

CalHEERS 24-Month Roadmap
2019 Initiatives - DRAFT - By Category
(as of 11/27/2017)

Initiative Names & Brief Descriptions	Suggested Target Release Timeline	Category
Get Insured (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
Get Insured (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
Allow Reinstatements from Carriers via 834 Transaction - <i>Provide the capability to initiate reinstatements directly via 834 transactions.</i>	2019 Q2	Agent Sales & Carrier Integration
Termination Codes in 834 Transactions - <i>Introduce specific termination codes in the 834 transaction to indicate the reason for enrollment terminations.</i>	2019 Q2	Agent Sales & Carrier Integration
Payment Integration with Carriers (Credit Card)	2019 Q3	Agent Sales & Carrier Integration
Renewals 2019 Open Enrollment - <i>Update for messaging, operational items, improved user functionality, and updates for , attestation, and tax codes.</i>	2018 Q3	Annual Renewals
Renewal Updates for 2020 Open Enrollment - <i>Various updates - both operational and functional for 2019 renewals.</i>	2019 Q3	Annual Renewals
BREFS Phase B Part 2B (Mixed Household Notices) - <i>Implement Mixed Household (MAGI MC & APTC) combined notices for redetermination/renewal scenarios.</i>	2019	Business Rule Exposure for SAWS (BREFS)
BREFS Phase C Part 2 (Eligibility Override) - <i>Allow county workers the capability to override eligibility results.</i>	2018 Q2/Q3	Business Rule Exposure for SAWS (BREFS)
BREFS Phase C Part 3 (Eligibility Next Day Remediation) - <i>Allow county workers the ability remediate eligibility determinations after Noticing and transacting with MEDS has occurred</i>	2018 Q3/ 2019 Q1	Business Rule Exposure for SAWS (BREFS)
BREFS Phase C Part 4 (Eligibility Standby) - <i>Allow county workers to review the eligibility results and mark them final before noticing and other downstream processing takes place.</i>	2019 Q1/Q2	Business Rule Exposure for SAWS (BREFS)
BREFS Phase D (Verification Only Service & Separation by Source) - <i>Allows the SAWS to better control when needing verification information. Intent of this CR is to call FDSH verification services individually</i>	2019 Q2	Business Rule Exposure for SAWS (BREFS)

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BREFS Phase E (Case Management) - <i>Explore various improvements in the CalHEERS-EHIT interface to allow county eligibility workers to manage their caseloads.</i>	2019 Q3/Q4	Business Rule Exposure for SAWS (BREFS)
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 Q2	CalHEERS - Efficiency Improvements
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>	2018 Q2	CalHEERS - Efficiency Improvements
Automation of Employer Notice - <i>Implement an employer repository so that the system can aggregate employer data and reduce the volume of notices going to employers who have multiple employees applying in the individual market.</i>	2019 Q2	CalHEERS - Efficiency Improvements
Service Desk Request/Process Improvements - <i>Allow Counties and Service Centers to Create Users and Manage Users for their own Organizations</i>	2018 Q2	CalHEERS - Service Desk
Improve Individual Extract from Data Warehouse for Data Analysis - <i>Enhancements to the Consumer data file for deeper reporting capabilities and data analytics</i>	2018 Q3	CalHEERS - Worker Productivity Updates
Improve Timing and Amount Data Sharing between CalHEERS and Service Center Systems - <i>Enhance the type, amount, and timing of data that is shared between CalHEERS and the Service Center System.</i>	2019 Q1	CalHEERS - Worker Productivity Updates
Implement New Development Architecture Suite - <i>Increase capability, stability and usability for overall program</i>	2018 Q2	Development Architecture Tools Enhancements
Full Implementation of a Configuration Database for Improved System Reliability and Enhanced Reconciliation and Management of Complex System and Infrastructures - <i>Allows the operations more flexibility of component deployments, maintenance, and better control of the many systems that makeup CalHEERS</i>	2019 Q2	Full Implementation of Configuration Database

