

Executive Summary

CalHEERS Feature Release 15.9 (to be deployed on 10/12/2015) contains the following:

- Consumer Assistance
- Eligibility & Enrollment
- Interfaces
- Plan Management
- Education & Outreach
- eHIT
- IRS 1095
- Financial Management
- MEDS
- Notices
- Plan Management
- Service Center

The following **Key New Features** have been added or modified in this release:

- Consumer Assistance
- Eligibility & Enrollment
- Interfaces
- Plan Management

The following **Key System Updates** have been deployed in this release:

- Education & Outreach
- eHIT
- Eligibility & Enrollment
- IRS 1095
- Financial Management
- MEDS
- Notices
- Plan Management
- Service Center

The following **Key Fixes** have been updated or resolved in this release:

- None

The following **Alternate Procedures** have been provided with this release:

No Longer in Effect with this release

- None

New with this release

- None

Purpose and Scope

This document describes the contents of the CalHEERS Feature Release 15.9. 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.

Ref ID	Type	Previous Design/Problem	Modified Functionality In this Release	Pages Impacted
Consumer Assistance				
Expedited/Flexible Application Entry for SCRs				
7169	Change Request	This functionality did not previously exist.	<ul style="list-style-type: none"> In an effort to reduce the time it takes to complete the paper application process, SCRs and/or any Covered California designated role are now able to skip required fields and continue entering all information provided by the Consumer, as the application pages are now available in a flexible page view where all pages in the application are laid out from top to bottom without having to continue from one page to the next. When SCRs log into the <i>Individual homepage</i> and click on the Apply for <current year>, Resume, Report a Change, or Renew button, the <i>View Confirmation</i> popup displays and says, “Would you like to open in the Consumer View or the Flexible Admin View?” The <i>Case Notes</i> page has been renamed as the <i>Notes</i> page and 	<ul style="list-style-type: none"> All application pages Individual homepage Notes Search Individual

Ref ID	Type	Previous Design/Problem	Modified Functionality In this Release	Pages Impacted
			<p>displays within the flexible application.</p> <ul style="list-style-type: none"> The <i>Search Individual</i> page now includes a New Flexible App in Admin View button. 	
Eligibility & Enrollment				
MAGI Eligibility Determination for CCHIP				
33378	Change Request	This functionality did not previously exist.	<p>Children ages 0-19, whose household income is above 266% and up to 322% of the Federal Poverty Level (FPL), who are applying for coverage through Covered California and are eligible for the County Children’s Health Initiative Program (CCHIP) are now informed and enrolled into the program. This eligibility is sent via secure channel to local counties administering CCHIP (San Francisco, San Mateo and Santa Clara), and eligible Consumers are enrolled into a county contracted health plan.</p>	NA
Medi-Cal Access Program Integration				
8517	Change Request	This functionality did not previously exist.	<p>The Medi-Cal Access Program (MCAP) provides low cost health insurance coverage to uninsured, middle income pregnant women. CalHEERS is being enhanced to determine MCAP eligibility. CalNOD01 Covered California Eligibility Determination Notice, Redetermination, and Verification Inconsistencies Notice of</p>	<ul style="list-style-type: none"> Apply for Benefits – Get Help With Costs Application Signature Eligibility Results/Renewal Results Household Enrollment Introduction Household

Ref ID	Type	Previous Design/Problem	Modified Functionality In this Release	Pages Impacted
			Action (NOA), and CalNOD02 MAGI Medi-Cal Notice of Action (NOA) have been updated to include MCAP.	<ul style="list-style-type: none"> Enrollment Summary Change Plan Selection Program Eligibility Summary by Person Application Signature for Reported Changes Terminate Participation Budget Worksheet My Options
Former Foster Youth Eligible to 4M Aid Code for Non-MAGI Medi-Cal				
3066	Change Request	This functionality did not previously exist.	<p>CalHEERS will now determine and assign the Former Foster Youth (4M) aid code. Therefore, the following pages have been updated as follows:</p> <p>When a user older than 26 who meets the 4M aid code qualifications clicks on the Report a Change button/link or the Continue Report a Change button/link on the <i>Individual homepage</i>, the <i>26-year-old Former Foster Youth – Need More Information</i> popup displays and says, “Right now you are in the Medi-Cal program for Former Foster Youth. This program gives free Medi-</p>	<ul style="list-style-type: none"> Individual homepage Apply for Benefits – Get Help with Costs Personal Data – Demographic Information Eligibility Results/Renewal Results

