Covered California

Task Guide
Navigator Strategic Workplan

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NAVIGATOR STRATEGIC WORKPLAN OVERVIEW

Navigator Entities and their Locations are required to develop a Strategic Workplan for their target market. The Strategic Workplan will leverage existing community relationships to reach eligible consumers to enroll them in Covered California Health Plans.

This Strategic Workplan should consider the effectuated enrollment goals and identified areas of enrollment opportunity to establish outreach, education, and retention campaign strategies.

The Strategic Workplan should include a strategy and plan to conduct outreach and education activities throughout the term of the contract with enrollment activities concentrated during Open Enrollment. Instructions for creating Campaign Strategies and Workplan Activities are included below.

LOCATE THE STRATEGIC WORKPLAN

1. Navigate to the Strategic Workplan from the Entity Account page, or from the link provided in the email sent from Covered California. The status of the workplan should be listed as **Draft**.

CREATE A CAMPAIGN STRATEGY

1. Click **New** next to the Campaign Strategies section on the Strategic Workplan page.

2. Enter the campaign strategy information and click **Save** when finished.

   Note: More than one campaign strategy can be created. To create more than one campaign strategy, click **Save & New** instead of Save, which will open a new Campaign Strategy form.

3. A message will appear once the Campaign Strategy has been created. Click this link to view the newly created Campaign Strategy or click the **View All** button in the Campaign Strategies section on the Strategic Workplan page.
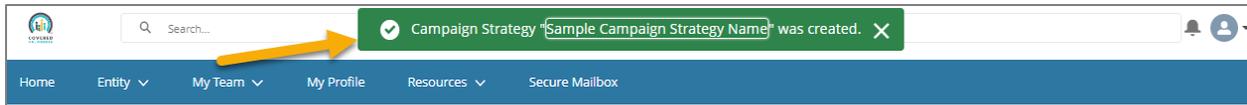
WORKPLAN ACTIVITIES

Workplan activities are the specific activities that a Navigator Entity participates in to conduct outreach. Workplan activities are separated into two activity types: Events and All Other Activity Types. Events include activities that occur at a specific location and/or time, and where there may be direct interaction with consumers. All Other Activity Types includes social media, paid media, phone campaigns, etc.

CREATE A WORKPLAN ACTIVITY – ALL OTHER ACTIVITY TYPES

1. Click **New** next to the Workplan Activities section on the Strategic Workplan page.

2. Select the **All Other Activity Types** record type and click **Next**.

3. Enter the activity information and click **Save** when finished.

   Note: More than one workplan activity can be created. To create more than one activity, click **Save & New** instead of Save.

New Workplan Activity: All Other Activity Types

* Workplan Activity Name	* Timeframe Date Start
* Strategic Workplan	* Timeframe Date End
SW-1638	
Status	* Frequency/Quantity
Draft	
* Activity Category	* Hours per Occurrence
--None--	
* Activity Type	* Location Name

Available
- Outreach
- Education
- Enrollment
- Post-Enrollment

Chosen

* Description of Activity

* City

* Participating Organization

* Zip Code

Cancel   Save & New   Save

4. A message will appear once the Workplan Activity has been created. Click this link to view the newly created Workplan Activity or click the **View All** button in the Workplan Activities section on the Strategic Workplan page.
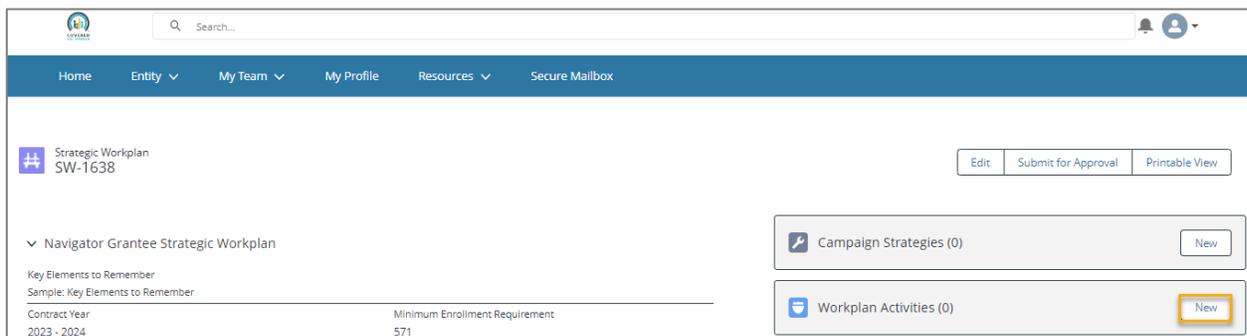

CLONE A WORKPLAN ACTIVITY

1. To clone a Workplan Activity, navigate to the Workplan Activities section from the Strategic Workplan page. Select the **Workplan Activity Name** that will be cloned. If the activity you want to clone is not visible, click the **View All** button to view the full list of activities.