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<p>Implement New Technology and Capabilities to Increase Modularity, Move to Cloud Deployable Components, and Update and System Architecture to Improve Stability & Usability - <i>Changes to the CalHEERS system architecture to provide more flexibility in deployment, and hosting options, while also providing more stability to the overall system.</i></p>	2018 Q3	Infrastructure Enhancement
<p>Medi-Cal Plan Selection - <i>Allow Medi-Cal consumer to make and change managed care plan selection in CalHEERS.</i></p>	2020	Medi-Cal Plan Selection
<p>Consumer Protection Programs (CPPs) - Implement 4-Month Continuing MAGI based Medi-Cal for Parent/Caretaker Relatives, Continuous Eligibility for Children (CEC), Transition Medi-Cal (TMC), and Continuous Eligibility (CE) for Pregnant Women.</p>	2019	New Programs
<p>AB 1296 - Section 15926 (County Health Coverage) - <i>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.</i></p>	2019	New Programs
<p>County Inmate Program - <i>Implement county inmate aid code for Limited Scope or Restricted Scope, treat county inmate application as self attestation for Covered California programs eligibility determination, and deny eligibility to APTC/CSR for an individual that attests to being incarcerated.</i></p>	2018 Q3	New Programs
<p>Presumptive Eligibility & Other Health Coverage Programs in CalHEERS</p>	2019 Q2	New Programs
<p>Missing Information and NOD16 Notices - <i>The system generated notice will provide the SCR with a list of missing information and prevent the need to track or search for this information.</i></p>	2018 Q2	Notice Updates
<p>Continue Enhancement of NOD01 - <i>Updates to the NOD01 for consumer readability and clarity of results and next actions.</i></p>	2019 Q1	Notice Updates
<p>Update NOD00 - <i>Improve the layout and formatting of the ad hoc notice</i></p>	2019 Q2	Notice Updates

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Federal Data Services Hub (FDSH) Fraud Archive Reporting Service (FARS) Interface Upgrade - <i>The Federal DSH introduced the new version to offer Marketplaces enhanced responses and to improve user outcome and direction to the Applicant.</i>	2018 Q2	Partner Interface Updates
Get Insured (GI) Proration of APTC - <i>Prorate APTC instead of capping as this will alleviate a variety of hardship among our carriers</i>	2018 Q2	Partner Interface Updates
FTB Web Interface - <i>Migrate existing FTB interface to a web based interface.</i>	2019 Q2	Partner Interface Updates
CalHEERS-SAWS Reconciliation - <i>Create batch process to handle monthly reconciliation of data between CalHEERS and SAWS. Similar to the reconciliation processes between the MEDS-SAWS and MEDS & CalHEERS that exists today.</i>	2019	Partner Reconciliation Improvements
Batch HX10 to MEDS - <i>Realign/Resynch SSN number, a matching elements used by MEDS to process incoming transactions, between CalHEERS and MEDS.</i>	2018 Q3	Partner Reconciliation Improvements
Automate Effectuation Report to Carriers - <i>Automate Effectuation Reports to carriers to improve workload accuracy and efficiency.</i>	2019 Q1	Partner Reconciliation Improvements
Mitigate Duplicate Application - Long Term Solution (Phase 2) - <i>Implement functionality to Link and Delink cases between SAWS and CalHEERS.</i>	2019 Q1/Q2	Partner Reconciliation Improvements
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>	2019 Q2	Partner Reconciliation Improvements
Carrier Reconciliation Module - <i>Implement enhanced capability for processing plan/status data reconciliation between CalHEERS and Carriers.</i>	2019 Q2	Partner Reconciliation Improvements
Generating HX20 for Closed Eligibility Periods	2019 Q2	Partner Reconciliation Improvements
Program Changes Relating to Potential New Federal Rules	2019	Program Updates

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Student Visas - <i>Update rules to properly enroll consumers in APTC instead of Medi-Cal.</i>	2018 Q2	Program Updates
Infant Initiative - <i>Deemed Infants E6/E7, pre-natal, and hospital Presumptive Eligibility</i>	2018 Q3	Program Updates
SSA Income Title II Income Verification - <i>Updates to utilize Title II Income amounts and SSA disability indicator from Federal Data Services Hub.</i>	2018 Q3	Program Updates
Verify Lawful Presence (VLP) Steps Two and Three of the VLP Service - <i>Implement automation of Step Two and Step Three of the VLP service.</i>	2018 Q3	Program Updates
Allow Individuals Over 30, with a Hardship Exemption, to Select a Catastrophic Plan	2019 Q1	Program Updates
IAP Transitions Enhancements (Phase 2) - <i>Continue to implement enhancements to ensure seamless consumer transitions between programs</i>	2019 Q1	Program Updates
Special Enrollment Period (SEP) Dropdown and Workflow - <i>Updates to the Special Enrollment Period business rules and User Experience Flow</i>	2019 Q1	Program Updates
Eligibility Results Trigger & Display - <i>Analysis to determine how eligibility results scenarios can be simplified for consumer understanding and accurate messaging.</i>	2019 Q1	Program Updates
Immigration Enhancement (Phase 3)	2019 Q1	Program Updates
IRS Safe Guards Beyond Current Implementation - <i>Implement full suite of IRS safe guards to allow clear and prescriptive messaging to consumers like non-tax filers</i>	2019 Q2	Program Updates
Subscriber Management Updates - <i>Updates to how the Policy Holder Subscriber can be managed in CalHEERS</i>	2019 Q2	Program Updates
Verification of Special Enrollment Qualifying Life Events - <i>Update rules and business process pertaining to qualifying events.</i>	2018 Q2	RAC/SEP

