CalHEERS 24-Month Roadmap
2018 Initiatives - DRAFT - By Category
(as of 1/6/17)

Initiative Names & Brief Descriptions	Suggested Target Release Timeline	Category	Feedback from Advocates on 12/30/16	DHCS, Covered CA & CalHEERS Responses
Renewals 2018 Open Enrollment - *Update for messaging, operational items, improved user functionality, and updates for , attestation, and tax codes.*	2017 Q3	Annual Renewals		
Renewal Updates for 2019 Open Enrollment - *Various updates - both operational and functional for 2019 renewals.*	2018 Q3	Annual Renewals		
BREfS Phase C (Eligibility Standby & Eligibility Override) - *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.*	2017 Q3	Business Rule Exposure for SAWS (BREfS)		
BREfS Phase D (Verification Only Service & Separation by Source) - *Allows the SAWS to better control when needing verification information.*	2017 Q3	Business Rule Exposure for SAWS (BREfS)		
BREfS Phase B Part 2A (Mixed Household Notices) - *Implement Mixed Household (MAGI MC & APTC) combined notices for initial application scenarios.*	2018 Q1 and/or Q2	Business Rule Exposure for SAWS (BREfS)		

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BREfS Phase B Part 2B (Mixed Household Notices) - *Implement Mixed Household (MAGI MC & APTC) combined notices for redetermination/renewal scenarios.*	2018 Q1 and/or Q2	Business Rule Exposure for SAWS (BREfS)		
BREfS Phase E (Case Management) - *Explore various improvements in the CalHEERS-EHIT interface to allow county eligibility workers to manage their caseloads.*	2018 Q3	Business Rule Exposure for SAWS (BREfS)	Case management functions should also allow the Covered CA service center to be able to access information for CalHEERS cases that are under county control (whether for Medi-Cal cases or mixed coverage families). This promotes the idea of no wrong door and allows the services center the ability to assist consumers who need Covered CA to perform an action (as opposed to the current situation where the call center says there is nothing they can do if the county has a CalHEERS case).--From NHeLP (Racela) BREfS Phase E – Case Management be moved from 2018 Q3 to 2018 Q2. Q3 is usually a packed release dedicated to Covered CA.--From CWDA/SAWS.	
Security Administrator Access Management - *Allow Counties and Service Centers to self-serve in the creation and management of their Users.*	2018 Q1	CalHEERS - Efficiency Improvements		

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User Security Improvement - *Implement Fine Grained Security Access to allow for more flexibility of User security at the field level vs. the page level.*	2018 Q1	CalHEERS - Efficiency Improvements		
Pending Application Data Transfer Object Removal - *These objects take up large amounts of space in the database. Replacing them with an alternative solution will save long term database costs.*	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 - *Update to 834 file processing, agent tools, improvements to plan selection user interface, and enrollment and reporting.*	2018 Q1	Agent Sales & Carrier Integration		

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GI 2.0 New Functionality for 18.6 Release - *Update to 834 file processing, agent tools, improvements to plan selection user interface, and enrollment and reporting.*	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 - *Update to 834 file processing, agent tools, improvements to plan selection user interface, and enrollment and reporting.*	2018 Q3	Agent Sales & Carrier Integration		
Medi-Cal Plan Selection - *Allow Medi-Cal consumer to make and change managed care plan selection in CalHEERS.*	2017 Q3	Medi-Cal Plan Selection	We would like this to allow applicants to go directly into the plan of their choice rather than fee-for-service to avoid confusion as to which providers they can see.--From WCLP (Flory)	
Operationalize Non-Qualifying Immigrants (NQI) Medi-Cal Affordability Wrap - *Turn on NQI Wrap functionality and implement with Eligibility determination, noticing, and plan selection.*	2017 Q3	Medi-Cal Plan Selection		
County Inmate Program in CalHEERS	2017 Q3	New Programs		
State Inmate Program in CalHEERS	2017 Q3	New Programs		

