JOB AID: CURRENT ENROLLMENT AND ENROLLMENT HISTORY

COVERED CALIFORNIA

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October 7, 2015

This Job Aid illustrates how to view enrollment information for all benefit years. All user roles have access to the *Current Enrollment* and the *Enrollment History* pages, where detailed enrollment records associated with a case may be viewed. Two pages are available to view: the *Current Enrollment* page which replaces the *Plan Enrollment Summary by Program* page and the *Enrollment History* page which replaces the *Plan Enrollment Summary by Person* page.

Note: Only Administrative users—Service Center Representatives (SCRs) and County Eligibility Workers (CEWs)—can view the *Enrollment Transaction Details* page.

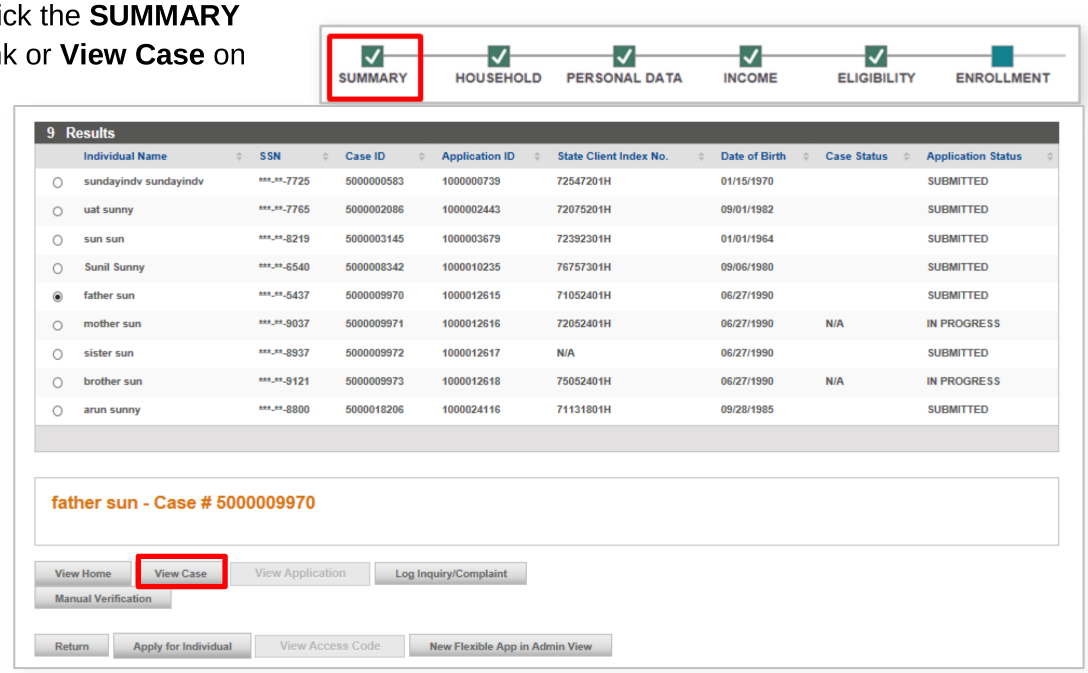
Enrollment pages allow users to view enrollment records for Covered California programs with the following statuses:

- Pending
- Cancel
- Enrolled
- Terminated

Navigate to Current Enrollment or Enrollment History

The *Current Enrollment* and *Enrollment History* pages are accessed from the *Application History* page in two ways depending on whether an application or case is active or no longer active (terminated).

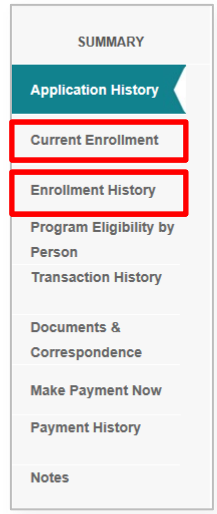
- Active case - click the **SUMMARY** process step link or **View Case** on the *Search Individual* page.
- Terminated case – click the **View Case** button on the *Search Individual* page.



