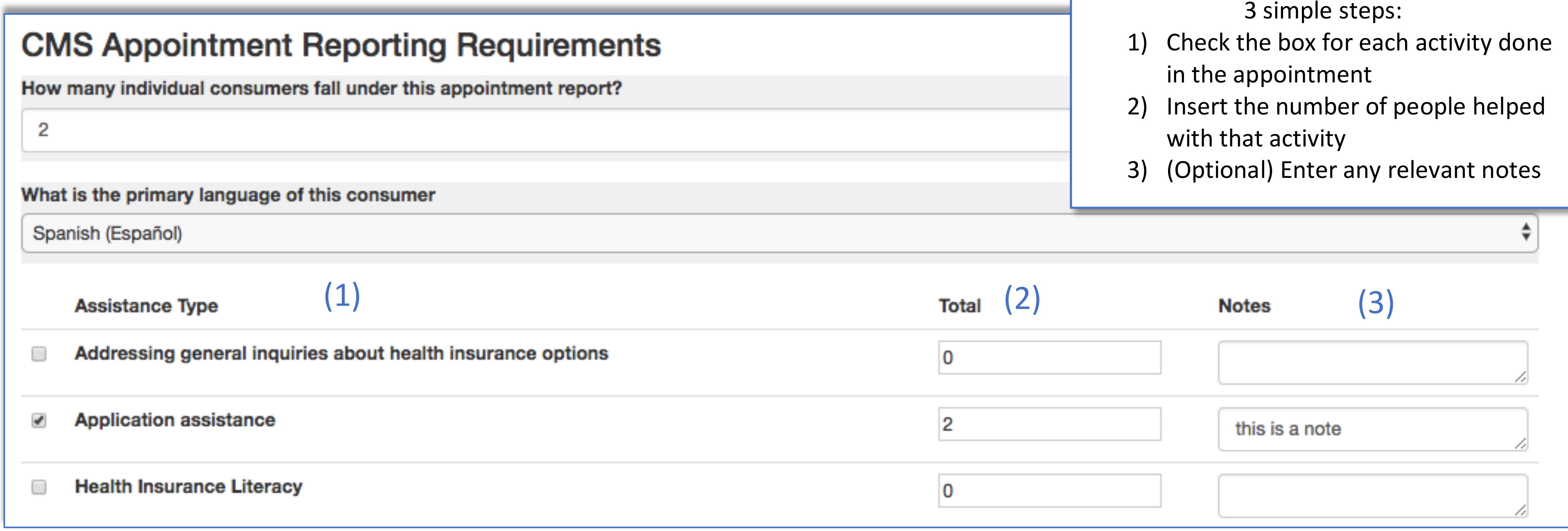
Appointments – Navigator Reporting

Most Navigator groups on the Connector require their assisters to use this section to track key outcomes for their regular reports to CMS. If you are unsure if this applies to you, contact your manager or local Connector admin

Completing the CMS Appointment Reporting Requirements section takes only 3 simple steps:

1) Check the box for each activity done in the appointment
2) Insert the number of people helped with that activity
3) (Optional) Enter any relevant notes



CMS Appointment Reporting Requirements

How many individual consumers fall under this appointment report?

2

What is the primary language of this consumer

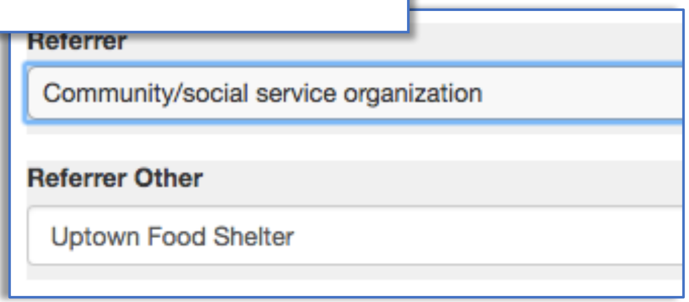
Spanish (Español)

	Assistance Type (1)	Total (2)	Notes (3)
☐	Addressing general inquiries about health insurance options	0	
☑	Application assistance	2	this is a note
☐	Health Insurance Literacy	0	

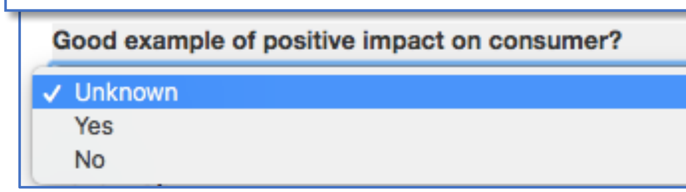
Appointments – Other Reporting Fields

In addition to the key outcomes mentioned above, you can track a lot of other useful information for each consumer appointment, including referral tracking, story collection, notification opt-out, and flagging consumers who need follow-ups.

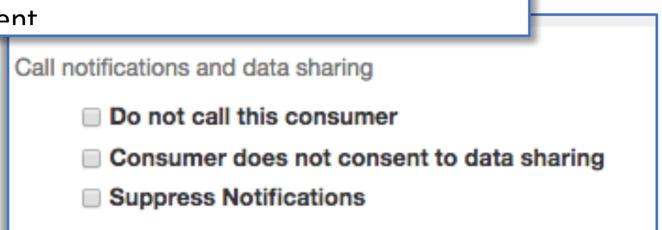
1) Referral tracking – How are consumers finding you? This data can be used to demonstrate the success of outreach to funders/staff. You can use the "Referral Other" line to track more specific sources over time



