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<u>Navigator Weekly Progress Report</u>

During one-on-one interactions with consumers, indicate the number of consumers Navigators have directly assisted with:

- Addressing general inquiries about health insurance options
- *Understanding and using health insurance:
    - Health insurance literacy
    - Locating providers
    - Billing and payment questions
- Enrolling or re-enrolling in a QHP:
    - Electronically using the Marketplace Website
    - Telephonically using Marketplace Call Center
    - In writing using a paper Marketplace Application
- Medicaid/CHIP applications or referrals
- *Answering questions about and/or making referrals to:
    - Agents/brokers
    - Medicare
    - Other consumer assistance/health insurance programs
    - Issuers
    - State departments of insurance
- *Marketplace tax forms (1095-A)
- *Filing Marketplace exemptions
- *Submitting Marketplace or insurance coverage appeals
- *Complex cases and other Marketplace issues, such as:
    - Data matching issues/Periodic data matching issues
    - SEP eligibility
    - Employer-sponsored coverage issues
    - APTC/CSR
    - Other (text field)

*PERMISSIBLE ASSISTANCE: The HHS Notice of Benefit and Payment Parameters for 2020 (HHS 2020 Payment Notice[1]) amended federal regulations at 45 C.F.R. § 155.210(e)(9) to make

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[1] See *HHS 2020 Payment Notice*: https://www.federalregister.gov/documents/2019/04/25/2019-08017/patient-protection-and-affordable-care-act-hhs-notice-of-benefit-and-payment-parameters-for-2020

certain types of assistance, including post-enrollment duties for FFE Navigators **permissible**, but not required as had previously been the case. To coincide with this regulatory change, weekly reporting on the data fields associated with the duties outlined in 45 C.F.R. §155.210(e)(9) will now be optional as well. Both the regulatory and reporting changes will apply to Navigator grants awarded in 2019 and beyond.

Navigator Monthly Progress Report

Indicate the total amount of grant funds spent to date as of the last day of the previous month
Indicate the total amount of grant funds remaining as of the last day of the previous month
Please indicate the activity that you have done this month, as applicable:

- Number of site visits conducted with sub-grantees/sub-recipients
- Number of internal assister training with staff and sub-grantees/sub-recipients
- Number of background checks for Assisters
- Number of breaches with protocols for collecting PII or retaining consent forms

Please explain how you ensure successful performance of your sub-grantees/sub-recipients, if applicable.

Describe how you have collaborated with the CMS regional office this month. Please note what is working well and any challenges you face.

Provide at least one example of a best practice this month in each of the categories:

- Successful outreach and education tactics
- Collaboration with others in the community, including partnering organizations, local businesses, etc.
- Work with CACs (*if applicable*)

Provide a complete list of the sub-grantee organizations you are currently supporting with your Navigator grant funds to perform Navigator duties. If there are any changes to the organizations who have served as sub-grantees (additions/deletions) during the current budget period, please indicate those changes along with a brief description.

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Events and Marketing/Promotion Activities

Provide a list of events and/or marketing/promotion activities.

For each event, include the date, time, name of event, sponsor/partner, event description, location, point of contact information, and type of population-based event {faith based, women, youth, African American, American Indian/Alaskan Native, Latino/Hispanic, Asian American/Pacific Islander, Lesbian/Gay/Bisexual/Transgender}, if applicable).

For marketing/promotion activities, provide a description of the activity and the number of consumers expected to be reached through social media impressions, viewership, listenership, etc.

Navigator Quarterly Progress Report

Provide at least one example of a best practice describing how your organization has adhered to Culturally and Linguistically Appropriate Services (CLAS) standards this quarter.

Provide at least one example of a best practice describing how your organization has ensured that consumers with disabilities have reasonable modifications and accommodations to access your Marketplace assistance services this quarter.

List up to five most common languages, other than English, spoken by consumers you have assisted this quarter.

Provide at least one example of a best practice describing how your organization has collected, retained, and protected consumers' Personally Identifiable Information (PII) this quarter.

Upload a copy of your consent form (only required for quarter 1, unless modified) and describe how your organization has retained consent forms this quarter.

Navigator Annual Progress Report

The data collection for the Annual Progress Report will capture submitted updates from each quarterly report. In an effort to decrease the estimated burden for reporting, CMS will use the same questions from the quarterly reports to serve as a cumulative activity report for the entire grant cycle.

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CMS will also collect information from Navigator organizations to inform the public about the availability of consumer enrollment services from the designated organizations. This information will be displayed on a public facing website. Any updates, additions, or deletions to that information can be submitted electronically by the Assister organization to ensure that accurate and current information is available to the public.