Executive Summary

CalHEERS Feature Release 17.2 (to be deployed on 02/13/2017) contains updates to following:

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

- Technology
- Service Center
- Notices
- Eligibility & Enrollment
- Reporting

Key System Updates that have been deployed in this release:

- eHIT
- MEDS
- Consumer Assistance
- Service Center
- Eligibility & Enrollment
- Interfaces
- Unassigned
- Technology
- Online Application
- Notices
- Enrollment-Financial Management

Key Fixes that have been updated or resolved in this release:

- Eligibility
- Enrollment-Financial Management
- Online Application
- Reports
- Notices

Alternate Procedures that have been provided with this release:

No Longer in Effect with this release

- Enrollment-Financial Management
- Online Application

New with this release

- Online Application
- Eligibility

Purpose and Scope

This document describes the content of the CalHEERS Feature Release 17.2. 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
Technology				
CAPTCHA Software (Amend)				
32983	Change Request	This functionality did not previously exist.	Google's ReCAPTCHA solution is now implemented on the *Username & Password* page. (The registration page uses a session counter when the user selects their username. Once the user reaches the threshold while attempting to select their username [user name is taken], Google's ReCAPTCHA solution will implement to slow down the ability for username harvesting).	Username and Password
Service Center				
Reprint and Re-mail Document to Consumer				
65920	Change Request	This functionality did not previously exist.	CalHEERS now allows authorized users to request a reprint and remailing of any notice listed in the consumer's inbox. Delivery will be based on the consumer's communication preference (e-mail or mail).	Inbox
Bulk Document Upload				
66251	Change Request	This functionality did not previously exist.	CalHEERS can now process and link documents in bulk from a source outside of the CalHEERS system. CalHEERS has the functionality to import a bulk upload document from external sources, including Novitex and Service Center. CalHEERS has the functionality to consume metadata that is associated to documents that are uploaded in bulk. CalHEERS has the functionality to automatically link documents uploaded in bulk to the correct case based on the metadata provided. CalHEERS creates a BPM work task for the Admin User to review documents when the document cannot be linked to a Case via bulk upload. The task is assigned to the Manual Verification queue.	NA

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			CalHEERS has the functionality to move a document that was erroneously uploaded to a case to the correct case.	
Notices				
2017 Q1 Notice Change Request				
70049	Change Request	This functionality did not previously exist.	CalHEERS now generates a notice to the employer under the following conditions: • If all mandatory employer information is available, and • When a consumer has an Initial determination of eligibility for APTC and is in an (Effectuated) Enrolled status with active employer income, or • When a consumer renews for the next benefit year, is eligible for APTC, and is in an (Effectuated) Enrolled status and with active employer income, or • When a consumer, who is eligible for APTC and is in an (Effectuated) Enrolled status, reports a new current employer, or • When a consumer, who is eligible for APTC and is in an (Effectuated) Enrolled status, updates employer information and an employer notice has not been generated in the benefit year. CalHEERS uploads a copy of the employer notice to the user's *Documents & Correspondence* page without triggering the secure mailbox notification to the user. CalHEERS now has a reason snippet for ineligibility to APTC/CCP/CSR programs during intake, or add a person during Report a Change, or add a person during Renewal, based on attestation to Medicare enrollment. CalHEERS now has a reason snippet for CalNOD1 for an individual who is a new applicant and reports a lump sum income	Documents & Correspondence

<table>
<tr><th>Ref ID</th><th>Type</th><th>Previous Design/Problem</th><th>New Functionality In this Release</th><th>Pages Impacted</th></tr>
<tr><td></td><td></td><td></td><td>amount which makes the individual MAGI Medi-Cal Ineligible in the application month, and MAGI Medi-Cal Eligible, Conditionally Eligible, or Potentially Eligible in the following month. (Informs the consumer of the current month Medi-Cal denial and the following month Medi-Cal potential eligibility.)

CalHEERS has updated the appeals language on the CalNOD01 notice.

CalHEERS has removed the duplicate text in CalNOD01 from snippet 165 that already exists in snippet 328. (The text removed was “About Special Enrollment Periods” and “What’s a qualifying life event?”</td><td></td></tr>
<tr><td colspan="5" align="center">Eligibility & Enrollment</td></tr>
<tr><td colspan="5">Implement Renewal Opt Out Reasons (Amend)</td></tr>
<tr><td>70614</td><td>Change Request</td><td>This functionality did not previously exist.</td><td>CalHEERS now collects the reason for opting out of renewal, providing the business an option to pull data on why users are opting out.

When a user selects Off for the Renew Mode field on the Renew Mode For Covered California Programs page, the following text will display with reasons for user to choose from:

Instead of Covered California, what will be your main source of health insurance?
My employer or union, or a family member’s employer or union
A plan I purchased myself from an insurance company and not through Covered California
I will be covered by Medi-Cal
I will be covered by Medicare (Medicare is the federal health insurance program for all people ages 65 and older, regardless of income or medical history.)
I will receive health insurance from somewhere else
I will be uninsured</td><td>Renew Mode For Covered California Programs</td></tr>
</table>

<table>
<tr><th>Ref ID</th><th>Type</th><th>Previous Design/Problem</th><th>New Functionality In this Release</th><th>Pages Impacted</th></tr>
<tr><td></td><td></td><td></td><td>CalHEERS now adds the opt-out reasons to the Data Warehouse.</td><td></td></tr>
<tr><td colspan="5">Reporting</td></tr>
<tr><td colspan="5">Collect Employer Name and Address and Generate Notice to Employers with Employees eligible to APTC (Amend 3)</td></tr>
<tr><td>29911</td><td>Change Request</td><td>This functionality did not previously exist.</td><td>To comply with Federal and State regulations, CalHEERS now sends a notice to the employer when an employee of theirs is determined eligible for APTC. (Federal and state regulations require Covered California to notify any employer if one of their employees has been determined eligible for APTC through Covered California, and notify them of their appeals rights.)

Users are required to provide Employer information (Name and Address) details for CalHEERS to be able to issue notice to the employers.

Below are the changes in the user interface:

The Employer Contact Information page is added. The page will only display for APTC eligible/conditionally eligible and “enrolled” consumers who are “employed” with current income.

• The Employer Contact Information transaction is added to the Change Log Table on the Transaction History page.

• On the Household Members page, the SHOP Application option is removed from the dropdown list for If no SSN, why? field. For all existing users who have SHOP Application chosen, Select One will be displayed for the user to choose from the dropdown list.

• The Does this person need help with long-term care or home and community-based services? question and question set are moved from the Healthcare page to the Personal Data – Demographic Information page.</td><td>Household Members

Personal Data – Demographic Information

Personal Data – Health Insurance Information

Employment Income
Add Employment Income (Help Page)

Employer Contact Information

Transaction History

Eligibility Results</td></tr>
</table>

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			• New page layout for the *Personal Data – Health Insurance Information* page. • The employer contact information question is removed from the *Personal Data-Health Insurance Information* page. • The ESI Question flow on the *Personal Data - Health Insurance Information* page is updated. • Rules added to the **Delete** link on the *Employment Income* page. • Rules added to the **Continue Health Plan Update** button on the *Eligibility Results* page. • The *Employment Income – Add Income* (help page) removed Employer Contact Person, Employer Phone Number, Employer Mailing Address Line 1, Employer Mailing Address Line 2, City, State, Zip Code, and County. • *Apply for Health Insurance* (landing page) In Apply Mode (New Application or Application in Progress) – The Update **Employer Contact Information** link is enabled if at least one member in the household has active APTC eligibility or conditional eligibility in the current month, or is eligible or conditionally eligible for APTC in the future month, and has an employment income record active in the current month or future month. • *My Health Insurance* (landing page) in Maintain Mode – The Continue **Health Plan Update** button is modified to direct consumer to the *Employer Contact Information* page if at least one member in the household has active APTC eligibility or conditional eligibility in the current month,	

