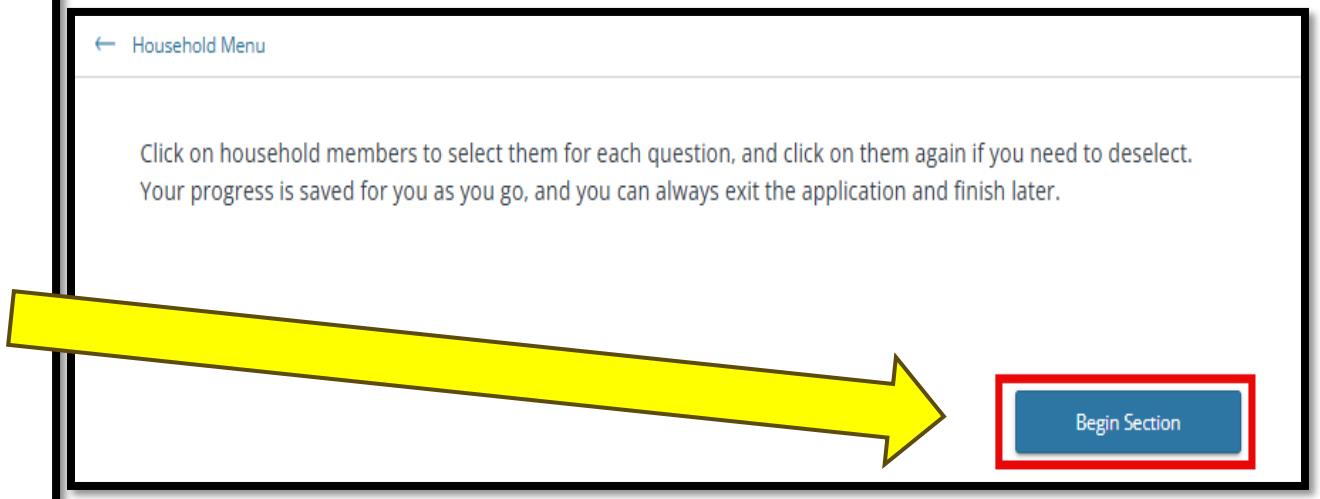
to provide clearer context on who should be included in the application.



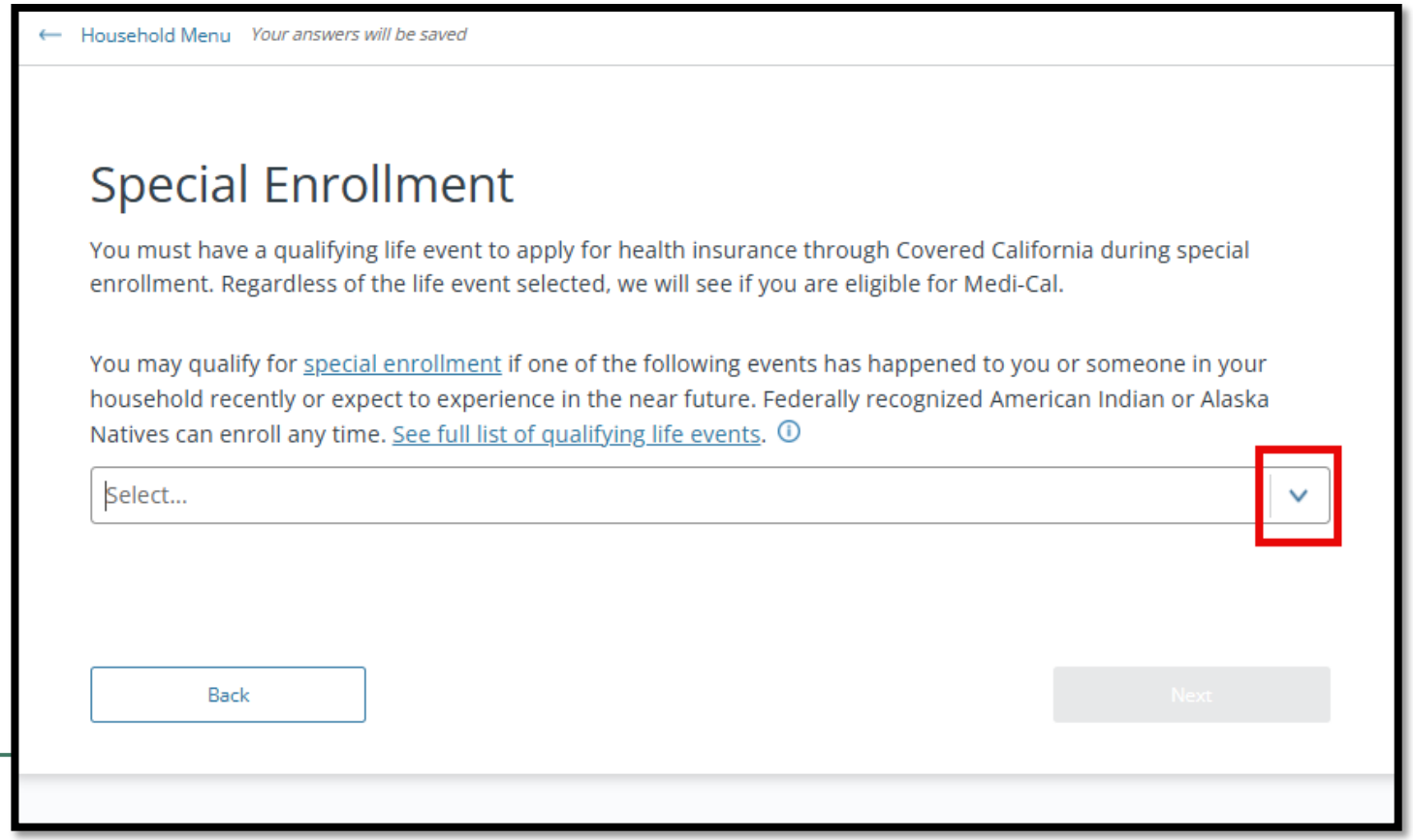


Household Menu: Basic Information





Special Enrollment Period: Select QLE



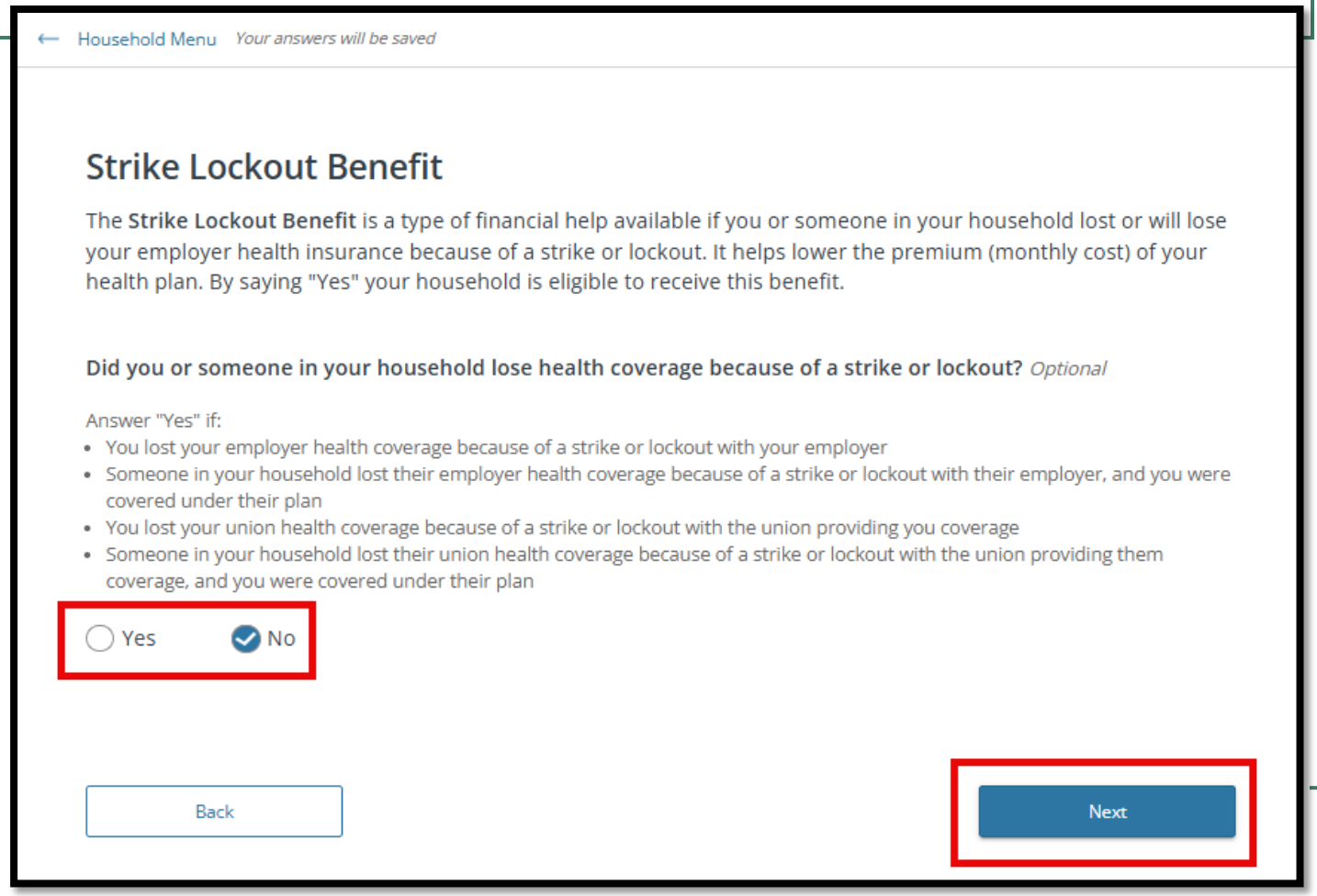
Note:
While a Qualifying Life Event is not required to enroll during Open Enrollment, Consumers that do have a qualifying life event may be eligible to enroll with an earlier effective date

For more information:
Major Life Events

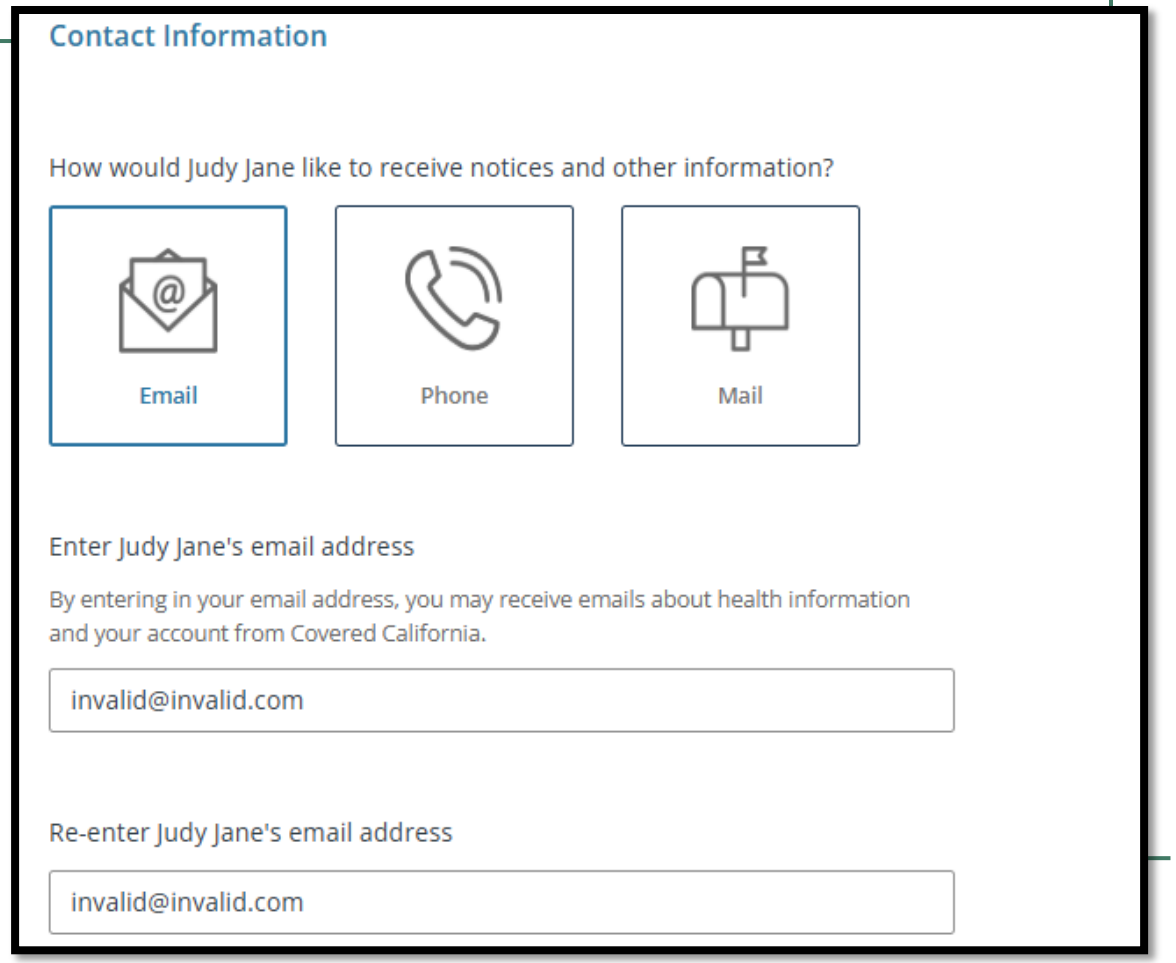
Special Enrollment Period: Callout

CalHEERS provides subsidy savings for consumers affected by an approved **strike, lockout, or labor dispute**.

Consumers who attest to a strike lockout receive the same premium assistance and Cost-Sharing Reductions (CSR) as a consumer with a household income of 138.1% of the Federal Poverty Level (FPL).

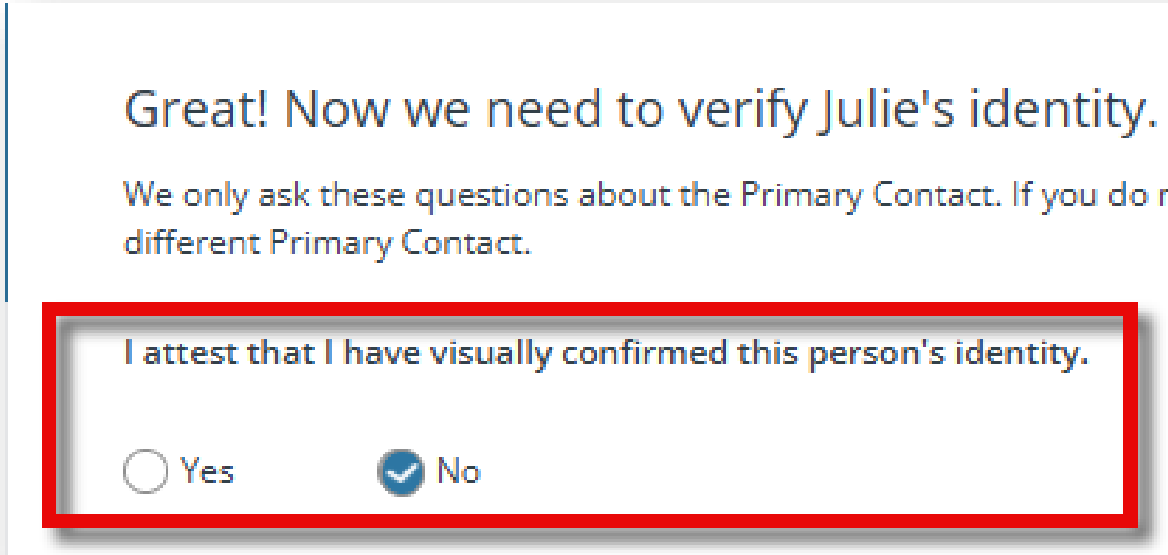


Household Menu: Primary Contact



Primary Contact: Identity Verification - Remote Identity Proofing (RIDP) Option #1 (best results)

Can automatically verify identity with databases without further actions.



"I attest that I have visually confirmed this person's identity."

