Executive Summary

CalHEERS Feature Release 18.2 (to be deployed on 02/12/2018) contains updates to following:

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

- Cross-Business Area
- Consumer Assistance
- eHIT
- Eligibility & Enrollment

Key System Updates that have been deployed in this release:

- Interfaces
- Eligibility & Enrollment
- Notices
- Marketing
- Eligibility
- Online Application
- Reports
- EHIT

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No Longer in Effect with this release   **New** with this release

- None
- None

Purpose and Scope

This document describes the content of the CalHEERS Feature Release 18.2. 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	New Functionality In this Release	Pages Impacted
Cross-Business Area				
Implementation of General GI Product Enhancements				
88351	Change Request	These enhancements did not previously exist.	The mentioned enhancements are made to GI products:	NA

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			Cost Calculator Enhancements (Plan Management) • Updates to cost values for 2018 coverage year • Updates to Plan Summary Tile display (e.g., add hover text with total cost amount). **QRS Enhancements (Plan Management)** • The hover text, labels, and disclaimer are aligned to CMS standards. • The hover text logic is updated to conform text to different rating scenarios (i.e. if a product has only two indicator ratings, the text should refer to "two categories below" rather than three. **UI Usability Enhancements (Marketing)** • Dental Plan Tiles no longer displays the APTC Information	
		**Consumer Assistance**		
		Implement Agency Module Phase 1 - part 2		

92588	Change Request	This functionality did not previously exist.	CalHEERS now has an Agency Manager Dashboard in the Agency Module.
			
			Features of the Agency Manager Dashboard are:
			
			Agency Manager Functions
			   o View, filter and sort a list of "My Agents"
			• **Agent**
			   o View Agent's Certification Status
			   o View and Edit Agent's Contact Information
				Individual Manage Delegate

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			o View and Edit Agent's profile Information • **Book of Business (BOB)** o View Agency level BOB (includes BOB for all My Agents) o View, filter, and sort all delegated consumers by Agent and other criteria • **Consumer** o View details pertaining to individuals. The details that can be viewed are: household information, case number, coverage, and agent information. o Accept consumer delegation requests on behalf of Agents o Take action on Agent's delegates ▪ Complete an Individual Application ▪ Submit an application o Transfer a consumer from one Agent to another Agent within the Agency o Transfer all consumers from an Agent to another Agent within the Agency o Export Agent level and Agency level BOB **Agent Functions (as part of Agency)** o Be automatically delegated when an agent starts a consumer application o View/Accept consumer delegation requests that are pending response o View/search/filter by BOB	

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			Agency/Agent Dissociation ○ Dissociate an Agent ○ Activate/Deactivate an Agent **Covered California Get Help Experience** ○ To include Agency Name and Contact Information in search results for Agents.	
-Eligibility & Enrollment

Eligibility & Enrollment
Implement State Inmate Program in CalHEERS

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
82977	Change Request	This functionality did not previously exist.	CalHEERS now processes and determines eligibility for State Medi-Cal Inmate Eligibility Program (MCIEP) applications. (The State MCIEP applications were processed manually. With this CR, CalHEERS can process eligibility for State Inmate Program and State Medical Parole Program) The California Correctional Health Care Services (CCHCS) staff completes the Medi-Cal paper applications on behalf of the state inmate population for the California Department of Corrections and Rehabilitation (CDCR). Then, they send the applications to DHCS for eligibility determinations. The DHCS MCIEP staff will enter and process the applications received from the CCHCS into CalHEERS. The DHCS MCIEP staff are responsible for the case management. CalHEERS has created a dynamic application based on user type (DHCS State MCIEP) which displays the relevant questions dynamically to the State MCIEP.	NA
eHIT

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
R18.2 SAWS Performance Test and Post Implementation Support				
109104	Change Request	This functionality did not previously exist.	This CR provided hours for supporting SAWS Volume-metric performance testing and post implementation support for Release 18.2. CalHEERS conducted coordinated volume-metric performance testing of eHIT for all SAWS consortia's (C-IV, CalWIN, LRS) for release 18.2. CalHEERS will support eHIT related post implementation activities and support, CalHEERS/SAWS Deep dive sessions for all SAWS consortia's (C-IV, CalWIN, LRS) post release 18.2.	NA

Key System Updates

The following summarizes the modified features included in this release.