Initiative Names & Brief Descriptions	Suggested Target Release Timeline	Category	Feedback from Advocates on 12/30/16	DHCS, Covered CA & CalHEERS Responses
Consumer Protection Programs	2018 Q1	New Programs		
AB 1296 - Section 15926(h)(4) (County Health Coverage) - *An applicant who is not eligible for an insurance affordability program for a reason other than income eligibility, or for any reason in the case of applicants and recipients residing in a county that offers a health coverage program for individuals with income above the maximum amount allowed for the Exchange premium tax credits, shall be referred to the county health coverage program in his or her county of residence.*	2018 Q3	New Programs	AB 1296 – Section 15926 (County Health Coverage) – this should refer anyone not eligible for Covered CA or Medi-Cal, not just those over income. Persons may be ineligible due to the family glitch or failure to take up employer coverage and still need care prior to their next open enrollment.--From WCLP (Flory)	
Presumptive Eligibility & Other Health Coverage Programs in CalHEERS	2018 Q3	New Programs		
Eligibility for Insurance Affordability Programs based On Immigration Status Phase II - *Determine level of benefits for Medi-Cal eligibility based on lawful presence, qualified non-citizen status.*	2017 Q3	Partner Reconciliation Improvements		

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Modify CalHEERS to Send HX18/HX20 to a User Friendly Console - *Make MEDS alerts available in CalHEERS.*	2017 Q3	Partner Reconciliation Improvements		
2-Way Updates with Carriers - *Allow for certain data (e.g. Consumer Address updates) received from the carriers to update CalHEERS consumer data.*	2018 Q2	Partner Reconciliation Improvements		
Generating HX20 for Closed Eligibility Periods	2018 Q2	Partner Reconciliation Improvements		
Long Term Duplicate Application Phase II - *Implement functionality to Link and Delink cases between SAWS and CalHEERS.*	2018 Q2	Partner Reconciliation Improvements	Long Term Duplicate Application Phase II (Linking/Delinking) be moved from 2018 Q2 to 2018 Q1.-- From CWDA/SAWS.	
Carrier Reconciliation Module - *Implement enhanced capability for processing plan/status data reconciliation between CalHEERS and Carriers.*	2018 Q2	Partner Reconciliation Improvements		
CalHEERS MEDS Reconciliation - *Create batch process to handle reconciliation of data between CalHEERS and MEDS.*	2018 Q3	Partner Reconciliation Improvements		

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Add functionality for individuals over 30 to select catastrophic plan with hardship exemptions	2018 Q1	Program Updates		
Deferred Action for childhood arrivals (DACA) Student Visas - *Update rules to properly enroll consumers in APTC instead of Medi-Cal.*	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	A recent NewsFlash tells providers PE for pregnant women will be automated April 1, 2017, which is more than a year earlier than the AB 1296 ad hoc materials indicate at pp. 3 and 5. We support the earlier implementation but are very concerned that advocates have not been informed about the work being done for April 2017, despite numerous requests to have an opportunity to comment on the design and related implementation procedures. Could DHCS let us know right away what the design proposal is and allow for public comment?--From MCH Access (Kersey/Quacinella)	

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SSA Income Title II Income Verification	2018 Q3	Program Updates	Will this income verification also include disregarding Title XVI (SSI) income erroneously input into the application as "Social Security" income?--From NHeLP (Racela)	
Semiannual examination of data sources for enrollees in APTC or CSR	2017 Q3	RAC/SEP	Since this is slated for Q3 2017, has this already gone through pre-JADS policy discussion? We would like the opportunity to understand and discuss the consumer impact and due process implications for this.--From NHeLP (Racela)	
Verification of Special Enrollment Qualifying Life Events - *Update rules and business process pertaining to qualifying events.*	2018 Q1	RAC/SEP	We recommend that the vendor selected undergo a pilot program with stakeholder input and participation to assess the efficacy and accuracy of their verification results.--From NHeLP (Racela)	
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		

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Make system updates so administrators can update delegations after an agent or CEC has been removed.	2018 Q1	Stability Improvements		
eHIT Improvements - *Update the CalHEERS-SAWS interface to enhance stability, improve error handling and messaging, and long term maintainability.*	2018 Q2	Stability Improvements	eHIT Improvements be moved from 2018 Q2 to 2018 Q1. -- From CWDA/SAWS.	
Update Eligibility and program transition logic for fringe scenarios from previously implemented changes	2018 Q2	Stability Improvements	Fixes for unexpected results of previous CRs be moved from 2018 Q2 to 2018 Q1. -- From CWDA/SAWS.	
Reason Code Enhancements for Noticing Gaps - *Enhance reason codes for notice generation to enhance clarity of noticing to consumers.*	2018 Q2	Stability Improvements	Reason Code Enhancements for Noticing Gaps be moved from 2018 Q2 to 2018 Q1. The BRs and ICRs are awaiting DHCS to bring to a Summit. The advocates would support this also since incorrect notices can be sent to consumers without worker manual intervention. -- From CWDA/SAWS.	
User Interface Refresh - *Improve remaining Portal Pages, beyond the landing pages and Single Streamlined Application.*	2017 Q3	User Experience Updates		