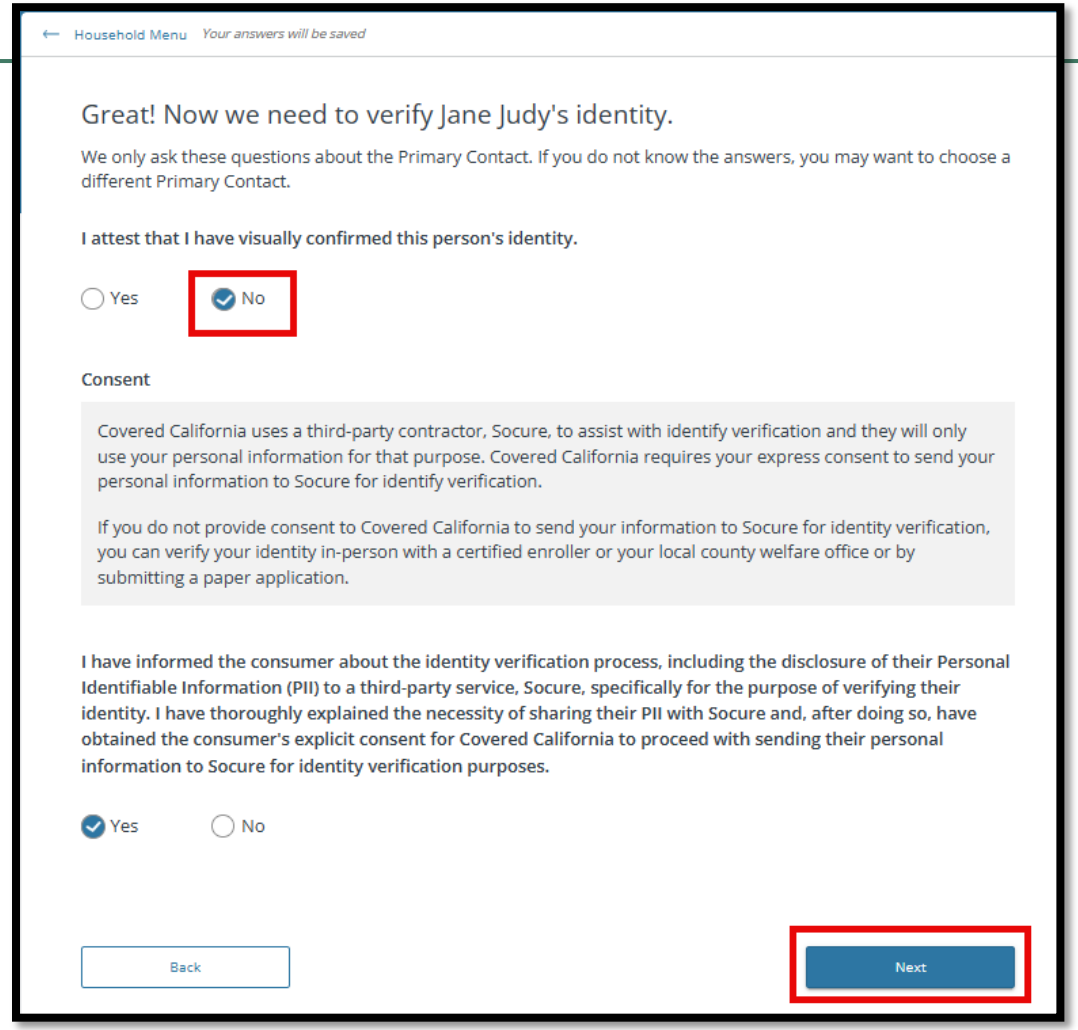
- Answering **"No"** routes to **"Remote Identity Proofing"**

Background on Remote Identity Proofing (RIDP)

- RIDP allows the applicant to use the Federal Remote Identity Proofing (RIDP) services over the phone to which CalHEERS connects online; if assisting the applicant, the enroller must obtain the applicant's consent to access their identity information over RIDP.
- CalHEERS implements the Socure RIDP service to perform identity verification in compliance with Minimum Acceptable Risk Standards for Exchanges (MARS-E).
- This will lead to an improvement to the success rate and reduction of applicants abandoning an application.

Quick Guide: Remote Identity Proofing (RIDP)

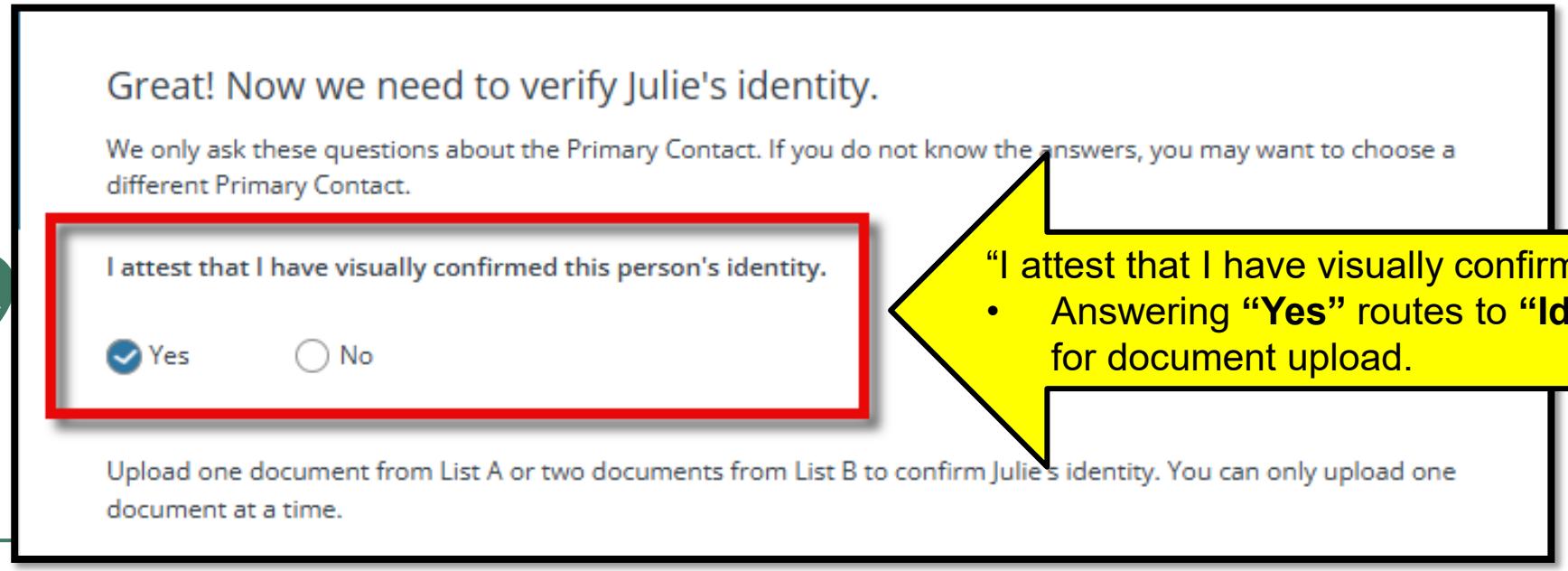
Primary Contact: Remote Identity Proofing (RIDP)



- Selecting '**No**' will prompt for consent to third party contractor who will assist with identifying verification.
- It is important that the ***Name*** spelling and ***DOB*** are entered accurately for a successful result on the first step.

Primary Contact: Identity Verification Identity Proofing (IDP) Option #2

User is attesting they have visually verified identification of the person in front of them and uploads the identity document provided.

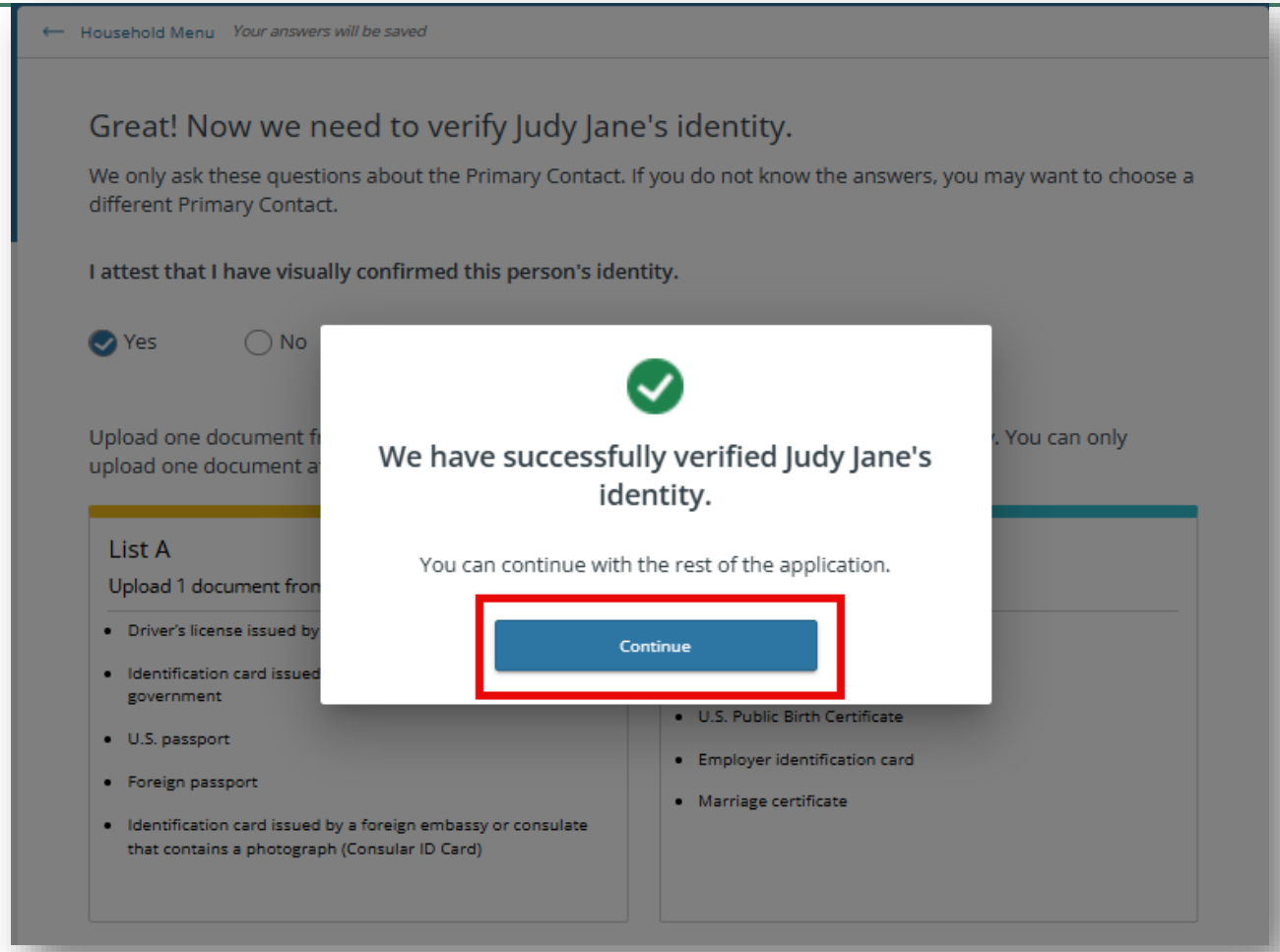


"I attest that I have visually confirmed this person's identity."

- Answering **"Yes"** routes to **"Identity Proofing"** process for document upload.

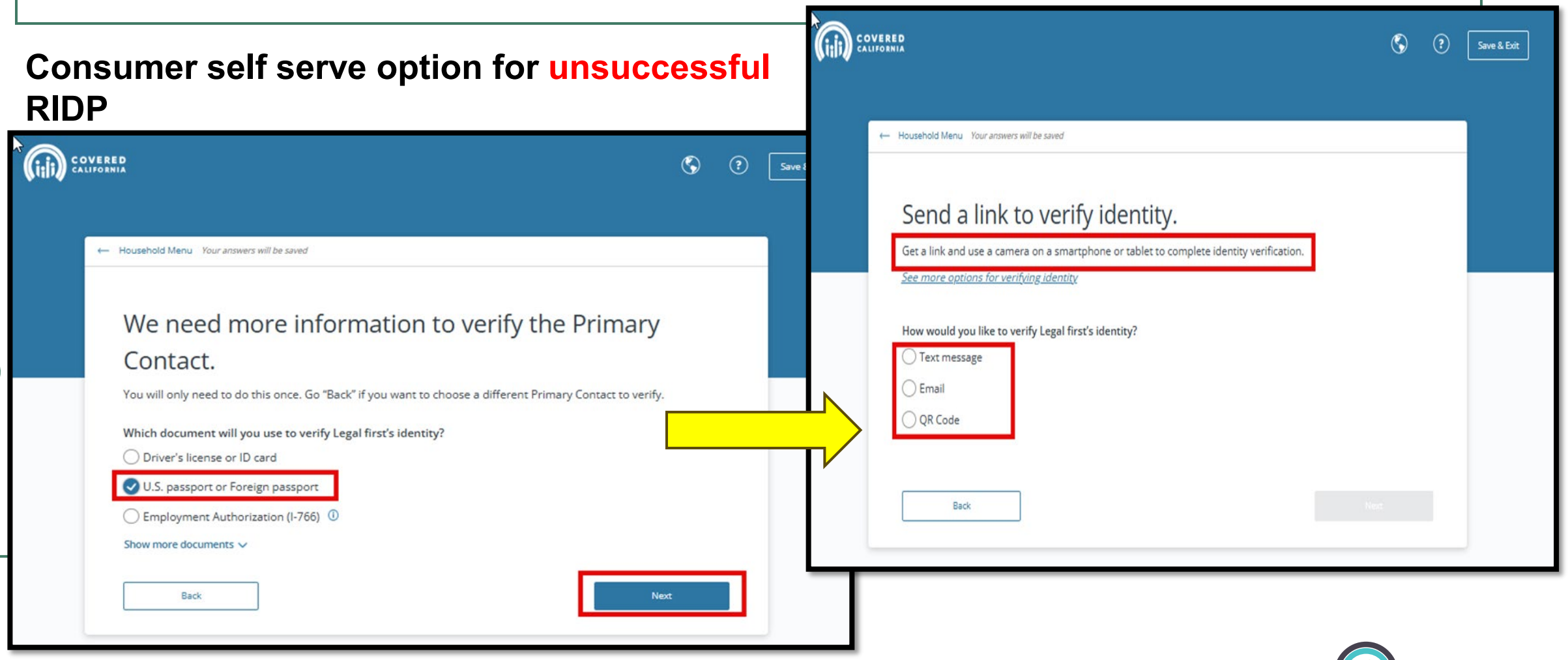
Quick Guide: Identity Acceptable Documents

Primary Contact: Visual Verification Identity Proofing (IDP) Option #2



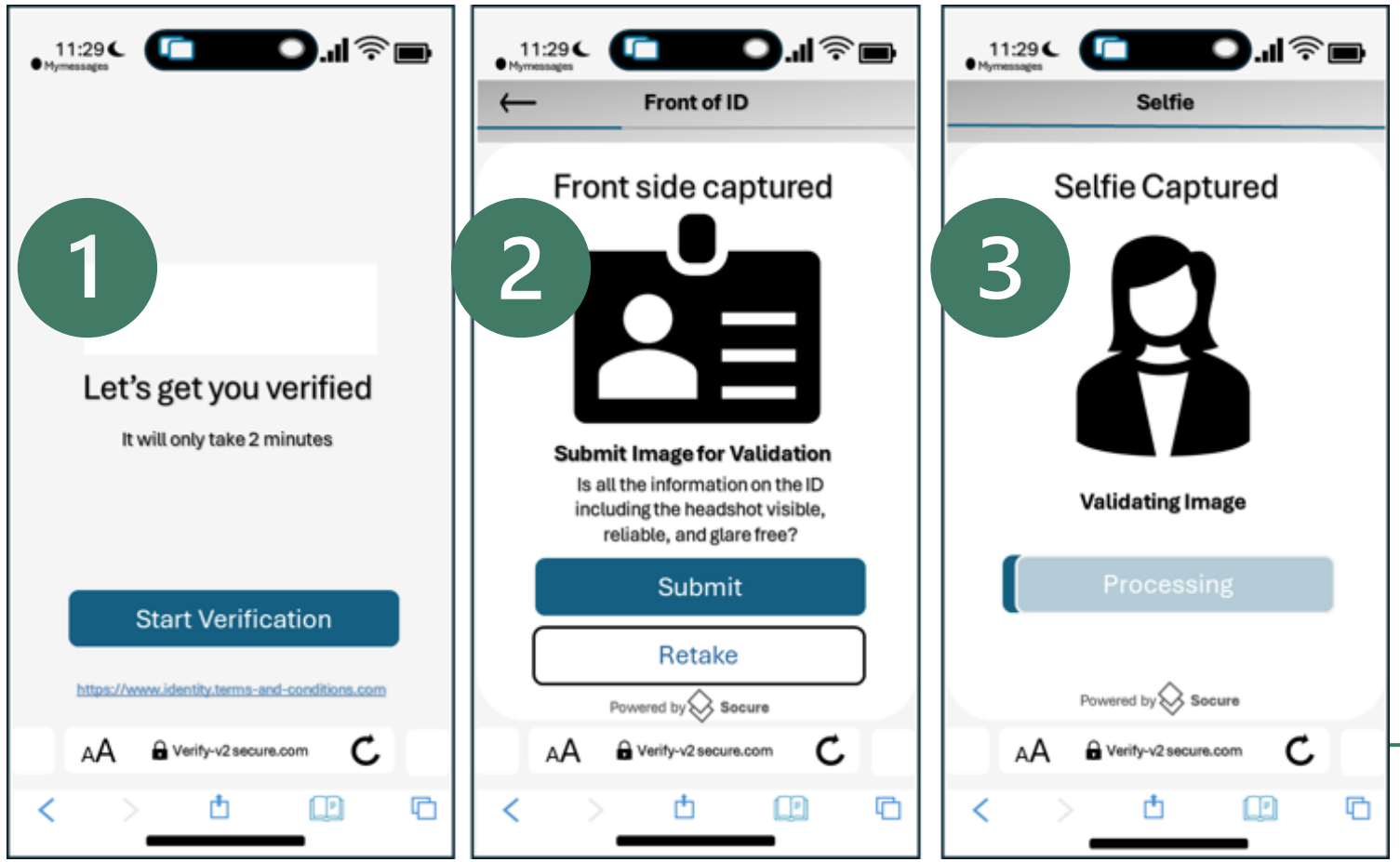
Primary Contact: Next steps of RIDP

Consumer self serve option for unsuccessful RIDP



Primary Contact: Identity Verification: Self Serve, Option #3

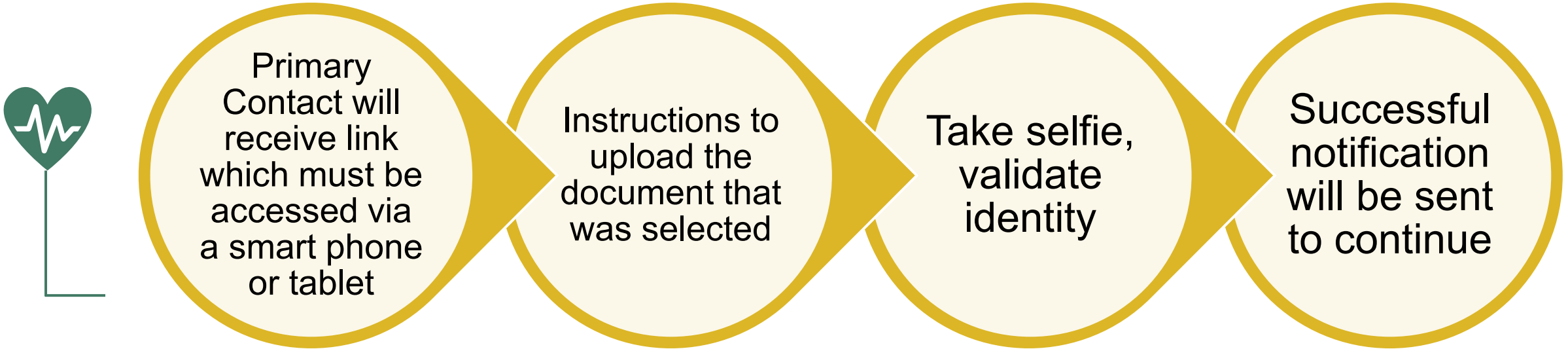
Consumers that do not pass remote identity proofing step 1 *or* identity proofing can automatically self serve