2. In the top, right corner of the Workplan Activity, click the **Clone** button.

Then click **Next**.

Clone

Workplan Activity Name

Job Fair Event Booth

* Strategic Workplan

SW-1638

Activity Type

Available

Retention

Chosen

Outreach

Education

Enrollment

Post-Enrollment

Timeframe Date Start

4/3/2023

Timeframe Date End

4/7/2023

Frequency/Quantity

Weekly

Hours per Occurrence

1.0

Location Name

CA Zoo

Activity Category

Unpaid/Other

Description of Activity

Sample Description of Activity

Participating Organization

Next

3. A New Workplan Activity form will appear with pre-populated fields. Make the necessary changes to the form and when finished, click **Save**.

Note: More than one workplan activity can be created. To create more than one activity, click **Save & New** instead of Save.

CREATE A WORKPLAN ACTIVITY - EVENT

1. Click **New** next to the Workplan Activities section on the Strategic Workplan page.
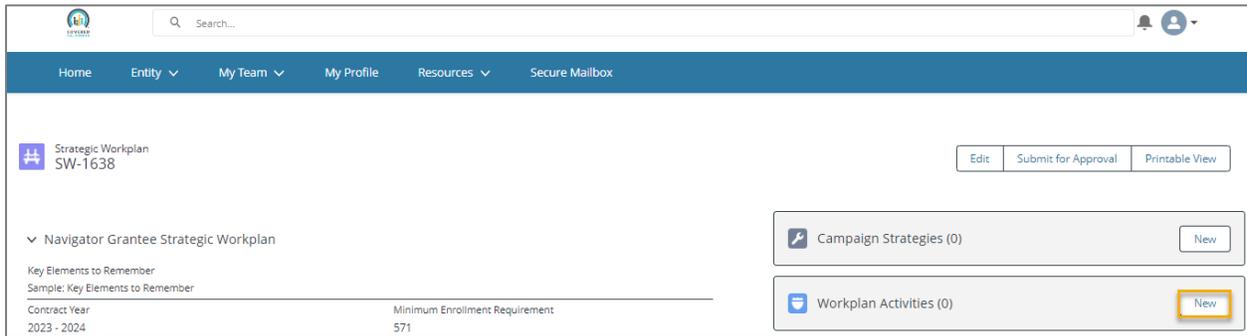
2. Select the **Event** record type and click **Next**.

3. Enter the event information and click **Save** when finished.

   Note: More than one event can be created. To create more than one event, click **Save & New** instead of Save.

New Workplan Activity: Event

Proposed Event Details

* Workplan Activity Name

* Participating Organization ⓘ

* Strategic Workplan

🔢 SW-1638 ✕

* Description of Activity

* **Activity Type**

Available

Education

Enrollment

Chosen

▶

◀

Audience Capacity

Your Role at the Event

--None-- ▼

Publish to Events Portal?

☐

Host Contact Information

* Host Contact Name

* Host Contact Phone Number

* Host Contact Email

Event Time

* Event Date

📅

* Start Time

🕐

Cancel   Save & New   Save

4. A message will appear once the Workplan Activity Event has been created. Click this link to view the newly created Workplan Activity Event or click the **View All** button in the Workplan Activities section on the Strategic Workplan page.
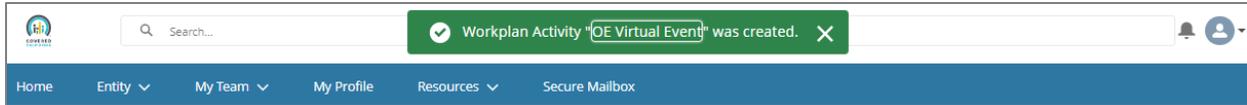
CLONE AN WORKPLAN ACTIVITY EVENT

1. To clone a Workplan Activity Event, navigate to the Workplan Activities section from the Strategic Workplan page. Select the **Workplan Activity Event Name** that will be cloned. If the activity you want to clone is not visible, click the **View All** button to view the full list of activities.

2. In the top, right corner of the Event, click the **Clone** button.

Then click **Next**.

Clone

Workplan Activity Name

OE Virtual Event

Participating Organization ⓘ

Sample Participating OrganizationLead

Activity Type

Available

Chosen

Education

Enrollment

Description of Activity

Sample Description of Activity

Host Contact Name

Kevin Smith

Host Contact Phone Number

9280011000

Host Contact Email

kevinsmith@fake.email.invalid

Event Date

4/8/2023

Supported Languages

Available

Chosen

Arabic

English

Cambodian

Mandarin

Save

3. A new Workplan Activity Event form will appear with pre-populated fields. Make the necessary changes to the form and click **Save** when finished.

Note: More than one Workplan Activity Event can be created. To create more than one Workplan Activity Event, click **Save & New** instead of Save.

