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JOB AID: CHANGE PLAN

November 7, 2014

This Job Aid illustrates the **Change Plan** link, displaying on the *Individual Landing* page, and is intended for Certified Enrollment Counselors, County Eligibility Workers, Certified Insurance Agents and Service Center Representatives.

Change Plan Link

Consumers have the choice to change their health insurance plan selected during Renewal or Open Enrollment. For example, if a household was auto-enrolled into a similar plan from the previous year, the household may want to select a different plan.

The screenshot displays the 'Individual Landing' page for a user named Pete Peters. At the top, there are four navigation tabs: 'EXPLORE What's Right For You', 'PREVIEW Health Plans', 'APPLY To Get Covered', and 'GET HELP Find Answers'. Below the tabs, a welcome message reads 'WELCOME, PETE PETERS' with a sub-message 'Are you moving? Changing jobs? Expecting a child? We'll keep you covered.' and two buttons: 'Report a Change' and 'Report a Change_2014'. A progress bar indicates the user is 'COVERED AS OF 01/01/2015' and lists steps: SUMMARY, HOUSEHOLD, PERSONAL DATA, INCOME, ELIGIBILITY, and ENROLLMENT, all marked as complete. On the right, an 'ACTIONS' column lists several options, with 'Change Plan' highlighted in a red box. Other actions include 'Withdraw Application', 'Report a Change', 'Continue Change Report', 'Withdraw Change Report', 'Select Health Plan', and 'Terminate Association'. Below the actions, there are sections for 'RESOURCES' (Manage Delegates, Download PDF Application, Get Adobe PDF Reader) and 'MORE OPTIONS' (Authorized Representative).

Renewal Period (ends 12/15/2014)

If a household is eligible for renewal, the **Change Plan** link displays in the **Actions** column on the *Individual Landing* page through the end of the renewal period. The consumer may use this link to change a health insurance plan they selected during renewal, or if the consumer was auto-enrolled in last year's plan, then they have the opportunity to change their selection.

Click the **Change Plan** link to navigate the user to the *Change Plan Selection* page to begin the plan selection process.

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Click the **Change Plan Selection** button to navigate the user to get started on plan selection. The Consumer can review and **Keep** their existing plan or **Shop** for a new plan.

The screenshot shows the 'CHANGE PLAN SELECTION' page. At the top, there are four tabs: 'EXPLORE What's Right For You', 'PREVIEW Health Plans', 'APPLY To Get Covered', and 'GET HELP Find Answers'. Below these are progress indicators for 'SUMMARY', 'HOUSEHOLD', 'PERSONAL DATA', 'INCOME', 'ELIGIBILITY', and 'ENROLLMENT', all marked with green checkmarks. The main content area is titled 'CHANGE PLAN SELECTION' and includes a brief explanation of the process. Below this is a table with columns: 'Persons', 'Program', 'Plan', and 'Carrier Website Address'. The first row shows 'Pete Peters' under 'Persons', 'Covered California Plan' under 'Program', and a yellow 'Change Plan Selection' button under 'Plan'. The 'Carrier Website Address' column contains a disclaimer and a URL. A 'Cancel' button is located at the bottom left of the table area.

The screenshot shows the 'Keep your current plan or shop for a new one' page. It has a sidebar with '1. Getting Started' and '2. Checkout'. The main content area has two buttons: 'Keep Current plan' and 'Shop All plans'. Below these is a section titled 'Would you like to keep this plan?' for 'Pete Peters' with an effective date of 01/01/2015. It displays a Kaiser Permanente Bronze 60 HSA plan with a monthly premium of \$256.90 (change of \$0.00) and premium assistance of -\$0.00 (change of \$0.00). The total 'Your payment' is \$256.90/mo. A yellow 'Keep' button is at the bottom right.

When the renewal period ends, the **Change Plan** link is inactive (greyed out), as the consumer's opportunity to change plan selection has ended for 2015. If the household has a qualifying life event which enables them to change plans, they can complete a Report a Change to initiate plan selection.

Open Enrollment Period (11/15/2014 – 02/15/2015)

The **Change Plan** link displays in the **Actions** column on the *Individual Landing* page after an applicant has completed an application and plan selection during Open Enrollment. The consumer may use this link to change the health insurance plan they selected during the Open Enrollment period.

Click the **Change Plan** link to navigate the user to the *Change Plan Selection* page, where they begin the plan selection process.

Click the **Change Plan Selection** button to navigate the user to get started on plan selection. The Consumer can review and **Keep** their existing plan or **Shop** for a new plan.

When the Open Enrollment period ends, the **Change Plan** link is inactive (greyed out), as the consumer's opportunity to change plan selection has ended for 2015. If the household has a qualifying life event which enables them to change plans, they can complete a Report a Change to initiate plan selection.