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Enhance Enrollment Business Rules for Change Reporting with Eligibility Updates	2019 Q1	RAC/SEP
Semiannual Examination of Data Sources for Enrollees in APTC or CSR	2019 Q1	RAC/SEP
Implement Capability to Handle Advanced Availability of Report a Change for Permanent Move, Release from Incarceration, and MEC.	2019 Q2	RAC/SEP
Eligibility & Application Enhancements for the Data Warehouse - <i>Enhance Current Operational Reporting and Implement New Reports for Program Analysis</i>	2018 Q2	Reporting Improvements
Data Warehouse Enhancement - <i>Enhancements to the Data Warehouse including migration of additional data elements and reporting enhancements to support analytics</i>	2019 Q3	Reporting Improvements
Policy Based Payment Enhancements - <i>Enhancements and updates required for generating of PBP Report</i>	2019 Q3	Reporting Improvements
Update Security Infrastructure to Implement Latest Technology and Toolsets to Protect Against Potential Security Attacks	2019 Q1	Security Software Upgrades and Enhancements
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
Update Eligibility and Program Transition Logic for Fringe Scenarios from Previously Implemented Changes	2019 Q1	Stability Improvements
Enable Administrators to Update Delegations after an Agent or CEC Has Been Removed	2019 Q2	Stability Improvements
eHIT Improvements - <i>Update the CalHEERS-SAWS interface to enhance stability, improve error handling and messaging, and long term maintainability.</i>	2019 Q3	Stability Improvements

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New Production Monitoring Capabilities, including New Physical Platform Capabilities and Deeper Network Analytics - <i>Increase breadth and depth of monitoring information available for production operations to further improve situational awareness</i>	2018 Q2	System Management Tools Software Enhancements
Special Enrollment Period (SEP) Pre-Enrollment Verification - <i>Add verification business process flow to verify SEP Reasons before consumers are effectuated in a QHP/QDP</i>	2018 Q2	User Experience Updates
Manage Verifications Usability Updates - <i>Improve consumers understanding of what is needed for outstanding verifications and how it impacts their eligibility</i>	2018 Q2	User Experience Updates
100% Mobile Capability - <i>Complete CalHEERS updates so all functions of CalHEERS are accessible on a mobile device.</i>	2018 Q3	User Experience Updates
Implementation of Get Insured (GI) Primary Care Physician (PCP) Selection Module and Provider Density Tool - <i>Provide the ability for PCP Selection and the ability to see the amount of providers in your area</i>	2018 Q3	User Experience Updates
Translate NOD12 into Threshold Languages	2018 Q3	User Experience Updates
Income Data Quality Enhancements (Phase 2) - <i>Updates to further enhance income and tax household functionality.</i>	2018 Q3	User Experience Updates
Content Management Implementation - <i>Implementation of a content management process to allow business to update web content in an agile manner</i>	2018 Q3	User Experience Updates
Continue User Experience Testing and Updates to the CalHEERS Portal	2019 Q1	User Experience Updates
User Interface Refresh - <i>Improve remaining Portal Pages, beyond the landing pages and Single Streamlined Application.</i>	2019 Q2	User Experience Updates
Provider Directory Enhancements	2019 Q2	User Experience Updates
Content Management Implementation - <i>Full implementation of a content management tool to allow business to update web and notice content in an agile manner</i>	2019 Q2	User Experience Updates

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Document Verification Integration - <i>Utilize electronic recognition and verification of common verification documents.</i>	2018 Q2	Worker Productivity Updates
Federal Plan Management Data Template Automation - <i>Implement automated validation of data entered into the federal plan management templates to alleviate manual validation efforts.</i>	2018 Q3	Worker Productivity Updates
Dedicated Training Environment (Phase 2) - <i>Provide dedicated training environments for service center and county use with enhanced capabilities.</i>	2019 Q1	Worker Productivity Updates
Automated APTC Calculator - <i>Automated APTC calculator for use by Admins for Manual Overrides and data integrity analysis.</i>	2019 Q1	Worker Productivity Updates
Business Process Management (BPM) Enhancements - <i>Update and add to current workflows for greater efficiency in common service center tasks.</i>	2019 Q3	Worker Productivity Updates
Security Role Enhancements - <i>Update Security Roles to allow for greater flexibility in page access based on role requirements.</i>	2019 Q3	Worker Productivity Updates
Note: 2018 Q2 and 2018 Q3 CalHEERS Initiatives have been listed in this 2019 strategic planning/roadmap document, in the event concept discussions and/or Joint Application Design (JAD) processes determine the initiatives or change requests are more feasible to be targeted for 2019 implementation.		