POST A WORKPLAN ACTIVITY EVENT TO THE EVENTS PORTAL

Workplan Activity Events seamlessly integrate with the [Covered California Events Portal](#). To list a Workplan Activity Event on the Covered California Events Portal website, ensure that the **Publish to Events Portal?** checkbox is checked before saving the Event.

If you forget to check the box prior to saving, open the event, check the **Publish to Events Portal?** checkbox and click **Save**. The Account Manager will review the Event prior to it being posted on the Covered California Events Portal.

SUBMIT A STRATEGIC WORKPLAN FOR APPROVAL

1. Once all Campaign Strategies and Workplan Activities have been added, the Strategic Workplan is ready to be submitted for approval. Click on the **Submit for Approval** button in the top right of the Strategic Workplan page.
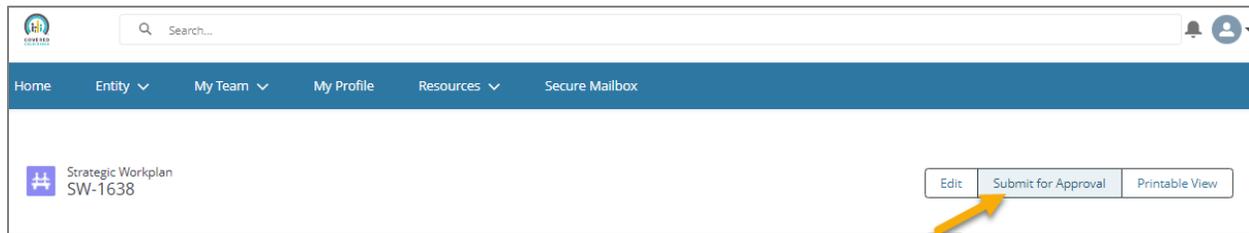
2. A screen will be presented where the user can enter comments. Comments entered here are for the Reviewer to read prior to making any decision in the approval process. Click **Submit** to submit the Strategic Workplan for approval.
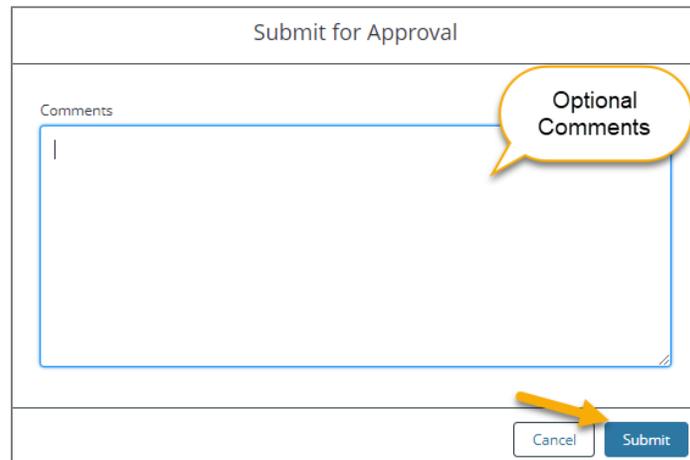
3. The Approval History list will have an updated entry listed as Submitted and Pending (Approval) for this submission and the Strategic Workplan is locked until it is Approved / Rejected.

4. The Entity will receive an email notification of the Strategic Workplan submission. The Entity can use the link provided in the email to review the Strategic Workplan and check on its approval status.
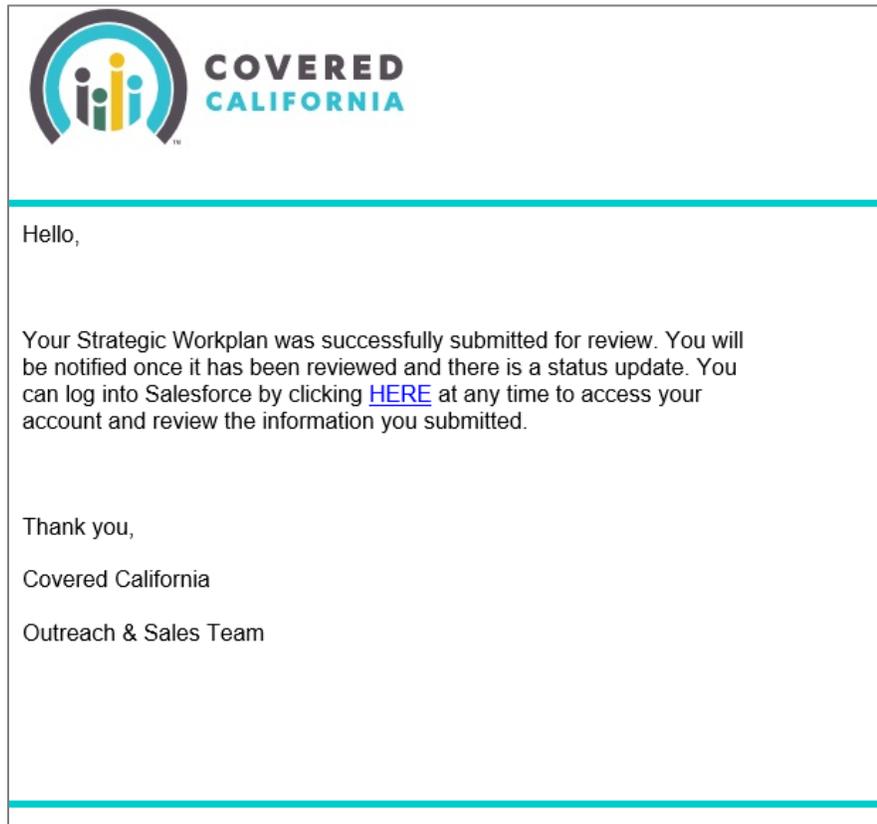
STRATEGIC WORKPLAN APPROVAL PROCESS