Once the *Application History* page displays, click either link:

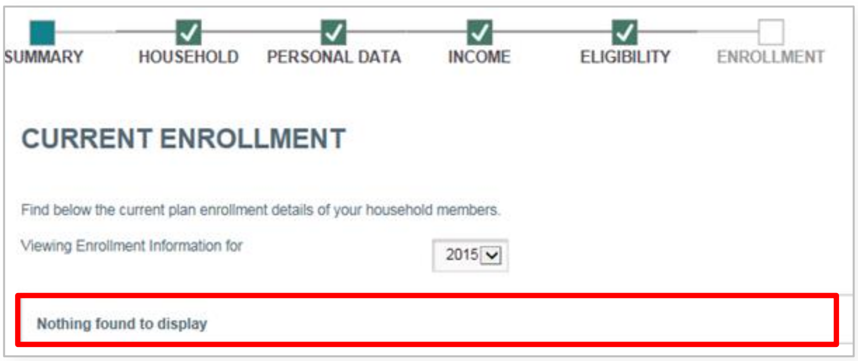
- **Current Enrollment** navigates the user to the *Current Enrollment* page
- **Enrollment History** navigates the user to the *Enrollment History* page

Click the **Information Icon** located at the top right-side of either page for contextual page help. An *Online Help* popup displays.



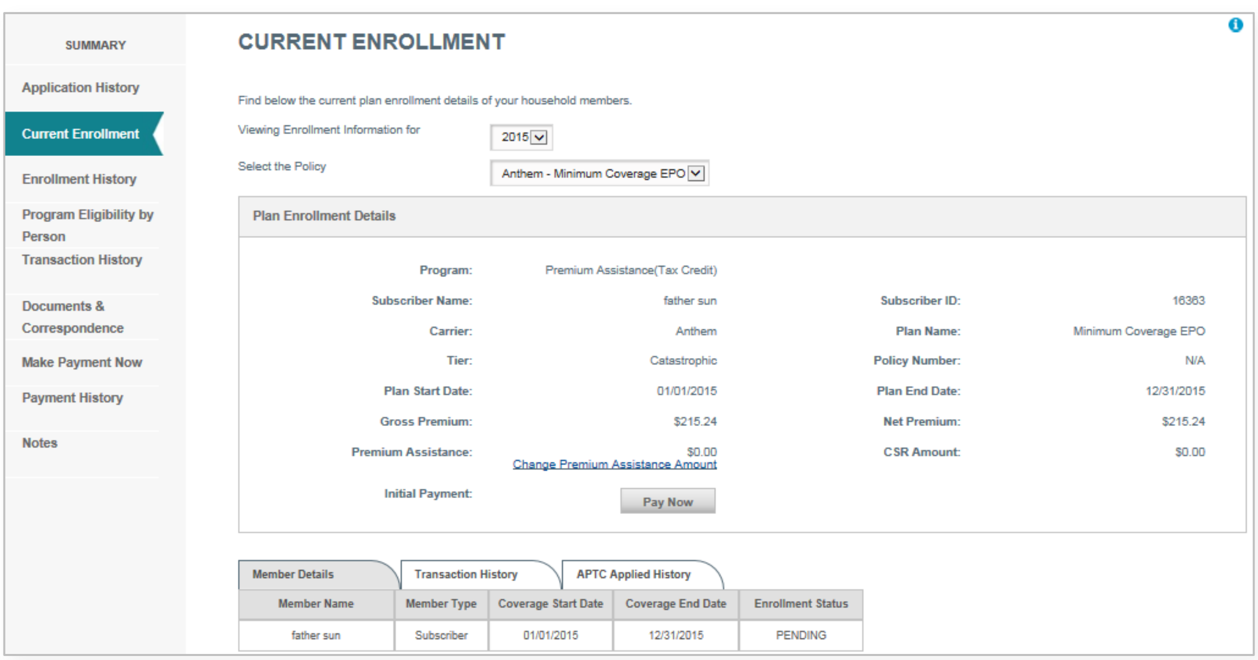
Current Enrollment Page

The *Current Enrollment* page displays all current enrollment details associated with the case for a given benefit year. When there is no active plan enrollment associated to a case, this section displays the text: *Nothing found to display.*



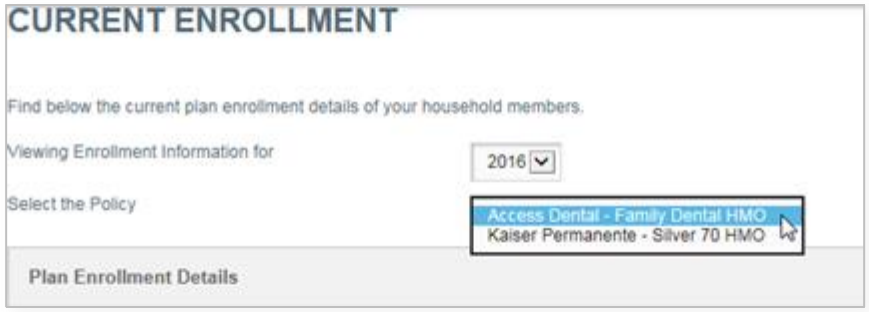
The *Current Enrollment* page is divided into three sections:

- Selection functionality for **Viewing Enrollment** and **Policy** information
- **Plan Enrollment Details**
- Tabs for: **Member Details**, **Transaction History**, and **APTC Applied History**



Viewing Enrollment information for – If multiple years are available for viewing, the dropdown lists current and previous years in ascending order. The display year defaults to the latest benefit year, except during the Renewal or Open Enrollment Period (OEP) which defaults to the benefit year corresponding to the renewal/OEP coverage.

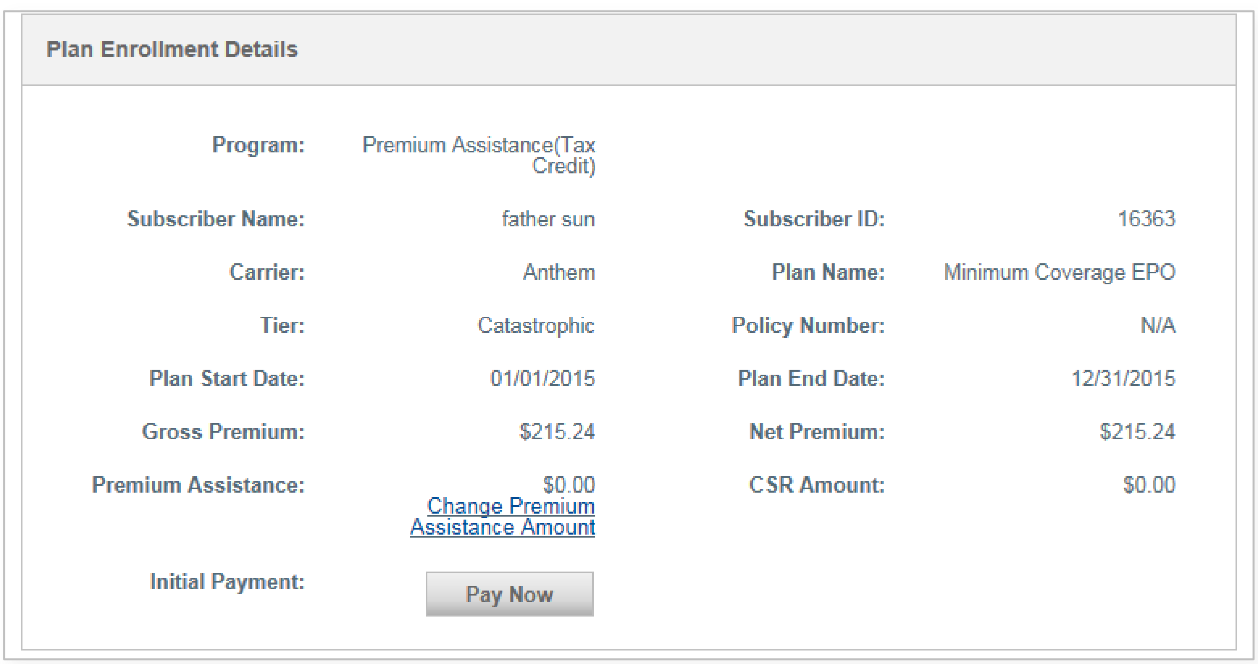
Select the Policy – If multiple policies are available for viewing, the dropdown lists all policies associated with the case for the benefit year selected.



Plan Enrollment Details – This section displays Covered California Plan enrollment details. One of the following enrollment statuses, based on the latest start date: *Enrolled, Pending,* or *Terminated* (Coverage end date >= System date).
Medi-Cal and Denti-Cal based plan enrollments are grouped under Medi-Cal. Medi-Cal enrollments shall have one of the following enrollment statuses: *Enrolled* or *Pending*.