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			<p>Cal to people who were in foster care at age 18 or older. You qualified for this Medi-Cal program until your 26th birthday. On <person’s DOB> you turned 26. We looked at the information we have about you to decide if you still qualify for Medi-Cal, but we now need more information from you, such as your income. This information will help to decide if you are still eligible for Medi-Cal or another affordable health program. You can give us this information online through Covered California or you can contact your county Medi-Cal worker. Your Medi-Cal will continue while your information is checked to see if you qualify for another Medi-Cal program or another affordable health program.”</p> <p>When a user clicks on the click here for someone who was previously in foster care link on the <i>Apply for Benefits – Get Help with Costs</i> page, the <i>Former Foster Care</i> popup says, “If you were in</p>	

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			<p>foster care in any state on your 18th birthday or later, you may qualify for free Medi-Cal until age 26...”</p> <p><i>The Personal Data – Demographic Information</i> page asks, “Was this person in foster care in any state on his or her 18th birthday or later? If yes, this person may qualify for free Medi-Cal up to age 26 and his or her income does not matter” and “Where was this person in foster care on their 18th birthday or later?” Additionally, if more than one household member exists on the application, the <i>Applying with Other Household Members</i> popup displays and says, “If a former foster youth applies for health insurance with other household members, such as their child or spouse, then their income information must be given to decide whether those other household members will get help paying for health insurance. The former foster youth will qualify for Medi-Cal regardless of</p>	

Ref ID	Type	Previous Design/Problem	Modified Functionality In this Release	Pages Impacted
			<p>their income information.” If only one household member exists on the application, the <i>Medi-Cal for Former Foster Youth</i> popup displays and says, “If you were in foster care in any state on your 18th birthday or later, you may qualify for free Medi-Cal until age 26 and your income does not matter...”</p> <p>When a user receives the 4M aid code, the <i>Eligibility Results</i> page says, “Good news! Based on the information you gave us, you have been conditionally approved for the Medi-Cal program for former foster youth...” or “You do not qualify for Covered California with premium assistance...because you qualify for the Medi-Cal program for former foster youth.”</p>	
Updated Fair Share Percentage				
44290	Change Request	This functionality did not previously exist.	The Fair Share Percentage has been updated based on IRS guidance. Fair Share Percentage is used to calculate a Consumer’s fair share of the premium and corresponding APTC amount. CalHEERS is required to update the percentages used to	NA

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			calculate fair share and APTC for taxable years and plan years beginning after December 31, 2015. This is an annual procedure.	
Add APTC Effective Date to the 834 Transactions				
36110	Change Request	This functionality did not previously exist.	APTC affective dates have been added to the 834 Carrier transaction to allow Carriers to update consumer accounts correctly.	NA
Interfaces				
Federal Hub Renewal and Redetermination Verification Service				
34345	Change Request	This functionality did not previously exist.	The Renewal and Redetermination Verification (RRV) Composite (batch) Service provides a method for verification of information in batch, during annual renewal cycles for Covered California insurance programs.	NA
Plan Management				
Family Dental Plans				
34757	Change Request	This functionality did not previously exist.	Families with at least one adult member enrolled within a Covered California Plan now have the option to select family dental coverage in CalHEERS.	<ul style="list-style-type: none"> • Getting Started • User Preferences • Plan Comparison • Plan Details • Your Cart • Keep Your Current Plan • Confirmation • Individual homepage • Plan Selection – One Plan for

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				All <ul style="list-style-type: none"> Plan Selection – In Progress Plan Selection – Custom Grouping Household Enrollment Summary Change Plan Selection Terminate Participation Household Enrollment Introduction Change Plan Effective Dates / Reinstate Coverage

Key System Updates

The following summarizes the modified features included in this release.