When a Strategic Workplan is submitted for approval it is assigned to an Account Services Representative. The Account Services Representative will receive an email for each Strategic Workplan submission. The Account Services Representative will review the Campaign Strategies and planned Workplan Activities and approve / reject the Strategic Workplan. A comment box is provided to the Account Services Representative to provide any additional comments to the Entity.

APPROVAL OF THE STRATEGIC WORKPLAN

If the Strategic Workplan is approved, the Entity will receive an email notification of the approved Workplan with corresponding comments, if applicable. All associated Workplan Activities will reflect a **Draft** status.

Hello,

Covered California has reviewed and approved your strategic workplan.

You can view the status of this task below along with any feedback provided by the review team HERE.

Thank you,

Covered California

Outreach & Sales Team
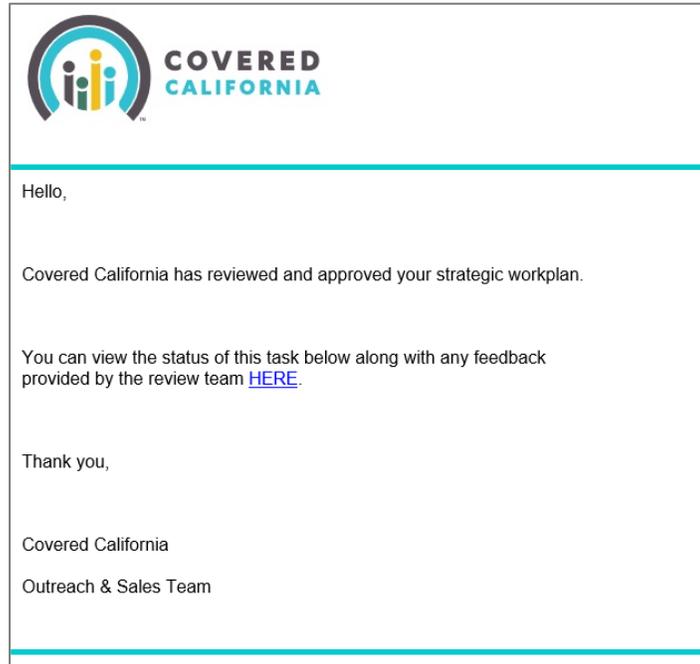
REJECTION OF THE STRATEGIC WORKPLAN

If the Strategic Workplan is rejected the record's status is reset to Draft and unlocked for editing and re-submission. The Entity will receive an email notification of the rejected Workplan with corresponding comments and can edit and re-submit the Strategic Workplan for approval.

Hello,

Covered California has returned the status of your Strategic Workplan to draft due to missing or incomplete information.

Approver Comments: Need more info

Please log into Salesforce (LINK) to access your Strategic Workplan so you can update and resubmit the workplan.

Thank you,
Covered California
Outreach & Sales Team
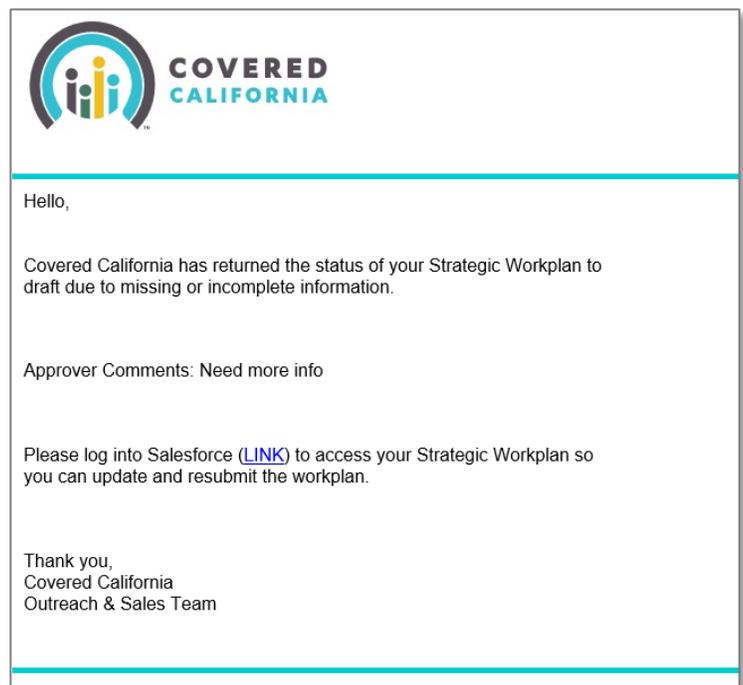
EARN OUTREACH POINTS FOR WORKPLAN ACTIVITIES AND EVENTS