Plan Enrollment Details

The **Plan Enrollment Details** section displays the following information for Covered California Plan enrollments only:



Program – Displays the program name associated with the plan enrollment, with possible values:

- Covered California Plan
- Premium Assistance (Tax Credit)

Subscriber Name – Full name of the Subscriber associated with the plan enrollment

Subscriber ID – Subscriber identification number associated with the plan enrollment

Carrier – Name of the carrier associated with the plan enrollment

Plan Name - The name of the associated plan

Tier – The plan tier displays one of the following values:

- Bronze
- Silver
- Gold
- Platinum
- Low
- High
- Catastrophic

Policy Number – The policy number assigned by the Carrier (*N/A* displays if the number is not available)

Plan Start Date – The coverage start date of the Subscriber associated with the plan enrollment

Plan End Date – The coverage end date of the Subscriber associated with the plan enrollment

Gross Premium – The latest total premium amount applicable to the plan enrollment

Net Premium – The latest net premium amount derived by subtracting any applicable premium assistance amount

Premium Assistance – The latest premium assistance amount as applicable to the plan enrollment

CSR Amount - The latest cost sharing amount as applicable to the plan enrollment

Change Premium Assistance Payment Amount – This hyperlink displays when the plan is in a Pending or Enrolled status and the household is eligible for APTC. Clicking the hyperlink allows the consumer to change their APTC amount.

Initial Payment – One of the following elements displays to assist initial premium payment:

- **Pay Now** button **–** When the enrollment status is Pending, this button is enabled to support the consumer's initial payment directly to the Carrier (health insurance plan provider) via NIC.
- **Paid** status **–** When the enrollment status is Enrolled and the Carrier supports either the NIC payment functionality or online payment through a redirect to their website.
- **This insurance company does not receive online payments from Covered California. Please call your plan or wait for a bill from them –** This message displays when the NIC payment functionality or online payment through a redirect to the health plan provider's website is not available for direct payment.

Member Details Tab

The **Member Details** tab displays available information on the following:

Member Details | Transaction History | APTC Applied History

Member Name	Member Type	Coverage Start Date	Coverage End Date	Enrollment Status
father sun	Subscriber	01/01/2015	12/31/2015	PENDING

- Member Name
- Member Type
- Coverage Start Date
- Coverage End Date
- Enrollment Status

Transaction History Tab

The **Transaction History** tab displays available information on the following details:

- Transaction ID (Unique identification number associated to the plan enrollment transaction)
- Transaction Name
- User ID
- Date/Time

The **Transaction ID** displays as a hyperlink for SCR/CEW users only. Clicking the **Transaction ID** hyperlink navigates the user to the *Enrollment Transaction Details* page.

Member Details | Transaction History

Transaction ID	Transaction Name	User ID	Date/Time
12564	Plan Selection	tm04@scr_supervisor_23	2016-01-31 09:52:57
12566	Carrier Effectuation	tm04@scr_supervisor_23	2016-01-31 10:21:27

APTC Applied History Tab

The **APTC Applied History** tab displays only when an APTC-eligible plan enrollment exists. When the consumer applies an APTC amount to a premium payment, the following details are available:

Member Details | Transaction History | APTC Applied History

Month	APTC Applied Amount

- Month
- APTC Applied Amount

The APTC amount applied to a premium payment corresponds to a specific month. If APTC is not applied to a given month (consumed), then *N/A* displays.