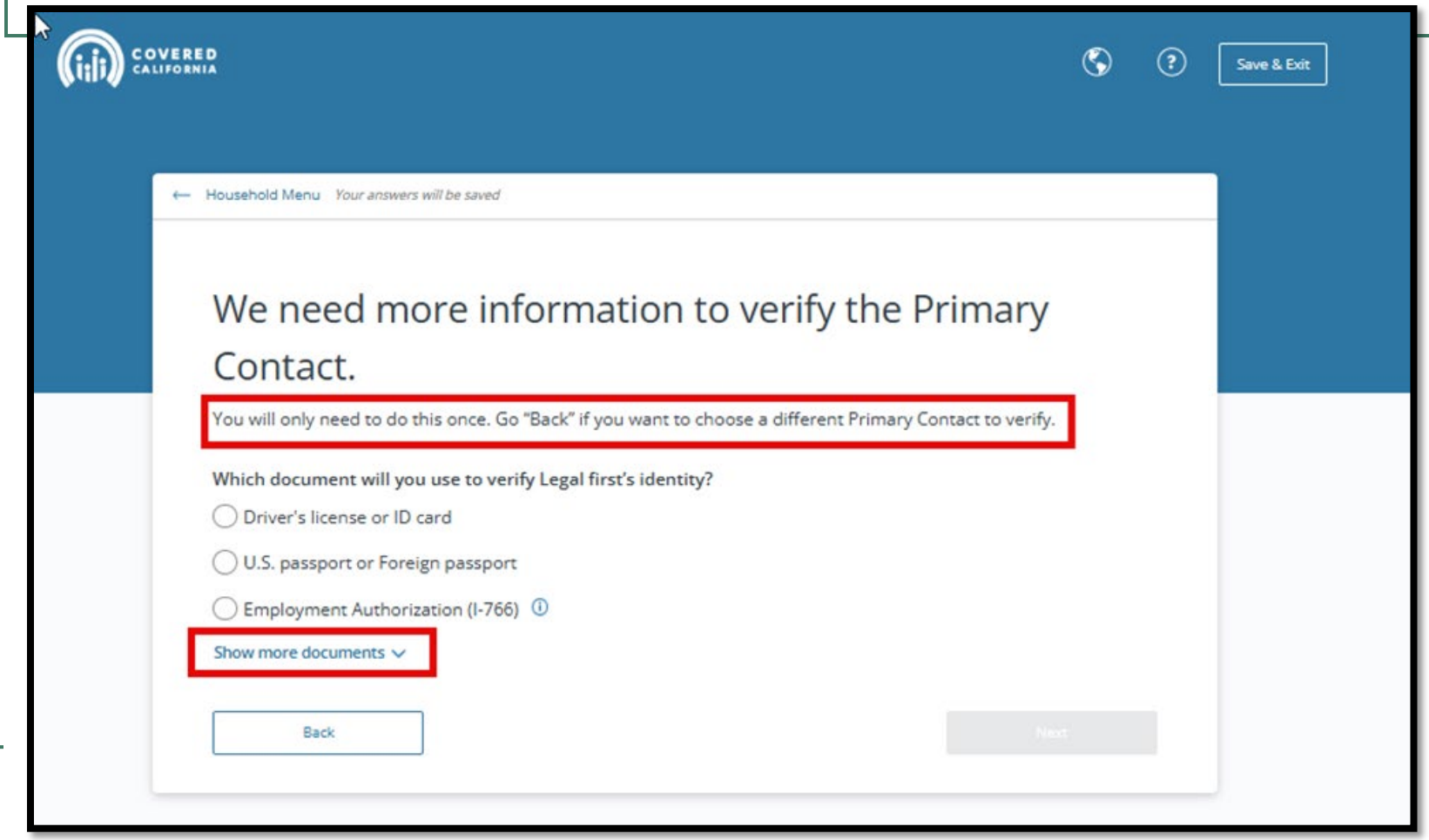
Primary Contact: Identity Verification: Self Serve, Option #3

Choose a method for how the consumer will receive a link to verify identity:

- Text Message: Enter consumer's phone number, device must be able to receive text messages
- Email: Enter consumer's email address
- QR Code: QR Code will be displayed



If RIDP Does Not Succeed?



An unsuccessful result will prompt for more information

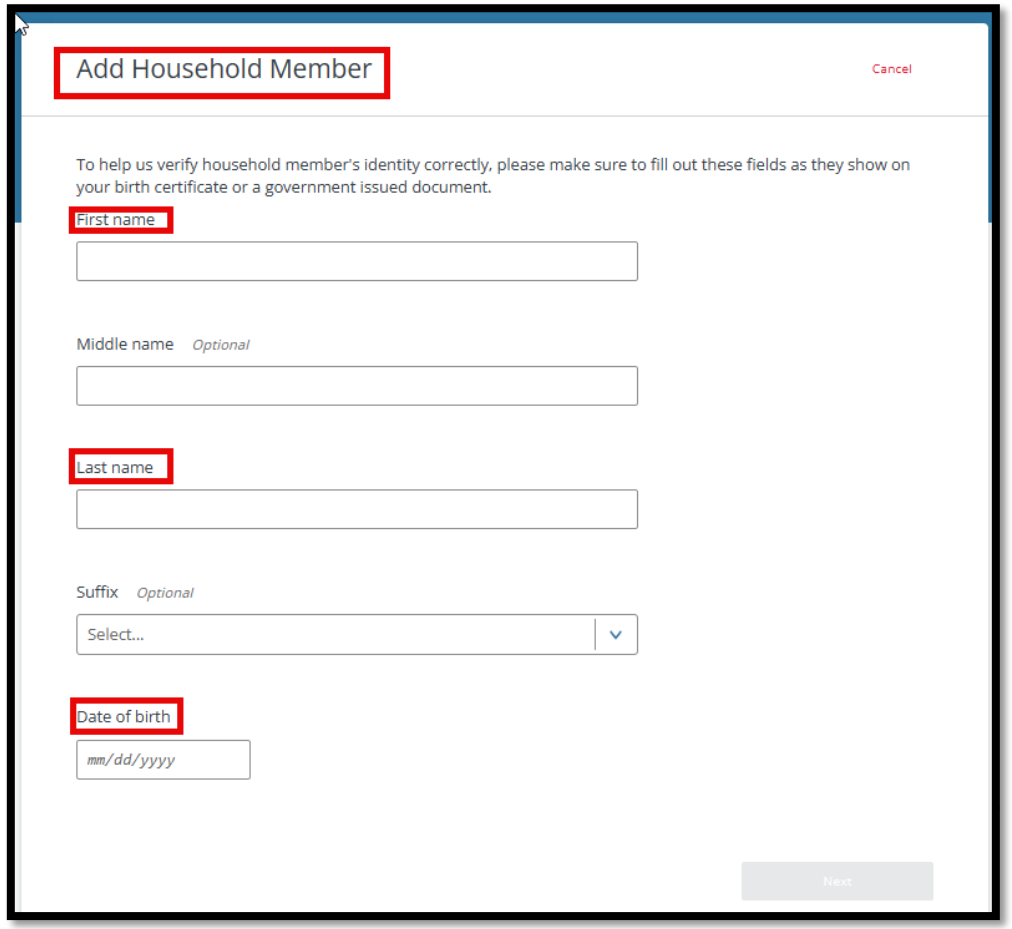
A List of document choices to use to verify identity will be provided.

Visual Verification (IDP) and Remote Identity Proofing (RIDP) Tips

Tips for Successful Identity Verification:

Primary Contact should be complete and include the following:

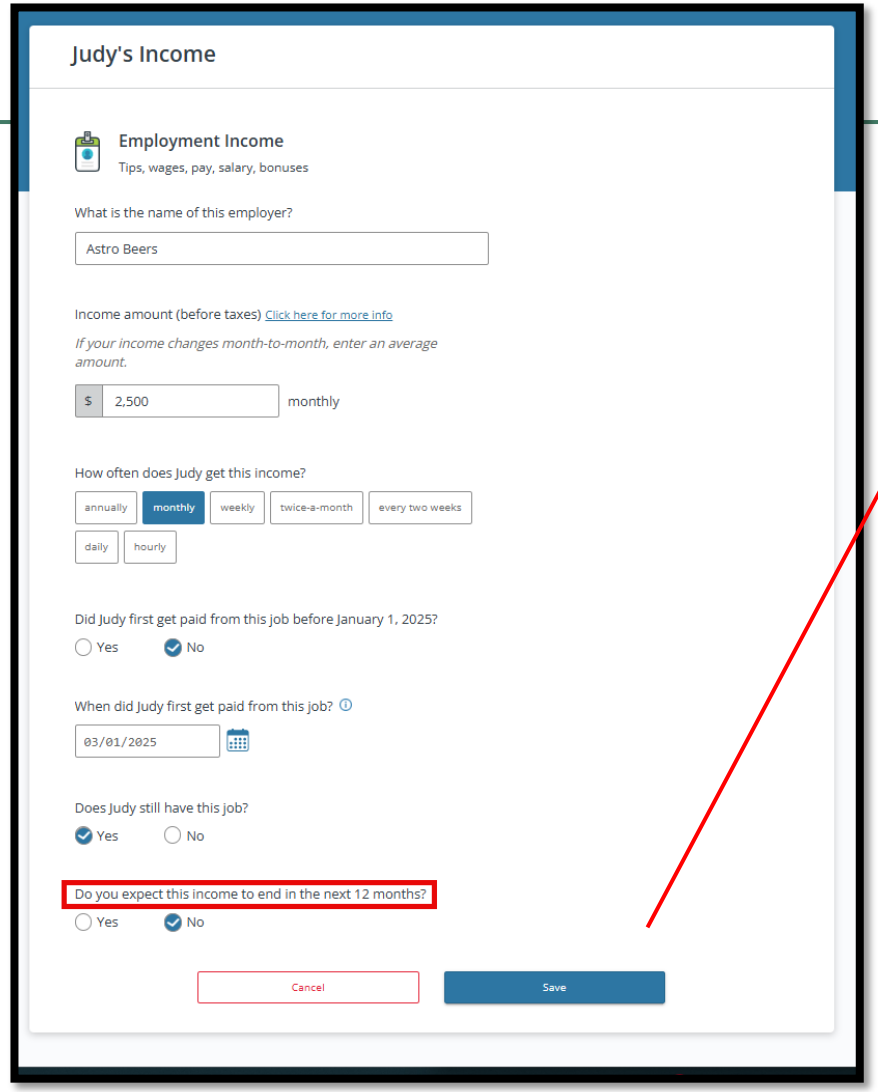
- Legal first and last name
- Date of birth
- Current address
- Valid phone number
- Email address
- Social security number (optional). This field is optional in the application, but if available and included, the identification verification process is improved.

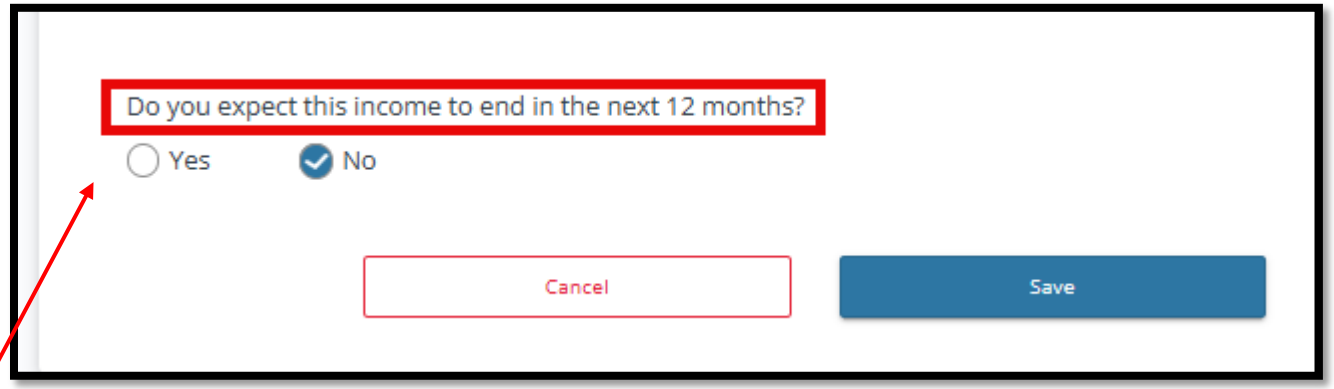


Household Menu: Continue After Identity Verification

- Answer the following and proceed through the application:
  - Members applying for coverage
  - Medicare questions
  - US Citizen question-New optional field for Alien /USCIS number Naturalized or Derived citizen
  - Pregnancy question
  - American Indian(AI) or Alaska Native9AN)-Updated drop down for AI/AN
  - Tax filing status

Income



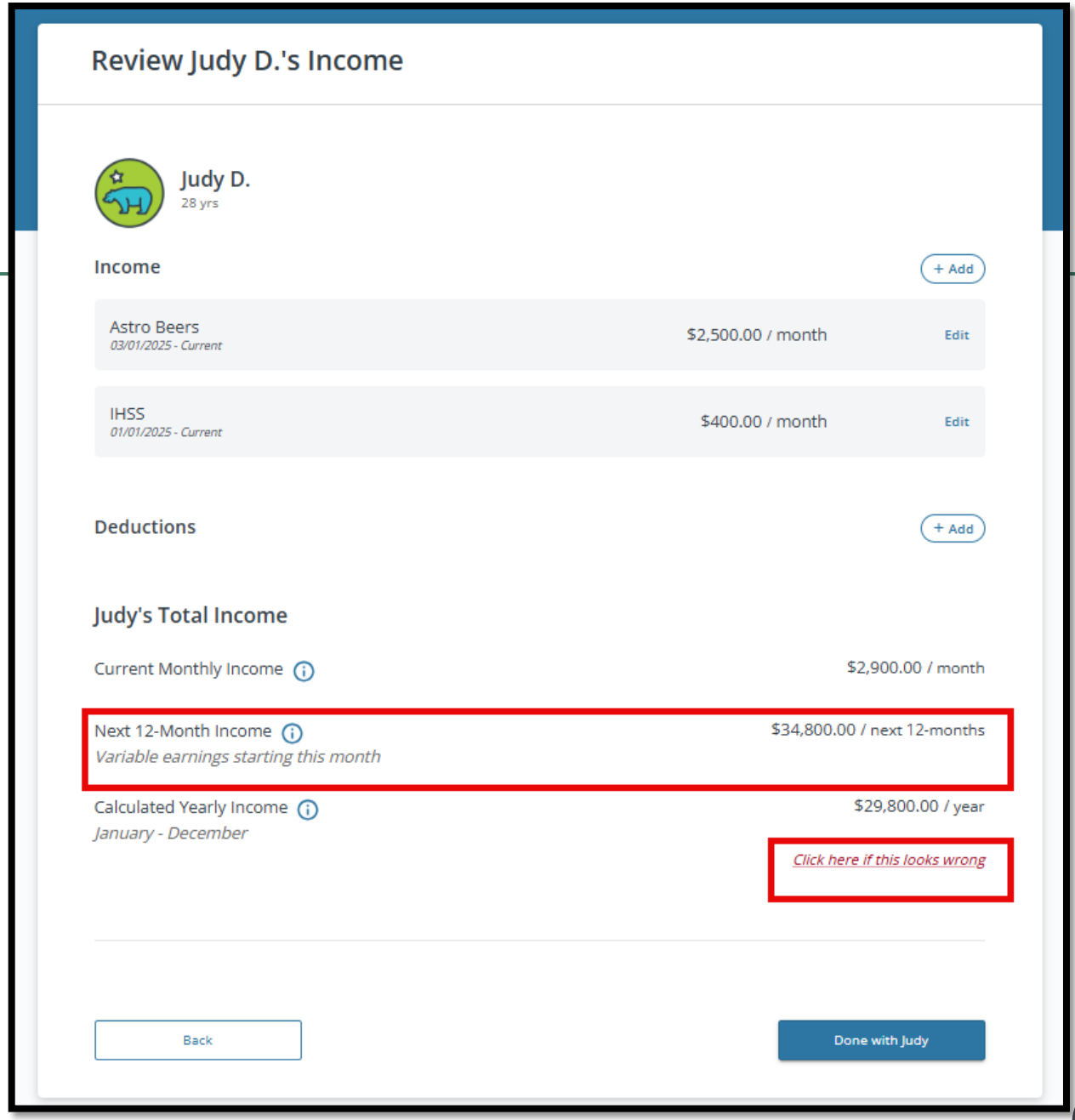


After answering the tax filing questions you will answer income related questions.