Navigator grant entities will be assigned outreach expectations based on their Grant Amount Award tier as listed in the Proposed Outreach Activity Goals in the [Navigator Grant Program Request for Application (RFA) Announcement](#). Navigator grant entities will earn points throughout the grant award year by participating in, tracking, and reporting on their planned Workplan Activities and Events as listed the Activities that Earn Outreach Points section of the Navigator Grant Program RFA Announcement. Please see [Appendix A](#) for a table that outlines documentation types Navigator Grantees can submit confirming their execution of their outreach activities for this grant cycle.

Grant entities with subcontractors may report on the activities of sub-entities and will be awarded points for activities tracked. However, it is the lead entity's responsibility to ensure that all activities are correctly logged in order to receive points. The social media categories with capped accruals are limited to the lead entity earning the specified point maximum regardless of which entity (lead or sub) performs the activity.

SUBMIT WORKPLAN ACTIVITY/EVENT DOCUMENTATION FOR OUTREACH POINTS

When an Entity completes a Workplan Activity or Event from their Strategic Workplan, corresponding documents and / or information for must be provided to earn Outreach Points.

Examples of required documents for Outreach Points approval include:

- In-Person Event: Copy of registration or copy of agenda or other proof of attendance
- Social Media: Screenshot of post AND link to the post
- Paid Media: Invoice AND media (or scanned) file or screenshot AND link to media (if applicable)
- Earned Media: Media (or scanned) file or screenshot AND link to media (if applicable.

For questions or concerns regarding documentation needed to receive Outreach Points, contact your assigned Account Services Representative for assistance.

1. Navigate to the Strategic Workplan from the Entity Account page.

2. Under the Workplan Activities list, select the Activity or Event name that will be submitted for outreach points. If the Activity or Event name is not visible, click the **View All** link to view more.

3. Under the Notes & Attachments section, click the **Upload Files** button to upload files required to earn outreach points. Optionally, click and drag the files to the Notes & Attachments section to upload the files.
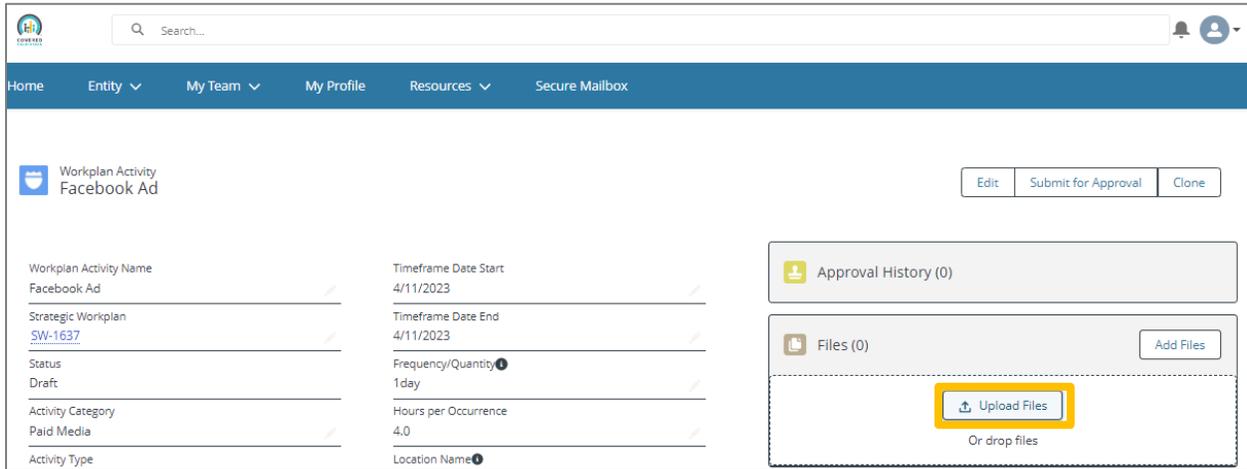
4. Click the **Done** button once the file has been uploaded.
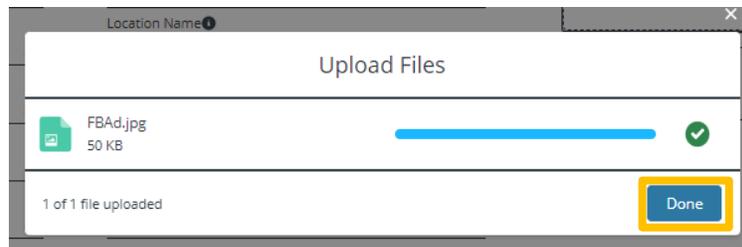
5. A message will appear once the file has been successfully uploaded to the Event. Repeat Steps 3-4 to include additional attachments.
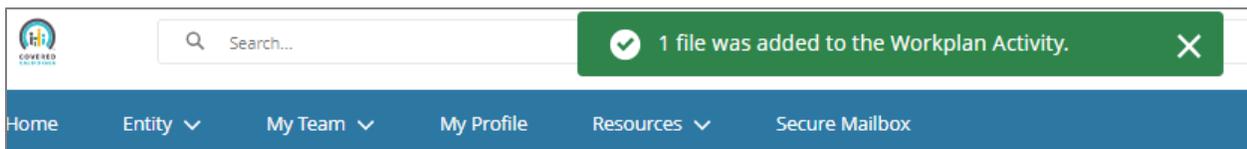
6. Once all files have been uploaded, click the **Submit for Approval** button.
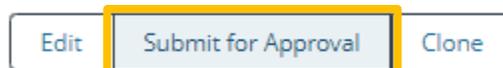
7. Optionally, enter any comments or links to websites that are required to earn outreach points. Once complete, click **Submit**.