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			or is eligible or conditionally eligible for APTC in the future month, and has an employment income record active in the current month or future month. Otherwise, the user is redirected to the *Household Enrollment Introduction* page. • *My Health Insurance (landing Page)* In Maintain Mode – The **Choose Health Plan** Button is added to direct the consumer to the *Employer Contact Information* page if at least one member in the household has active APTC eligibility or conditional eligibility in the current month, or is eligible or conditionally eligible for APTC in the future month, and has an employment income record active in the current month or future month. • *My Health Insurance (landing Page)* – The **Report a Change** Button removed direction to the consumer to the *Employer Contact Information* page if at least one member in the household has active APTC eligibility or conditional eligibility in the current month, or is eligible or conditionally eligible for APTC in the future month, and has an employment income record active in the current month or future month. • *My Health Insurance (landing page)* – The **Update Employer Contact Information** link displays if at least one member in the household has active APTC eligibility or conditional eligibility in the current month, or is eligible or conditionally eligible for APTC in the future month, and has an employment income record active in the current month or future month. On ***click***, the consumer is directed to the *Employer Contact Information* page. • *My Health Insurance (landing page)* – Renewal Mode – The **Update Employer Contact Information** link displays if at least	

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			one member in the household has active APTC eligibility or conditional eligibility in the current month, or is eligible or conditionally eligible for APTC in the future month, and has an employment income record active in the current month or future month. On ***click***, the consumer is directed to the *Employer Contact Information* page. • CalHEERS displays questions regarding the consumer's employer contact information only if the consumer is eligible or conditionally eligible for APTC. • CalHEERS provides APTC consumers the ability to update answers to the employer contact information questions at any time. • The employer contact information question is removed from the *Personal Data-Health Insurance Information* page. • CalHEERS calls the Hub for the following federal-based verifications, and stores the outcome and response codes for eligibility determinations for the mentioned Covered California Programs: o Medicare, o Peace Corps, o TRICARE, and o VHA. • CalHEERS does not call the Hub for the following state-based verifications: o Medicaid, o CHIP, and o BHP. • CalHEERS determines ineligibility for APTC when there is an Admin Failure of any MEC verification attribute (ESI, NON-ESI, MEDS, Medicare), even if another is e-verified.	

Ref ID	Type	Previous Design/Problem	New Functionality In this Release	Pages Impacted
			• CalHEERS now has the functionality to modify the existing hover text to the existing SSApp question on MEC (including Medicare) coverage. • The employer questions on the *Employer Information of the Earned Income Details* page are removed. • CalHEERS now sends health care, Non-ESI verification data, and hub responses codes and description for Medicare, Tricare, Veterans, and Peace Corps to the CalHEERS Data Warehouse. • The CalHEERS SAWS interface Other Health Care node is modified to align with the portal changes. • CalHEERS now preserves Employer Contact Information in Mixed Household scenarios. • CalHEERS SAWS interface is updated with new business validations to ensure conditional data elements within the Other Health Care node are sent when certain data within the Other Health Care node is sent. • CalHEERS determines a consumer ineligible for CCP when the consumer attests to having Medicare at intake, or adds a person during Report a Change or Renewal. • CalHEERS continues a consumer’s eligibility for CCP when the consumer has an active plan selection, attests to having Medicare at Report or Change or Renewal, and continues to be otherwise eligible for CCP. • The ESI Employer Notices Extract and project documentation now includes employer address information.	

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
eHIT				
EHIT Schema Technical Update v7.0				
67666	Change Request	CalHEERS SAWS EHIT schema interface was on version 6.0.	CalHEERS SAWS EHIT schema interface is updated to version 7.0.	NA
28742 (CR 79498)	Functionality Update	Below were SAWS EHIT Disposition Service • NOA Generation information was persisted • Business validations # 84, 87 through 109 were present	Below are updates to SAWS EHIT Disposition service • NOA Generation information is no longer persisted • Business validations # 84, 87 through 109 are removed	NA
County of Responsibility Electronic EICT (Amend)				
52600	Change Request	CalHEERS did not support Servicing Counties and Case Management Counties to be different counties.	CalHEERS now supports Servicing Counties and Case Management Counties to be different counties. • The CalHEERS System conducts a scheduled process to identify triggering events that satisfy specific case conditions to determine if the CalHEERS System can set the enablement flag to reassign the County of Responsibility (COR) of the case in the future event that the assigned Primary Contact's residence address changes to a different county. • CalHEERS identifies cases for evaluation based on any of the following triggering conditions: 1. Eligibility is processed successfully from the last successful run of the batch to the current batch run. 2. A Disposition is processed successfully from the last successful run of the batch to the current batch run.	NA

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			3. A 90-day Discontinuance cure period for the CalHEERS Case's eligibility evaluation has expired. • CalHEERS allows reassignment of the County of Responsibility after the process has evaluated that the case meets all of the following conditions: 1. All applying members are Denied, Ineligible, or Discontinued from MAGI Medi-Cal. 2. For MAGI Medi-Cal Discontinuance, at least one Disposition corresponding to the MAGI Medi-Cal Discontinuance determination is processed. 3. The 90-day cure period of a discontinuance for “failure to provide” has expired. 4. The CalHEERS case has no open referrals for Non-MAGI Medi-Cal. 5. All CalHEERS Non-MAGI referrals reported per case member have a status of Ineligible or Discontinued. • CalHEERS’ process of evaluation accounts for the 90-day cure period from the first day of the benefit month of discontinuance for each case member incurring a “Failure to Provide” reason of discontinuance. • CalHEERS uses the established CalHEERS county of responsibility for the corresponding MEDS transactions HX12, HX18, HX20, HX20U, HX34, and HX40 county of responsibility for all individuals on the case based on the residence address of the primary applicant. • CalHEERS communicates and updates the county of responsibility for the primary contact (all co-applicants will have their county of responsibility	

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			aligned with the primary contact) to MEDS for APTC, CSR, CCP, MCAP, and CCHIP members via HX05 transaction. • CalHEERS SAWS interface validates an individual's residential zip and county code for processing in CalHEERS. • CalHEERS SAWS interface changes the county of responsibility upon request of an ICT by the SAWS for a prospective benefit month. • CalHEERS SAWS interface processes case eligibility received via ICT for a prospective benefit month. • A business validation is added in CalHEERS to accept ICT EDRs for prospective benefit months only. • CalHEERS SAWS interface routes traffic according to the original source system that sent it. • CalHEERS does not maintain SAWS Case and corresponding person linkage after the release of county of responsibility. • CalHEERS updates consumer messaging when a change in residence address is made on the portal • CalHEERS shall trigger HX05 transaction to convert existing cases where a county of responsibility change is required up through the implementation of this change request.	
Add Business Validation to Primary Contact Match in the CalHEERS SAWS eHIT Interface to Mitigate Against Case Data Overlay				
10021	Change Request	All SAWS eHIT updates in CalHEERS were made based on Case person number only (CalHEERS SAWS eHIT Interface	All SAWS eHIT updates in CalHEERS are now validated against the following primary contact details, along with Case person number (these measures avoid demographic	NA

<table>
<tr><th>Ref ID</th><th>Type</th><th>Previous Design/Problem</th><th>Updated/Resolved Functionality In this Release</th><th>Pages Impacted</th></tr>
<tr><td></td><td></td><td>uses the Case person number (ergo MEDS person number) for case linkage).</td><td>data overlay for person mismatches at the primary contact level):
• First Name
• Last Name
• Gender
• Date of Birth
• Social Security Number

• The CalHEERS SAWS eHIT Interface creates a logging event and rejects the EDR transaction to inform SAWS of a person data mismatch at the primary contact level.

• The CalHEERS SAWS eHIT Interface provides an administrative flag at person level to bypass the matching criteria validation, and allows correction of demographic information within CalHEERS by SAWS.

