The Navigator Monthly Progress Report is used to identify successful strategies employed by Navigator Grantees. It will be used to help Covered California focus on successes and/or barriers the grantees are encountering. The Navigator Grant Program concentrates on the enrollment of consumers in a Covered California Health Plan.

Organization Full and Legal Name:	
Fictitious Doing Business As Name (if applicable):	
Grant Agreement #:	
Reporting Month:	
Report submitted by (First Name, Last Name):	
Are you the authorized or primary contact:	☐ Authorized ☐ Primary ☐ Designated Authorized
Direct phone number:	
Date (mm/dd/yyyy):	

How many *active* Certified Enrollment Counselors (CECs) does your organization have?

How many *pending* CECs does your organization have?

If pending, please check the box(es) below as to why:

- ☐ Has not begun certification process
- ☐ Pending CALHEERS login information
- ☐ No access to LMS
- ☐ Training not completed yet
- ☐ Other:

Describe your targeted audience population:

ENROLLMENT & RENEWAL ASSISTANCE

Identify the number of consumers who were assisted, *successfully enrolled*, or *successfully renewed* in the corresponding categories for a Covered California Qualified Health Plan (QHP). The chart below **DOES NOT** include Medi-Cal enrollment assistance. Refer to the following definitions when filling in the chart:

- **Follow Up Needed:** Consumers who were assisted with educational information about Covered California Qualified Health Plans, but not enrolled. These consumers should be documented and later followed up with.
- **Pending:** Applicants who have started the application process for a Covered California Qualified Health Plan but have not yet been *successfully enrolled.* These consumers should be documented and later followed up with.
- **Successful Renewal:** Consumers who already had healthcare through a Covered California Qualified Health Plan, who have now *successfully renewed* their health care coverage.
- **Successful Enrollment:** New applicants who are not renewing, and now have *successfully enrolled* into a Covered California Qualified Health Plan.
- **Post-Enrollment:** Post-enrollment consists of providing assistance to consumers who are already enrolled. Post-enrollment assistance can include, but is not limited to: sending out reminders for enrolled consumers to remember to renew their coverage; customer service satisfaction surveys; reminding enrolled consumers how and where to make payments; informing enrolled consumers where they can locate nearby healthcare facilities, etc.

INDIVIDUALS ASSISTED					
Category	Follow Up Needed	Pending	Successful Renewal	Successful Enrollment	Post Enrollment
# of Consumers					

OUTREACH & EDUCATION ACTIVITIES

Identify the total number of outreach and education activities for your organization for the reporting month. Use the definition below when filling in the chart.

Outreach & Education: The act of reaching out to your targeted audience through one-time, on-going, occasional, or annual activities to provide educational and/or enrollment assistance.

Activity Type	# of Activities	# of Touches
Workshops		
Community Event		
Businesses		
Direct Mailing		
Door-to-Door Canvassing		
Faith-Based		
One on One		
Phone Calls		
Schools		
Conferences		
Social Media		
Webinars		
Other:		
Other:		
Other:		

Total Activities _____ Total Touches _____

COVERED CA HEALTH PLAN ENROLLMENTS & RENEWALS BY COUNTY

Identify the number of consumers who were *successfully enrolled* **AND** those who were *successfully renewed* into a Covered California Qualified Health Plan by county.

COUNTY	#
Alameda	
Alpine	
Amador	
Butte	
Calaveras	
Colusa	
Contra Costa	
Del Norte	
El Dorado	
Fresno	
Glenn	
Humboldt	
Imperial	
Inyo	
Kern	
Kings	
Lake	
Lassen	
Los Angeles	
Madera	
Marin	

COUNTY	#
Mariposa	
Mendocino	
Merced	
Modoc	
Mono	
Monterey	
Napa	
Nevada	
Orange	
Placer	
Plumas	
Riverside	
Sacramento	
San Benito	
San Bernardino	
San Diego	
San Francisco	
San Joaquin	
San Luis Obispo	
San Mateo	
Santa Barbara	

COUNTY	#
Santa Clara	
Santa Cruz	
Shasta	
Sierra	
Siskiyou	
Solano	
Sonoma	
Stanislaus	
Sutter	
Tehama	
Trinity	
Tulare	
Tuolumne	
Ventura	
Yolo	
Yuba	

DEMOGRAPHICS

Identify the number of consumers who were assisted, successfully enrolled, or successfully renewed in the corresponding ethnic categories for a Covered California Qualified Health Plan (QHP). The chart below **DOES NOT** include Medi-Cal enrollment assistance.