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
Education & Outreach				
Updates to Online Help Pages				
40146	Change Request	On-line help functionality was not updated to support previous system enhancements.	The following on-line help has been appropriately updated and displays in English and Spanish as follows: <ul style="list-style-type: none"> The help popups on all income pages display information about the First Date Paid and Last Date Paid elements. 	<ul style="list-style-type: none"> All income pages Renewal Summary Use of this Website Household Primary Contact Income Summary Application

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			<ul style="list-style-type: none"> • The <i>Renewal Summary</i> page displays the <i>Renewal Summary</i> help popup. • The <i>Use of this Website</i> help popup displays the question, “What does the View the Notice of Privacy Practice link do?” • The <i>Household Primary Contact</i> help popup displays correct information in the Validation column (e.g., “Letters only” displays for “First Name”). • The <i>Income Summary</i> help popup and the <i>Income Summary</i> page display “Total Expected Yearly Household Income” and “If you expect your total household income to different from this in 2015 then Click Here.” • The <i>Application Signature</i> help popup (<i>Submit Application for Eligibility</i> popup) does not contain information that does not display on the <i>Application Signature</i> page (e.g., “Rights and Responsibilities”). • After clicking on the help icon on the <i>Expected Income for 2016</i> page, the help popup displays. 	<p>Signature</p> <ul style="list-style-type: none"> • Expected Income for 2016 • Personal Data – Tax Information • Personal Data-Health Insurance Information • Additional Program Information • Assister Enrollment Entity FAQs Household Members

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			<ul style="list-style-type: none"> • The <i>Tax Information</i> help popup matches the <i>Personal Data – Tax Information</i> page (i.e., the page and popup ask, “Is this person planning to file taxes this year?”). • The <i>Health Care Information</i> help popup matches the information on the <i>Personal Data-Health Insurance Information</i> page (i.e., the popup and page ask, “Does this person have or has this person been offered affordable health insurance for 2015?”). • The <i>Additional Program Information</i> page displays the <i>Additional Program Information</i> help popup. • After clicking on the Espanol link in the header, the <i>Assister Enrollment Entity FAQs</i> page displays in Spanish. When the No radio button is selected for Is this person a U.S. Citizen or National? on the <i>Household Members</i> page and then a user hovers over the Check the box if this person has satisfactory immigration status 	

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			text, the hover text displays.	
Prevent the Agent from Updating Fields After Certification				
46187	Change Request	Certified Insurance Agents had the ability to make changes to all data in their Agent Portal which caused down-stream issues with Agent payments as well as manual processing to correct the issues caused by changing the Business name, Federal tax ID, and address fields.	The Agent can no longer make changes to the Business name, Federal tax ID, and address fields after the Agent is Certified. The Agent must contact the Service Center/Agent Manager to make changes to these fields.	Agent Information
Training Support Resources for Release 15.3				
35260	Change Request	On-line videos had not been updated to support previous system enhancements.	<ul style="list-style-type: none"> As seen on the <i>Tutorials</i> page, the following English and Spanish tutorial videos and transcripts have been updated with 15.3 functionality: <ul style="list-style-type: none"> How do I apply for health insurance? How do I navigate Covered California? Overview of Covered California Additionally, the How do I submit an inquiry? video has been removed as this functionality no longer exists within CalHEERS. 	Tutorials
eHIT				
Automating SAWS Traffic Summary and Processing Reports through SFTP				
10119	Change Request	The SAWS (Statewide Automated Welfare System) consortia were accessing the processing reports and traffic summary directly via OBIEE	The SAWS consortia receives the processing reports and traffic summary via SFTP (Secure File Transfer Protocol) in a	NA