• CalHEERS SAWS implements a periodic report based on the business validation rejection occurrences logged from the mismatch occurrences.

• The CalHEERS SAWS Interface provides an ability to update the designation of the Primary Applicant and Primary Contact with CalHEERS by SAWS.</td><td></td></tr>
<tr><td colspan="5">MEDS</td></tr>
<tr><td colspan="5">Change MEDS HX18 and HX20 batch process to Generate at an Individual Level</td></tr>
<tr><td>10675</td><td>Change Request</td><td>MEDS HX18 (this batch process is responsible to read the interface events table where all new applications created in CalHEERS waiting to be sent to MEDS reside), and HX20 (this batch process is responsible for managing changes to the existing Program Eligibility information in</td><td>CalHEERS now sends any/all MEDS transactions to MEDS at an individual level.

CalHEERS sends MEDS transactions for individuals who do not have an assigned CIN only after a CIN has been assigned to the individual.</td><td>NA</td></tr>
</table>

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		CalHEERS System received from MEDS), batch processes were generated at a case level. (In the event that one individual on the case had no CIN, the entire case transaction was on hold until a CIN was returned, causing large backlogs.)		
Consumer Assistance				
CEC Delegations				
65685	Change Request	CalHEERS automatically removed the CEC delegation when a user enrolled in a plan.	CalHEERS does not automatically remove the CEC delegation when a user enrolls in a plan. • The CEC's delegation will persist after the application is submitted unless the CEE, CEC, SCR admin, or the consumer removes the delegation. • The CEC's delegation will persist after the enrollment is effectuated unless the CEE, CEC, SCR admin, or the consumer removes the delegation. • The CEC will continue to have the privileges to work on the case the same way as before enrollment (Report a Change, Submit Application, Plan Selection, Renewals, etc.)	NA
Service Center				
Upload Documents to a Case Anytime by Any User				
65922	Change Request	SCR's had access to upload documents to a case in Conditionally Eligible status only.	All user's now have access to upload documents to a case in any status at any time. • CalHEERS allows users to link existing documents that have already been transferred to CalHEERS ECM/WCC by Novitex to a case. • CalHEERS creates a BPM (manual verification) task when a consumer	Documents and Correspondence

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			uploads a document via the *Documents and Correspondence* page. • CalHEERS allows for one document to be associated to more than one outstanding verification to more than one consumer on a case.	
Eligibility & Enrollment				
Dropdowns for Citizenship Documents				
70676	Change Request	CalHEERS functionality for uploading citizenship documents did not match Covered California's policy. Specifically: If a consumer uploaded a document from the Primary list, they could continue. If a consumer uploaded a document from the Secondary List A, then they were required to upload a document from the Secondary List B, before they could continue.	CalHEERS now displays explanatory text on the *Uploads Documents* popup on the *Uploads Documents* page when an individual selects a document type on the "Secondary List A." • The following text: "If you upload this document type, then you must upload a second document to verify your citizenship" is displayed when a user chooses the **Document Category*** dropdown value as **Proof of Citizenship or Lawful Presence** and any of the following **Document Type*:** o Consular Report or Certificate of Child Born Abroad o U.S. Public Birth Certificate o U.S. citizen identification card o Federal or State census record o Northern Mariana Identification Card o Final adoption decree o U.S. military records o Evidence of U.S. Civil Service employment before June 1, 1976 o U.S. Medical records with child's name and indicating a U.S. place of birth o U.S. Insurance records indicating a U.S. place of birth o School records showing the child's name and U.S. place of birth o Official religious records recorded in the U.S • CalHEERS now prompts the individual to upload a document from the "Secondary	Upload Documents

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			List B" if the consumer uploads a document from "Secondary List A." • The **Secondary Document Type** conditional box is added with the following dropdown list for **Secondary Document Type*:** o ID card or Driver's License o School ID card o U.S. military card/draft record/Military dependent's ID card o U.S. Coast Guard Merchant Mariner card o A clinic, doctor, hospital, or school record, including preschool or day care records o Employer ID card o High school or college diploma o Foreign birth certificate o Social Security card o Marriage Certificate o Divorce Decree o Property deed or title • The following document names are added to the **Document Type*** dropdown list: o U.S. Passport/U.S. Passport Card o Certificate of U.S. Citizenship/Naturalization o Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe: Tribal enrollment card o Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe: Certificate of Degree of Indian Blood o Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe: Tribal census document o Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe:	

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			Document on Tribal letterhead, issued under the signature of the appropriate Tribal official o Consular Report or Certificate of Child Born Abroad o U.S. Public Birth Certificate o U.S. citizen identification card o Federal or State census record o A Northern Mariana Identification Card o A final adoption decree o U.S. military records o Evidence of U.S. Civil Service employment before June 1, 1976 o U.S. Medical records with child's name and indicating a U.S. place of birth o U.S. Insurance records indicating a U.S. place of birth o School records showing the child's name and U.S. place of birth o Official religious records recorded in the U.S CalHEERS consolidated the following document type names for verification of citizenship: o Certificate of U.S. Citizenship/Naturalization o Consular Report or Certification of Child Born Abroad o Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe: Tribal enrollment card o Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe: Certification of Degree of Indian Blood o Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe: Tribal census document	

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			o Documentary evidence issued by a federally-recognized American Indian or Alaska Native Tribe: Document on Tribal letterhead, issued under the signature of the appropriate Tribal official	
Income Data Quality and Usability Enhancements				
57638	Change Request	CalHEERS did not contain clear instructions about which income types are countable and not countable, leading to income types being entered into the miscellaneous field that should not be included in the consumer's MAGI budget, or omitting income types that should be counted. This resulted in incorrect eligibility determinations for some users.	CalHEERS now contains clear instructions about which income types are countable and not countable, and which non-countable income types can be excluded, thereby reducing user error. Below are the Business Rules Engines (BREs) and validations updated in CalHEERS, resulting in correct eligibility results: • CalHEERS provides access to the Income and Deduction Types chart on the DHCS Website. • When a One-Time Lump Sum is entered for the month of application and one or more members are not MAGI Medi-Cal eligible, CalHEERS determines eligibility for the month of application and for the month after application. • When a One-Time Lump Sum is entered for a future month for a Medi-Cal beneficiary, CalHEERS disregards the One-Time Lump Sum for the MAGI Medi-Cal determination. • CalHEERS applies an exception to the counting of income based on the member's role in the tax filing household under evaluation (this includes whether or not they are a Tax Filer, or whether they are a dependent or child under 19 or 21 if a full time student with a parent living in the household. These are contained in 42 CFR Section 435.603 (f) and 42 CFR 435.603 (d) (2) (i)).	Add Other Income

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			• CalHEERS prevents a non-tax filer from claiming a dependent. • CalHEERS identifies per capita gaming distributions of American Indian/American Native (AI/AN) income and counts them for the MAGI Medi-Cal and APTC determinations. • CalHEERS has the ability to count shared income between Registered Domestic Partners (RDP) and apply it while determining eligibility. • CalHEERS requires a consumer who applies on their own and indicates they are a Registered Domestic Partner (RDP) to add the other Registered Domestic Partner (RDP) before continuing the application. • CalHEERS compares the individual's countable MAGI Medi-Cal income to the appropriate dollar income limit while determining eligibility for MAGI Medi-Cal and Exchange programs. • CalHEERS makes all members of a MAGI-MC household eligible only when all of the countable income of that MAGI-MC household is verified. • CalHEERS applies the exception to the counting of income based on the member's role in the tax filing household. • "Miscellaneous" is renamed to "Other Taxable Income" in the **What type of income?** dropdown options on the *Add Other Income* page.	
MAGI Income Information Passed to SAWS (Amend)				