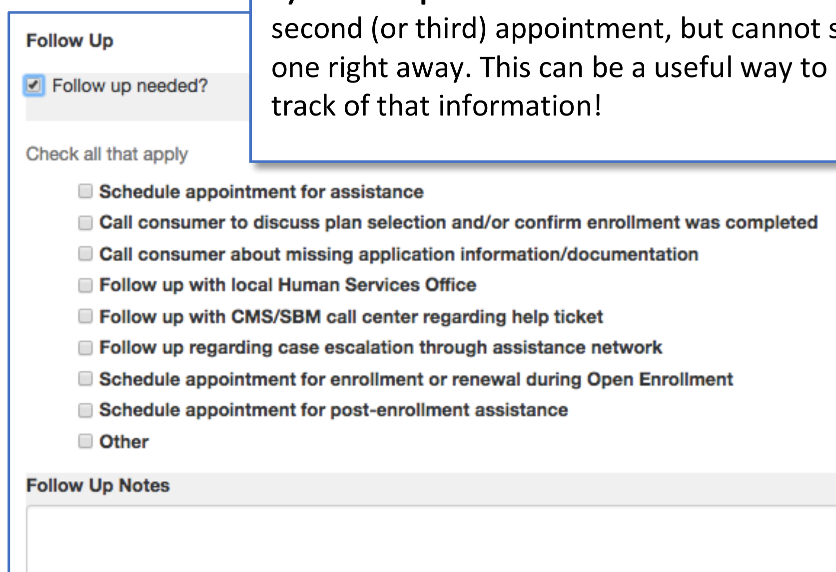
2) Story collection – a text box will appear if "yes" is selected, allowing you to record positive consumer stories to pitch to reporters and/or for other work your organization may be doing



3) notification opt-out – If the consumer does not want to receive updates from YI about health insurance, important deadline reminders and how to use insurance, they can opt-out of data sharing. You can also check "suppress notifications" so that the consumer doesn't get email or text reminders about their apointment

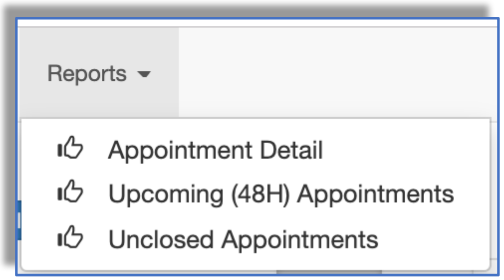


4) Follow-ups – Sometimes consumers need a second (or third) appointment, but cannot schedule one right away. This can be a useful way to keep track of that information!



Connector Reports Overview

Reports are a powerful part of the Connector. With the Reports page you can gain key insights on Connector Data to make key decisions about where to devote time/resources and tell the story of your success(es)



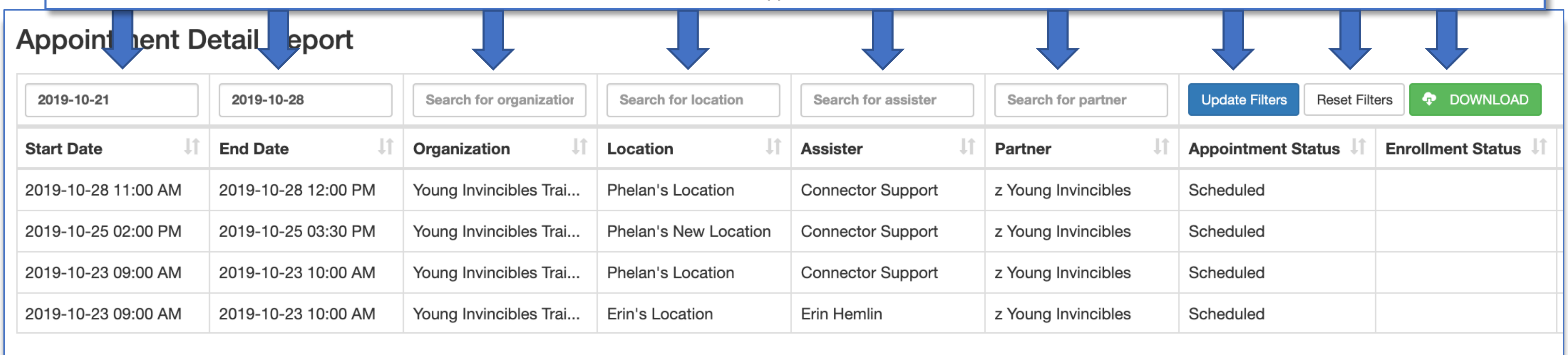
Appointment Detail: Shows data on Appointment outcomes. Default is the past 7 days

Upcoming (48H): Shows upcoming appointments with links to edit them

Unclosed Appointment: Compiled report of all non-closed appointments with direct links to edit them

Users can narrow or modify reports by a number of key fields including Date, Organization, Location and Assister. Then click the blue "Update Filters" button to run the new report and fetch the new data. Users can clear or reset these filters by clicking the "Reset Filters" button.

Users can also download these reports to further analyze their data by clicking the green "DOWNLOAD" button



Start Date	End Date	Organization	Location	Assister	Partner	Appointment Status	Enrollment Status
2019-10-28 11:00 AM	2019-10-28 12:00 PM	Young Invincibles Trai...	Phelan's Location	Connector Support	z Young Invincibles	Scheduled	
2019-10-25 02:00 PM	2019-10-25 03:30 PM	Young Invincibles Trai...	Phelan's New Location	Connector Support	z Young Invincibles	Scheduled	
2019-10-23 09:00 AM	2019-10-23 10:00 AM	Young Invincibles Trai...	Phelan's Location	Connector Support	z Young Invincibles	Scheduled	
2019-10-23 09:00 AM	2019-10-23 10:00 AM	Young Invincibles Trai...	Erin's Location	Erin Hemlin	z Young Invincibles	Scheduled	