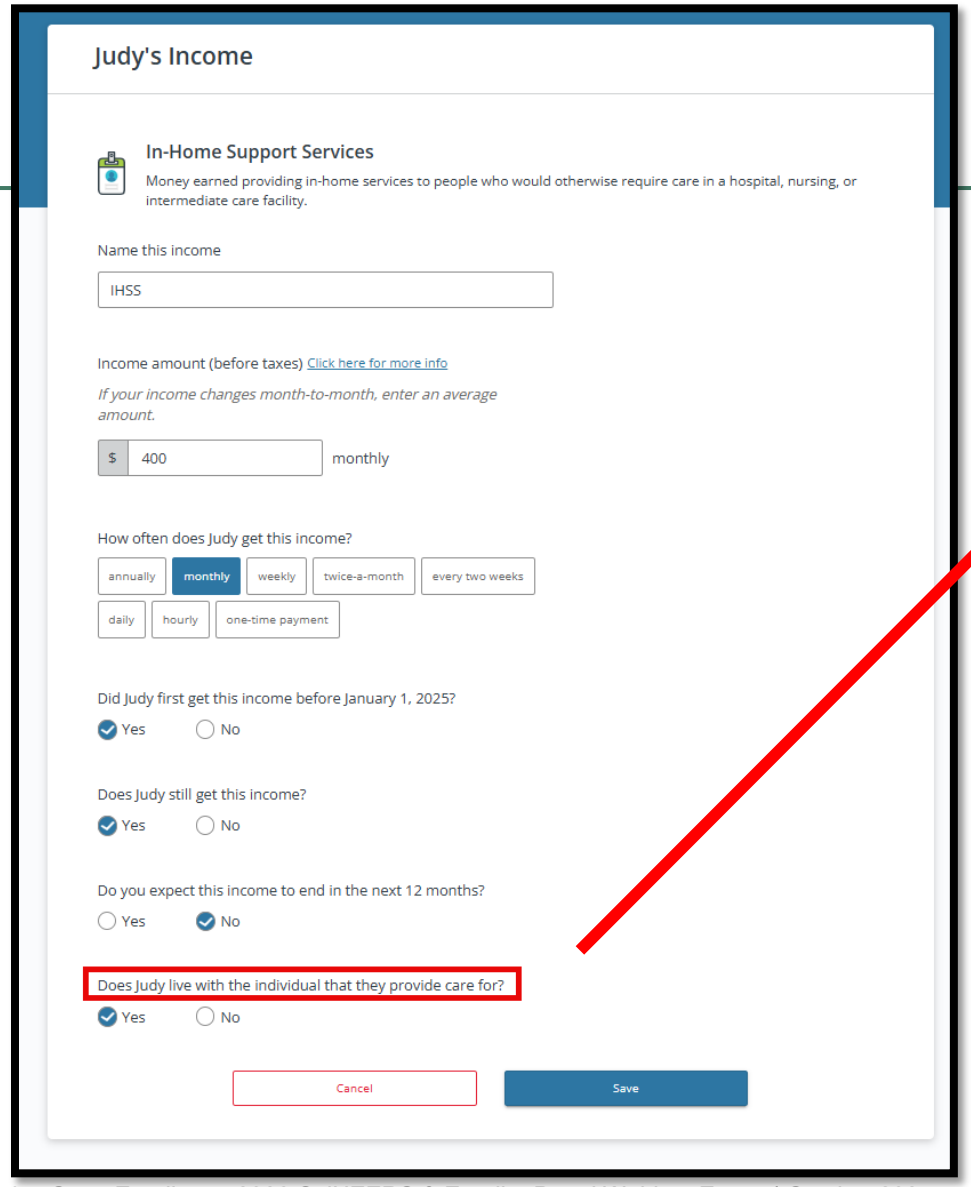
Update from 25.9 release: ***"Do you expect this income to end in the next 12 months?"***
Previously it was "next 4 months."

Income

- Updated look of the income summary.
- Now includes the *Current Monthly Income*, the ***Next 12-month Income*** and the *Calculated Yearly Income*.
- Projected Annual Income (PIA) can still be edited by clicking *“Click here if this looks wrong.”*



Income

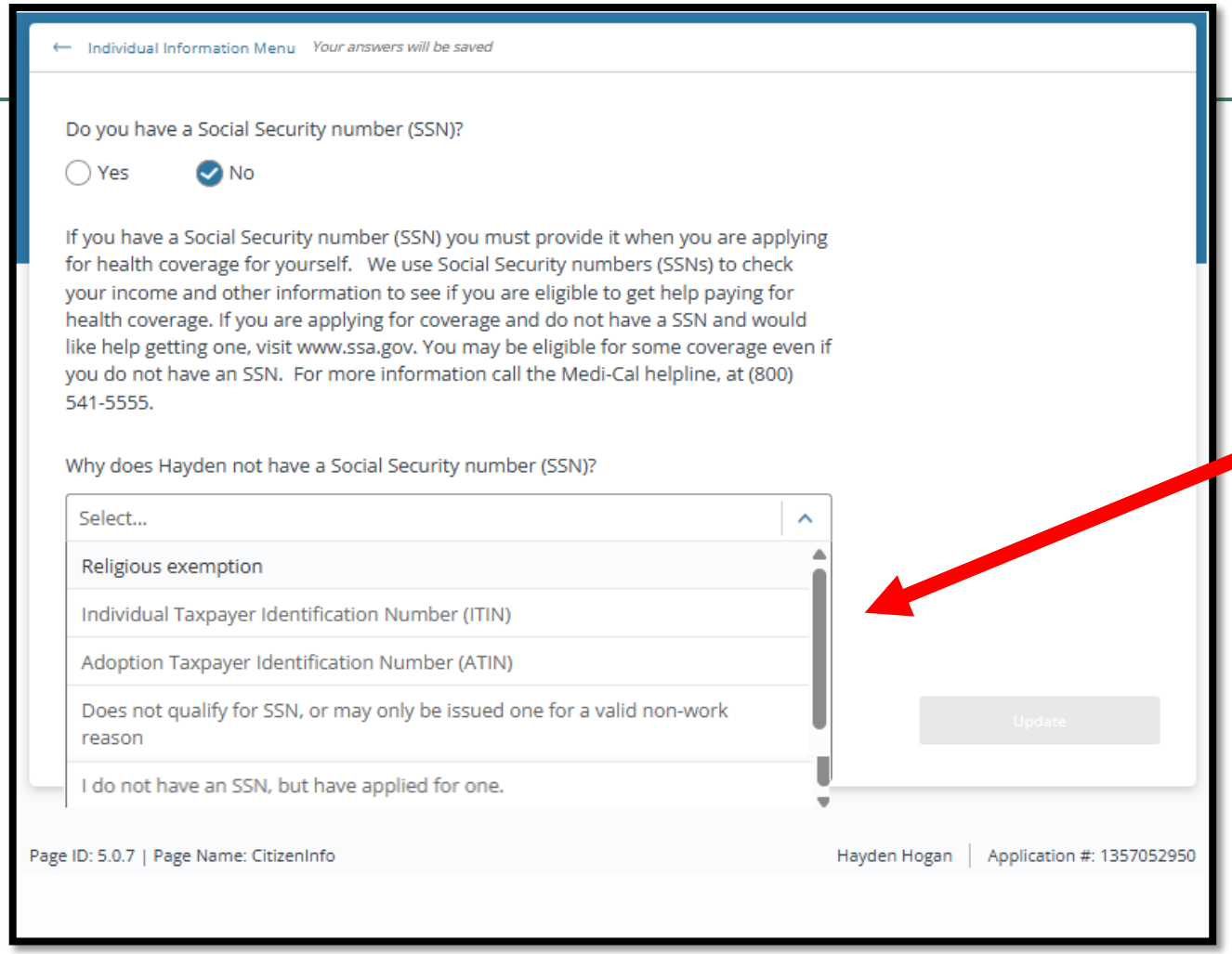


NEW: In Home Support Services (IHSS) Income

Individual Information

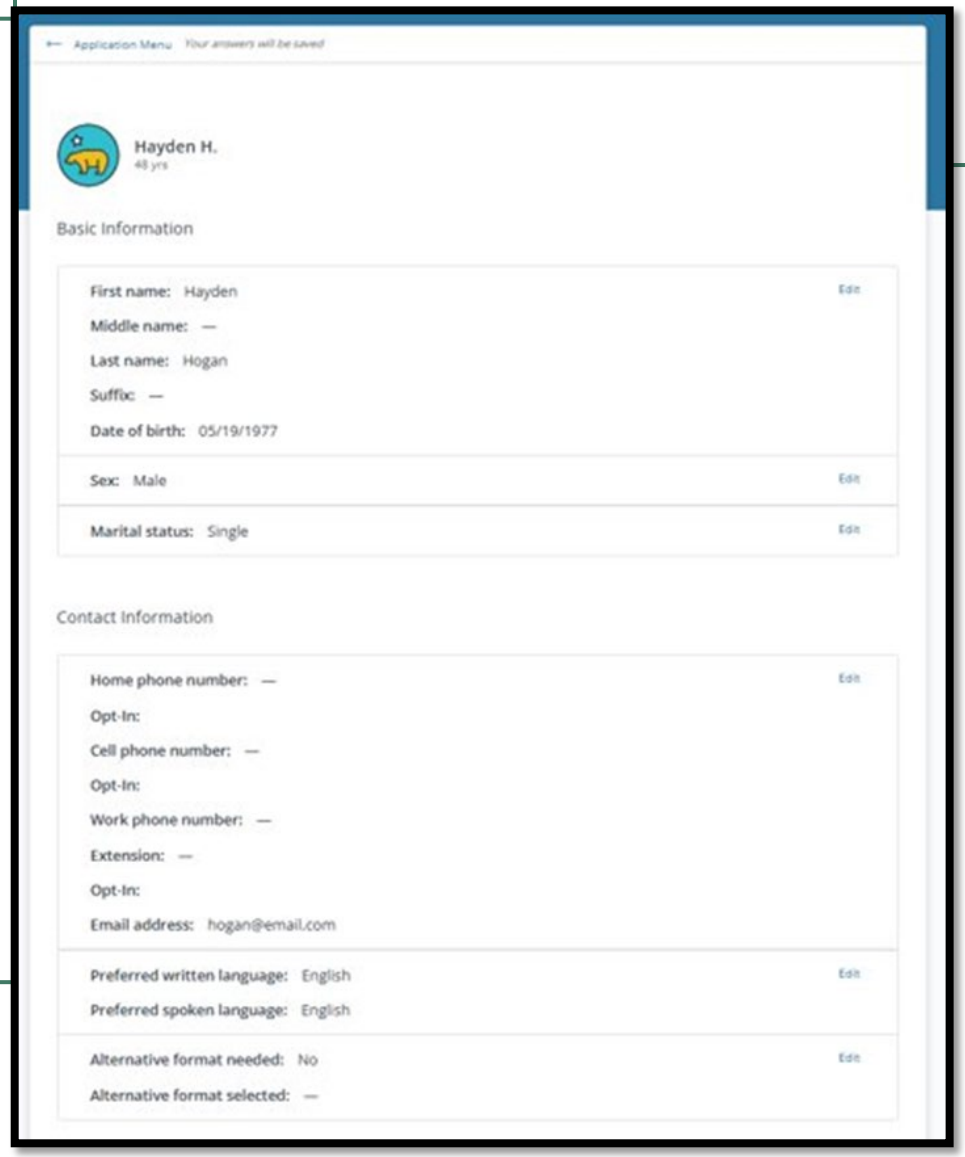
- Answer the following and proceed through the application:
  - Other coverage: Medicare, Employer sponsored, Cobra or None of the above.
  - Continue through the next questions that if answered **yes** and eligible for Medi-Cal, may provide other benefits.

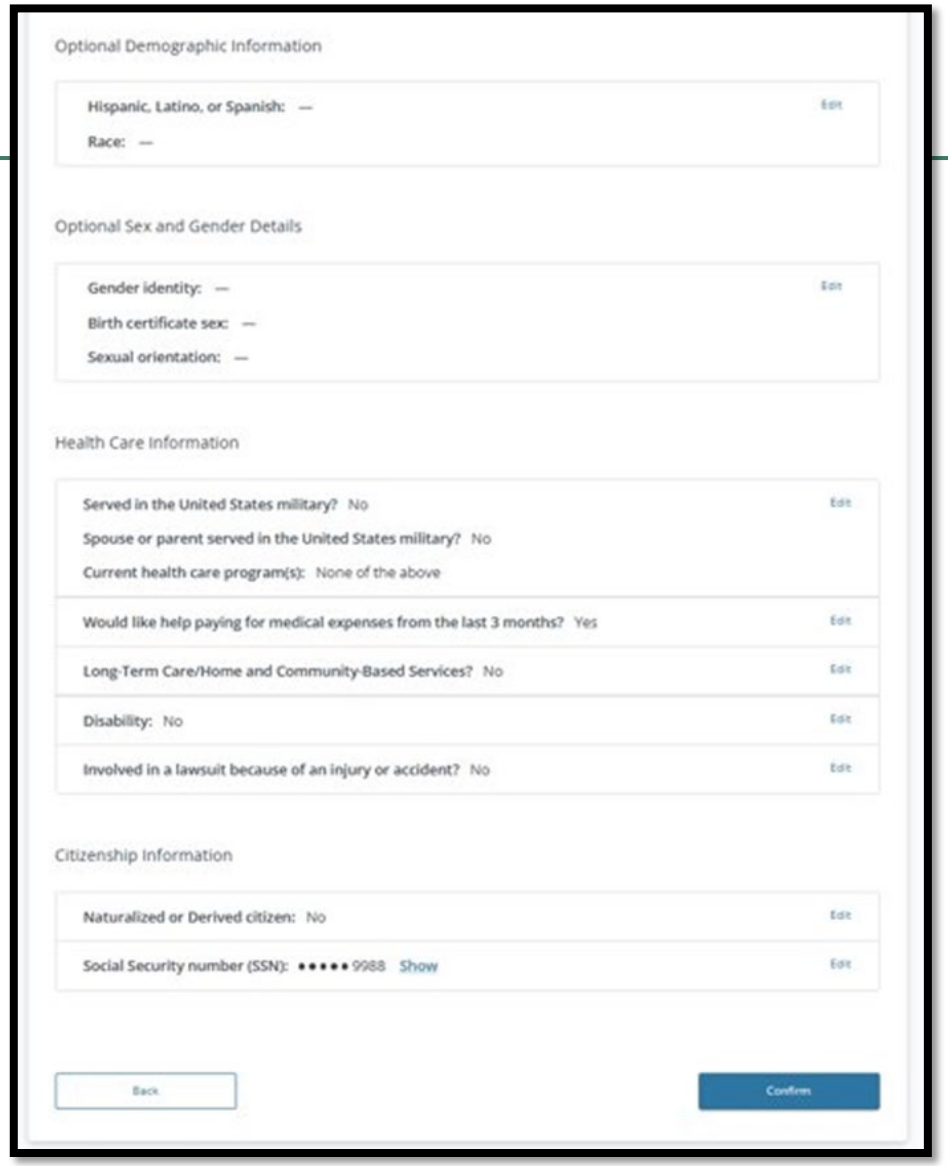
Individual Information



Consumers that do not have a Social Security Number to provide must select the corresponding reason for failing to provide a SSN

