CalHEERS Release Notes

Release 20.6

Executive Summary

CalHEERS Feature Release 20.6 (deployed on 06/29/2020) contains updates to the following:

Key New Features that have been added or modified in this release:

- Reporting

Key System Updates that have been deployed in this release:

- Consumer Assistance
- Eligibility & Enrollment
- eHIT
- Financial Management
- Interfaces
- Notices
- Plan Management
- Service Center
- Online Application
- Reporting
- Enrollment - Financial Management

Key Fixes that have been updated or resolved in this release:

- None

Alternate Procedures that have been provided with this release:

No Longer in Effect with this release

- None

New with this release

- Reports

Purpose and Scope

This document describes the content of the CalHEERS Feature Release 20.6. Any known issues are described together with key features of the release contents, alternate procedures, and actions required.

Key New Features

The following summarizes the new features included in this release.

Reporting

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
154911	Change Request	Reports were requested as part of CR 138709 in order to measure the effectiveness of the CR. Statistical data should be collected to determine the counts of Sales Agents and Consumers who receive the duplicate application messages. No reports currently exist identifying duplicate applications.	**Functional Changes:** The new report, Duplicate Prevention Detail Extract is generated on the first of the month and runs for the prior months data. The report is a CSV file and is available on demand. The following data elements display on the report from left to right: 1. Year: Year in which the report is being viewed/generated 2. Month: Previous month of any given month in which report is being viewed/generated 3. User Type: Dropdown that has user roles of Broker, Assister, Admin, Assister Agency Manager, Assister Enrollment Entity and Individual 4. First Name: First name of individual 5. Last Name: Last name of Individual	N/A

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			6. Date of Birth: Date of birth of the individual 7. SSN: Social Security number of the individual 8. Application ID: The Application ID of the individual 9. Application Submitted Date: Date of submission of the application 10. Application Status: current status of the application created. 11. Applying for Whom: Beneficiaries of the application 12. Case ID: Case number 13. Case Status: Current status of the case 14. Old Case ID: The most recent Case ID that was found on a duplicated application **Technical Change:** A new table in the database is created to track those applications which had the duplication individual validation check triggered. Data is moved to the data warehouse (DW) and made available for when the report is requested.	

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			The report includes applications started in the prior month which contained a successful duplicate individual validation check within the same month. During the load process of a target DW table, two types of errors (Duplicates and Nullable values in non-nullable attributes) are captured, all other types of errors; e.g. data type mismatches, data length inconsistencies, etc. would cause the mapping to fail and would not be captured in the Oracle Data Integrator (ODI) error table; mapping failure details will be captured in ODI for troubleshooting. The records in the error table will be retained during every batch run, until the error records are resolved and reprocessed.	
125989	Change Request	A need exists to store and report on historical data from Verify Lawful Presence	**Functional Changes:** There are no functional changes for this Change Request. Raw data will be available in the Data Warehouse. The raw data will contain the following: 1. Individuals for which VLP is initiated/required by Country of Issuance/Year	N/A

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			2. Individuals at each step 1, 2 and 3 3. VLP cases with error response 4. Individuals errors out at each step 1a,1b ,2 and 3 with including the error type 5. Individual pending cases (initiated > 90 days) 6. Auto close cases **Technical Changes:** The data warehouse will store all requests and response steps gathered during the verify lawful presence process for an individual. This includes Step 1, 1a, 1b, 2 and 3. The information listed above will not be in OBIEE and will not be a regular star schema. Error handling during the load process of a target DW table will be in place. There will be two types of errors Duplicates and Nullable values in non-nullable attributes. All other types of errors would cause the mapping to fail and would not be captured in the ODI error table. There is an error table for every target table loaded through an ODI mapping (E$_<Target Table	

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			Name>). The records in the error table will be retained during every batch run, until the error records are resolved and reprocessed. The data loaded into the data warehouse is not real-time, the data loaded will be current as of the commencement of the batch run. The ETL batch process to load the Data Warehouse will be executed every day of the week (including the weekends and holidays). To ensure availability to the latest data, the end-users may not generate any ad-hoc reports at the time of the ETL batch execution.	