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
Interfaces				
CalHEERS update of FDSH RIDP to version 2.0 - FHUB Service ID: H1.1 and H66				
92697	Change Request	The FDSH RIDP schema was on H1 (RIDP v1).	The FDSH RIDP schema is on H1.1 (RIDP v2). The schema, response codes and portal messaging is updated on CalHEERS.	NA
Eligibility & Enrollment				
Cases Stuck in Medi-Cal Renewal Mode				
90492	Change Request	The MAGI Medi-Cal cases stuck in Renewal mode required assistance from Covered California or Counties to close the MAGI Medi-Cal renewal to be able to enroll into CCP.	CalHEERS automated the closure of MAGI Medi-Cal renewals. CalHEERS now closes MAGI Medi-Cal Renewals when all MAGI Medi-Cal members are found ineligible or discontinued.	NA

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted

		A case gets stuck in MAGI Medi-Cal Renewal mode when an action taken by the county results in ineligibility or when a negative action is applied for one or all individuals in the MAGI Medi-Cal case and there is no MAGI Medi-Cal Renewal 'Disposition' sent for the case by SAWS.	A case in MAGI Medi-Cal Renewal mode with at least one household member eligible or conditionally eligible for Covered California Program can select a Covered California Plan.
			
			CalHEERS shall process a data fix to close a MAGI Medi-Cal Renewal when the following criteria is met:
			
			• A case in MAGI Medi-Cal Renewal mode with no:
			   o Eligible MAGI Medi-Cal members
			   o Conditionally Eligible MAGI Medi-Cal members, or
			   o Pending MAGI Medi-Cal members on the case	

Update to Income Service Requests and Income Caching Rules				
81432	Change Request	A significant number of service requests were sent to IRS, EDD and FTB from CalHEERS for the Income Services Verification. CalHEERS did not restrict the number of calls made for the Income Services Verification to IRS.	The triggering conditions for the Income Services Verification are updated to reduce the number of service requests to IRS, EDD and FTB. • CalHEERS triggers the Income Services Verification for individuals within the subsidy FPL limits when subsidy income verification is not cached except for intake or renewal applications. • CalHEERS triggers the Income Services Verification for individuals within the MAGI Medi-Cal FPL limits when MAGI Medi-Cal income verification is not cached at an individual level except for intake or renewal applications. • CalHEERS does not trigger the Income Services Verification when a Negative Action is received for	NA

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			individuals within the MAGI Medi-Cal FPL Limits and their current MAGI Medi-Cal Income Verifications are not cached. • CalHEERS limits the number of IRS requests made for the Income Services Verification to once per Refresh Cycle (For example: IRS updates the tax data information every Friday, the refresh cycle for IRS is once a week on Fridays and CalHEERS will only call once during the refresh cycle) per SSN list value for a Report a Change. • CalHEERS limits the number of IRS requests made for the Income Services Verification to once per Refresh Cycle per SSN list even if the impacted data elements are related to Income (except for SSN) are changed. • CalHEERS calls the IRS if the SSN list value is changed within the Refresh Cycle	
			**Notices**	
2018 18.2 Notice Change Request				
87457	Change Request	CalHEERS notices were missing verbiage and other information.	This CR includes various changes to some of the existing CalHEERS notices. Below are the modifications: • CalHEERS now generates a new reason snippet on the CalNOD01 notice when a consumer is either Ineligible or Discontinued due to Admin Verification fail or system determination. • CalHEERS updated snippet 330, snippet 381, and snippet 828 (previously snippet 166) with new verbiage.	Eligibility Results

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			• The snippet 121 (How to Turn in Your Information) is moved above Snippet 182 (We Need Proof You Do Not Have Other Coverage) in the CalNOD01ab and CalNOD01c notices. • CalHEERS now generates the CalNOD03 notice in the following languages: ○ English ○ Spanish ○ Chinese ○ Vietnamese ○ Russian ○ Tagalog ○ Khmer/Cambodian ○ Arabic ○ Farsi ○ Korean ○ Hmong ○ Armenian • CalHEERS now generates and sends a new Notices of Action (NOAs) to the beneficiaries who have applied for the MAGI State Inmate or MAGI State Medical Parole Programs • CalHEERS allows single-month noticing for retroactive months of eligibility for the MAGI MCIEP State Inmate Program or MAGI MCIEP State Medical Parole Program. • The *Eligibility Results* page now includes information for consumers ineligible for APTC/CSR, who indicated they are not planning to file taxes.	
Marketing				
Password and Security Question Updates				