8. The Approval History list will have an updated entry listed as Submitted and Pending (Approval) and the Workplan Activity or Event will be locked until it is Approved / Rejected.

9. The Entity will receive an email notification of the submission. The Entity can use the link provided in the email to review the Workplan Activity and check on its approval status.

WORKPLAN ACTIVITY/EVENT OUTREACH POINTS APPROVAL PROCESS

When a Workplan Activity or Event is submitted for outreach points, it is assigned to an Account Services Representative. The Account Services Representative will review the Workplan Activity/Event for proper documentation and approve / reject the Workplan Activity for points. A comment box is provided to the Account Services Representative to provide any additional comments to the Entity.
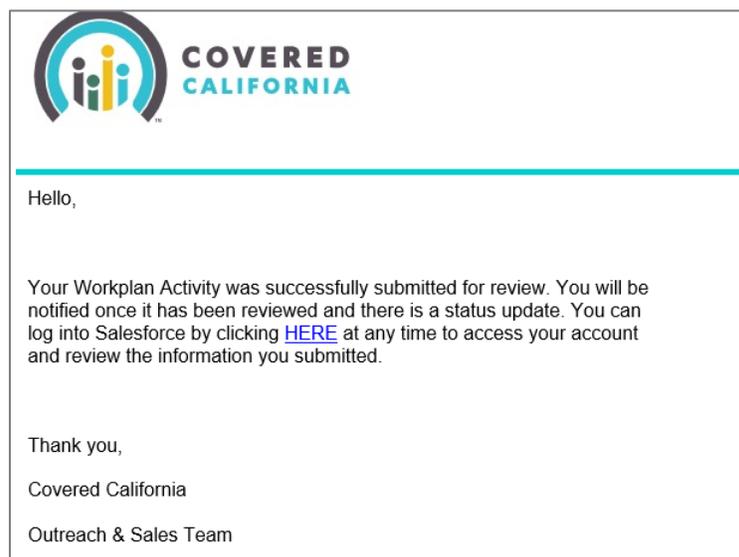
APPROVAL OF A WORKPLAN ACTIVITY/EVENT AND ASSIGNMENT OF OUTREACH POINTS

If the Workplan Activity is approved for points, it is considered complete and the Account Services Representative will assign Outreach Points based on the Activities that Earn Outreach Points section of the Navigator Grant Program RFA Announcement.

The Entity will receive an email notification of the approved Workplan with corresponding comments, if applicable.

Hello,

Covered California has reviewed and approved your Activity/Event.

You can view the status HERE along with any feedback provided by the review team.