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		(Oracle Business Intelligence Enterprise Edition).	readable file format (CSV [Comma Separated Value file]), thus automating the report process.	
EDR-C Mitigation of Near Consecutive Eligibility Determination Request Submissions				
42378	Change Request	When CalWIN/LEADER sent multiple companion EDR sets for the same case at the same time or with less time difference, the CalHEERS system picked each record from the multiple companion set concurrently for the processing which caused table contention, duplicate case creation and performance issues.	When CalWIN/LEADER sends multiple companion EDR sets for the same case at the same time or with less time difference, the CalHEERS system will process those companion EDR sets sequentially which avoids table contentions, duplicate case creations and performance issues.	NA
Reinstate Individuals Sent in EDR When CalHEERS Case and CalHEERS Person or SAWS Person Number Match				
44645	Change Request	Individuals were being “soft-deleted” in error because the system was not utilizing start and end dates at the Individual level, which resulted in problems when EDRs were received for prior month's eligibility which didn't contain all active participants. “Soft deleted” means the record exists in the database but has a delete flag set to Y which, in essence, inactivates that record.	CalHEERS has modified its handling of soft deletes by validating that an Individual's SAWS Case Number and CIN match, and removing the “soft delete” flag to avoid inactivating an active case participant based on what is received in an EDR for prior month's eligibility. Individuals who were incorrectly soft-deleted have been reinstated.	NA
Eligibility & Enrollment				
Portal Validation for Correcting Email and Address Errors				
27645	Change Request	Existing validation logic/rules for CalHEERS email and address were inconsistent causing validation errors.	The validation logic/rules for CalHEERS email and address have been updated to be consistent. The CalHEERS system validates email and address using the	<ul style="list-style-type: none"> • Authorized Representative Information • Household Primary Contact • Address & Contact • User

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			<p>following rules:</p> <p>Email</p> <ul style="list-style-type: none"> • Minimum of 1 character (if required) and maximum of 50 characters • Name <ul style="list-style-type: none"> ○ If there is a period, first characters prior to first period character (any combination of) <ul style="list-style-type: none"> ▪ Underscores ▪ Lower case letters ▪ Upper case letters ▪ Digits 0 through 9 ▪ Hyphens ○ Rest of name (any combination of) <ul style="list-style-type: none"> ▪ Periods ▪ Underscores ▪ Lower case letters ▪ Upper case letters ▪ Digits 0 through 9 ▪ Hyphens • @ symbol • Domain name (any combination of) <ul style="list-style-type: none"> ○ If there is a period, prior to first period <ul style="list-style-type: none"> ▪ Lower case letters ▪ Upper case letters 	<p>Information</p> <ul style="list-style-type: none"> • Contact Information • Account Summary • My Profile Enter Your Information

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			<ul style="list-style-type: none"> ▪ Digits 0 through 9 ▪ Hyphens ○ Rest of name (any combination of) <ul style="list-style-type: none"> ▪ Periods ▪ Lower case letters ▪ Upper case letters ▪ Digits 0 through 9 ▪ Hyphens • Extension (last period precedes extension) <ul style="list-style-type: none"> ○ 2 to 4 lower case letters or upper case letters for example (“com,” “net,” “org,” etc.) <p><u>Address Line 1 and Address Line 2 (any combination of)</u></p> <ul style="list-style-type: none"> • Minimum of 1 character (if required) and maximum of 50 characters • Digits 0 to 9 • Lower case letters • Upper case letters • Periods • Apostrophes • Hyphens • Commas • Spaces • Forward Slash • Backward Slash • Number Sign (#) 	
Enable Terminate Participation Link for Prior Year				
43967	Change Request	The Terminate Participation link on the <i>Individual homepage</i> page was disabled if	The Terminate Participation link on the <i>Individual homepage</i> page	Individual homepage