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
95177	Change Request	The CalHEERS password policy was as mentioned: • Cannot contain a dictionary word • Must be at least 8 characters • Cannot be more than 16 characters • Must have at least 1 number • Must have at least 1 special character (!, @, #, $, %, ^) • Must have at least 1 UPPERCASE character • Must have at least 1 lowercase character	CalHEERS has made the following changes to the password policy: • There is no maximum length for a password • The Password dictionary is updated • The following special characters are now allowed in the password: ` ~ ! @ # $ % ^ & * ( ) _ + - = [ ] \ { } | ; ' : " , . / < > ? The Security Questions for each of the five security question groups are updated. Messaging to users regarding password requirements, dictionary words, special characters, OTP codes, and security questions are updated on all relevant portal pages.	Create an Account to Apply Security Questions My Profile
Eligibility				
20453 (CR 79500)	Defect Fix	Households with mixed reported incomes from trusted data sources failed the income verification.	Households with mixed reported incomes from trusted data sources pass the income verification.	NA
35328 (CR 79500)	Defect Fix	Children without a Social Security Number (SSN) and evaluated for County Children's Health Initiative Program (CCHIP) are determined as "Conditionally Eligible" incorrectly.	Children without a SSN and evaluated for CCHIP are determined "Eligible" as expected.	Eligibility Results
37757 (CR 79500)	Defect Fix	Soft Pause is being reapplied after a Soft Pause has already been lifted and the case is then rerun for a prior month when a Soft Pause was not applied.	Soft Pause is not being reapplied after a Soft Pause has already been lifted and the case is then rerun for a prior month when a Soft Pause was not applied.	NA
Online Application				

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
36600 (CR 79500)	Defect Fix	Some APTC/CSR/CCP conditionally eligible members in the ROP batch encountered errors when a VLP call was made.	APTC/CSR/CCP conditionally eligible members in the ROP batch are not encountering any errors when a VLP call is made.	NA
33727 (CR 79500)	Defect Fix	Error message "5WD9ZFSU" is being displayed when a user tries to verify the member details on the *Household Verification* page	User can verify the member details on the *Household Verification* page without receiving any errors	Household Verification
33759 (CR 79500)	Defect Fix	Error messages "00RYV3HM" and "KXUX5I1N" are being displayed when a user when user clicks on the **Flexible Admin View** button from the popup.	User can navigate to the *Flexible Admin* page after clicking on **Flexible Admin View** button from the popup without receiving any error.	Flexible Admin
Reports				
36377 (CR 79500)	Defect Fix	Multiple fields in Data Warehouse were not displaying the latest value whenever there was a change to override the original value.	All fields in Data Warehouse are displaying the latest value whenever there is a change to override the original value.	NA
EHIT				
40246 (CR 79500)	Defect Fix	Indian Health Services Indicators did not have a default value, therefore Build Validations 160 and 161 occurred when SAWS did not provide the required information and resulted in failed EDRs.	Indian Health Services Indicators have a default value, therefore Build Validations 160 and 161 will not occur when SAWS do not provide the required information causing the EDRs to process successfully.	NA
36520 (CR 79500)	Defect Fix	Error logs do not contain all the details when a specific County of Responsibility (COR) error is received. The COR is not being recorded in the logs therefore SAWS and County workers are having trouble proceeding with the advised workaround/resolution	Error logs contain all the details when a specific County of Responsibility (COR) error is received. The COR is recorded in the logs enabling SAWS and County workers to identify and proceed with the advised workaround/resolution	NA

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
36995 (CR 79500)	Defect Fix	"EligibleTypeCode" is displayed as "MA" when switching a Person on QHP Hold for MCAP to MCAP which is an incorrect code.	"EligibleTypeCode" is displayed as "NA" when switching a Person on QHP Hold for MCAP to MCAP as expected.	NA
34964 (CR 79500)	Defect Fix	"Countableind" is showing an "N" for Projected Annual Income (PAI) income instead of "Y". As per IDD, if income category is PAI, always send "Y" as countable.	"Countableind" is displayed aa "Y" for Projected Annual Income (PAI) as per IDD.	NA

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.