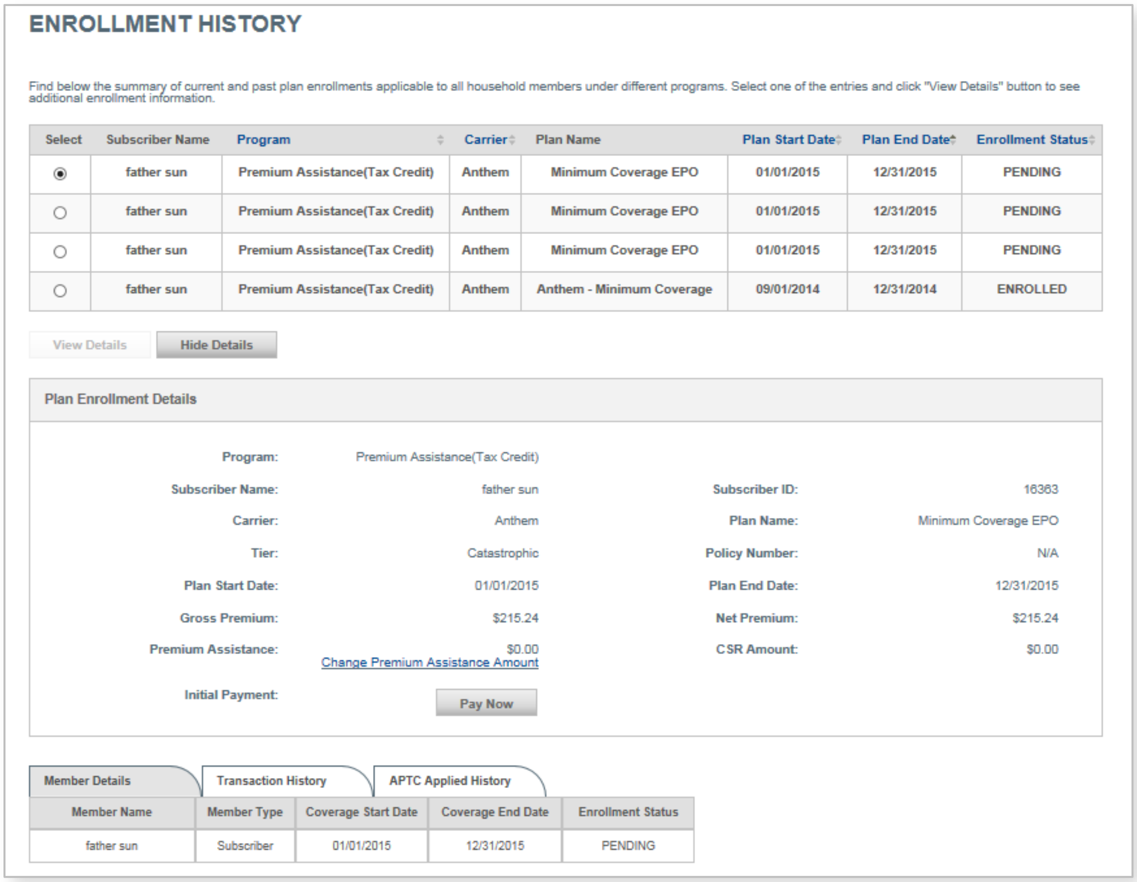
Enrollment History Page

The *Enrollment History* page provides a summary of current and past enrollments listed by household member.

The *Enrollment History* page is divided into two sections:

- **Enrollment History Table**
- **Plan Enrollment Details**

The plan enrollment history displays plan information for the last 60 month period in descending date order. When enrollments are not associated to the case, the *Nothing found to display* message appears.



ENROLLMENT HISTORY

Find below the summary of current and past plan enrollments applicable to all household members under different programs. Select one of the entries and click "View Details" button to see additional enrollment information.

Select	Subscriber Name	Program	Carrier	Plan Name	Plan Start Date	Plan End Date	Enrollment Status
◉	father sun	Premium Assistance(Tax Credit)	Anthem	Minimum Coverage EPO	01/01/2015	12/31/2015	PENDING
○	father sun	Premium Assistance(Tax Credit)	Anthem	Minimum Coverage EPO	01/01/2015	12/31/2015	PENDING
○	father sun	Premium Assistance(Tax Credit)	Anthem	Minimum Coverage EPO	01/01/2015	12/31/2015	PENDING
○	father sun	Premium Assistance(Tax Credit)	Anthem	Anthem - Minimum Coverage	09/01/2014	12/31/2014	ENROLLED

View Details | Hide Details

Plan Enrollment Details

Program: Premium Assistance(Tax Credit)

Subscriber Name:	father sun	Subscriber ID:	16363
Carrier:	Anthem	Plan Name:	Minimum Coverage EPO
Tier:	Catastrophic	Policy Number:	N/A
Plan Start Date:	01/01/2015	Plan End Date:	12/31/2015
Gross Premium:	$215.24	Net Premium:	$215.24
Premium Assistance:	$0.00 Change Premium Assistance Amount	CSR Amount:	$0.00
Initial Payment:	Pay Now		

Member Details | Transaction History | APTC Applied History

Member Name	Member Type	Coverage Start Date	Coverage End Date	Enrollment Status
father sun	Subscriber	01/01/2015	12/31/2015	PENDING

The following elements are displayed in the **Enrollment History** table:

Subscriber Name – The Household member's full name (first, middle, last name and suffix)

Select – Radio button associated with each enrollment entry

Program – Type of program or plan enrollment in which the household member is enrolled:

- Covered California
- Premium Assistance

Carrier – Name of the carrier associated with the plan enrollment

Plan Name – Name of the plan associated with the enrollment

Plan Start Date – Subscriber's coverage start date associated with plan enrollment

Plan End Date – Subscriber's coverage end date of plan enrollment

Enrollment Status – Subscriber's enrollment status:

- Pending
- Terminated
- Enrolled
- Cancel

To view more information about an enrollment, select the corresponding radio button next to the Subscriber entry, and then click the **View Details** button. The *Plan Enrollment Details* section and the *Member* Details multi-tab panel displays.