Key System Updates

The following summarizes the modified features included in this release.

Consumer Assistance

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
144196	Change Request	A database table did not exist to capture the delegation history of each consumer enrollment over time.	**Functional Changes**: With this change any new Agent, Issue Enrollment Representative or Issuer Admins delegation or delegation changes are available and displayed. *Issuer Enrollment* page Fields:	Issuer Enrollment Enrollments Enrollment Search Screen

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			1. *Enrollments* 2. *Issuer Logo* 3. *Issuer Name* *Enrollments* Page: The following will be displayed: 1. *Subscriber Name* 2. *Policy ID* 3. *Plan Number* 4. *Plan Type* 5. *Status* 6. *Subscriber ID* 7. *Last 4 digits of SSN* 8. *Agent Federal Tax ID* 9. *DOB of the Subscriber* The Issuer Enrollments Representative can search for enrollments by a certified Agent's name or License Number. The Issuer Representative can export the search results. When clicking the **Go** button the following displays at the bottom of the page: 1. *Subscriber* 2. *DOB* 3. *SSN* 4. *Policy ID* 5. *Plan Type* 6. *Plan Number* 7. *Enrollment Status* 8. *Effective Start Date*	

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			9. *Subscriber ID* 10. *Agency Federal Tax ID* Clicking the **Export** button creates an excel file which includes the filtered enrollments in the following columns: 1. *Subscriber* 2. *DOB* 3. *SSN* 4. *Policy ID* 5. *Plan Type* 6. *Enrollment Status* 7. *Effective Start Date* 8. *Effective End Date* 9. *Subscriber ID* 10. *Agent Name* 11. *Agent License Number* 12. *Agency Federal Tax ID* 13. *Delegation Start Date* 14. *Delegation End Date* **Note**: Clicking the **Export** button with an *Agency Federal Tax ID* as a filter creates an Excel file only with enrollments associated with that Agency Federal Tax ID. **Technical Changes**: Any new Agent or CEC delegation or delegation change is captured in a new database table and the data from this table is exported and available in	

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			the UI and is accessible by Issuer Enrollment Representatives. A script runs monthly to identify active delegations for 2020 enrollments for entry into the new DB Table.	
150743	Change Request	Upon the Account Transfer changes implemented with Release 19.4 all Certified Enrollers have lost access to details of their consumers enrollment information such as enrollment ID, Subscriber ID, Applied APTC Amount, Termination History (when the plan was terminated and by whom).	**Business Changes** Certified Enrollers have read-only access to the additional enrollment information currently available only to Service Center Representatives (SCRs). This includes the panels containing *Enrollee Data*, *Enrollment History* on the *Enrollment Details* page and access to the *Enrollment – Premium History* page. The *Basic Information* page, accessed via the *View Enrollment Details* page, allows Agency Managers and Approved Admin Staff Level 1 and Approved Admin Staff Level 2 to view consumer information and enrollment detail. Access to the Consumer Admin Portal (CAP) pages is be read-only with additional restrictions. Fields in the *Enrollment History* section displays	Enrollment Details Show Premium History Enrollment History

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			the roles of the person making the change and does not display the name of the person.	