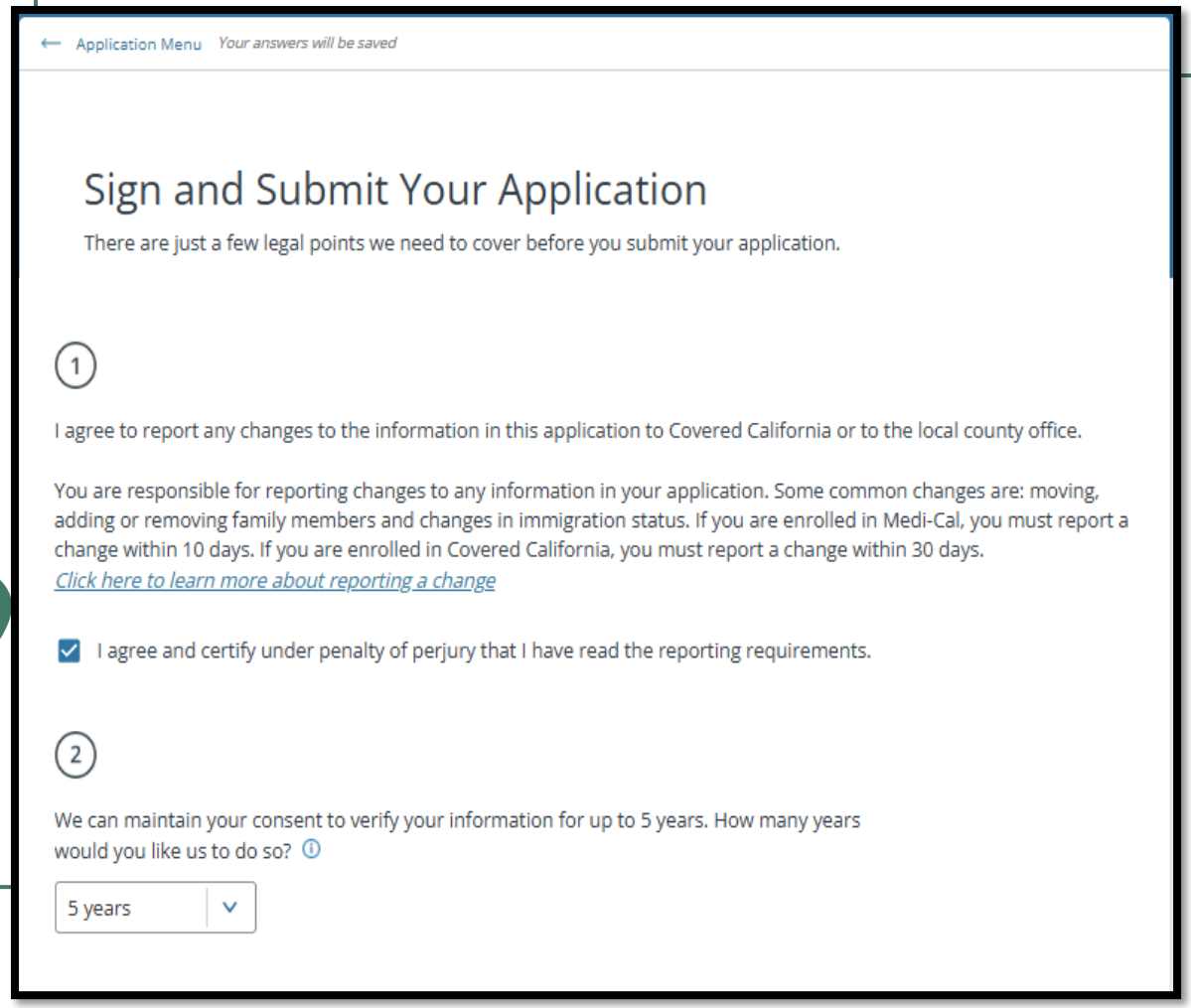
Review Application

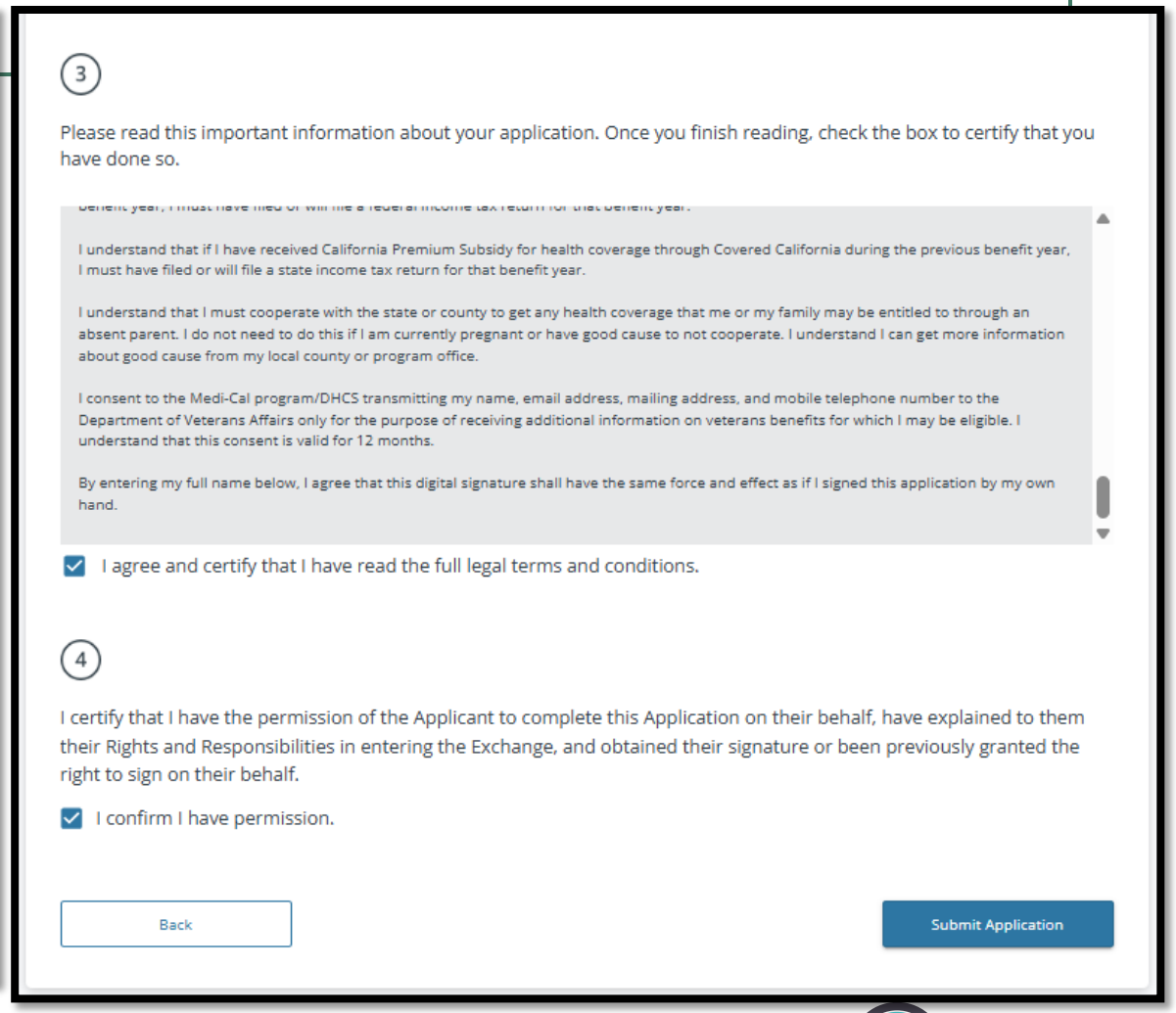




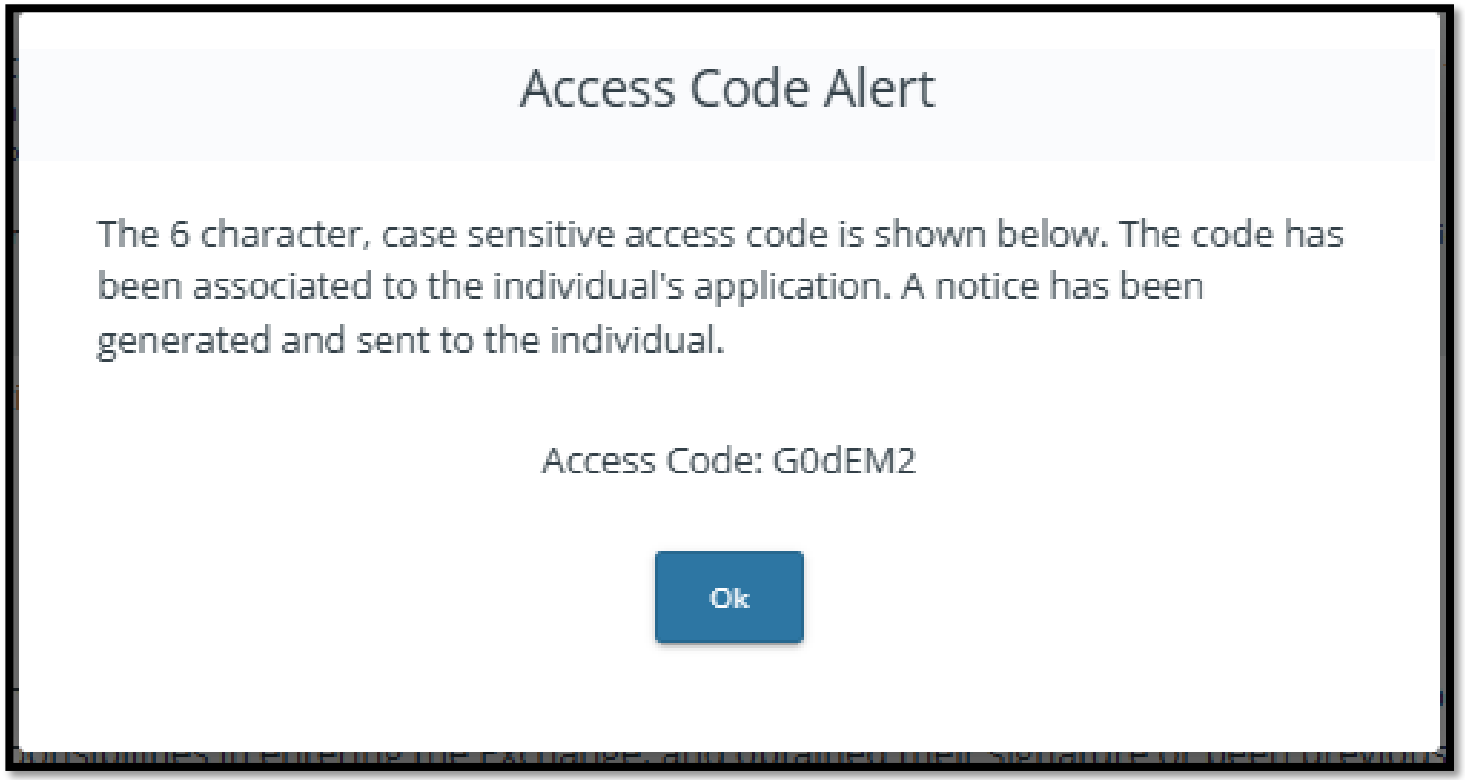
Users will then be prompted to review the application information for accuracy

Application: Sign and Submit





Access Code: Alert



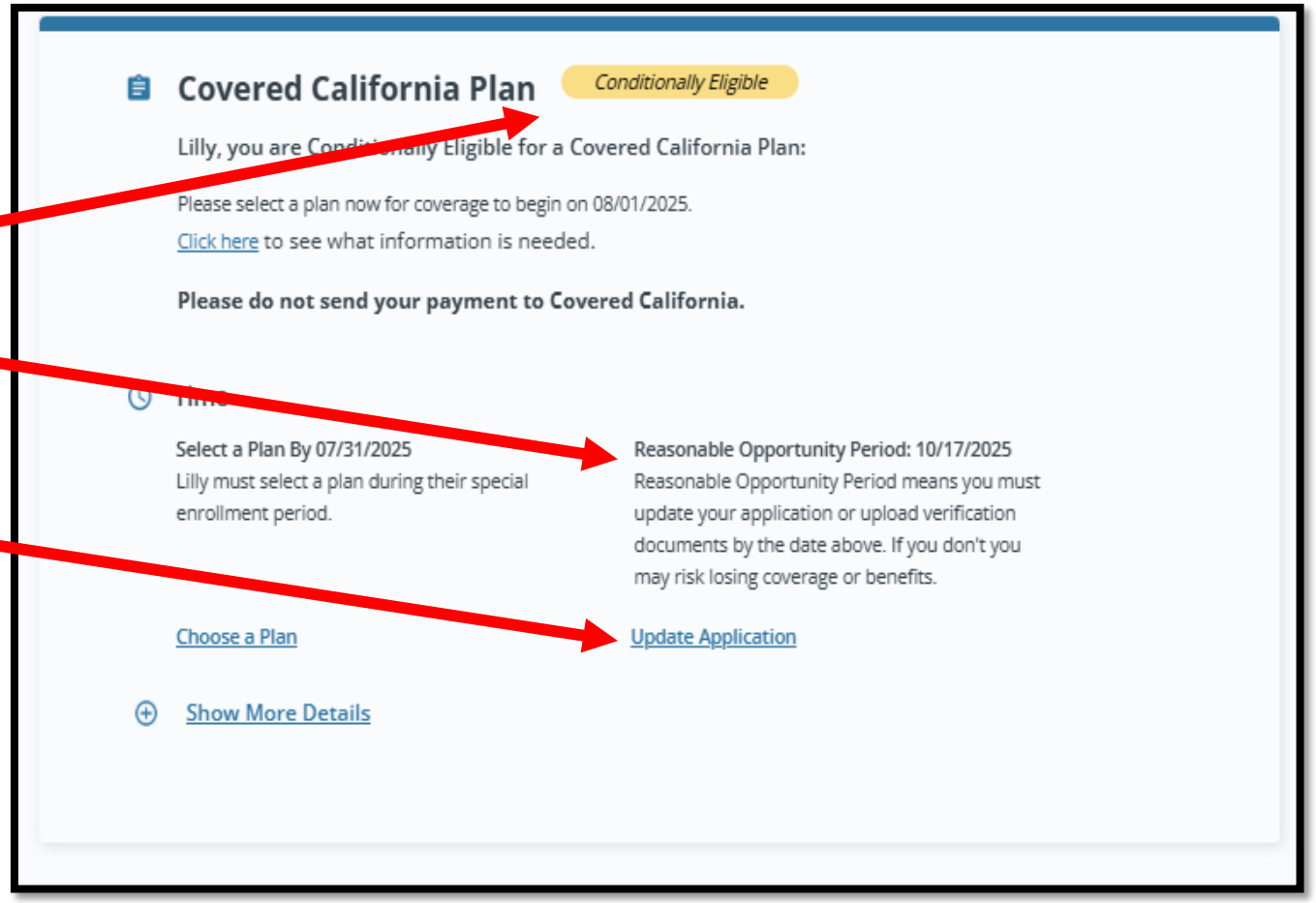
Access codes are provided for consumers to create their individual user account to link to the application you just submitted.

Eligibility Results: Conditional Eligibility

Eligibility results will populate after submitting application.

If the eligibility is ***conditional***, there will be information about the **reasonable opportunity period (ROP)** timeline.

NEW: ***Update Application*** link will appear when consumer is required to provide proof of social security number (SSN) in the following sections: Plan section, Financial Help section

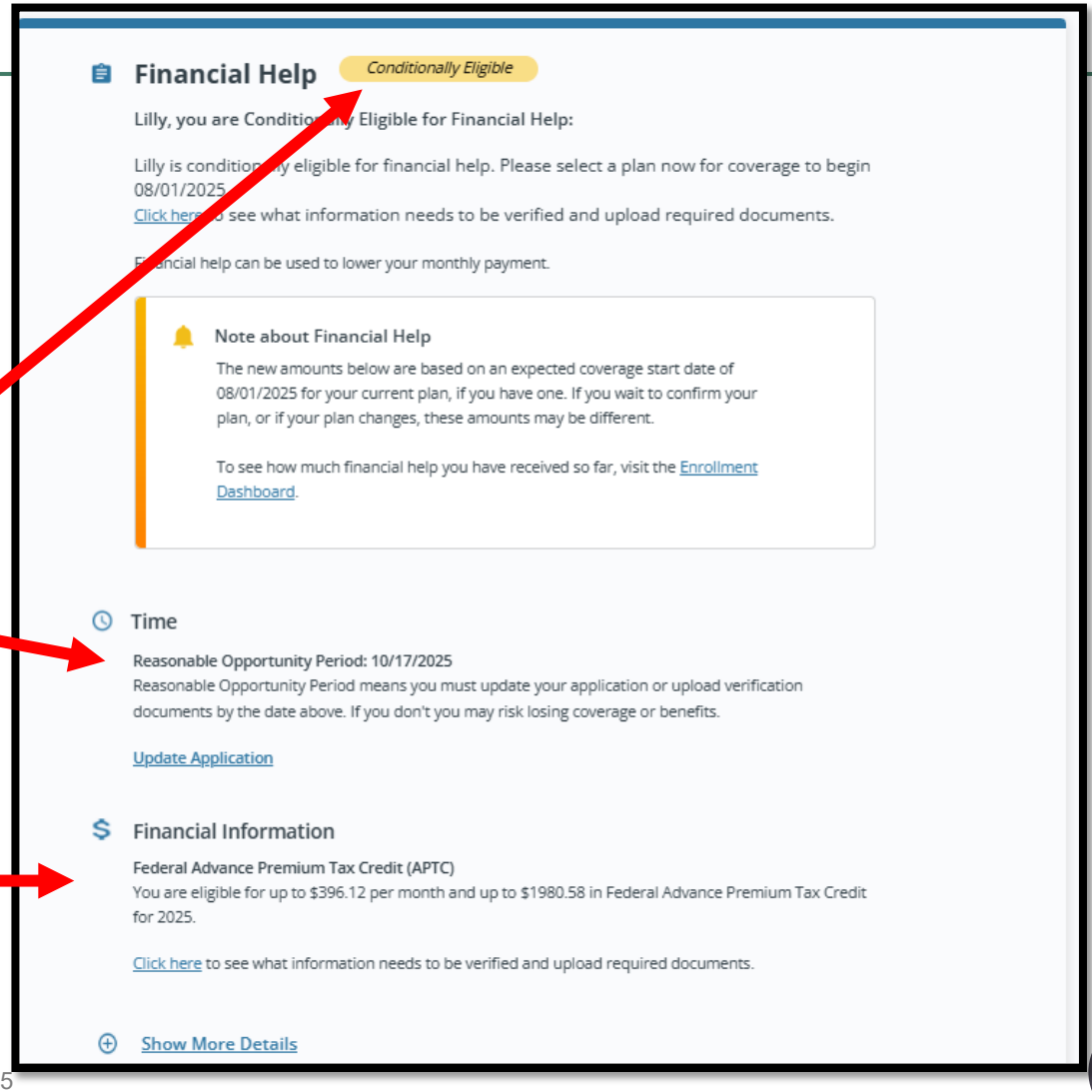


Eligibility Results: Financial Help

On the eligibility results for each enrollee information is provided about the financial help.