Entity Name: Navigator Entity ABC

Workplan Activity Name: twitter July

Status: Approved

Outreach Points Earned: 3

Thank you,

Covered California

Outreach & Sales Team
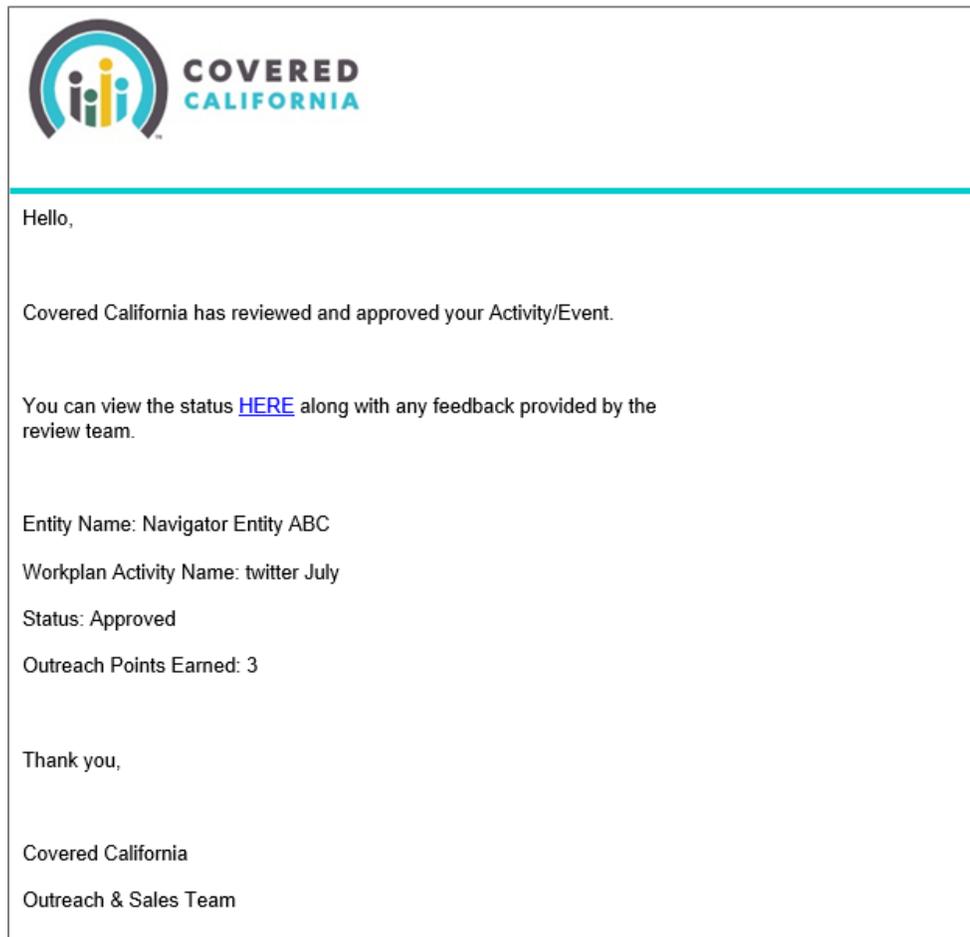
REJECTION OF A WORKPLAN ACTIVITY/EVENT

If the Workplan Activity is rejected for points, the record's status is reset to Draft and unlocked for editing and re-submission. The Entity will receive an email notification of the rejected Workplan Activity with corresponding comments and can edit and re-submit for approval.

Hello,

Covered California has returned the status of your Workplan Activity to draft due to missing or incomplete information.

Approver Comments: deinied. need to upload proof

Please log into Salesforce (LINK) to access your Workplan Activity.

Thank you,
Covered California
Outreach & Sales Team
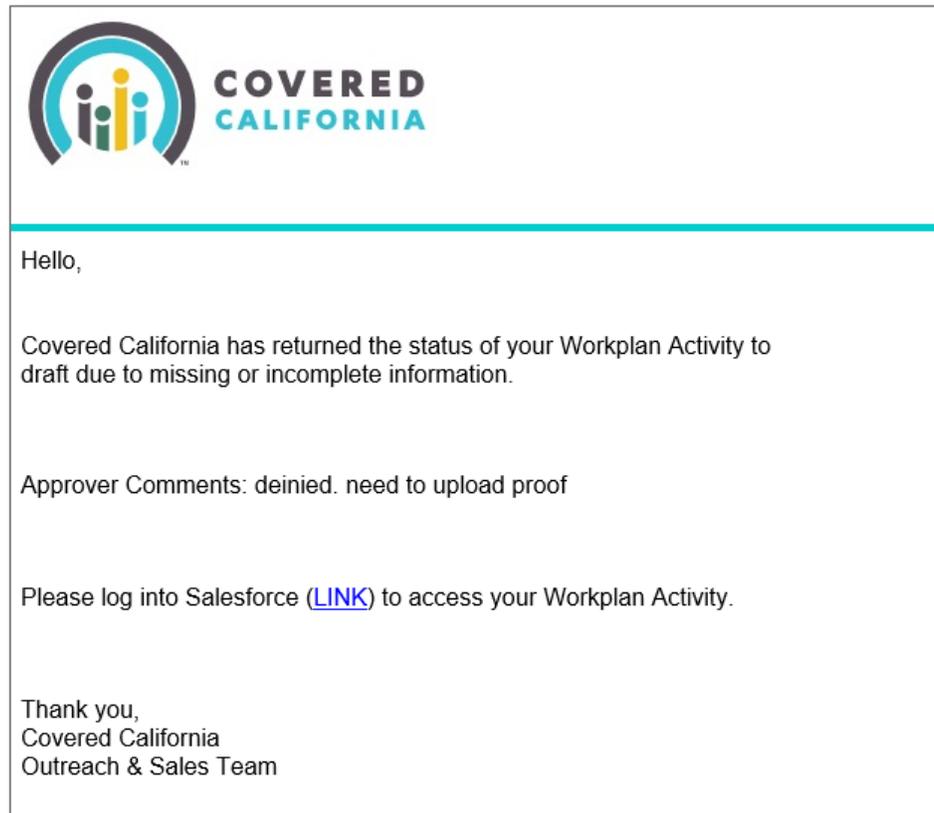
CHECK STATUS OF WORKPLAN ACTIVITIES/EVENTS AND OUTREACH GOAL

