

**CalHEERS 24-Month Roadmap**  
**2018 Initiatives - DRAFT - By Category**

(as of 12/12/16)

Initiative Names & Brief Descriptions	Suggested Target Release Timeline	Category
<p>Renewals 2018 Open Enrollment -  <i>Update for messaging, operational items, improved user functionality, and updates for , attestation, and tax codes.</i></p>	2017 Q3	Annual Renewals
<p>Renewal Updates for 2019 Open Enrollment -  <i>Various updates - both operational and functional for 2019 renewals.</i></p>	2018 Q3	Annual Renewals
<p>BREFS Phase C (Eligibility Standby &amp; Eligibility Override) -  <i>Allow county workers to review the eligibility results and mark them final before noticing and other downstream processing takes place. Also gives the capability to override eligibility results.</i></p>	2017 Q3	Business Rule Exposure for SAWS (BREFS)
<p>BREFS Phase D (Verification Only Service &amp; Separation by Source) -  <i>Allows the SAWS to better control when needing verification information.</i></p>	2017 Q3	Business Rule Exposure for SAWS (BREFS)
<p>BREFS Phase B Part 2A (Mixed Household Notices) -  <i>Implement Mixed Household (MAGI MC &amp; APTC) combined notices for initial application scenarios.</i></p>	2018 Q1 and/or Q2	Business Rule Exposure for SAWS (BREFS)
<p>BREFS Phase B Part 2B (Mixed Household Notices) -  <i>Implement Mixed Household (MAGI MC &amp; APTC) combined notices for redetermination/renewal scenarios.</i></p>	2018 Q1 and/or Q2	Business Rule Exposure for SAWS (BREFS)
<p>BREFS Phase E (Case Management) -  <i>Explore various improvements in the CalHEERS-EHIT interface to allow county eligibility workers to manage their caseloads.</i></p>	2018 Q3	Business Rule Exposure for SAWS (BREFS)
<p>Security Administrator Access Management -  <i>Allow Counties and Service Centers to self-serve in the creation and management of their Users.</i></p>	2018 Q1	CalHEERS - Efficiency Improvements
<p>User Security Improvement -  <i>Implement Fine Grained Security Access to allow for more flexibility of User security at the field level vs. the page level.</i></p>	2018 Q1	CalHEERS - Efficiency Improvements

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Pending Application Data Transfer Object Removal - <i>These objects take up large amounts of space in the database. Replacing them with an alternative solution will save long term database costs.</i>	2018 Q1	CalHEERS - Efficiency Improvements
Service Desk Request/Process Improvements	2018 Q3	CalHEERS - Service Desk
Improve Individual Extract from Data Warehouse for data analysis	2018 Q2	CalHEERS - Worker Productivity Updates
Improve timing and amount data sharing between the CalHEERS and Service Center systems	2018 Q2	CalHEERS - Worker Productivity Updates
GI 2.0 New Functionality for 18.2 Release - <i>Update to 834 file processing, agent tools, improvements to plan selection user interface, and enrollment and reporting.</i>	2018 Q1	Agent Sales & Carrier Integration
GI 2.0 New Functionality for 18.6 Release - <i>Update to 834 file processing, agent tools, improvements to plan selection user interface, and enrollment and reporting.</i>	2018 Q2	Agent Sales & Carrier Integration
Payment Integration with Carriers (Credit Card)	2018 Q3	Agent Sales & Carrier Integration
GI 2.0 New Functionality for 18.9 Release - <i>Update to 834 file processing, agent tools, improvements to plan selection user interface, and enrollment and reporting.</i>	2018 Q3	Agent Sales & Carrier Integration
Medi-Cal Plan Selection - <i>Allow Medi-Cal consumer to make and change managed care plan selection in CalHEERS.</i>	2017 Q3	Medi-Cal Plan Selection
Operationalize Non-Qualifying Immigrants (NQI) Medi-Cal Affordability Wrap - <i>Turn on NQI Wrap functionality and implement with Eligibility determination, noticing, and plan selection.</i>	2017 Q3	Medi-Cal Plan Selection
County Inmate Program in CalHEERS	2017 Q3	New Programs
State Inmate Program in CalHEERS	2017 Q3	New Programs