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
30049	Change Request	CalHEERS-SAWS eHIT Interface for both MAGI and APTC did not include these OPA budget elements.	CalHEERS-SAWS eHIT Interface for both MAGI and APTC now includes the following OPA budget elements: 1. Soft Paused Due To 2. Person Primary Tax Filer 3. Person Included in Primary Tax Filer's Tax Household 4. Person Plans to File Taxes 5. Person Expected to be Required to File Taxes 6. Person Tax Filing Status 7. Person Tax Dependent Status 8. Who claims this person as a tax dependent 9. MAGI - Employment Income (Monthly) 10. MAGI - Self-Employment Income (Monthly) 11. MAGI - Other income (Monthly) 12. MAGI - Total Income 13. MAGI - Allowable deductions (Monthly) 14. MAGI - Total Income after Deductions 15. MAGI - Projected Monthly Income 16. MAGI - Countable Income 17. MAGI - Number of household member + Number of expected babies 18. MAGI - List of Household Members 19. MAGI - Federal Poverty Level 20. MAGI - Federal Poverty Level % for individual 21. MAGI - MAGI Medi-Cal Eligible 22. MAGI- Meets 435.603(f)(2)(I-iii) to use a non-tax filer household composition for MAGI Medi-Cal 23. MAGI - Meets 435.603(I) exception to use APTC income/deduction calculations for MAGI Medi- Cal determination 24. 24. MAGI - Meets 435.119(c): Adults ineligible to the New Adult Group due to dependent child under age 19 without Minimum Essential Coverage	NA
Interfaces				
Business Rules Exposure for SAWS (BREfS) – Phase A: Modify the eHIT interface to provide reasons and detailed data for eligibility determination results to SAWS.				

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
72004	Change Request	CalHEERS-SAWS eHIT Interface for both MAGI and APTC did not include the reasons and detailed data for eligibility determination results to SAWS.	CalHEERS-SAWS eHIT Interface for both MAGI and APTC now includes the reasons and detailed data for eligibility determination results to SAWS; the following details are now included in the interface: 1. Income determination details – What income was used (and excluded) for each individual for the determination, including the income limit. 2. Income deduction details – What deductions were used for the determination. 3. Tax Household size/ detail – What persons were included in the tax household(s) for purposes of the eligibility determination. • The following OPA budget worksheet elements are populated in the CalHEERS-SAWS eHIT Interface for both MAGI and APTC: MAGI: By person to whom income/deduction is assigned, by income/deduction type and by income source: o MC - Non countable income (not currently on Budget display, not in CR 30049). Included source and amount. o MC - Employment Income (total is included in CR 30049) expanded to include source and amount provided for each employment income record entered). o MC - Self-Employment Income (total is included in CR 30049) expanded to include source and amount provided for each self-employment income record entered).	NA

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			o MC - Other income (total is included in CR 30049), expanded to include source and amount provided for each other income record entered). o MC - Allowable deductions (total is included in CR 30049), expanded to include source and amount provided for each allowable deduction entered). o MC - Disallowed Deductions (not on budget worksheet) added source and amount. o MC - Countable Income (total is included in CR 30049) expanded to include source and amount provided for each countable income record entered **(added PAI/CMI indicator to indicate which income is being used) Projected Monthly Income (total is included in CR 30049), expanded to include individual amount)** • APTC: o APTC -Total Income after Deduction Monthly (needed for mixed household notices). o APTC -Total Income after Deduction Annual (needed for mixed household notices). o APTC - Federal Poverty Level (needed for mixed household notices). o APTC - Federal Poverty Level % for Individual (needed for mixed household notices). o APTC - Monthly APTC Amount (needed for mixed household notices). o APTC - Annual APTC Amount (needed for mixed household notices). • UPW Income Disregard.	

<table>
<tr><th>Ref ID</th><th>Type</th><th>Previous Design/Problem</th><th>Updated/Resolved Functionality In this Release</th><th>Pages Impacted</th></tr>
<tr><td></td><td></td><td></td><td>The Portal Budget Summary Page now includes new elements added in BR1 for MAGI Medi-Cal Only:
MC - Total Non-countable income and details.
MC - Current Monthly Income details.
MC - Allowable deductions details.
MC – Total Countable Income details (add PAI/CMI indicator to indicate which income is being used and amount details).
CalHEERS-SAWS eHIT interface adds “PA” as an income category and send PAI amounts for each individual when available.</td><td></td></tr>
<tr><td colspan="5" align="center">Unassigned</td></tr>
<tr><td colspan="5">25% Reasonable Compatibility for Income</td></tr>
<tr><td>83066</td><td>Change Request</td><td>CalHEERS had 10% as reasonable compatible percentage for income while determining eligibility for APTC/CSR consumers.</td><td>CalHEERS now has 25% as reasonable compatible percentage for income while determining eligibility for APTC/CSR consumers.

The below mentioned will be performed.
CalHEERS redetermine eligibility for consumers who are conditionally eligible for "household income - subsidy" and have an eligibility effectuation date on or after 1/1/2017
CalHEERS clears the cache for all outstanding verifications for consumers who are conditionally eligible for "household income – subsidy”.
CalHEERS suppresses the CalNOD01 notice generated based on the batch for the consumers who were conditionally eligible for "household income – subsidy”.
CalHEERS generates a batch report which includes the following data fields:</td><td>NA</td></tr>
</table>

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
			o Outreach Template Fields o The prior household income - subsidy verification status, and o The post household income - subsidy verification status • CalHEERS appends a case note to each case that was cleared for income.	
			Technology	
Automate workflow processes for Covered California				
28970	Change Request	BPM tool was on Oracle 11g version.	BPM tool is upgraded to Oracle 12c version.	NA
			Online Application	
20350 (CR 79498)	Functionality Update	The SSA call counters for **Is this Person a U.S Citizen or National?*** field on *Household Members* page (HM_US_CITIZEN _NATIONAL table) was not reset.	The SSA call counters for **Is this Person a U.S Citizen or National?*** field on *Household Members* page (HM_US_CITIZEN _NATIONAL table) is reset.	Household Members
24620 (CR 79498)	Functionality Update	The waiting room message for a Spanish user was displayed in English.	The waiting room message for a Spanish user displays in Spanish.	NA
27109 (CR 79498)	Functionality Update	The validation message displayed for a 18 year old single household member on *Personal Data – Demographic Information* page when all the questions were answered as No was "You Indicated that one or more parent for this child is absent from the home or deceased on the Relationships page. If that is correct, select the "Yes" option. If that is incorrect, return to the "Build Your Household page" and add the appropriate members."	The validation message displayed for a 18 year old single household member on *Personal Data – Demographic Information* page when all the questions are answered as No is "You Indicated that one or more parent for this child is absent from the home or deceased on the Relationships page. If that is correct, select the "Yes" option. If that is incorrect, return to the Relationships page and add the appropriate members."	Personal Data – Demographic Information

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
27796 (CR 79498)	Functionality Update	The **Continue** button displayed on *Enter Username* and *Security Questions* page was inconsistent.	The **Continue** button displayed on *Enter Username* and *Security Questions* page is consistent.	Enter Username Security Questions
		Notices		
30983 (CR 79498)	Functionality Update	Notice CalNOD22 had the following text "Your total amount is due 10 calendar days from the bill date" to notify the payment due date.	Notice CalNOD22 has the following text "Participation Fee payments will be due 15 days from the date the invoice is emailed from Covered CA" to notify the payment due date.	NA
31951 (CR 79498)	New Functionality	Notice CalNOD22 did not have Comments column.	Notice CalNOD22 now has Comments column allowing QHPs to comment on the accuracy of the enrollment if they decide to dispute a fee.	NA
33003 (CR 79498)	Functionality Update	Notice CalNOD01c was not generated for households discontinued by ROP batch.	Notice CalNOD01c generates for households discontinued by ROP batch.	NA
		Enrollment-Financial Management		
25847 (CR 79498)	Defect Fix	When a user submitted an eligibility request on or after 16th of December during open enrollment, the following message displayed on *Household Enrollment Introduction* page, "You Have until 12/15/2016 (Year of request) to choose your Covered California plan".	When a user submits eligibility request on or after 16th of December during open enrollment, the following message displays on the *Household Enrollment Introduction* page, "You Have until MM/DD/YYYY (open enrollment expiry date) to choose your Covered California plan".	Household Enrollment Introduction