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		there was not an open enrollment segment for the year for which the termination was being processed.	is enabled for the prior year enrollment even when there is no active enrollment for the current year.	
Add 5% MAGI Income Disregard for the Parent/Caretaker Group				
4497	Change Request	The 5% Modified Adjusted Gross Income (MAGI) Income Disregard had not been applied to the parent/caretaker group.	The 5% MAGI Income Disregard can now be applied to the parent/caretaker group when determining income eligibility for certain non-pregnant adults who are not eligible for enrollment in the Affordable Care Act New Adult coverage group.	Eligibility Results
Change “[Day/Hours] per week” from Optional to Required				
35331	Change Request	The [Day/Hours] per week field on the <i>Add Employment Income, Add Other Income, and Add Deduction</i> pages was optional when the Consumer indicated they were paid daily or hourly.	The [Day/Hours] per week field on the <i>Add Employment Income, Add Other Income, and Add Deduction</i> pages is now required when the Consumer indicates they are paid daily or hourly.	<ul style="list-style-type: none"> • Add Employment Income • Add Other Income • Add Deduction
Collect Employer Name and Address				
44322	Change Request	<p>CalHEERS was not collecting Employer Contact Information when applicants indicated they were employed, and displayed the following information instead:</p> <ul style="list-style-type: none"> • <i>Household Members</i> page: <ul style="list-style-type: none"> ○ The “Note to Employers and Employees applying for SHOP” statement displayed. • <i>Health Insurance Information</i> page: <ul style="list-style-type: none"> ○ Added employer name, 	<p>CalHEERS now asks for Employer contact information (Employer name and address) when an applicant indicates they are employed.</p> <ul style="list-style-type: none"> • <i>Household Members</i> page: <ul style="list-style-type: none"> ○ The “Note to Employers and Employees applying for SHOP” statement on the Household Member page is 	<ul style="list-style-type: none"> • Health Insurance Information • Household Members • Add Employment Income

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		<p>employer identification number (EIN), employer address to Health Insurance Information page.</p> <ul style="list-style-type: none"> ○ Updated 'Name' to 'Plan Name' in Health Insurance Information page. ○ Added 'Even though you were not offered insurance through an employer, we want you to answer a few optional questions.' Static text to Health Insurance Information page. ○ Online Help content for Health Insurance Information page is updated to include the newly added fields. <ul style="list-style-type: none"> ● <i>Add Employment Income</i> page: <ul style="list-style-type: none"> ○ Added employer contact person, employer phone number, and employer mailing address to Add Employment Income page per CR 44322. ○ Online Help content for Add Employment Income page is updated to include the newly added fields <p>The same changes in individual portal are also updated in the single page flexible application.</p>	<p>removed.</p> <ul style="list-style-type: none"> ● <i>Health Insurance Information</i> page: <ul style="list-style-type: none"> ○ Added employer name, employer identification number (EIN), employer address to Health Insurance Information page. ○ Updated 'Name' to 'Plan Name' in Health Insurance Information page. ○ Added 'Even though you were not offered insurance through an employer, we want you to answer a few optional questions.' Static text to Health Insurance Information page. ○ Online Help content for Health Insurance Information page is updated to include the newly added fields. ● <i>Add Employment Income</i> page: <ul style="list-style-type: none"> ○ Added employer contact person, employer phone number, and employer mailing address to Add Employment Income page per 	