Eligibility & Enrollment

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138709	Change Request	Duplicate prevention logic applied under CR52313 and CR52314 have failed to contain the volume of duplicate cases/applications submitted each year. This is because logic is applied at account creation and not within the application and business rules themselves. The following is occurring: 1. SAWS continues to open duplicate cases through EDR Intake transactions. 2. Individuals are bypassing the duplicate prevention logic at account creation 3. Sales Agents do not create accounts as part of their business process. As such, they have no way to confirm if a consumer already has an account because the duplicate prevention	**Functional Changes:** Changes were made to prevent consumers and Certified Insurance Agents (CIAs), Certified Enrollment Counselors (CECs), Plan Based Enrollers, Agents and Agency Managers from submitting an application for individuals who already have an existing active/inactive case (closed duplicate cases and MCIEP are excluded) in the system. In order to prevent duplicate cases, the following popup and messages display for a consumer or Sales Agent informing them that the household member being added may already exist in the system. The phone number dynamically displays based upon user role: For Consumers, Authorized Representatives, Agents,	Citizenship Info Create an Account to Apply page

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		logic is not presented to them. Duplicate accounts create overlapping program eligibility and can result in multiple enrollments for consumers as well as a tax liability to repay APTC they may not have been eligible to. This also creates duplicative participation fees (Per member/per month) for the carriers. An existing tool tip assisted consumers SAWS intake is not addressed as part of CR 138709.	Agency Managers, Certified Enrollment Counselors and Plan Based Enrollers <u>New *This person is already in our system popup*</u> 1. When CalHEERS detects that a user's information matches against an existing household member on the click of **Done** or **Next** button on the *Citizen Info* page for each household member on the application. Closed Duplicate cases and MCIEP program cases are not checked. 2. *This person is already in our system* popup displays. 3. *Caution! This person may already have an application, or they may have applied in the past. This action could create a duplicate record. Call Covered California before you continue. [800-787-6921]*. 4. The **Back** button navigates the user back to the *Citizen Info* page. 5. The **Continue** button navigates the user to the *Individual Menu* if the HHM is a citizen/national/non-applying and navigates the user to *Non-Citizen*	

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			Info page if HHM is non-citizen/nationals. An existing tool tip was removed on the *Create an Account to Apply* page and a new static help message was added to give the consumer direction on how to obtain an access code for an application they have submitted in the past. SAWS intake is not addressed as part of this change. **Technical Changes:** Logic for duplication checks for API call is implemented. Portal Services and Web Services are implemented to persist the Warning Message into the new table.	
153779	Change Request	Prior to Account Transfer, when an enrollment member was terminated, and then added back to the enrollment with a gap in coverage, the system terminated the original enrollment and created a new one. This required a new enrollment ID to track the individuals two enrollment segments separately. After Account Transfer, the GI product began adding these members back to the same enrollment ID with a new coverage	**Functional Changes:** There are no functional changes for this Change Request. **Technical Changes**: When an enrollee was at one point enrolled with other members of a household and was then terminated and subsequently is given coverage again (with a new start date) the insurance issuers receives two transactions. 1. A termination transaction that	N/A

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		start date. This functionality is causing issues for the following business areas: REM, ABE, 1095s, data warehouse and some carriers.	terminates the enrollment for all enrollees on the enrollment the person is being terminated from. 2. An add transaction that enrolls the previously terminated enrollee along with the other enrollees on the enrollment. The previously terminated enrollee's premium is added and the other enrollee's premiums are not re-rated.	
153970	Change Request	In the current system, an individual can select their tax filing status as Married Filing Jointly without being prompted to add the other individual's information on the application with whom he/she is filing taxes jointly. This leads to incorrect household composition and income budgeting as the other individual's information is not required, which can result in incorrect eligibility determination. The current system does not accept out-of-state residence addresses, nor does it capture an out-of-country indicator	**FUNCTIONAL CHANGES:** Individuals with a residence address as out of country or outside of California are not eligible for benefits. This includes Consumers who have moved out of California, applying or discontinued individuals with an out of State/out of Country address. **Married Filing Jointly** If someone on the application attests to tax filing status of Married Filing Jointly, CalHEERS requires there to be another person on the application whom they are filing taxes with. The person, who files taxes as	Add Household Member Who Lives with Primary Contact Final Review Household Info Review Tax Information Review Household Information Confirm These Home and Mailing Addresses