View Details button – Clicking this button displays the **Plan Enrollment Details** for the associated member and multi-tab panel for the selected radio button.

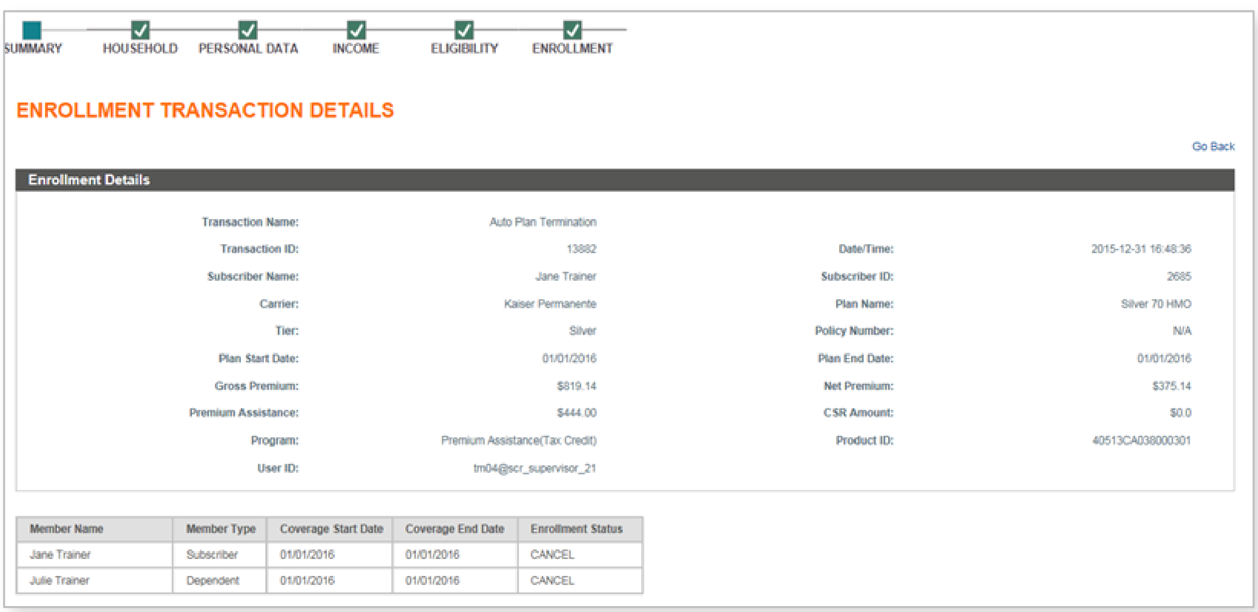
Hide Details button – When **Plan Enrollment Details** display, this button is enabled. Click the button to remove the member details and multi-tab panel from view.

Enrollment Transaction Details

The purpose of the *Enrollment Transaction Details* page is to view detailed enrollment information about a selected transaction either from the **Transaction History**, **Current Enrollment**, or **Enrollment History** page.

The *Enrollment Transaction Details* page is viewable only by SCRs and CEWs. It is divided into three sections:

- **Enrollment Details**
- **Member Details**
- **Change Log Table – Note:** This table displays only for the following enrollment events:
    - Update Current Plan
    - Change APTC Applied Amount
    - Change Plan Selection
    - Change Plan Effective Date



The **Transaction Names** displays one of the following enrollment transaction elements:

- Plan Selection
- Update Current Plan

- Change Plan Effective Date (if the process does not involve cancellation/termination of the current plan)
- Change APTC Applied Amount
- Auto Plan Termination
- Reinstate Participation
- Terminate Participation

Click the **Go Back** link to return to *Transaction History* page.

This table lists definitions for the elements found in the **Enrollment Details**, **Member Section**, and **Change Log Table**, and the possible associated values.