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			<p>CR 44322.</p> <ul style="list-style-type: none"> Online Help content for Add Employment Income page is updated to include the newly added fields <p>The same changes in individual portal are also updated in the single page flexible application.</p>	
Catastrophic Plans to be Excluded on Monthly and Yearly IRS Reporting				
31851	Change Request	Catastrophic plans were reported on monthly, yearly, and Consumer hardcopy 1095-A forms.	Catastrophic plans are not reported on monthly, yearly, or Consumer hardcopy 1095-A forms in order to comply with “IRS Marketplace Reporting Workshop – Part 18” which states that “Individuals enrolled in catastrophic plans are not eligible to receive advance payments of the premium tax credit, nor can they claim the premium tax credit on their tax return at filing. Therefore, marketplaces must not generate monthly or 1095-A end-of-year reports – to either the Individual or the electronic report to the IRS – for catastrophic plans.”	NA
Enhance User Interface to Improve Transition and Capture of Information in the CalHEERS Portal				
37034	Change Request	User Interface was confusing to consumers in the following instances: <ul style="list-style-type: none"> Duplicate Renew buttons. <i>Optional Information</i> page - Alaska Indian/American 	The user interface has been enhanced to improve transition and capture of information in the CalHEERS portal to support Renewal/Open	<ul style="list-style-type: none"> Individual homepage Personal Data-Demographic Information

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		<p>Native state and tribe questions displayed on this page.</p> <ul style="list-style-type: none"> • <i>Eligibility Results/Renewal Results</i> page - No error message displayed when the user reported a change that could not be processed during the current benefit year. • <i>Household Enrollment Introduction</i> page - No messaging displayed when a Consumer reported a change too late to take effect in the current benefit year. • <i>Preview Plans</i> page - Preview Plans for dropdown did not display and users could not select a year. 	<p>Enrollment functionality for 2016, including:</p> <ul style="list-style-type: none"> • <i>Individual homepage</i> - Renewals language has been updated and aligned and there is now only one Renew button. • <i>Personal Data-Demographic Information</i> page - Alaska Indian/American Native state and tribe questions now display on this page. • <i>Eligibility Results/Renewal Results</i> page - Error message has been added when the user reports a change that cannot be processed during the current benefit year, requiring them to submit a Report a Change for the future benefit year. • <i>Household Enrollment Introduction</i> page - Messaging has been added when a Consumer reports a change too late to take effect in the current benefit year. • <i>Preview Plans</i> page - Added Preview Plans for dropdown so users can select a year. 	<ul style="list-style-type: none"> • Eligibility Results/Renewal Results • Household Enrollment Introduction • Change Plan Effective Dates/Reinstate Coverage • Preview Plans • Flexible Application
Update CalHEERS Renewals Roadmap				
37028	Change Request	The CalHEERS Renewals experience, including notices	The CalHEERS Renewals experience, including	All Pages

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		and functionality, had not been updated for 2016 renewals.	notices and functionality, has been updated for 2016 renewals.	
Changes to the Business Rules Engine (BRE)				
37032	Change Request	<p>When a user reported a change, the BRE (Business Rules Engine) would re-determine eligibility for all changes made.</p> <p>Additionally:</p> <ul style="list-style-type: none"> • <i>Individual homepage</i>- Only Admins could access the Report a Change for <current year> button, Report a Change for <current year> link, Continue Change Report for <current year> link, and Withdraw Change Report for <current year> link. • <i>Address and Contact</i> page - Only California Mailing Addresses were permitted. • <i>Application Signature</i> page- Special Enrollment (SEP) section did not display during Open Enrollment Periods. 	<p>This CR includes a series of portal changes for modifying portal text and behavior, including the ability to provide an out of state mailing address, and bypassing plan selection for a consumer when they move but do not change county or rating region.</p> <p>Additionally:</p> <ul style="list-style-type: none"> • <i>Individual homepage</i>- All users can now access the Report a Change for <current year> button, Report a Change for <current year> link, Continue Change Report for <current year> link, and Withdraw Change Report for <current year> link, but non-Admins can only access the button/links through December 31. • <i>Address and Contact</i> page - Mailing Address in all states is now permitted. • <i>Application Signature</i> page - Updated design to allow Special Enrollment (SEP) section to display during Open Enrollment Periods 	<ul style="list-style-type: none"> • Individual homepage • Address and Contact • Application Signature • Flexible Application