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		for individuals. This change will enable individuals who are out-of-state, as well as out-of-country, to be evaluated in the applications determination.	Married Filing Jointly, must include the other individual they file taxes with on the application. That person can be a spouse, a Registered Domestic Partners, or an unrelated person. **Out of State Residence:** Applicants and beneficiaries, other than the Primary contact has the ability to provide or indicate an out-of- country address at application, renewal and report a change. In addition, applicants and beneficiaries, including the primary contact, has the ability to indicate an out of state address at application, renewal and report a change. If *Does this person live outside of the United States?* 1. If **No** is selected then Street Address, City, State and zip code appears. 2. If **Yes** is selected then all remaining address fields do not display. **Portal Page Changes**: 1. *Select all household members who do not live with [HHM}* page: A new question *Does this person live outside*	Confirm These **Relationships** and **Marital Statuses** are Correct

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			of the United States? Displays if the user selects **No** for *Is this person's residence address the same as your address*. 2. *Household Relationships* page: A new popup, *Please Review Your Relationships Two or more person on your application have picked "Spouse" with the same person. Please update the relationships.* Displays when a HHM chooses spouse with a HHM that already has a spousal relationship with another HHM. 3. *Removal* of the Primary Tax Filer tax filing status from the *Who is the Primary Tax Filer for your household?* page. 4. *Select all household members who plan to file taxes in 2020.*page: a. A new question is added to the tax section *Who does this person file taxes with?* Displays if the user selects Married Filing Jointly for "*What will this person's tax filing status be this year*?" and there is more	

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			than one person on the application. b. A new popup, *Please Review Your Household Information Both people who are “Married Filing Jointly” must be on the application. Please add another person even if they are not applying for health care. If added a filing partner is a concern, please contact your local county office. Click here to add the other person or click Ok to go back* displays when a household member previously selected MFJ with a 2nd household member that changed their tax filing status from MFJ to another tax filing status and there is at least 1 other person on the application that is available to attest to MFJ. c. The new popup, *Please Review Your Relationships*, displays when a HHM chooses spouse with a HHM that already has a	

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			spousal relationship with another HHM d. The Tax filing status changed from a segmented control to a Radio button. e. *Two or more persons on your application are Married Filing Jointly with the same person*. *Please go back and update your information* is displayed if more than one household members selects “Married Filing Jointly” with the same person. 5. <u>*Tax Filing Review* page:</u> *a.* The married filing jointly individual will be displayed along with the household member who is also married filing jointly. 6. <u>Address Page Change</u>: a. The State field will change from pre-populated to a drop-down on the *Who Lives with Primary Contact* screen with the ability to enter a residence State outside of California.	

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			b. On the *Select all household members who do not live with [HHM]* a new field *Does [HHM] live outside the United States?* Displays. Clicking the Yes button displays the address fields Clicking the No button enables the address fields for entry. 7. <u>*Plan to File Taxes* page Change:</u> c. Help message *"If a person files taxes as Married Filing Jointly, the person they file with must be included on the application and also file their taxes as Married Filing Jointly"* will display If a [HHM] has previously selected Married Filing Jointly with a second [HHM] that has changed their tax filing status from Married Filing Jointly to another tax filing status AND there is at	

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			least one other person on the application that is available to attest to Married Filing Jointly 8. Flexi App Changes: d. Primary contact Zip Code can be out of State. The validation on the Zip Code field will only display if the State is California. **Technical Changes** The data element for Residency that is transmitted between the CalHEERS and MEDS Interface, MEDS transactions HX34, HX05, HX12, HX18, HX20, will reflect/default to code 99 for such individuals if the primary applicant's residence county is outside of California. If all household members are out of state, the default county code is '99'	

eHIT

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
154346	Change Request	CalHEERS SAWS EHIT Interface schema updates are required in order to be aligned with changes made with Change Request 153970 Married Filing	**Functional Changes:** There are no functional changes for the CR. See Change Request 153970 for a description of the changes relating to	N/A

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		Jointly Spouses and Out of State Individuals. Those changes are related to Married Filing Jointly Spouse and Out of State Individuals Current EHIT Interface Schema is version 14	Married Filing Jointly Spouses and Out of State Individuals. **Technical Changes:** This is a technical change with the CalHEERS SAWS EHIT Interface Schema. These changes are needed for Change Request 153970 Married Filing Jointly Spouses and Out of State Individuals. Updated to EHIT Interface Schema version15.	