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
Eligibility				
32342	Defect Fix	The *Eligibility Results* page displayed children eligible for both CCHIP and MAGI Medi-Cal.	The *Eligibility Results* page displays children eligible for either CCHIP or MAGI Medi-Cal.	Eligibility Results
Enrollment-Financial Management				
32015	Defect Fix	The **Consent Date** and **Years of Consent** details on the **Agent Book of Business,** extracted on the *Active Consumers* page were incorrect.	The **Consent Date** and **Years of Consent** details on the **Agent Book of Business,** extracted on the *Active Consumers* page are correct.	Active Consumers
31685	Defect Fix	When an admin clicked the **Save** button on *Add Representative* page after filling the required information, *Issuer Representative* page was displayed.	When an admin clicks the **Save** button on *Add Representative* page after filling the required information, *AHBX Delegation Info* popup displays.	Add Representative
32357	Defect Fix	When an admin clicked the **Active Consumers** link on the *Agent Information* page, an exception error message was displayed.	When an admin clicks the **Active Consumers** link on the *Agent Information* page, *Active Consumers* page displays.	Agent Information
33185	Defect Fix	When an agent clicked the **My Profile** link on the *Agent Information* page in Spanish, the *My Profile* page displayed in English.	When an agent clicks the **My Profile** link on the *Agent Information* page in Spanish, the *My Profile* page displays in Spanish.	Agent Information
33366	Defect Fix	A new profile link for Agents /CEE /CECs on the *Agent Information* page header read **My Profile**.	The new profile link for Agents / CEE /CECs on the *Agent Information* page header, reads **My Security Profile**.	Agent Information
32213	Defect Fix	When a user clicked the **Logout** button on any of the GI pages, an exception error message displayed.	When a user clicks the **Logout** button on any of the GI pages, logout is successful.	All GI pages
32045	Defect Fix	The **View Details** and **Compare** button were not aligned within the box on the *Browse Health plans* when accessed in Spanish.	The **View Details** and **Compare** button are aligned within the box on the *Browse Health plans* when accessed in Spanish.	Browse Health Plans
32211	Defect Fix	When an admin clicked the **Document Upload** link on the *Certified Enrollment Counselors*	When an admin clicks the **Document Upload** link on the *Certified Enrollment Counselors*	Certified Enrollment Counselors

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		page, an exception error message displayed.	page, the *Document Upload* page displays.	
32048	Defect Fix	When an admin changed the **AHBX Enrollment Start**, **GI Enrollment Start**, **AHBX Enrollment End** and **GI Enrollment End** dates on *Complete Enrollments Override Updates* page for a terminated case, the APTC dates were incorrect.	When an admin changes the **AHBX Enrollment Start**, **GI Enrollment Start**, **AHBX Enrollment End** and **GI Enrollment End** dates on *Complete Enrollments Override Updates* page for a terminated case, the APTC dates are correct.	Complete Enrollments Override Updates
32207	Defect Fix	Admins were unable to Copy/Paste text in **Determination Notes*** field on the *Complete Enrollments Override Updates* page.	Admins are able to Copy/Paste text in **Determination Notes*** field on the *Complete Enrollments Override Updates* page.	Complete Enrollments Override Updates
33456	Defect Fix	When an admin changed the **AHBX Enrollment End** and **GI Enrollment End** date and clicked the **Update Enrollment** button on *Complete Enrollment Override Updates* page, an exception error message displayed.	When an admin changes the **AHBX Enrollment End** and **GI Enrollment End** date and clicks on the **Update Enrollment** button on *Complete Enrollment Override Updates* page, the save is successful.	Complete Enrollment Override Updates
33458	Defect Fix	When an admin changed the APTC amount and clicked the **Update Enrollment** button on the *Complete Enrollment Override Updates* page, an exception error message displayed.	When an admin changes the APTC amount and clicks on the **Update Enrollment** button on *Complete Enrollment Override Updates* page, APTC and Gross Premium amounts are updated.	Complete Enrollment Override Updates
33462	Defect Fix	When an admin changed the **AHBX Enrollment End** and **GI Enrollment End** date and clicked the **Update Enrollment** button on the *Complete Enrollment Override Updates* page for a terminated case of Kaiser Silver 70 HMO, an exception error message displayed.	When an admin changes the **AHBX Enrollment End** and **GI Enrollment End** date and clicks on the **Update Enrollment** button on *Complete Enrollment Override Updates* page for a terminated case of Kaiser Silver 70 HMO, the save is successful.	Complete Enrollment Override Updates
32882	Defect Fix	When a user reported a change to income and address, the Plan Start and End date displayed on the *Current Enrollment* page and	When a user reports a change to income and address, the Plan Start and End date displayed on the *Current Enrollment* page	Current Enrollment

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		did not match the details in the AHBX DB.	matches the details in the AHBX DB.	
33485	Defect Fix	When a user clicked **Eligibility** from Application Progress track on the *Individual Homepage*, question marks (?) were displayed on the *Eligibility Results* page.	When a user clicks **Eligibility** from the Application Progress track on the *Individual Homepage*, *Eligibility Results* page display correctly with no questions marks.	Eligibility Results
32203	Defect Fix	A SHARP issuer representative was unable to Create Representative and View additional representatives on the *Issuer Representative* page.	A SHARP issuer representative is able to Create Representative and View additional representatives on the *Issuer Representative* page.	Issuer Representative
32244	Defect Fix	An Issuer admin did not have access to edit, activate or suspend a carrier's Issuer Representative on the *Issuer Representative* page.	An Issuer admin has access to edit, activate and suspend a carrier's Issuer Representative on the *Issuer Representative* page.	Issuer Representative
32881	Defect Fix	When an admin clicked the **Log In** button on *Log In Or Create an Account* page, after entering the credentials, a We Apologize error message displayed.	When an admin clicks the **Log In** button on *Log In Or Create an Account* page, after entering the credentials, Administration Homepage displays.	Log In Or Create an Account
19639	Defect Fix	When a user removed the middle name, AHBX database updated middle name as NULL, however GI DB persisted the previous values.	When a user removes the middle name, both AHBX and GI DBs update middle name as NULL.	NA
25213	Defect Fix	Renewal Batch job returned an exception error for cases where the users selected Cantonese or Mandarin as written language and Traditional Chinese as spoken language.	Renewal Batch job renews successfully for cases where the users selects Cantonese or Mandarin as written language and Traditional Chinese as spoken language.	NA
28774	Defect Fix	When IND21 was received with Coverage End Date being earlier than Coverage Start Date, AHBX database updated the Coverage End date to be the same as Coverage Start date.	When IND21 is received with Coverage End Date being earlier than Coverage Start Date, AHBX database rejects IND21 without processing the transaction.	NA
31633	Defect Fix	Batch Operations team were unable to terminate any running Autosys jobs.	Batch Operations team have access to terminate any running Autosys jobs.	NA