ETHNICITY	#
African	
African-American	
American Indian/ Native American	
Asian/Pacific Islander	
Armenian	
Cambodian	
Caucasian	
Chinese	
Farsi	
Filipino	
Hmong	
Japanese	

ETHNICITY	#
Korean	
Laotian	
Latino	
Middle Eastern	
Russian	
Thai	
Ukrainian	
Vietnamese	
Other:	
Other:	
Other:	
Other:	

Identify the number of consumers who were assisted, successfully enrolled, or successfully renewed in the corresponding gender categories for a Covered California Qualified Health Plan (QHP). The chart below **DOES NOT** include Medi-Cal enrollment assistance.

GENDER	#
Male	
Female	

FEEDBACK

Describe new found strategies if any, and highlight successes since the previous monthly tracking report.

Describe upcoming planned activities and events if any.

Has there been any major improvements that your organization has experienced since the previous monthly tracking report?

Have you experienced any technical difficulties trying to enroll consumers with specific healthcare plans and/or providers?

How can Covered California help you? Are there any barriers preventing you from meeting your goals?

CEC HELPLINE RATINGS

Use the rating scales below to evaluate the Certified Enrollment Counselor (CEC) Helpline. Provide any additional feedback in the space below the ratings.

CEC Helpline overall satisfaction	Extremely Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied	Extremely Satisfied
	○	○	○	○	○
Customer Service representatives are well trained	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
	○	○	○	○	○

How often do your Certified Enrollment Counselors utilize the CEC helpline?

On average, about _____ times per _____.

What is the average wait time before you speak with a live person?

On average, about _____ minutes.

Please provide any additional feedback regarding the CEC Helpline.

CALHEERS SYSTEM RATINGS

Use the rating scales below to evaluate the CalHEERS system. Provide any additional feedback in the space below the ratings.

CalHEERS system overall satisfaction	**Extremely Dissatisfied**	**Somewhat Dissatisfied**	**Neutral**	**Somewhat Satisfied**	**Extremely Satisfied**
	○	○	○	○	○
The system is easy to navigate	**Strongly Disagree**	**Somewhat Disagree**	**Neutral**	**Somewhat Agree**	**Strongly Agree**
	○	○	○	○	○

Please provide any additional feedback regarding the CEC Helpline.

LMS TRAINING RATINGS

Use the rating scales below to evaluate the Learning Management System (LMS) Training. Provide any additional feedback in the space below the ratings.

LMS Training overall satisfaction	Extremely Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied	Extremely Satisfied
The objectives of the training were clearly defined	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
The content was organized and easy to follow	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
The time allotted for the training was sufficient	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
The training objectives were met	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree

What did you like most about the training?

What aspects of the training could use improvement?

Please provide any additional feedback regarding the LMS Training.

FIND LOCAL HELP WEBPAGE RATINGS

Use the rating scales below to evaluate the *Find Local Help* webpage. Provide any additional feedback in the space below the ratings.

Find Local Help webpage overall satisfaction	Extremely Dissatisfied	Somewhat Dissatisfied	Neutral	Somewhat Satisfied	Extremely Satisfied
The webpage is easy to navigate	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
Advertising our storefront(s) on the webpage is beneficial	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
Advertising our event(s) on the webpage is beneficial	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree
The webpage to Find Local Help drives a lot of traffic for our entity	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree

What do you like most about the Find Local Help webpage?

What aspects of the webpage could use improvement?

Please provide any additional feedback regarding the Find Local Help webpage.

RESOURCES

http://www.coveredca.com/
Covered California homepage.

http://www.hbex.ca.gov/
The State of California, Health Benefit Exchange (HBEX) homepage.

http://hbex.coveredca.com/navigator-program/
The Navigator Grant Program homepage.

http://www.coveredca.com/get-help/local/
The Find Local Help webpage that directs consumers to storefronts and events.

http://www.coveredca.com/get-help/local/storefronts/
The webpage where consumers can search all storefront listings.

https://coveredca.custhelp.com/app/events/admin/propose
The portal where you can propose an event with all pertaining information.

http://hbex.coveredca.com/navigator-program/PDFs/2015-16-Navigator-Payment-Request-Form.pdf
The Navigator Grant Payment Request Form.

http://events.coveredca.com/community/
The Community Partner Storefront Application.

CommunityStorefront@covered.ca.gov
E-mail address used for all Community Partner Storefront inquiries.

Events@covered.ca.gov
E-mail address used for all Event inquiries.

1-855-324-3147
The Certified Enrollment Counselor (CEC) Helpline.