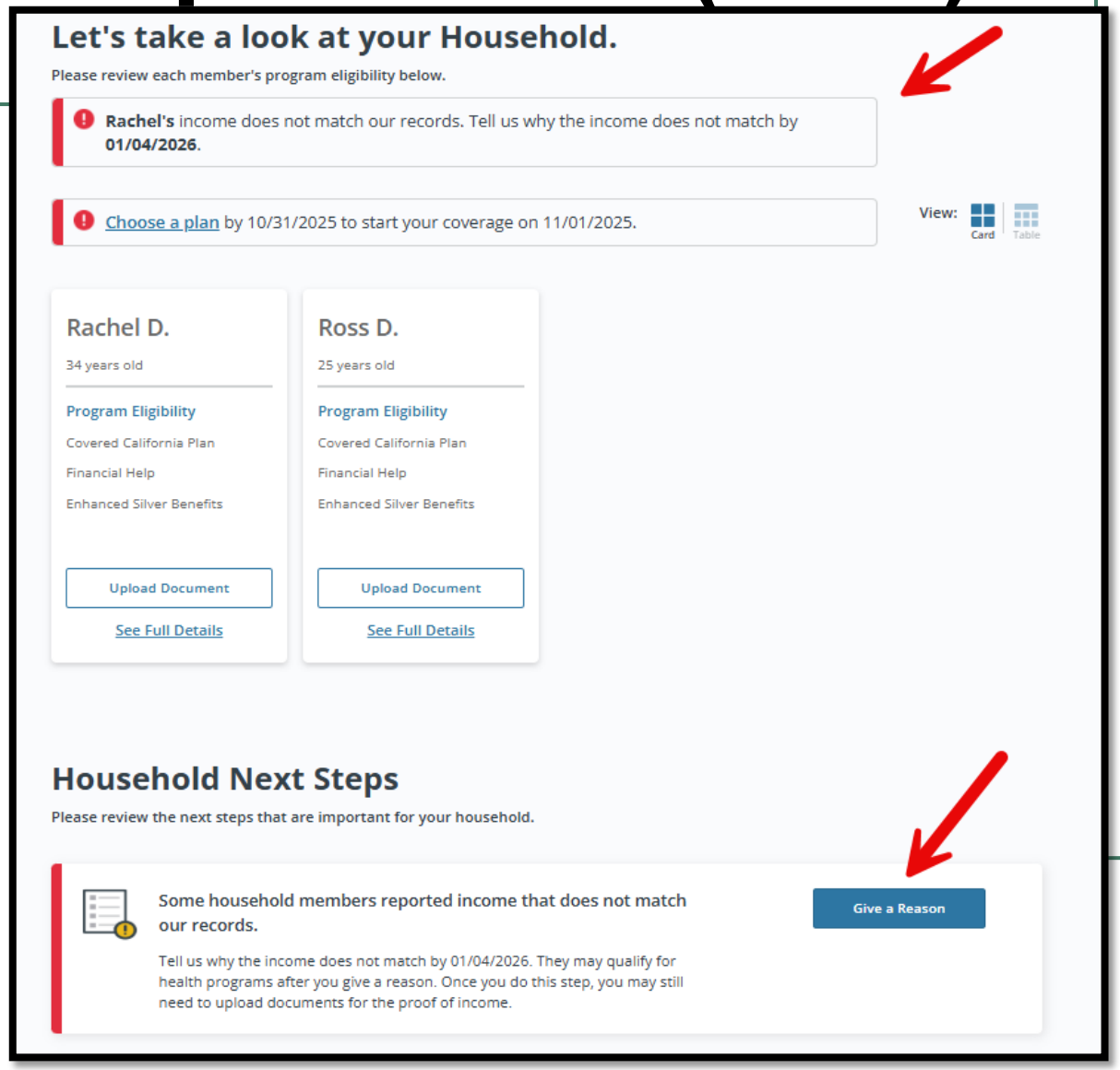
In the example,

- consumer is **conditionally eligible**.
- Information is provided for reasonable opportunity(ROP) expiration and includes link to upload documents.
- The financial information provides the amount of financial assistance and click here link that explains the information needed and allows upload of documents required.



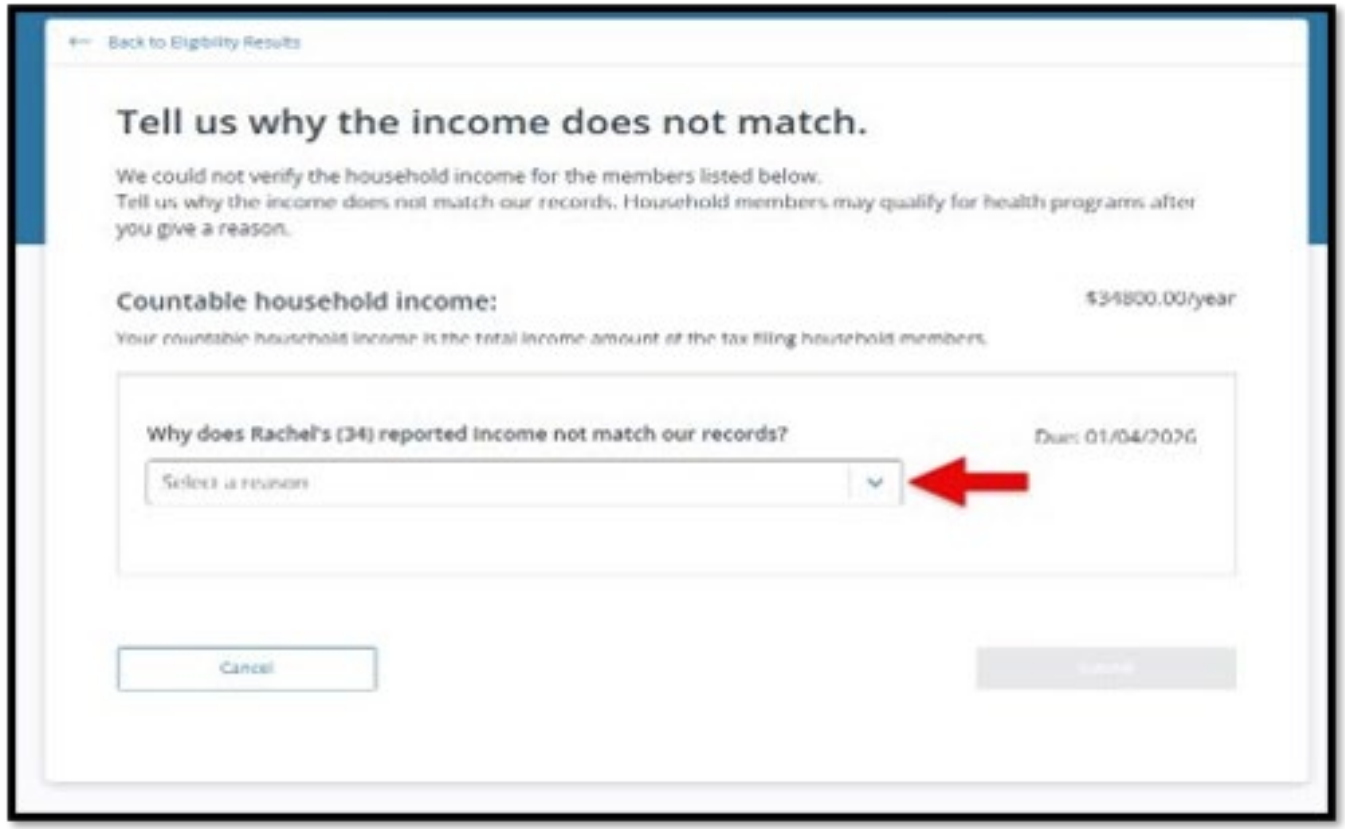
NEW: Reasonable Explanation (REX)

- New Page: ***Tell us why the income does not match***
  - Eligibility results will include a banner highlighted in red.
  - The Household next steps provides the opportunity to Give a Reason.
  - This allows the consumer to select a Reasonable Explanation when attested income could not be electronically verified.



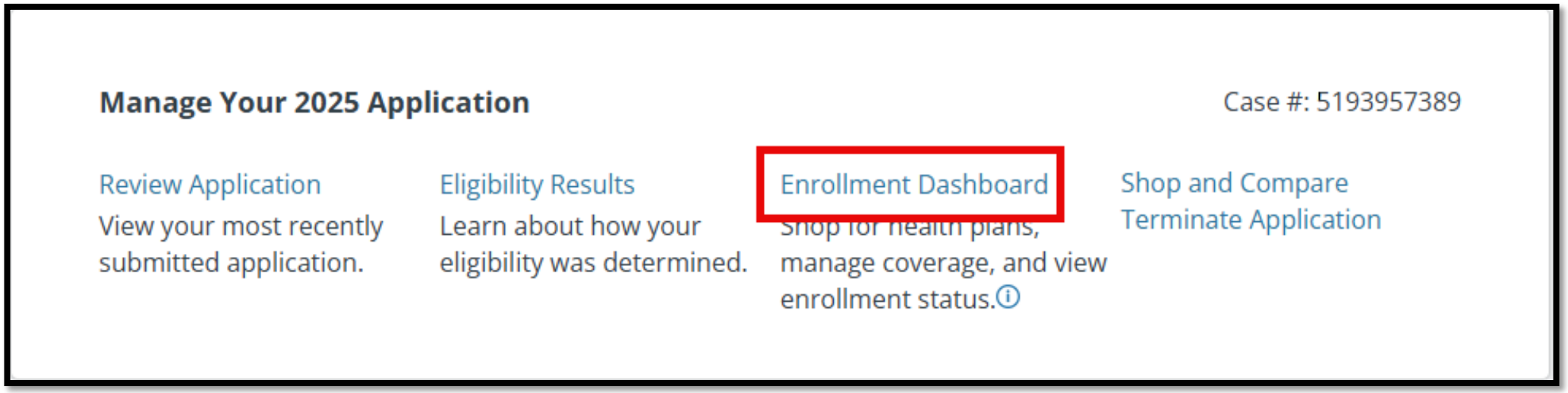
Reasonable Explanation: Choose Reason

- The link will provide a drop down of reason or other can be selected.
- Choosing other allows user to provide explanation.
- If users select from drop down list and submit, then CalHEERS will accept the consumer's attestation, clear the inconsistency, and pass the income verification. Eligibility will be redetermined.
- If the 'Other" option selected, REX-Other will trigger tasks for Exchange-only cases. REX-Other for Mixed Households and MAGI Medi-Cal cases will trigger communication to their respective Medi-Cal Office.



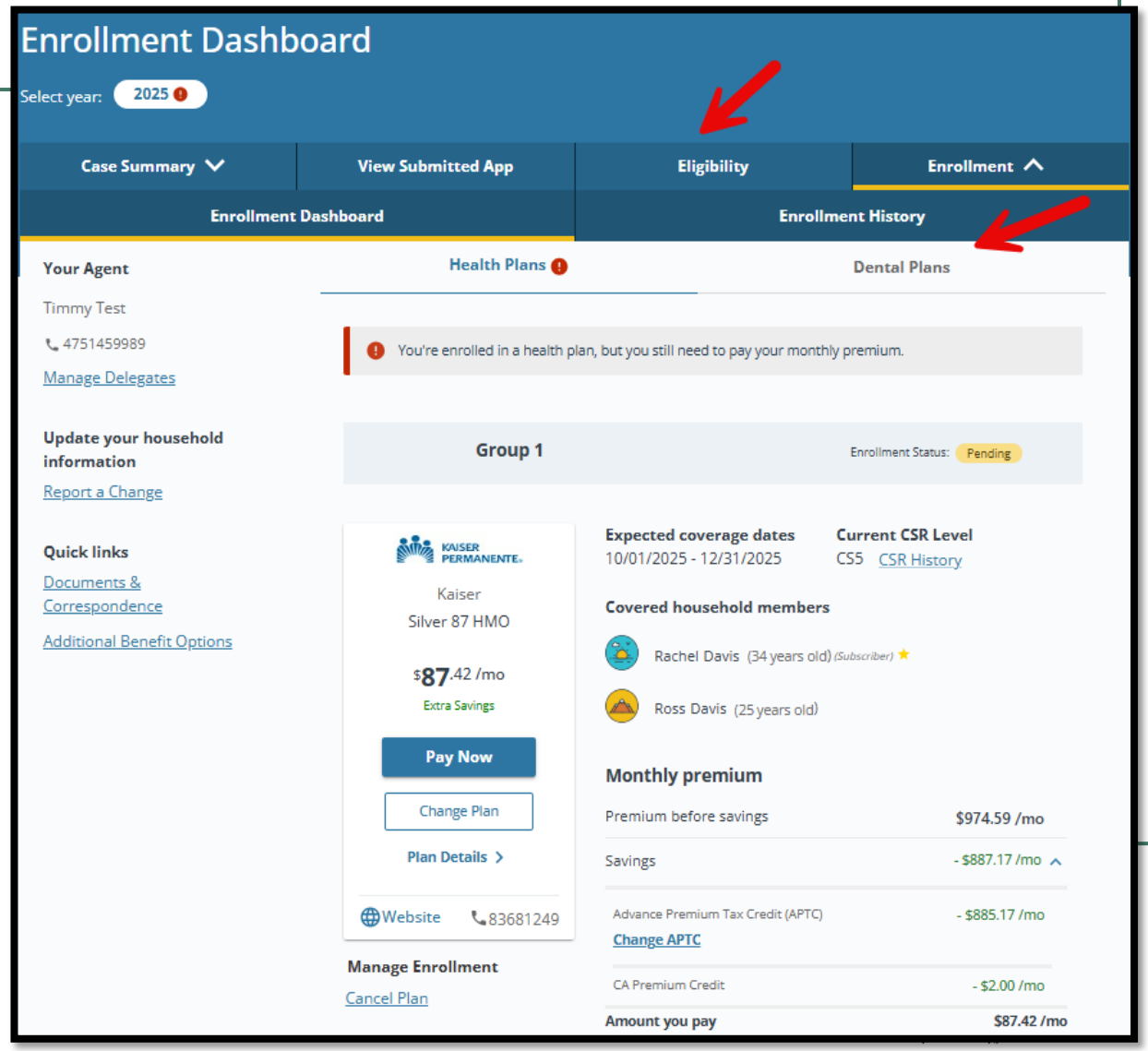
How to Access your Enrollment Dashboard

- **Enrollment Dashboard** for Enrollers Task Guide
- The Home page of the application provides a link to the enrollment dashboard.
- Scroll down to the Manage Your 2025 Application section.
- Click the link to the Enrollment Dashboard

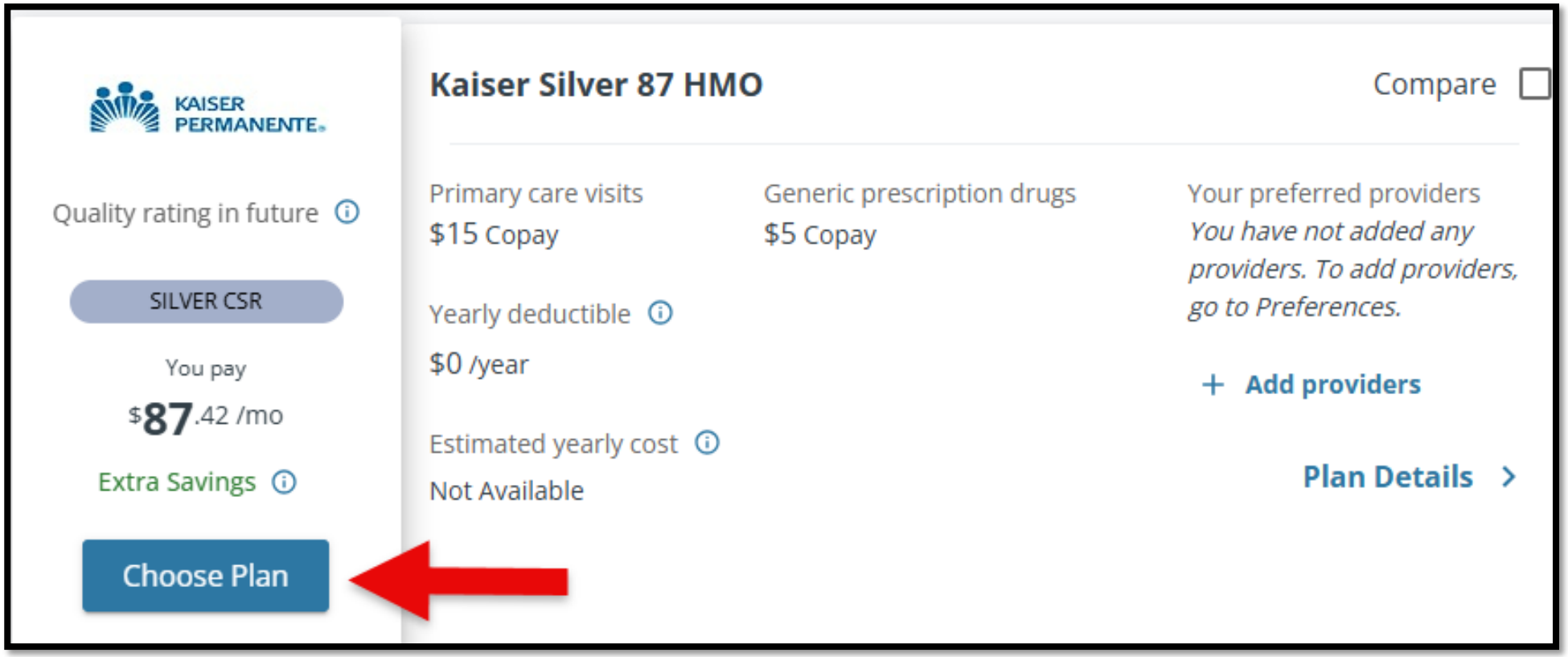


Enrollment Dashboard: Home Page

- Enrollment Dashboard tabs allows the user to navigate to other sections of the application. For example, Eligibility Results.
- The dashboard defaults to Health Plans. Dental plan tab can be selected to shop.