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
32472	Defect Fix	Dental renewal (ENR-3001-DD-04) batch job returned an exception error.	Dental renewal (ENR-3001-DD-04) batch job completes successfully.	NA
32519	Defect Fix	Dental renewal (ENR-3001-DD-03) batch job returned an exception error.	Dental renewal (ENR-3001-DD-03) batch job completes successfully.	NA
32595	Defect Fix	There were 5439 enrollments for the year 2016 and 47 enrollments for the year 2017 which had a Negative Net Premium on the ENROLLMENT_PREMIUM table.	There are no enrollments for the year 2016 & 2017 with Negative Net Premium on the ENROLLMENT_PREMIUM table.	NA
32733	Defect Fix	APTC was applied to Dental Enrollment (details visible on *Current Enrollment* page).	APTC is not applied to Dental Enrollment.	NA
33022	Defect Fix	The Enrollment Premium Table in the GI DB had 5 or more decimal digits for the amount.	The Enrollment Premium Table in the GI DB has 2 decimal digits for the amount.	NA
32345	Defect Fix	When an admin clicked **Next** button on *Populations Served* page with **Estimated Percent planned to Serve*** as 0 (zero) for **Health Care** and 100 for **Others (Please Specify)** in **Industries** an exception error message displayed.	When an admin clicks **Next** button on *Populations Served* page with **Estimated Percent planned to Serve*** as 0 (zero) for **Health Care** and 100 for **Others (Please Specify)** in **Industries,** *Location and Hours* page displays.	Populations Served
31899	Defect Fix	When an admin entered an incorrect **Case Number*** and **Enrollment ID** on *Search Enrollment* page and clicked the **Search for Enrollments** button**,** the following message was displayed “case id should be 10 digit numeric and should start with 5”.	When an admin enters an incorrect **Case Number*** and **Enrollment ID** on *Search Enrollment* page and clicks the **Search for Enrollments** button**,** the following messages display “case id should be 10 digit numeric and should start with 5” & “Enrollment ID cannot be more than 10 digits”.	Search Enrollment
32418	Defect Fix	Tooltip text for **Child Medically Necessary Orthodontia** field on *View Dental Plan Details* page was missing.	Tooltip text for **Child Medically Necessary Orthodontia** field on *View Dental Plan Details* page is present.	View Dental Plan Details
32419	Defect Fix	The **Child Dental Checkup** field on the *View Dental Plan Details* page, displayed twice with tooltip text for one of the entry only.	The **Child Dental Checkup** field on the *View Dental Plan Details* page, displays once with tooltip text.	View Dental Plan Details

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
32389	Defect Fix	Tooltip text for **Adult Root Canal - Molar** field on *View Dental Plan Details* page was missing.	Tooltip text for **Adult Root Canal - Molar** field on *View Dental Plan Details* page is present.	View Dental Plan Details
32390	Defect Fix	Tooltip text for **Child Filling – One Surface** field on the *View Dental Plan Details* page was missing.	Tooltip text for **Child Filling – One Surface** field on the *View Dental Plan Details* page is present.	View Dental Plan Details
Online Application				
32500	Defect Fix	When a user attempted to sort **Eligibility Request History** on the *Application History* page, by **Date/Time**, results were not sorted correctly.	When a user attempts to sort **Eligibility Request History** on the *Application History* page, by **Date/Time**, results are sorted correctly.	Application History
29768	Defect Fix	When an admin clicked the **View Application** button on *Search Individual* page for a 2016 application which was saved & exited on the *Application Signature* page, an exception error message displayed.	When an admin clicks the **View Application** button on *Search Individual* page for a 2016 application which is saved & exited on the *Application Signature* page, the *Application Signature* page displays.	Application Signature
32702	Defect Fix	When a user clicked **Submit** button on the *Application Signature page for Reported Changes* page, a We Apologize error message displayed.	When a user clicks **Submit** button on *Application Signature page for Reported Changes* page, the *Eligibility Results* page displays.	Application Signature for Reported Changes
32230	Defect Fix	When an admin clicked the **Save** button on *County Children's Health Initiative Program (CCHIP)* page after entering the details an exception error message was displayed.	When an admin clicks the **Save** button on *County Children's Health Initiative Program (CCHIP)* page after entering the details the save is successful.	County Children's Health Initiative Program (CCHIP)
31572	Defect Fix	When an admin sorted the notices on the *Documents and Correspondence* page by **Date/Time**, notices were sorted by Month and Date.	When an admin sorts the notices on the *Documents and Correspondence* page by **Date/Time**, notices are sorted by Year.	Documents and Correspondence
32553	Defect Fix	The records displayed on the *Documents and Correspondence* page were not aligned with the **Transaction Per Page** value selected.	The records displayed on the *Documents and Correspondence* page are aligned with the **Transaction Per Page** value selected.	Documents and Correspondence
34017	Defect Fix	The **Choose Dental Plan** button was missing on the *Enrollment*	The **Choose Dental Plan** button is present on the *Enrollment*	Enrollment

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		page for users who chose Other Qualifying life event and approved by admin.	page for users who choose Other Qualifying life event and approved by admin.	
31574	Defect Fix	The *Confirm Your Identity* popup on the *Flexible Application* page, did not display completely.	The *Confirm Your Identity* popup on the *Flexible Application* page displays completely.	Flexible Application
32032	Defect Fix	When an admin clicked the **Ok** button on the *Confirm Your Address* popup on the *Flexible Application* page, an exception error message displayed.	When an admin clicks the **Ok** button on the *Confirm Your Address* popup on the *Flexible Application* page, *Confirm Identity* popup displays.	Flexible Application
32706	Defect Fix	When an admin clicked **Submit** button on **Application Signature for Reported Changes** panel on *Flexible Application* page, an exception error message displayed.	When an admin clicks **Submit** button on **Application Signature for Reported Changes** panel on the *Flexible Application* page, **Eligibility Results** panel displays.	Flexible Application
31331	Defect Fix	The **Select Health / Dental Plan** link on the *Individual Homepage* was disabled for an application in renewal mode.	The **Select Health / Dental Plan** link on the *Individual Homepage* is enabled for an application in renewal mode.	Individual Homepage
31783	Defect Fix	When an admin clicked the **Report a Change** button/link on the *Individual Homepage*, an exception error message displayed.	When an admin clicks the **Report a Change** button/link on the *Individual Homepage*, the *Report a Change Summary* page displays.	Individual Homepage
31825	Defect Fix	When a user clicked the **Log In** button on the *Log In Or Create an Account* page after entering the credentials, a We Apologize error message displayed.	When a user clicks the **Log In** button on the *Log In Or Create an Account* page after entering the credentials, *Individual Homepage* displays.	Log In Or Create an Account
31856	Defect Fix	The 2017 renewed case records were not present in HBX_INDV_CASE_RENEWAL table of AHBX DB.	The 2017 renewal case records are present in HBX_INDV_CASE_RENEWAL table of AHBX DB.	NA
32003	Defect Fix	Eligibility batch job returned an exception error.	Eligibility batch job completes successfully	NA
33542	Defect Fix	MEDS HX12 (MED-1000-DD-01) batch job returned an exception error.	MEDS HX12 (MED-1000-DD-01) batch job completes successfully.	NA
31400	Defect Fix	When a user selected **Ordinary / Qualified Dividends** for **What kind of income** question on *Other Income* page on the Spanish screen the following	When a user selected **Ordinary / Qualified Dividends** for **What kind of income** question on *Other Income* page on the Spanish screen the following	Other Income