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			when a SEP reason would allow the Consumer an earlier start date.	
MEC Update for Limited Scope Medi-Cal for Pregnant Women				
45773	Change Request	The Minimum Essential Coverage (MEC) table for APTC/CSR listed a value of "False" for aid code M9 resulting in limited-scope Medi-Cal for pregnant women.	The MEC table for APTC/CSR lists a value of "True" for aid code M9. Pregnant women at application intake who meet the income criteria for limited-scope Medi-Cal for pregnant women are not allowed dual enrollment for APTC/CSR, as limited-scope Medi-Cal is now considered MEC.	NA
MEC Table Update #2				
47818	Change Request	The Minimum Essential Coverage (MEC) Table was incomplete and did not accurately validate MEC for some beneficiaries.	The CalHEERS MEC Table has been updated to match current Aid Code requirements, and accurately validates MEC for all beneficiaries.	NA
IRS 1095				
IRS - Update New Business Rules				
42509	Change Request	Policies with multiple events on the same day were erroring out of the 1095 monthly and annual processes.	Now, the event with the latest time will be used to determine APTC and Gross effective dates. Execution timelines were also extended.	NA
Financial Management				
Update CalSTARS Interface to Process Overpayments				
39962	Change Request	The CalSTARS interface was not generating both Carrier regular payment and overpayment transactions in TC 143 (Carrier payment extract).	The CalSTARS interface generates Carrier regular payment transactions in TC 143, and overpayment transactions in TC 109 (Carrier overpayment extract).	NA

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Modify PMPM Invoicing Criteria for 2016 Enrollment Period				
39912	Change Request	The logic used to invoice Carriers per member per month (PMPM) was to bill both pending and effectuated coverage.	The logic used to invoice Carriers PMPM has been modified to bill effectuated only for 2016 coverage.	NA
MEDS				
Date of Birth Field Enhancements for CalHEERS Portal				
46147	Change Request	Users were not always selecting the year when entering their Date of Birth in the CalHEERS portal. When no year was selected, the birth year defaulted to the current year, which caused issues with identify member processes and eligibility determinations.	In order to prevent incorrect eligibility, excess records in SCI (State Coverage Initiatives – Academy Health System) and MEDS (Medicaid Eligibility Data System), and an on-going backlog of applications for processing, the Date of Birth field in CalHEERS no longer defaults to any year. The date picker next to the Date of Birth field has been removed from the <i>Household Primary Contact</i> page, the <i>Household Members</i> page, and the <i>User Information</i> page so that the user has to type their birth year.	<ul style="list-style-type: none"> Household Primary Contact Household Members User Information
Notices				
Snippet Updates for CalNOD01				
43925	Change Request	CalNOD01 Covered California Eligibility Determination Notice, Redetermination, and Verification Inconsistencies Notice of Action (NOA) did not include the <i>Getting Help in a Language Other than English</i> page or the <i>Proof of Income</i> page. Additionally, existing Open Enrollment and Special Enrollment snippets had not been updated.	CalNOD01 Covered California Eligibility Determination Notice, Redetermination, and Verification Inconsistencies Notice of Action (NOA) includes the <i>Getting Help in a Language Other than English</i> page and the <i>Proof of Income</i> page. Additionally, existing Open Enrollment and	NA