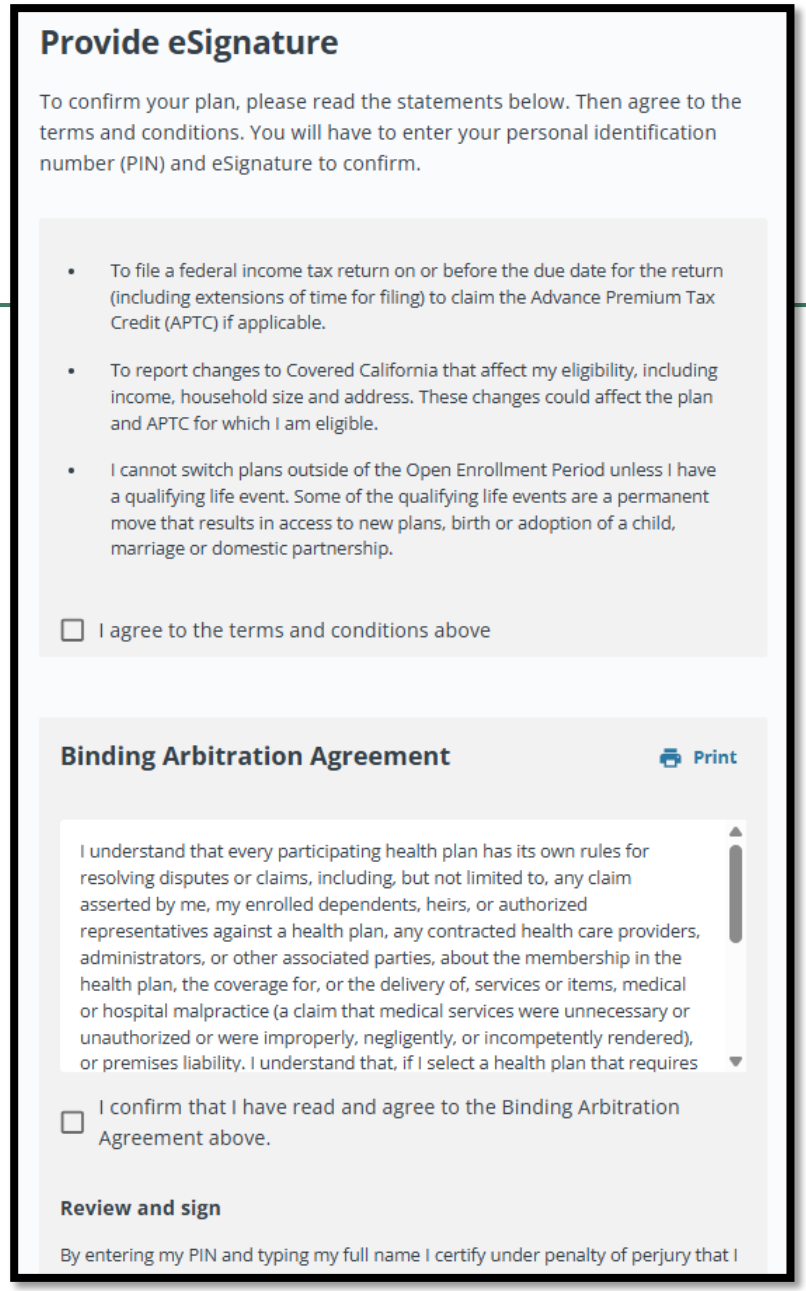


Enrollment Dashboard: Plan Selection

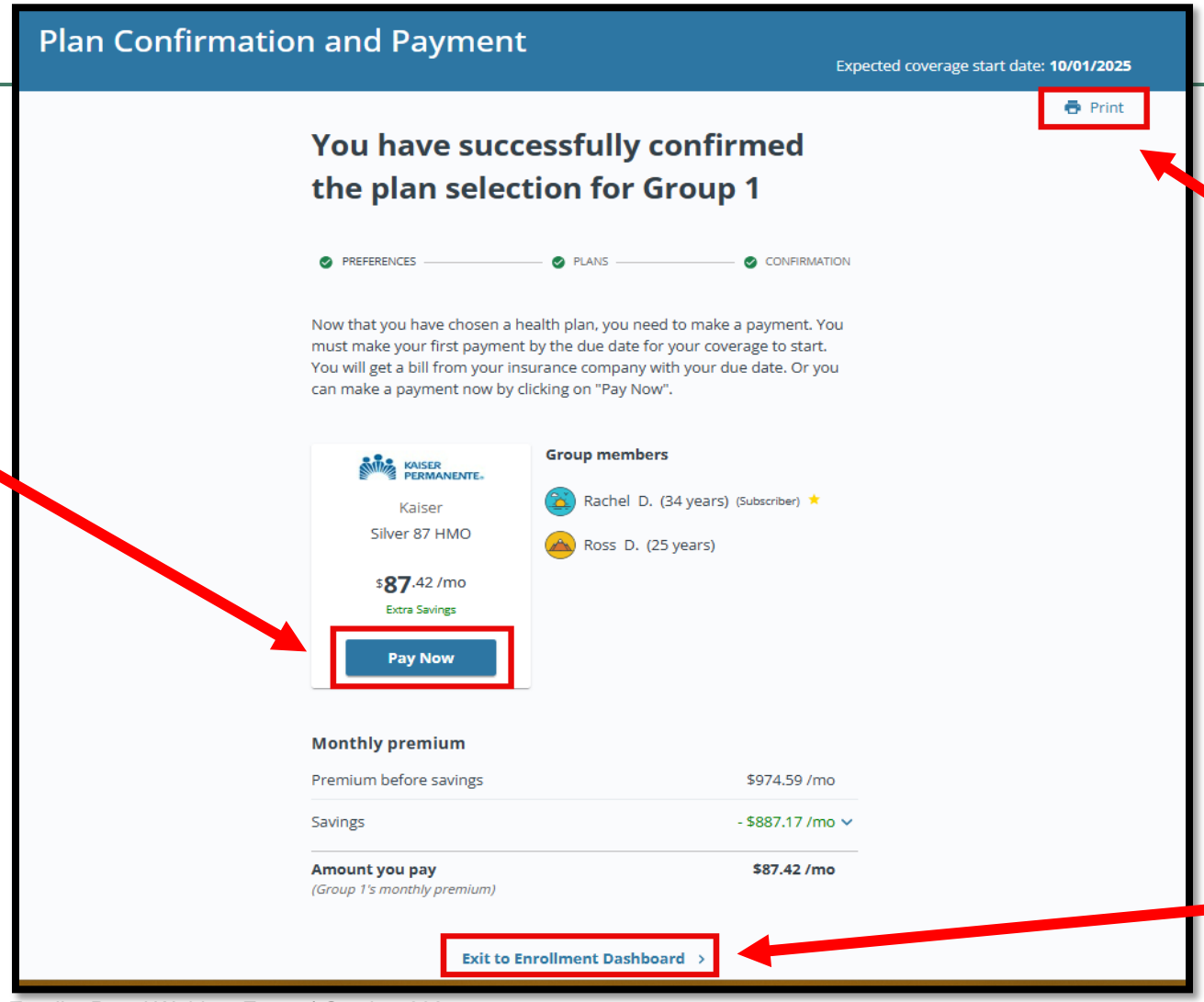


[Plan Selection and Benefits for Certified Enrollers Task Guide]