Outreach Points earned and details about the percentage of Outreach Goal will be reflected on the Strategic Workplan page under the **Details** section.

To check the status of individual Workplan Activities or Events, click **View All** in the Workplan Activities section on the Strategic Workplan page.

The Workplan Activities list will include details about each Workplan Activity/Event, including status, dates, Activity type, and (Outreach) Points Earned. Points earned will not be present until the Workplan Activity/Event status is listed as **Approved** or **Published – Points Awarded**.

	Workplan Activity Name	Status	Timeframe Date Start	Event Date	Activity Category	Points Earned	
1	Sacramento Community Job Fair	Approved	4/17/2023		Unpaid/Other	1	
2	Facebook Ad	Submitted	4/11/2023		Paid Media		

APPENDIX A

2020-2021 Navigator Program:

Outreach Activity Supporting Documentation List

This table outlines the documentation types the Navigator Grantees can submit to Covered California via the Entity Certification Portal confirming their execution of their outreach activities for this grant cycle. Navigator Grantees must enter all events completed by their sub-grantees in their portal to obtain the outreach activity points.

Note, the list is not limited to the types listed. Please contact your regional field representative If you have a different form of documentation then what is listed.

Outreach Activity Category	Points	Documentation Proof Types	Helpful Notes
1. **In-Person Event**	3 points earned per education or enrollment event logged	• Copy of confirmation of registration of attendees; • Copy of agenda; • Copy of agreement (or communications) with facility manager; or • Copy of advertisement of event (flyers, mailers, etc.).	**Events can be in-person or virtual** Log events in Entity Certification Portal One flyer with multiple dates can be used for the same recurring events such as weekly library events, etc. Events can be held in the entity office.
2. **Social Media:** Twitter	1 point per month wherein 4 published tweets	• Screenshot of post; and/or • Copy the link to the post in the comments section	(Max 3 points per month, per Primary Grantee) Must mention Covered California via @CoveredCA Tagging other social media pages do not get additional points.

3. **Social Media:** Facebook	1 point per month wherein 2 published posts	• Screenshot of post; and/or • Copy the link to the post in the comments section and upload any images used as attachments	<mark>(Max 3 points per month, per Primary Grantee)</mark> Must mention Covered California via @CoveredCA Can be the same content as the other social media platforms
4. **Social Media:** Instagram	1 point per month wherein 2 published posts	• Screenshot of post; and/or • Copy the link to the post in the comments section and upload any images used as attachments	<mark>(Max 3 points per month, per Primary Grantee)</mark> Must mention Covered California via @CoveredCA
5. **Social Media:** LinkedIn	1 point per month wherein 2 published posts	• Screenshot of post; and/or • Copy the link to the post in the comments section and upload any images used as attachments	<mark>(Max 3 points per month, per Primary Grantee)</mark> Must mention Covered California via @CoveredCA
6. **Paid Media**	1 point per $100 spent on advertising	• Copy of the paid invoice or purchase order; and • Link to media (if applicable).	Promoting Covered California enrollment and/or renewal
7. **Earned Media**	10 points earned per documented instance	• Print media: Soft copy of the print or a link to the media (if applicable); • Radio or TV: link to reference on the station's website (if applicable), and recording of mention and/or interview; or • Social media: screenshot and link to posting. • Press Release and photos	
8. **Outbound/ Phone**	3 Point Earned	• 3 points earned per outbound/phone event logged pre-approved by program in the event portal or Bi-Monthly report.	Appointment follow-up calls do not constitute as a phone event

| 9. Unpaid/Other | Up to 10 | • Covered California program staff will determine points awarded on a case by case basis. | (Max 10 points per Grant year, per Primary Grantee)

Covered California retains sole discretion to determine the number of points that can be awarded for each Unpaid/Other category. |
|---|---|---|---|