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Consumer Protection Programs	2018 Q1	New Programs
<p>AB 1296 - Section 15926 (County Health Coverage) -  <i>Offer a health coverage program for individuals with income above the maximum amount allowed for the Exchange premium tax credits and refer to the county health coverage program in the applicant's county of residence.</i></p>	2018 Q3	New Programs
Presumptive Eligibility & Other Health Coverage Programs in CalHEERS	2018 Q3	New Programs
<p>Eligibility for Insurance Affordability Programs based On Immigration Status Phase II -  <i>Determine level of benefits for Medi-Cal eligibility based on lawful presence, qualified non-citizen status.</i></p>	2017 Q3	Partner Reconciliation Improvements
<p>Modify CalHEERS to Send HX18/HX20 to a User Friendly Console -  <i>Make MEDS alerts available in CalHEERS.</i></p>	2017 Q3	Partner Reconciliation Improvements
<p>2-Way Updates with Carriers -  <i>Allow for certain data (e.g. Consumer Address updates) received from the carriers to update CalHEERS consumer data.</i></p>	2018 Q2	Partner Reconciliation Improvements
Generating HX20 for Closed Eligibility Periods	2018 Q2	Partner Reconciliation Improvements
<p>Long Term Duplicate Application Phase II -  <i>Implement functionality to Link and Delink cases between SAWS and CalHEERS.</i></p>	2018 Q2	Partner Reconciliation Improvements
<p>Carrier Reconciliation Module -  <i>Implement enhanced capability for processing plan/status data reconciliation between CalHEERS and Carriers.</i></p>	2018 Q2	Partner Reconciliation Improvements
<p>CalHEERS MEDS Reconciliation -  <i>Create batch process to handle reconciliation of data between CalHEERS and MEDS.</i></p>	2018 Q3	Partner Reconciliation Improvements
Add functionality for individuals over 30 to select catastrophic plan with hardship exemptions	2018 Q1	Program Updates

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Deferred Action for childhood arrivals (DACA) Student Visas - <i>Update rules to properly enroll consumers in APTC instead of Medi-Cal.</i>	2018 Q2	Program Updates
Program changes relating to New Federal Administration	2018 Q2	Program Updates
Verify Lawful Presence (VLP) Step Two and Three of the Verify Lawful Presence (VLP) Service	2018 Q2	Program Updates
Deemed Infants and E6 & E7 for Pregnant Women	2018 Q3	Program Updates
SSA Income Title II Income Verification	2018 Q3	Program Updates
Semiannual examination of data sources for enrollees in APTC or CSR	2017 Q3	RAC/SEP
Verification of Special Enrollment Qualifying Life Events - <i>Update rules and business process pertaining to qualifying events.</i>	2018 Q1	RAC/SEP
Update Enrollment Business Rules for change reporting with Eligibility Updates	2018 Q2	RAC/SEP
Implement capability to handle Advanced Availability of Report a Change for Permanent Move, Release from Incarceration, and MEC.	2018 Q2	RAC/SEP
Enhance to current operational reporting and implement new reports for program analysis.	2018 Q2	Reporting Improvements
Make system updates so administrators can update delegations after an agent or CEC has been removed.	2018 Q1	Stability Improvements
eHIT Improvements - <i>Update the CalHEERS-SAWS interface to enhance stability, improve error handling and messaging, and long term maintainability.</i>	2018 Q2	Stability Improvements
Update Eligibility and program transition logic for fringe scenarios from previously implemented changes	2018 Q2	Stability Improvements

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Reason Code Enhancements for Noticing Gaps - <i>Enhance reason codes for notice generation to enhance clarity of noticing to consumers.</i>	2018 Q2	Stability Improvements
User Interface Refresh - <i>Improve remaining Portal Pages, beyond the landing pages and Single Streamlined Application.</i>	2017 Q3	User Experience Updates
100% Mobile capability - <i>Complete CalHEERS updates so all functions of CalHEERS are accessible on a mobile device.</i>	2018 Q1	User Experience Updates
Usability Enhancements for Special Enrollment Period, Renewals, and other distinct eligibility and enrollment scenarios	2018 Q1	User Experience Updates
Continue User Experience testing and updates to the CalHEERS portal	2018 Q3	User Experience Updates
Document Verification Integration - <i>Utilize electronic recognition and verification of common verification documents.</i>	2017 Q3	Worker Productivity Updates
BPM Enhancements - <i>Update and add to current workflows for greater efficiency in common service center tasks.</i>	2018 Q1	Worker Productivity Updates
Security Role Enhancements - <i>Update Security Roles to allow for greater flexibility in page access based on role requirements.</i>	2018 Q1	Worker Productivity Updates
Dedicated Training Environment Phase 2 - <i>Provide dedicated training environments for service center and county use with enhanced capabilities.</i>	2018 Q2	Worker Productivity Updates
Accenture Billing Engine Transition - <i>Update the capabilities of the financial engine that bills the carriers for Covered California revenue collection.</i>	2018 Q3	Worker Productivity Updates