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100% Mobile capability - *Complete CalHEERS updates so all functions of CalHEERS are accessible on a mobile device.*	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 - *Utilize electronic recognition and verification of common verification documents.*	2017 Q3	Worker Productivity Updates		
BPM Enhancements - *Update and add to current workflows for greater efficiency in common service center tasks.*	2018 Q1	Worker Productivity Updates		
Security Role Enhancements - *Update Security Roles to allow for greater flexibility in page access based on role requirements.*	2018 Q1	Worker Productivity Updates		

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Dedicated Training Environment Phase 2 - *Provide dedicated training environments for service center and county use with enhanced capabilities.*	2018 Q2	Worker Productivity Updates		
Accenture Billing Engine Transition - *Update the capabilities of the financial engine that bills the carriers for Covered California revenue collection.*	2018 Q3	Worker Productivity Updates		
"New" from Advocates		Prenatal Gateway	The Prenatal Gateway is essential and should be a high priority for implementation under Section 1 of SB 24 (Figueroa 2003), W&IC Sec. 14148.03 and CMS' requirements.--From MCH Access (Kersey/Quacinella)	
"New" from Advocates		Hospital PE	We also request that a pathway be added to the existing Hospital PE Program so that newborns whose mothers had either Medi-Cal or MCAP for the delivery can be enrolled on-line in on-going Medi-Cal before leaving the hospital where they were born. We call this the Newborn Hospital Gateway.--From MCH Access (Kersey/Quacinella)	

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"New" from Advocates		Deemed eligibility	The online SSApp should also allow for real-time enrollment for infants (under age one year) when there is a match with MEDS for the infant's DOB and the mother's eligibility for either Medi-Cal or MCAP.--From MCH Access (Kersey/Quacinella)	
Additional Items not included in the 2018 Initiatives				
		Eligibility Results page	During several UAT testing scenarios the eligibility results page were misleading, inaccurate, and/or confusing. We provided more detailed examples of this to the UAT team, but some examples include: in some cases implies a SEP is required for Medi-Cal or gives income limits to programs for persons otherwise eligible (e.g . FFY), tells persons on Medicare not eligible for Medi-Cal, states that persons who have not applied are not eligible, referrals to county for non-MAGI evaluation are not clear and confusing given the choice for Cov CA plan selection. Persons moving from Cov CA to Medi-Cal first get information about being not eligible for Cov CA rather than leading with what they are eligible for. Also, link to information about filing appeals should be there and "view Medi-Cal details" is not a live link. The instructions "check your Manage Verifications page" needs explanation or a link. We'd like a comprehensive review of this page.--From WCLP (Flory)/NHeLP (Racela)	

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		APTCs for "married filing separately"	Married filing separately – if someone states their tax status is married filing separately they are found ineligible for APTCs. There should be opportunity to claim one of the exceptions (e.g. domestic violence, spousal abandonment, and option for head of household).--From WCLP (Flory)	
		Immigration	Immigration – satisfactory immigration status is not defined, yet applicants are supposed to know if they have it. May be worked into either the SSA CR or the immigration CR.--From WCLP (Flory)	
		SEPs	Special enrollment/ review of change requests outside of open enrollment. When making changes to the application not during open enrollment, applicants are required to give a reason and the date of qualifying event for changes reported when in many cases giving a reason does not make sense (or the person is on Medi-Cal), or the reason is not listed. This whole page is very confusing and may lead people to give inaccurate information just to get through the page. Will this be addressed in the SSA App CR?--From WCLP (Flory)	
		Add a family member	Ability to add a family member via "report a change".--From WCLP (Flory)	

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		SSApp	Personal data/tax information/primary caretaker questions – some of these questions are confusing or repetitive. Will these be addressed in the SSA App CR?--From WCLP (Flory)	
		Min. Value ESI	Question about employer insurance having minimum value – needs explanation. Will they be addressed in the SSA App CR?--From WCLP (Flory)	
		RIDP	RIDP pop-up screen needs to be directly responsive to the problem of not being able to complete RIDP. The pop-up is general info on RIDP that doesn't necessarily apply.--From WCLP (Flory)	
		Horizontal Integration	Horizontal Integration – Elizabeth Landsberg previously submitted readability language and language describing the programs.--From WCLP (Flory)	