Financial Management

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
150741	Change Request	Consumers can change their Agent/Certified Enrollment Counselor/Enroller delegation at any time. In addition, Agency Managers can re-assign consumer delegations to manage agency workload. While maintenance 834 EDI transactions are generated to the Carriers at the time of the Agent delegation change, the history of the delegation change (when and by whom) is not retained. The Service Center is unable to help Agents who want to know why	**Functional Changes:** The *My Delegates* page is accessible from the left navigation in the portal and provides the consumer with information about all the Agents or Certified Enrollment Counselors (CECs) they have delegated. **Note:** This link is not visible when an Agent or any other role is impersonating the consumer, meaning they are acting for the consumer. The search features will include: 1. *Agent First Name*	Basic Information My Delegates

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		they no longer have access to a consumer's record, or Carriers who want to know the delegation effective date in order to process accurate commission payments. Consumers can change delegations from Agents to Counselors and vice versa.	2. *Agent Last Name* 3. *CEC First Name* 4. *CEC Last Name* **Note:** 1) The search must be exact. For example, if a user is searching for an Agent with the first name of Jonathan typing the name Jon in the first name field does not pull the result for the Agent. 2) The search results are in the order of most current delegation on the top. 3) One row displays for delegations that cross multiple years. 4) A maximum of 2000 results display based upon the search. In the above scenario it would be a maximum of 2000 Agents. Upon completion of the search, the following elements display for the consumer: 1) *Agent Name/CEC Name* *2) Agency License Number (empty if CEC)* *3) Delegation Start Date* *4) Delegation End Date* 5) *Agency/Entity Business Name* *6) Reason to end designation*. **Technical Changes:** GetInsured (GI) adds a page to display designation history for Consumers,	

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			Brokers or Certified Enrollment Counselors. In addition, GI stores delegation history for Consumers. CalHEERS Data Warehouse stores historical data in a Data Mart table and provides access to users for reporting purposes. Error handling during the load process of a target DW table is in place with wo types of errors Duplicates and Nullable values in non-nullable attributes. Any new Agent or CEC delegation or delegation change is captured in the new database table. In addition, a one-time migration exercise has been done so that delegation information for currently active delegations is available in the new delegation history table.	

Interfaces

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
139192	Change Request	Race and Ethnicity is currently captured in the portal during account transfer. Currently the mapping of Race and Ethnicity	**Functional Changes:** No visual changes for users are implemented with this change. **Technical Change**:	N/A

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		for Cambodian and Other Hispanic, Latino or Spanish Origin is being sent to Get Insured (GI) with the code as “other”.	The Race and Ethnicity values are mapped correctly • Cambodian is mapped to 2033-9. • Other Hispanic, Latino, or Spanish origin is mapped to 2135-2. At renewal the updated code will be sent.	