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			Special Enrollment snippets have been updated.	
Plan Management				
Update 2016 SERFF Templates				
42266	Change Request	CalHEERS did not have data for 2016.	Carriers have added data for Plan Year 2016.	NA
Add New Carriers to CalHEERS				
28807	Change Request	An update was needed to add United Health Care, Oscar, and Dental Health Services to the existing list of Carriers.	To aid addition of 3 new Carriers (United Health Care, Oscar, and Dental Health Services) to CalHEERS, code, file transfer, table updates, Carrier communication, testing, etc. have been enabled.	NA
Add Automation, Monitoring, and Alerting to the Inbound and Outbound 834/GI Batch Processes				
29022	Change Request	Carrier 834 transactions were not visible in the CalHEERS portal nor were operational inconsistencies reported on a consistent basis. This led to errors in enrollments, terminations, and effectuations perpetuated over multiple Carriers.	Automation, monitoring, and alerting has been added to the inbound and outbound 834/Carrier batch processes, specifically: <ul style="list-style-type: none"> AUTOSYS has been implemented to automate both inbound and outbound processes, including notifications to the Accenture Ops team and CalHEERS Plan Management and Technical teams, in order to address issues in a timely manner and avoid downstream issues with the Carriers. An Incident Reporting process and a daily touch-base meeting with the Plan Management and 	<ul style="list-style-type: none"> Current Enrollment Enrollment History Program Eligibility Summary by Person Transaction History Enrollment Transaction Details

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			<p>Technical team have been implemented.</p> <ul style="list-style-type: none"> • A Batch Schedule report is produced daily. • Incident Reports detailing data quality, file integrity, and reconciliation issues have been provided. <p>In addition, the following updates have been made:</p> <ul style="list-style-type: none"> • <i>Current Enrollment</i> page <ul style="list-style-type: none"> ○ Replaced <i>Plan Enrollment Summary by Program</i> page with <i>Current Enrollment</i> page • <i>Enrollment History</i> page <ul style="list-style-type: none"> ○ Replaced <i>Plan Enrollment Summary by Person</i> page with <i>Enrollment History</i> page • <i>Program Eligibility Summary by Person</i> page <ul style="list-style-type: none"> ○ Added Current Eligibility Summary section • <i>Transaction History</i> page <ul style="list-style-type: none"> ○ Added enrollment related transactions to Transaction History table • <i>Enrollment Transaction Details</i> page 	

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			<ul style="list-style-type: none"> ○ Added this new page ○ Accessible only for SCRs ● Outbound 834 Processing ○ Map CalHEERS assigned policy number 	
Updated Zip Codes & Plan Crosswalk for Plan Year 2016				
44197	Change Request	The zip code/county/region combination of 95610/Placer/3 did not exist for plan benefit year 2016.	CalHEERS has added the zip code/county/region combination of 95610/Placer/3 effective for plan benefit year 2016. Therefore, Carriers may offer plans in this zip/county/region area.	NA
Extend Standard Payment WSDL for Open Enrollment Benefit Year 2016				
43360	Change Request	Binder payments were not previously collected through the CalHEERS portal for all Carriers.	The PayNow functionality has been implemented for additional carriers.	NA
Service Center				
Add Cantonese Language to All IVR Call Flows				
44674	Change Request	Interactive Voice Response (IVR) call flows only included English and Spanish as language options for full service functionality (information and self-service).	IVR call flows now include English, Spanish, and Cantonese as language options for full service functionality.	NA
Update the IVR for Zip Codes That Cross Counties				
32039	Change Request	When a Caller entered a zip code that has been identified as belonging to multiple counties, the Interactive Voice Response (IVR) announced information for the first county listed in the database table.	When a Caller enters a zip code that has been identified as belonging to multiple counties, the Interactive Voice Response (IVR) announces all counties. and gives the Caller a choice of which county information they wish to hear.	NA
Skills Based Routing for Covered California Service Center IVR				
34990	Change	The Interactive Voice Response	IVR now distributes	NA

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
	Request	(IVR) distributed incoming calls based on language (English or Spanish).	incoming calls based on the skill set of the Service Center Representative (SCR). Covered California Service Center IVR distributes calls, based on the prompts selected by callers, to SCRs with the assigned skill or skills.	

Key Fixes

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

Ref ID	Type	Previous Design/Problem	Functionality Fixed 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.

#	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.

#	New Alternate Procedures	Ref ID	Planned Release
None			