#	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			

Version 1

Glossary				
Acronym	**Full Form**		**Acronym**	**Full Form**
ABE	Accenture Billing Engine		IRS	Internal Revenue System
ADA	Americans with Disabilities Act		ISO	Information Security Officer
AHBX	Accenture Health Benefit Exchange		IVR	Interactive Voice Response
AI	American Indian		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)
ALM	Application Lifecycle Management		LFP	Lawful Presence
AN	Alaskan Native		LV	Life event needs verification
APTC	Advance Premium Tax Credits		MCAP	Medi-Cal Access Program
BOB	Book of Business		MCIEP	Medi-Cal Inmate Eligibility Program
BPM	Business Process Management		MEC	Minimal Essential Coverage
BRE	Business Rules Engine		MEDS	Medi-Cal Eligibility Determination System
CCHCS	California Correctional Health Care Services		MNE	Manual Eligibility
CCHIP	County Children's Health Initiative Program		NHeLP	National Health Law Program
CCP	Covered California Programs		NIST	National Institute of Standards and Technology
CDCR	California Department of Corrections and Rehabilitation		NMEC	Non-MAGI MEC AID Code
CEC	Certified Enrollment Counselor		NQI	New Qualified Immigrants
CEE	Certified Enrollment Entities		OBIEE	Oracle Business Intelligence Enterprise Edition
CEW	County Eligibility Worker		OPA	Oracle Policy automation
CFS	Carry Forward Status		PAI	Projected Annual Income
CIN	Client Index Number		PBE	Plan Based Enroller
CMI	Current Monthly Income		PBPS	Pitney Bowes Presort Services
CMS	Centers for Medicare & Medicaid Services		PDF	Portable Document Format
COR	County of Responsibility		PLR	Policy Level Reporting
CR	Change Requests		QDP	Qualified Dental Plan
CSR	Cost Share Reduction		QHP	Qualified Health Plan
CSS	Cascading Style Sheets (CSS is a style sheet language used for describing the		RDP	Registered Domestic Partner

Glossary				
Acronym	**Full Form**		**Acronym**	**Full Form**
	look and formatting of a document written in a markup language)			
CSV	Comma Separated Value		ROP	Reasonable Opportunity Period
DER	Determination of Eligibility Response		RTC	Rational Team Concert
DHCS	Department of Health Care Services		SA	Subject Area
DWH	Data Warehouse		SAWS	Statewide Automated Welfare Systems
ECM	Electronic Content Management System		SCIN	Statewide Client Index Number
EDD	Employment Development Department		SCR	Service Centre Representative
EDI	Electronic Data Interchange		SFTP	Secured File Transfer Protocol
EDR	Eligibility Determination Request		SIR	Service Investigation report
EERC	Eligibility Evaluation Reason Code		SLCSP	Second Lowest cost silver plan
EPO	Exclusive Provider Organization		SNOW	Service Now
ESI	Employer Sponsored Insurance		SQL	Structure Query Language
ETL	Extract, Transform and Load		SSA	Social Security Administration
FDSH	Federal Data Services Hub		SSN	Social Security Number
FIPS	Federal Information Processing Standard		STNA	Short Term Negative Action
FPL	Federal Poverty Level		UAT	User Acceptance Test
FTB	Franchise Tax Board		UPW	Unplanned Pregnant Woman
FTI	Federal Tax Information		URL	Uniform Resource Locator
FTR	Failure to Reconcile		USPS	United States Postal Service
GI	Get Insured		VLP	Verify Lawful Presence
IAP	Insurance Affordability Programs		WAT	Web Accessibility Toolbar
ICT	Inter County Transfer		WCC	Web Center Content
IDD	Interface Definition Document		WP	Work Products
IMM	Immigrant		WSDL	Web Services Descriptor Language