Notices

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
151996	Change Request	Additional snippets need to be added to NOD01 and existing snippets need to be suppressed based on the changes that are being made with Change Request 153970 “Out of State Residence”.	**Functional Changes**: The NOD01 (snippet 223) is being updated based upon changes for Change Request 153970. The changes are as follows: *a.* Current Language: *We were unable to verify your California Residence*. It will be updated to *Our records show you do not live in California.* b. Current Trigger: When State residency verification exists or Administrative failure for individuals exist. c. Updated Trigger: When the person is an applicant AND is ineligible or discontinued for QHP, and the individual self attests to residing out-of-state or out-of-	N/A

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			county or is administratively failed for state residency verification. There are three new snippets implemented for changes for CR153970. The changes are as follows: 1. Snippet 914: a. Language: You do not qualify for Medi-Cal because our records show you do not live in California. b. Trigger: The person is an applicant and is ineligible or discontinued for MAGI Medical and self-attests to residing out-of-state or out-of-country or is administratively failed for state residency verification. 2. Snippet 915: a. Language: Our records show you do not live in California. b. Trigger: The person is an applicant and is ineligible or discontinued for MCAP and self attests to residing out-of-state or out-of-country or is administratively failed for state residency verification.	

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			3. Snippet 916: a. Language: Our records show you do not live in California. b. Trigger: The person is an applicant and is ineligible or discontinued for CCHIP and self attests to residing out-of-state or out-of-country or is administratively failed for state residency verification. c. This will populate as the individual's only CCHIP eligibility denial reason. **Technical Changes:** Snippet 223 of NOD01 is being updated with new language and updated trigger. Three new Snippets (914, 915 and 916) will be implemented.	
159300	Change Request	Snippet language and/or formatting as well as removing variable information from CalNOD01, CalNOD38 and CalNOD63 needed.	Snippet language and variables for 170, 896 for CalNOD01, CalNOD38 and CalNOD63 updated. Updated CalNOD63 to remove CCHIP Contact Information and updated phone number on babel page.	N/A

Plan Management

Version 4

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
138977	Change Request	There are multiple organizations involved in the data management process. This has lengthened the process cycles, increases risk of errors and decreases flexibility in correcting data off cycle or on a more frequent basis.	**Functional Changes:** Provider Management Admin pages have been added to Covered California. A GI Enhanced Provider Data Management Module is implemented and allows for the following: 1. The new page *Manage Provider File Upload* is available for update status for those with profile ISSUER_ADMIN. The Issuer Administrator can load the data file using the new page. 2. Issuer Administrator has comprehensive log files that display status of Waiting, Failed or Success during the load process. 3. During upload the total number of records updated each time is provided. 4. There is availability of the files for future reference and includes an audit trail. 5. The Issuer Administrator has the capability to 'activate' the last uploaded file and	Manage Provider File Uploads page

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			make it available to the consumer. The audit trail includes pagination when there are more than 10 entries. The latest entries are always displayed on top. When the data file is loaded, each record is processed for completeness and format validation. If an error occurs the log file is updated, and the next record is processed. At the end of the file the total number of records processed displays along with the number of records failed and the type of failure. The file size limit is 100 MB. A message to notify the Issuer Admin displays when the upload is unsuccessful due to this limit. **Technical Changes:** Reference Table updates have been made to display the required drop-down value of Provider or Facility. An error message displays if the file format used is incorrect.	

Service Center

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
140479	Change Request	Currently the SCR is unable to pull up an in-flight application in the Salesforce portal. In-Flight applications are applications where an application ID has been created but has not yet been submitted. In-flight applications cannot be searched as they always show in-progress.	**Functional Changes:** When searching an individual on the *Administration Home* page in-flight application display when search by *Application ID* is selected. In flight applications display as *Withdrawn* when the application start date is more than 30 calendar days old and has a status of in-progress **Technical Changes:** A new table HBX_SFDC_INFLIGHT_APP has been created and is used to store in-flight applications. A one-time batch job populates the table with all in-flight applications when the application start date is more than 30 calendar days old and the status is in-progress. Once in production the batch job BAT-44 job runs nightly to add in-flight applications.	Administration Home Page Search Individual

Online Application

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
53007 (CR 160029)	Defect Fix	Error message is not displayed when the same SSN is entered for multiple individuals in the same application.	Error message displays when the same SSN is entered for multiple individuals in the same application.	N/A