Confirm Plan



Enrollment Dashboard: Print Screen



Print Plan Confirmation Page

Use “Pay Now” to link to carrier website for binder payment

Return to Enrollment Dashboard

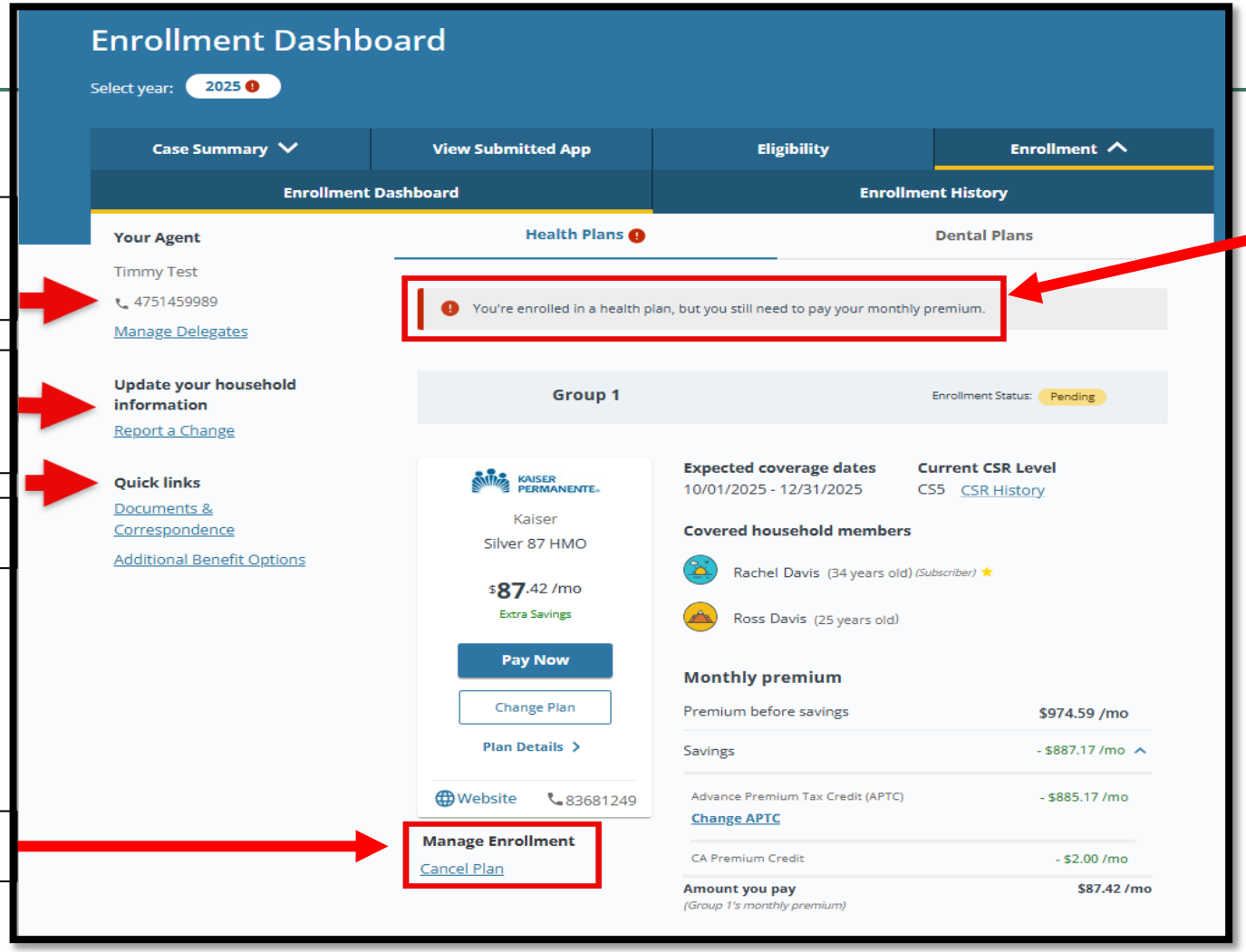
Enrollment Dashboard: New Links

Delegated Enroller Information

Report a Change Link

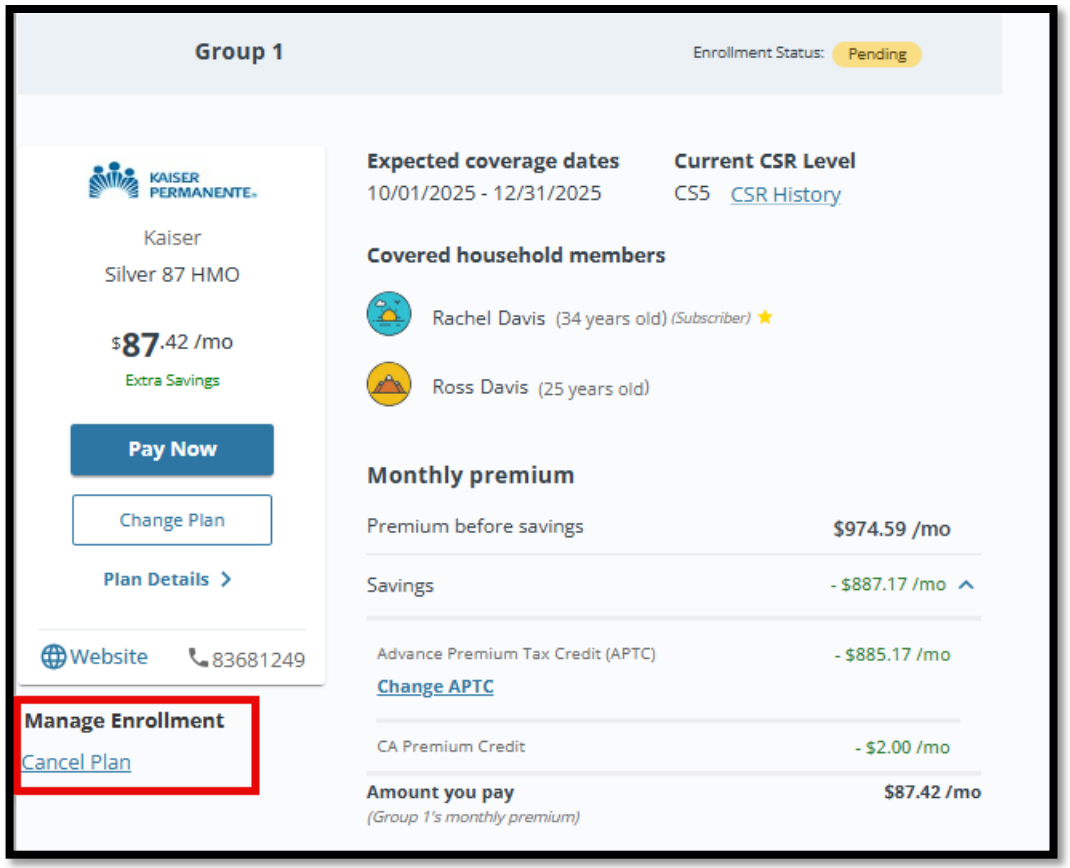
Quick Links

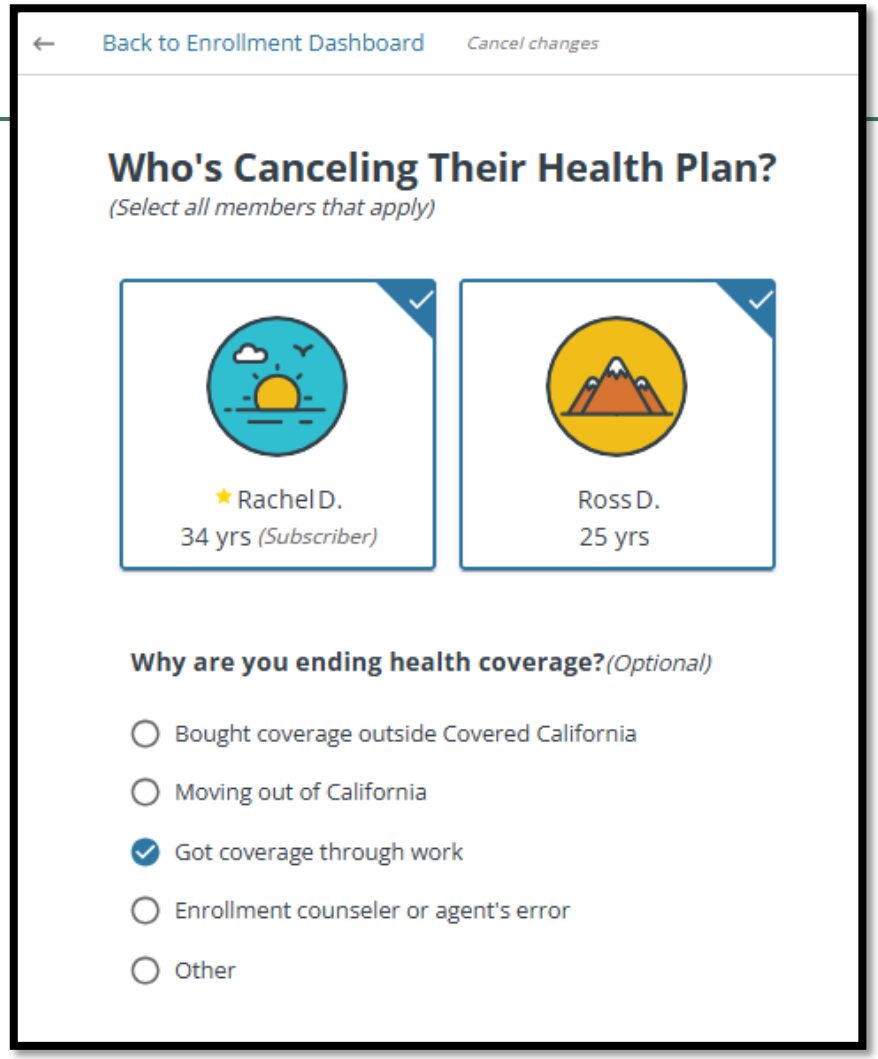
Manage Enrollment



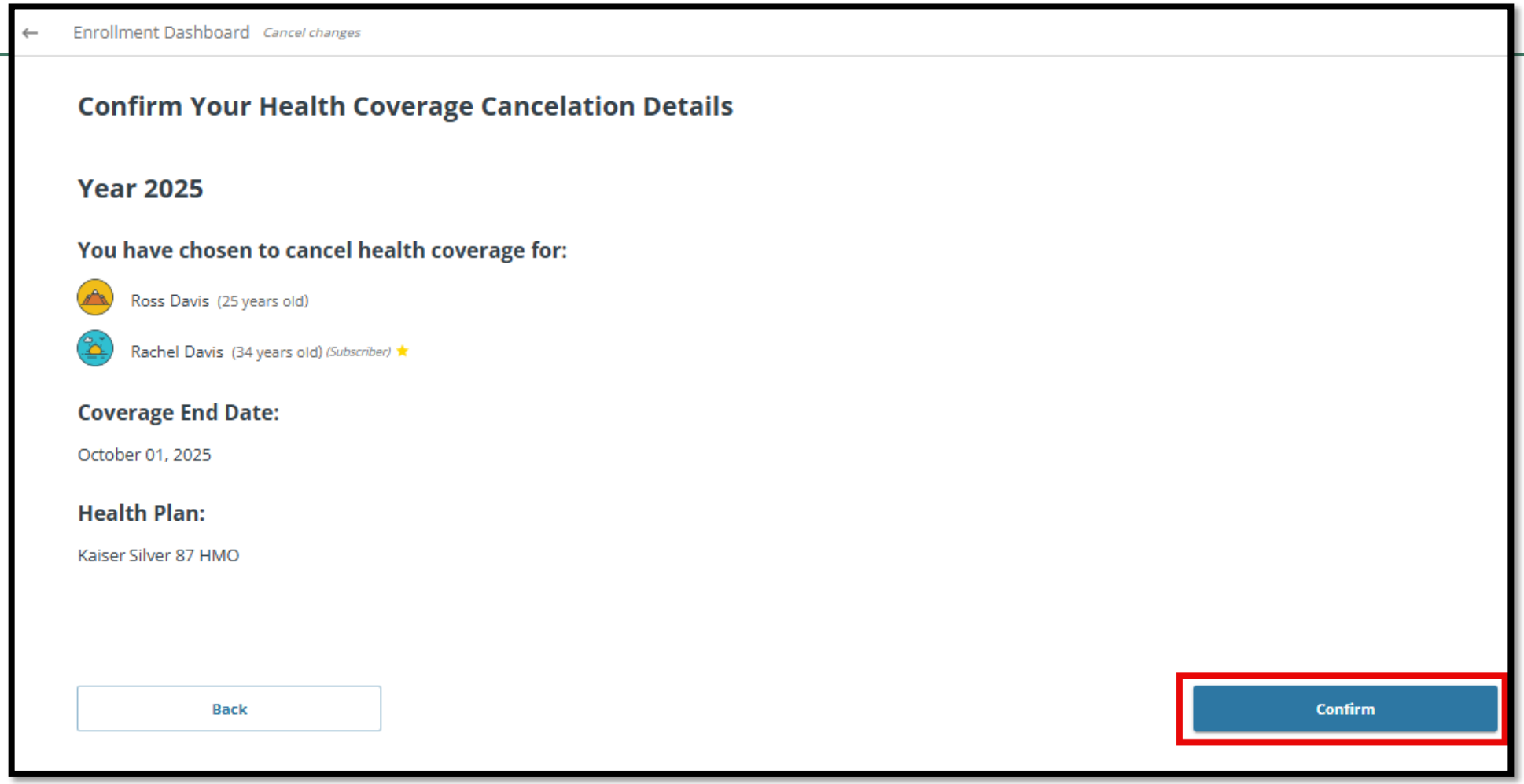
Banner messaging

Enrollment Dashboard: Cancel Feature





Confirm: Plan Cancel

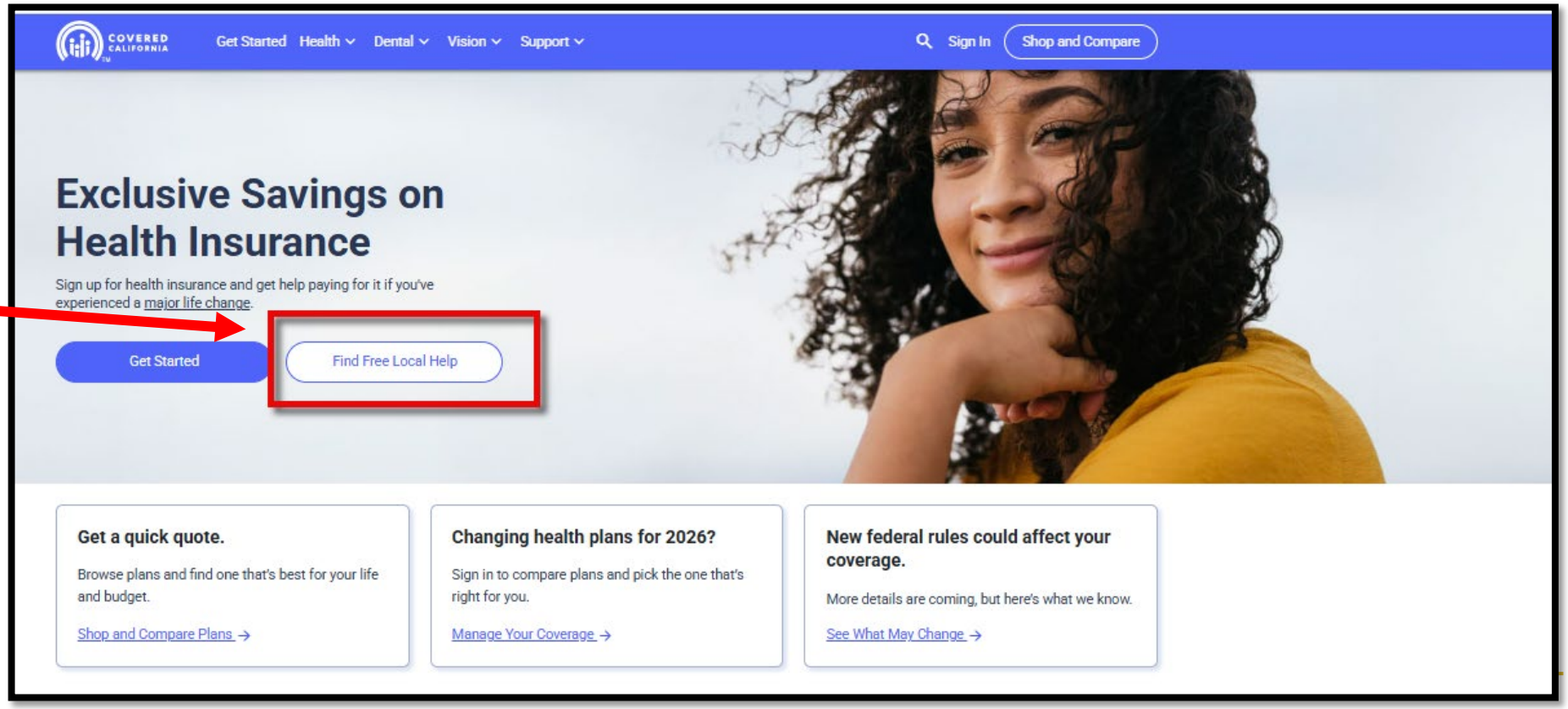


Reminders & Resources

Coveredca.com

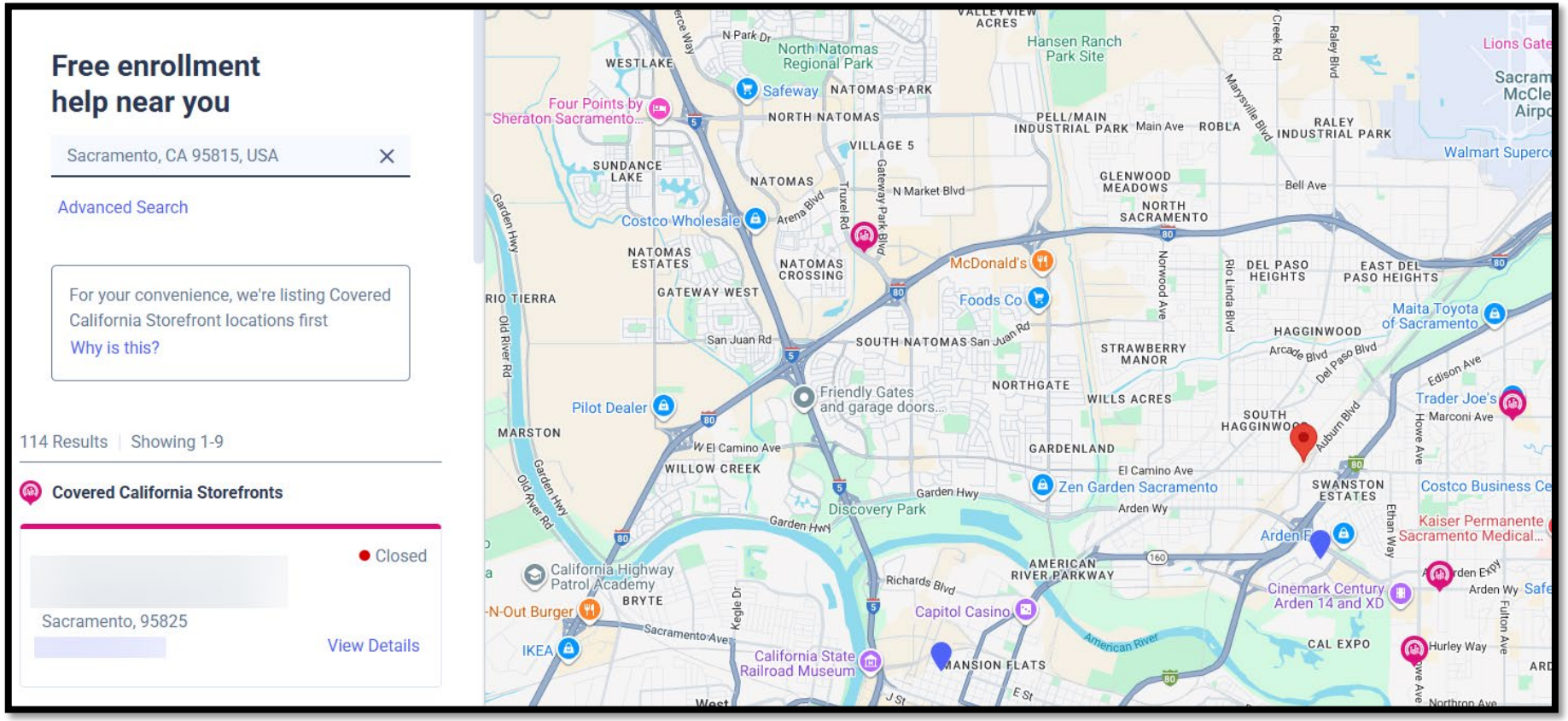
Find Free Local Help

Coveredca.com home page has been updated to add quick easily located access to find a local enroller



Find a Local Enroller

- Consumers can search for enrollers in their area
- Storefront locations are shown in pink, while other locations are shown in blue
- Storefront locations in an area will always be displayed first. This is one of the main advantages of being a Storefront



Escalations

Escalations

Certain Agent Service Center calls require additional provisioning that Service Center Representatives cannot complete. These types of requests are **escalated** to the next level of support.

Escalations are usually resolved within **7-10 business days**.

Two main exceptions to this are:

- Escalations requiring a Help Desk Ticket, such as CalHEERS Error Messaging.
- Carrier coordination is required for resolution. Usually needed with Non-Payment Reinstatement requests but may also be needed for other types of escalations.

Escalation: Type & Best Practice

Escalation Type	Count in 2025	Best Practice
Non-Payment Reinstatement	2,722	• Ensure consumers are keeping up with their insurance payments, including autopayments. • For Autopay Users: Whenever a change is made to an enrollment, follow up with the carrier to ensure the autopay is continuing and not cancelled.
ROP (Reasonable Opportunity Period) Reinstatement	2,645	• Accurate and complete data entry will ensure, when possible, e-verification can take place. • When requested, make sure documents have been uploaded so they can be reviewed. • Check in periodically to verify the document has been reviewed and the request has been cleared. • If not, call the Service Center

Escalation: Type & Best Practice

Escalation Type	Count in 2025	Best Practice
Termination Date Change / Effective Date Change	2,381	• Make sure to use the correct Qualified Life Event date when reporting a change for special enrollment. • If a consumer's current coverage is ending 8/31/25, enter that date for the QLE date rather than 9/1/25 • Report terminations in a timely manner to avoid getting the incorrect termination date

Eligibility / APTC Discrepancy	2,143	• For Mixed Households, make sure that the consumer has reported the correct information to their local county office.
		  • This will help avoid unexpected changes being applied by the local county office
		• When renewals start or when you have been delegated to a new case, review your consumers application for any changes
		• Make sure that Consent for Verification is updated prior to expiration
		  • This information is found in your Daily Email Summaries, shown earlier in this presentation.

Communications

Enroller Alerts and Briefings

- ✓ Enroller messages provide important information and content; they keep you informed and updated to help you best support Covered California consumers.

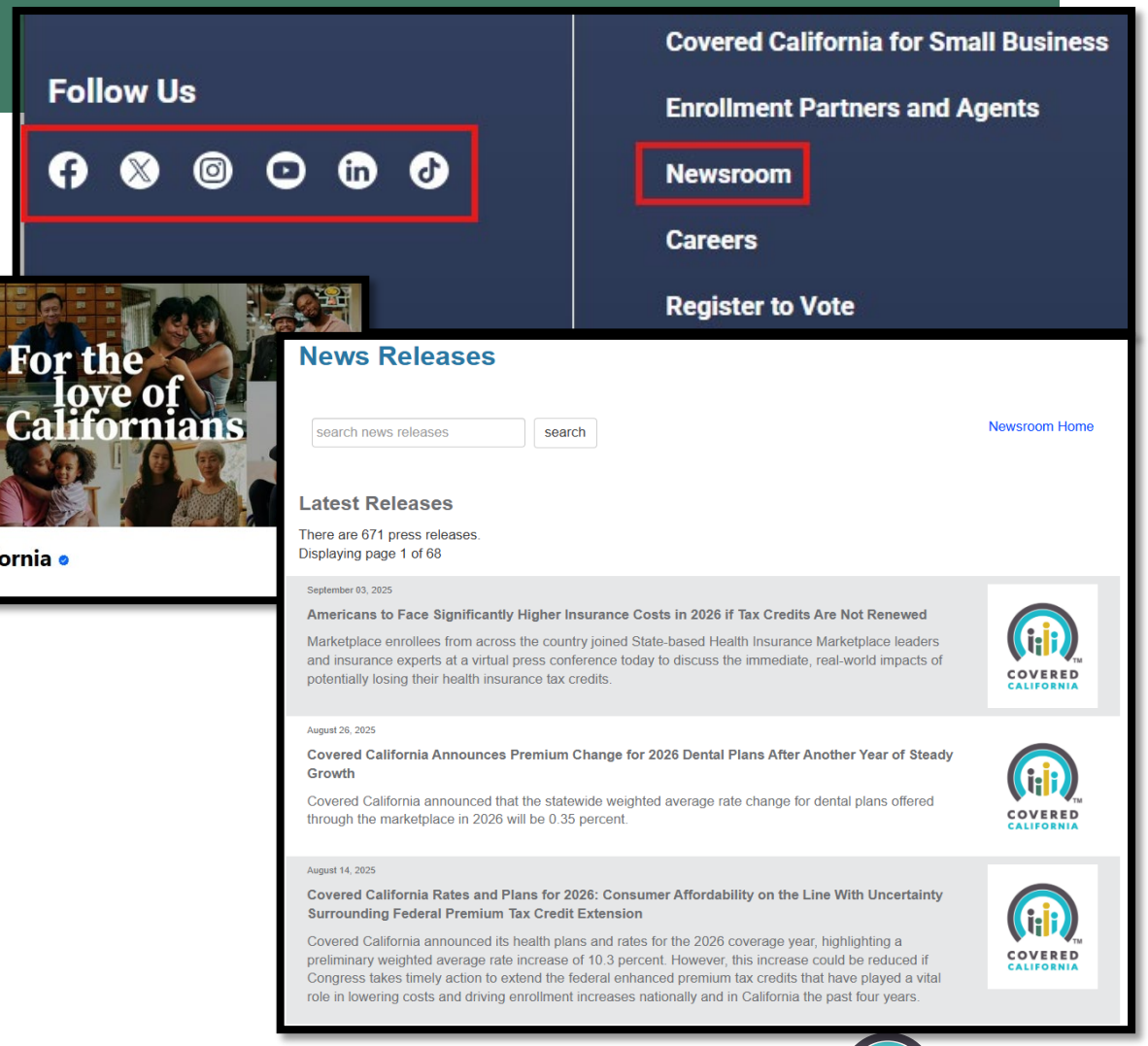
- ✓ Special announcements, policy changes, system updates, important dates, and enroller resources.

Best practices:

- ✓ **Create a new folder and save** all Enroller Alert Emails – search by key word/term for the specific topic you are seeking.
- ✓ Issues? Reach out to: OutreachandSales@covered.ca.gov

Official Covered California News and Press Releases

- Covered California™
  - Follow social media channels for quick updates.
- Health Care Marketplace - Official Site | News Releases
  - Find the latest news and important information on the Covered California Newsroom page.



Agent/CEC Service Center Hours

Voice:
Monday – Friday
8:00AM to 6:00PM

Chat:
Monday – Friday
8:00AM to 6:00PM

Holiday's Closed	
11/11/2025	Veterans Day
11/27/2025	Thanksgiving Day
11/28/2025	Day After Thanksgiving
12/25/2025	Christmas Day
01/01/2026	New Years Day
1/19/2026	Martin Luther King Day

Extended Hours for Open Enrollment

Deadline for 1/1/2026	
Date	Hours
12/30/2025	8:00AM – 8:00PM
12/31/2025	8:00AM – 8:00PM
Deadline for 2/1/2026	
1/29/2026	8:00AM – 8:00PM
1/30/2026	8:00AM – 8:00PM
1/31/2026	8:00AM – 10:00PM

Thank you!

COVERED CALIFORNIA™

For the love of Californians

Thank you for coming!