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		message “Question not found for lable.household income.dividends” was displayed.	message “Por favor consulte a la linea 9a y 9b del Formulario 1040” displays.	
32296	Defect Fix	When a user clicked **See My Results** button on *Preview Plans* page after entering the required details, a We Apologize error message displayed.	When a user clicks **See My Results** button on *Preview Plans* page after entering the required details, *My Options* page displays.	Preview Plans
32387	Defect Fix	When a user clicked **Submit** button on *Renewal Summary* page, a We Apologize error message displayed.	When a user clicks **Submit** button on *Renewal Summary* page, *Renewal Results* page displays.	Renewal Summary
33228	Defect Fix	The following dropdown value “Select One” on *Security Questions* page displayed in English for a Spanish user.	The following dropdown value “Select One” on *Security Questions* page displays in Spanish for a Spanish user.	Security Questions
24695	Defect Fix	When an admin searched for a case id and clicked the **View Case** button on *Search Individual* page, the *Summary* pages did not display the following information: • SCR name • Application # • Case #	When an admin searches for a case id and clicks the **View Case** button on *Search Individual* page, the *Summary* pages display the following information: • SCR name • Application # • Case #	Summary
32303	Defect Fix	When an admin clicked **Transaction History** link on *Transaction Details* page, an exception error message displayed.	When an admin clicks **Transaction History** link on *Transaction Details* page, *Transaction History* page displays.	Transaction Details
32781	Defect Fix	The following **Old Value** “I don’t have a SSN but have applied for one” in **Change Log Table** on *Transaction History* page displayed in English for a Spanish user.	The following **Old Value** “I don’t have a SSN but have applied for one” in **Change Log Table** on *Transaction History* page displays in Spanish for a Spanish user.	Transaction History
31328	Defect Fix	The colon (:) symbol was not aligned on *User Information* page.	The colon (:) symbol is aligned on *User Information* page.	User Information
31735	Defect Fix	When an admin clicked the **Renew Mode** link on *Verification* page, the application did not navigate to	When an admin clicks the **Renew Mode** link on *Verification* page, the application navigates to	Verification

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		Renew Mode for Covered California Programs page.	*Renew Mode for Covered California Programs* page.	
31978	Defect Fix	When an admin clicked the **CCHIP** link on *Verification* page, an exception error message was displayed.	When an admin clicks the **CCHIP** link on *Verification* page, *County Children's Health Initiative Program (CCHIP)* page displays.	Verification
31332	Defect Fix	Below mentioned are alignment issues. • *Personal Data – Optional Data* page o The following questions "What language should we write to this person in?" and "What language do you want us to speak to this person in?" were not center aligned to dropdown box. o The help icon for "Is this person of Hispanic, Latino, or Spanish Origin?" was not center aligned o The following question "What is this person's race? (Check all that apply)" was broken into 2 lines o **Back** button was not left aligned o **Back** & **Save & Exit** button were not center aligned in the button box. • *Employment Income* page o Table text was not in a single row and Table text size was not as per design document. o The grey box size for "Total current monthly household income: $	Below mentioned are alignment fixes. • *Personal Data – Optional Data* page o The following questions "What language should we write to this person in?" and "What language do you want us to speak to this person in?" are center aligned to dropdown box. o The help icon for ""Is this person of Hispanic, Latino, or Spanish Origin?" is center aligned o The following question "What is this person's race? (Check all that apply)" is displayed in a single line. o **Back** button is left aligned o **Back** & **Save & Exit** buttons are center aligned in the button box. • *Employment Income* page o Table text is in a single row and Table text size is as per design document. o The grey box size for "Total current monthly household income: $ 0.00" is as per design document. o **Back** button is left aligned	Personal Data – Optional Data Employment Income Add Employment Income Application Signature Income Deductions Other Income Self – Employment Income Income Summary Apply for Benefits Relationships Personal Data – Health Insurance Information Household Primary Contact Household Members Tax Information

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		0.00" was not as per design document. o **Back** button was not left aligned o **Back** & **Save & Exit** button were not center aligned in the button box. • *Add Employment Income* page o Semicolon (;) in the questions were not center aligned. • *Application Signature* page o Tooltip text for **Ok** button in *Phone Number Reminder* popup was missing for both English and Spanish. • *Tax Information* page o Question Marks (?) were not center aligned with the questions o **Back** button was not left aligned o **Back** & **Save & Exit** button were not center aligned in the button box. • *Income Deductions, Other Income, Self – Employment Income, Income Summary, Apply for Benefits, Relationships, Personal Data – Health Insurance Information* pages o **Back** button was not left aligned o **Back** & **Save & Exit** button were not center aligned in the button box. • *Household Primary Contact* page	o **Back** & **Save & Exit** buttons are center aligned in the button box. • *Add Employment Income* page o Semicolon (;) in the questions are center aligned. • *Application Signature* page o Tooltip text for **Ok** button in *Phone Number Reminder* popup is present in English and in Spanish. • *Tax Information* page o Question Marks (?) are center aligned with the questions o **Back** button is left aligned o **Back** & **Save & Exit** buttons are center aligned in the button box. • *Income Deductions, Other Income, Self – Employment Income, Income Summary, Apply for Benefits, Relationships, Personal Data – Health Insurance Information* pages o **Back** button is left aligned o **Back** & **Save & Exit** buttons are center aligned in the button box. • *Household Primary Contact* page o The following text "temporary address, please enter a mailing address with the City and Zip Code where you live.	

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		o The following text "temporary address, please enter a mailing address with the City and Zip Code where you live. We need an address to find available plans in your area" in **Primary Contact – Home Address** panel was not left aligned. o **Back** button was not left aligned o **Back** & **Save & Exit** button were not center aligned in the button box. • *Household Members* o The following text "You must provide a Social Security Number (SSN) if you wish to apply for health insurance. We use Social Security Numbers (SSNs) to check income and other information. Even if you are not applying, giving your SSN will help us review your application faster. If someone who is applying does not have an SSN and would like help getting one, visit www.ssa.gov." was broken into 2 lines. o **Back** button was not left aligned o **Back** & **Save & Exit** button were not center aligned in the button box.	We need an address to find available plans in your area" in **Primary Contact – Home Address** panel is left aligned. o **Back** button is left aligned o **Back** & **Save & Exit** buttons are center aligned in the button box. • *Household Members* o The following text "You must provide a Social Security Number (SSN) if you wish to apply for health insurance. We use Social Security Numbers (SSNs) to check income and other information. Even if you are not applying, giving your SSN will help us review your application faster. If someone who is applying does not have an SSN and would like help getting one, visit www.ssa.gov." is in a single line. o **Back** button is left aligned o **Back** & **Save & Exit** buttons are center aligned in the button box.	
Reports				
32120	Defect Fix	The ROP dates in the Individual Verification attribute in	The ROP dates in the Individual Verification attribute in	NA

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		Submitted Individual SA had incorrect value for ROP dates. **Impacted SA** Submitted Individual SA **Impacted Attribute** Individual Verification Attribute	Submitted Individual SA has correct value for ROP dates	
32621	Defect Fix	The Individual attribute in the Transaction SA were not populated for old cases. **Impacted SA:** Transaction SA **Impacted Attribute**: Individual Attribute	The Individual attribute in the Transaction SA are populated for old cases.	NA
32659	Defect Fix	The effective dating (DW_BGN_DT) was calculated from the source record created timestamp for history tracking in DWH. **Impacted SA:** All Subject Area **Impacted Attribute:** All dimension Attributes	The effective dating (DW_BGN_DT) is calculated from last modified date from the source tables for history tracking in DWH.	NA
32793	Defect Fix	The DW_INDV - HBX_HH_RELATIONSHIP join condition caused missing individuals and missing head of household associations to other functional areas. **Impacted SA:** Enrollee, Application, and Submitted Individual **Impacted Attributes:** Individual and Head of Household	The updated DW_INDV - HBX_HH_RELATIONSHIP join condition prevents two records being associated to the same individual.	NA
32939	Defect Fix	The Enrollee Next Year and Enrollee Previous Year attributes	The Enrollee Next Year and Enrollee Previous Year attributes	NA