53072 (CR 160029)	Defect Fix	An error on the Out of State Zip Code is occurring on the Household *Primary Contact Address page*.	Out of State Zip Code is entered on the *Primary Contact Address* page without error.	Primary Contact Address
52480 (CR 160029)	Defect Fix	The Certified Enrollment Counselor (CEC) that is displayed on the *Enrollment Dashboard* does not match the Agent / CEC delegated to the consumer displayed in *Manage Delegates* page.	The CEC displayed on the *Enrollment Dashboard* matches the Agent/CEC delegated to the Consumer displayed on the *Manage Delegates* page.	Enrollment Dashboard
53664 (CR 160029)	Defect Fix	SAWS Issue with addresses of non-primary *HHM* not being saved in the HBX Address table After Primary members change from SAWS, response DER is not showing address sent of non-primary members, instead it contains the primary member's address.	Non-Primary *HHM* is saved in the HBX address table and response DER shows address sent of non-primary *HHM* correctly.	N/A
53027 (CR 160029)	Defect Fix	No records are being fetched for partial matches of *First Name* when an individual search is completed.	Partial matches of *First Name* displays when an individual search is completed.	N/A
53631 (CR 160029)	Defect Fix	User cannot enroll because of APTC Alert showing that APTC in distributed groups cannot be more than group max APTC.	Consumers can enroll as expected without getting error message	N/A

53555 (CR 160029)	Defect Fix	"Failure " Pop up alert while trying to shop for the plan	Failure popup no longer appears while shopping for the plan	N/A

Reporting

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
158120	Change Request	CMS Schema Changes for State Based Marketplace Response (SBMR)	Schema changes completed to change/modify the Schema for State Based Marketplace Response (SBMR) in order to consume the files received.	N/A

Enrollment - Financial Management

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
53518 (CR 160029)	Defect Fix	The effective dates for APTC and State Subsidy are being updated when an RAC is completed even though the amounts did not change.	The effective dates for APTC or State Subsidy are only updated when there is change in amounts.	N/A
53413 (CR 160029)	Defect Fix	Multiple duplicate 834 transactions are being sent out to Carriers (Kaiser and Anthem) for terminated cases.	Single transactions for a terminated case are sent to carriers.	N/A
53411 (CR 160029)	Defect Fix	State Subsidy Effective Date is getting updated after RAC, even though the amounts didn’t change.	The effective dates for APTC or State Subsidy is only updated when there is a change in amounts.	N/A

Key Fixes

The following summarizes the key defect fixes implemented in this release.

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
None				

Alternate Procedures

Summary of Alternate Procedures

This section summarizes Alternate Procedures **No Longer in Effect** as of this release. Except for the following (and those noted in previous release notes), all other Alternate Procedures from previous releases remain in effect.

AP#	Alternate Procedures No Longer in Effect	Ref ID	Release Delivered
None			

This section summarizes the **NEW** Alternate Procedures for known issues agreed to be resolved in a future release.

Reports

AP#	CIT #	New Alternate Procedures	Ref ID	Planned Release
321	0070-20	View PDF link on Eligibility Results and Application History pages is inactive for some applications and cases.	54067	20.6.0.1

Glossary

Acronym	Full Form
ADA	Americans with Disabilities Act
Administrator (Admin)	SCR and CEW user roles
AI/AN	American Indian/Alaskan Native
ALM	Application Lifecycle Management
APTC	Advance Premium Tax Credits
BOB	Book of Business
BPM	Business Process Management
BRE	Business Rules Engine
CCHCS	California Correctional Health Care Services
CCHIP	County Children’s Health Initiative Program
CCP	Covered California Programs