Enrollment Details Section	
Element	**Definition**
Transaction Name	Name of the enrollment transaction type
Transaction ID	Unique system generated number to identify the transaction
Date/Time	Date and time of the enrollment event - CCYY-MM-DD:HH:MM:SS format
Subscriber Name	First, middle, last name, and suffix associated with the plan enrollment
Subscriber ID	Individual/member ID of the subscriber
Carrier	Name of the associated enrollment Carrier
Plan Name	Name of the specific plan
Tier	Plan tier of the enrollment: Bronze, Silver, Gold, Platinum, Low, or High
Policy Number	Policy number assigned by the Carrier or N/A if policy number not available
Plan Start Date	Subscriber's coverage start date associated with the plan enrollment
Plan End Date	Subscriber's coverage end date associated with the plan enrollment
Gross Premium	Total/gross premium associated with the plan enrollment
Net Premium	Net premium associated with the plan enrollment
Premium Assistance	Amount of Premium Assistance associated with the plan enrollment; displays N/A if plan enrollment is associated with CCP eligibility
CSR Amount	Amount of CSR associated with the plan enrollment; displays $0.00 if the CSR amount is zero
Program	Type of program displays: *Covered California Plan* if enrollment is CCP or CCP/CSR; *Premium Assistance* (Tax Credit) if enrollment is CCP/APTC or CCP/APTC/CSR program eligibility
Product ID	Displays 16 digit HIOS plan ID associated with the plan enrollment
User ID	Displays the user responsible for the enrollment update
Reason for Reinstatement	Displays the reason selected by the SCR/CEW on *Change Plan Effective Dates/Reinstate Coverage* page; Reason may be: *Erroneous Cancelation, Erroneous Termination, Payment Error, Appeal, System Error,* or *Other*
Comments	Comments entered by SCR/CEW on *Change Plan Effective Dates/Reinstate Coverage* page; only displays if the transaction is *Reinstate Participation*; required if reason for Reinstatement is *Other*
Termination Reason	The reason selected on the *Terminate Participation* page; only displayed if the transaction is *Terminate Participation*

Effective Date	Displays the effective date keyed on the *Terminate Participation* page
Comments	Comments by SCR/CEW on *Terminate Participation* page; only displayed if the transaction is *Terminate Participation*
Reason for Change	The reason selected by the SCR/CEW on *Change Plan Effective Dates/Reinstate Coverage* page; displays only if the transaction type is *Change Plan Effective Date*; reason may be: *System Error, Input Error, or Other*
Comments	Displays the comments keyed by the SCR/CEW on the *Change Plan Effective Dates/Reinstate Coverage* page; displays only if the transaction type is *Change Plan Effective Date;* required if reason for Change is *Other*
Old Start Date	Displays the old coverage start date as applicable for the plan enrollment on *Change Plan Effective Dates/Reinstate Coverage* page; displays only if the transaction type is *Change Plan Effective Date*
New Start Date	Displays the new coverage start date as keyed by the SCR/CEW for the plan enrollment on *Change Plan Effective Dates/Reinstate Coverage* page; displays only if the transaction type is *Change Plan Effective Date*
Member Section	
Member Name	Displays member's full name
Member Type	Displays member applicable to plan enrollment: *Subscriber* or *Dependent*
Coverage Start Date	Date the member's coverage starts for the applicable plan enrollment
Coverage End Date	Displays the member's coverage end date
Enrollment Status	Displays the enrollment status as applicable to the member associated with the plan enrollment: *Terminated, Cancel, Enrolled,* or *Pending*
Change Log Table	
The following Report a Change (RAC) types are listed if the enrollment event is *Update Current Plan, Change APTC Applied Amount, Change Plan Selection,* or *Change Plan Effective Date*	
Add Household Member	New or returning Household member reported
Remove Household Member	Removal of Household member
Name Change	Changes in first, last, or middle name
Change Household Primary Contact	Change in the Primary Contact's Name
Household Contact Information Change	Preferred method of contact, household physical address, mailing address, or phone number changes
Miscellaneous Information Change	Miscellaneous changes such as child's parent living outside the house, full time school attendance, foster care information, etc.
The following change types/elements are listed if the enrollment event is *Change APTC Applied Amount*	
Change APTC	APTC amount has changed
APTC Applied Amount	Amount of APTC applied (consumed)
APTC Effective Date	Date APTC change is effective
The following display if the change types listed are due to *Change Plan Effective Date*	
Change Plan Effective Date	Date the member's plan change is effective
Coverage Start Date	Date the member's coverage starts for the applicable plan enrollment change