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		in the Enrollee SA were not populated for some cases. **Impacted SA:** Enrollee **Impacted Attributes:** Enrollee Next Year Enrollee Previous Year	in the Enrollee SA are populated for all the cases.	
33120	Defect Fix	The records modified in the HBX_PRIVILEGED_PERSON or HBX_CONTACT INFO tables were not getting updated in the DWH User Account table. **Impacted SA:** All SA **Impacted Attribute:** User Account Attributes	The records modified in the HBX_PRIVILEGED_PERSON or HBX_CONTACT INFO tables are updated in the DWH User Account table.	NA
33128	Defect Fix	Delegation attributes were missing for a few application records. **Impacted SA:** Application SA **Impacted Attribute:** Delegation Attributes	Delegation attributes are present for all application records.	NA
33199	Defect Fix	Eligibility attributes were not updated for a few Cases in Submitted Individual SA. **Impacted SA:** Submitted Individual SA **Impacted Attribute:** Eligibility Attributes	Eligibility attributes are updated for all Cases in Submitted Individual SA.	NA
33684	Defect Fix	The mentioned attributes were missing in the Prior Eligibility Attributes folder in the Transaction SA: Assessment Date Case Eligibility Composition	The mentioned attributes are presented in the Prior Eligibility Attributes folder in the Transaction SA: Assessment Date Case Eligibility Composition	NA

Ref ID	Type	Previous Design/Problem	Updated/Resolved Functionality In this Release	Pages Impacted
		Begin Date End Date MAGI Household Size SUBSIDY Household Size Eligibility Determination Created by Eligibility Determination Created By User ID Eligibility Determination Created By User Type Renewal Batch Eligibility Flag	Begin Date End Date MAGI Household Size SUBSIDY Household Size Eligibility Determination Created by Eligibility Determination Created By User ID Eligibility Determination Created By User Type Renewal Batch Eligibility Flag	
33686	Defect Fix	The Transaction Attributes and Change Type Attributes in Transaction SA were visible as Database Columns. **Impacted SA:** Transaction SA **Impacted Attribute:** Transaction Attributes Change Type	The Transaction Attributes and Change Type Attributes in Transaction SA are visible as appropriate business-friendly data element names.	NA
Notices				
33719	Defect Fix	The Carry Forward Information notices job (ARC-1064-DD-01) took more than stipulated time to complete.	The Carry Forward Information notices job (ARC-1064-DD-01) completed within the stipulated time.	NA

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
Enrollment – Financial Management			
155	Users Are Unable to Choose a Health Plan When DOB is After the Coverage Start Date	17082	17.2
230	Choose Dental Plan button missing on the Enrollment page for users who chose Other Qualifying life event and approved by admin.	34017	17.2
Online Application			

#	Alternate Procedures No Longer in Effect	Ref ID	Release Delivered
214	A "We Apologize" error message displays when a user attempts to view an Application In Progress.	29768	17.2
228	When a user submits a renewal application but does not complete plan selection, the Select Health/Dental Plan link under the Action panel on the consumer's home page is disabled.	31331	17.2
216	When a user clicks on Report a Change link on the Individual Homepage, a "We Apologize" error message is displayed.	31626	17.2
226	When a user clicks the Log In button on the Log in or Create an Account page, a "We Apologize" error message is displayed.	31686 29748	17.2
225	When a user clicks the Send Email or Send Text button on the Login Assistance - Register Email And Phone Number page, a "We Apologize" error message is displayed.	31834	17.2

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
Online Application			
231	For Conditionally-Eligible applicants, the dropdown value for **Action** field under **Documents Uploaded** table on *Documents and Correspondence* page does not reset to **Select One** when cancelling the *Submit as Verification Document* popup.	34252	17.4
Eligibility			
233	During Special Enrollment, a user submitting an application reporting lump sum income within the same month of application is not able to select a plan when a qualifying life event enables eligibility the month of application or a month prior to application.	34341	17.3

Alternate Procedure 231: For Conditionally-Eligible applicants, the dropdown value for **Action** field under **Documents Uploaded** table on *Documents and Correspondence* page does not reset to **Select One** when cancelling the *Submit as Verification Document* popup.	
Users Impacted	All Users
Area Impacted	Online Application
What's Happening Now	On the *Documents and Correspondence* page, a Conditionally-Eligible applicant provides proof of eligibility and clicks the *Submit as Verification Document* popup. The user clicks the **Cancel** button on the popup and returns to the *Documents and Correspondence* page. The dropdown value for the **Action** field under **Documents Uploaded** does not display the reset value of *Select One.*

Alternate Procedure 231: For Conditionally-Eligible applicants, the dropdown value for **Action** field under **Documents Uploaded** table on *Documents and Correspondence* page does not reset to **Select One** when cancelling the *Submit as Verification Document* popup.	
Actions to Take	1. Navigate off the *Documents and Correspondence* page (to any other page). 2. Navigate back to the *Documents and Correspondence* page; the **Action** field value is reset to *Select One*.
SCR/Defect	Defect 34252
Planned Release	17.4

Alternate Procedure 233: During Special Enrollment, a user submitting an application reporting lump sum income within the same month of application is not able to select a plan when a qualifying life event enables eligibility the month of application or a month prior to application.	
Users Impacted	Users who are reporting a lump sum income during the application month during intake and either 1) have a special enrollment reason of 'had a baby', or 2) are eligible for special enrollment beginning on the life event date due to admin selection
Area Impacted	Eligibility
What's Happening Now	During Special Enrollment, a user submitting an application reporting lump sum income within the same month of application is not able to select a plan when a qualifying life event enables eligibility the month of application or a month prior to application.
Actions to Take	This alternative procedure must be applied in the same month as the application month; otherwise, the Service Center will need to enter a CalHEERS Help Desk Incident: 1. During the same month as application, process a Report a Change to remove the lump sum income. If this lowers the household income so that it is within the MAGI Medi-Cal limits, then Carry Forward will be applied. This will allow an enrollment in Covered California coverage, and the Carry Forward can be lifted by SAWS for the future month in order to grant the consumer MAGI Medi-Cal eligibility and end Covered CA coverage (if applicable.)
SCR/Defect	Defect 34341
Planned Release	17.3

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	**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)
AI	American Indian	**MCAP**	Medi-Cal Access Program
ALM	Application Lifecycle Management	**MEDS**	Medi-Cal Eligibility Determination System
AN	Alaskan Native	**NQI**	New Qualified Immigrants
APTC	Advance Premium Tax Credits	**OBIEE**	Oracle Business Intelligence Enterprise Edition
BPM	Business Process Management	**OPA**	Oracle Policy automation
BRE	Business Rules Engine	**PAI**	Projected Annual Income
CCHIP	County Children's Health Initiative Program	**PBE**	Plan Based Enroller
CCP	Covered California Programs	**PDF**	Portable Document Format
CEC	Certified Enrollment Counselor	**QHP**	Qualified Health Plan
CEE	Certified Enrollment Entities	**RDP**	Registered Domestic Partner
CEW	County Eligibility Worker	**ROP**	Reasonable Opportunity Period
CFS	Carry Forward Status	**RTC**	Rational Team Concert
CIN	Client Index Number	**SA**	Subject Area
CMI	Current Monthly Income	**SAWS**	Statewide Automated Welfare Systems
CR	Change Requests	**SCIN**	Statewide Client Index Number
CSR	Cost Share Reduction	**SCR**	Service Centre Representative
CSS	Cascading Style Sheets (CSS is a style sheet language used for describing the look and formatting of a document written in a markup language)	**SIR**	Service Investigation report
DER	Determination of Eligibility Response	**SNOW**	Service Now
DHCS	Department of Health Care Services	**SQL**	Structure Query Language
DWH	Data Warehouse	**SSA**	Social Security Administration
ECM	Electronic Content Management System	**SSN**	Social Security Number
EDI	Electronic Data Interchange	**UPW**	Unplanned Pregnant Woman
EDR	Eligibility Determination Request	**URL**	Uniform Resource Locator
FIPS	Federal Information Processing Standard	**WAT**	Web Accessibility Toolbar

Glossary				
Acronym	**Full Form**		**Acronym**	**Full Form**
FPL	Federal Poverty Level		**WCC**	Web Center Content
GI	Get Insured		**WP**	Work Products
ICT	Inter County Transfer			