Acronym	Full Form
CDCR	California Department of Corrections and Rehabilitation
CEC	Certified Enrollment Counselor
CEE	Certified Enrollment Entities
CEW	County Eligibility Worker
CFS	Carry Forward Status
CIN	Client Index Number
CMI	Current Monthly Income
CMS	Centers for Medicare & Medicaid Services
COR	County of Responsibility
CR	Change Requests
CSR	Cost Share Reduction
CSS	Cascading Style Sheets (CSS is a style sheet language used for describing the look and formatting of a document written in a markup language)
CSV	Comma Separated Value
DER	Determination of Eligibility Response
DER-U	Determination of Eligibility Response Unsolicited
DHCS	Department of Health Care Services
DIVS	Document Imaging and Verification Solution
DWH	Data Warehouse
ECM	Electronic Content Management System
EDD	Employment Development Department
EDI	Electronic Data Interchange
EDR	Eligibility Determination Request
EERC	Eligibility Evaluation Reason Code
EPO	Exclusive Provider Organization
ESI	Employer Sponsored Insurance
ETL	Extract, Transform and Load
FDSH	Federal Data Services Hub
FFY	Former Foster Youth
FIPS	Federal Information Processing Standard
FPL	Federal Poverty Level
FTB	Franchise Tax Board
FTI	Federal Tax Information
FTR	Failure to Reconcile
GHIX	GetInsured Health Insurance Exchange
GI	Get Insured
HBX	Health Benefit Exchange
HCV	Health Coverage Verification
HHM	Household Member name
High Dated	The record/data end date is set far off into the future with a pseudo date, such as the year 2500.
HMS	Health Management System
IAP	Insurance Affordability Programs
ICT	Inter County Transfer

Acronym	Full Form
IDD	Interface Definition Document
IMM	Immigrant
IRS	Internal Revenue System
ISO	Information Security Officer
IVR	Interactive Voice Response
JAWS	Job Access with Speech (JAWS is a computer screen reader program for Microsoft Windows that allows blind and visually impaired users to read the screen either with a text-to-speech output or by a Refreshable Braille display)
LP	Lawful Presence
LV	Life event needs Verification
MAGI	Modified Adjusted Gross Income
MCAP	Medi-Cal Access Program
MCIEP	Medi-Cal Inmate Eligibility Program
ME	Manual Eligibility
MEC	Minimal Essential Coverage
MEDS	Medi-Cal Eligibility Data System
NHeLP	National Health Law Program
NIST	National Institute of Standards and Technology
NMEC	Non-MAGI MEC AID Code
NOA	Notices of Action
NQI	New Qualified Immigrants
OAG	Oracle API Gateway
OAM	Oracle Access Manager
OBIEE	Oracle Business Intelligence Enterprise Edition
OIM	Oracle Identity Manager
OPA	Oracle Policy automation
PAI	Projected Annual Income
PBE	Plan Based Enroller
PBPS	Pitney Bowes Presort Services
PDF	Portable Document Format
PLR	Policy Level Reporting
QDP	Qualified Dental Plan
QHP	Qualified Health Plan
QLE	Qualifying Life Event
RAC	Report A Change
RDP	Registered Domestic Partner
ROP	Reasonable Opportunity Period
RTC	Rational Team Concert
SA	Subject Area
SAWS	Statewide Automated Welfare Systems
SCIN	Statewide Client Index Number
SCR	Service Center Representative
SDI	State Disability Insurance
SEP	Special Enrollment Period

Acronym	Full Form
SFTP	Secured File Transfer Protocol
SIR	Service Investigation report
SLCSP	Second Lowest cost silver plan
SNOW	Service Now
SQL	Structure Query Language
SSA	Social Security Administration
SSApp	Single Streamlined Application
SSN	Social Security Number
STNA	Short Term Negative Action
UAT	User Acceptance Test
UI	User Interface
UIB	Unemployment Benefits
UPW	Unmarried Pregnant Woman
URL	Uniform Resource Locator
USPS	United States Postal Service
VLP	Verify Lawful Presence
WAT	Web Accessibility Toolbar
WCC	Web Center Content
WP	Work Products
WSDL	Web Services Descriptor Language
XML	Extensible Markup Language