# California Health Benefit Exchange

Board Meeting
June 19, 2012
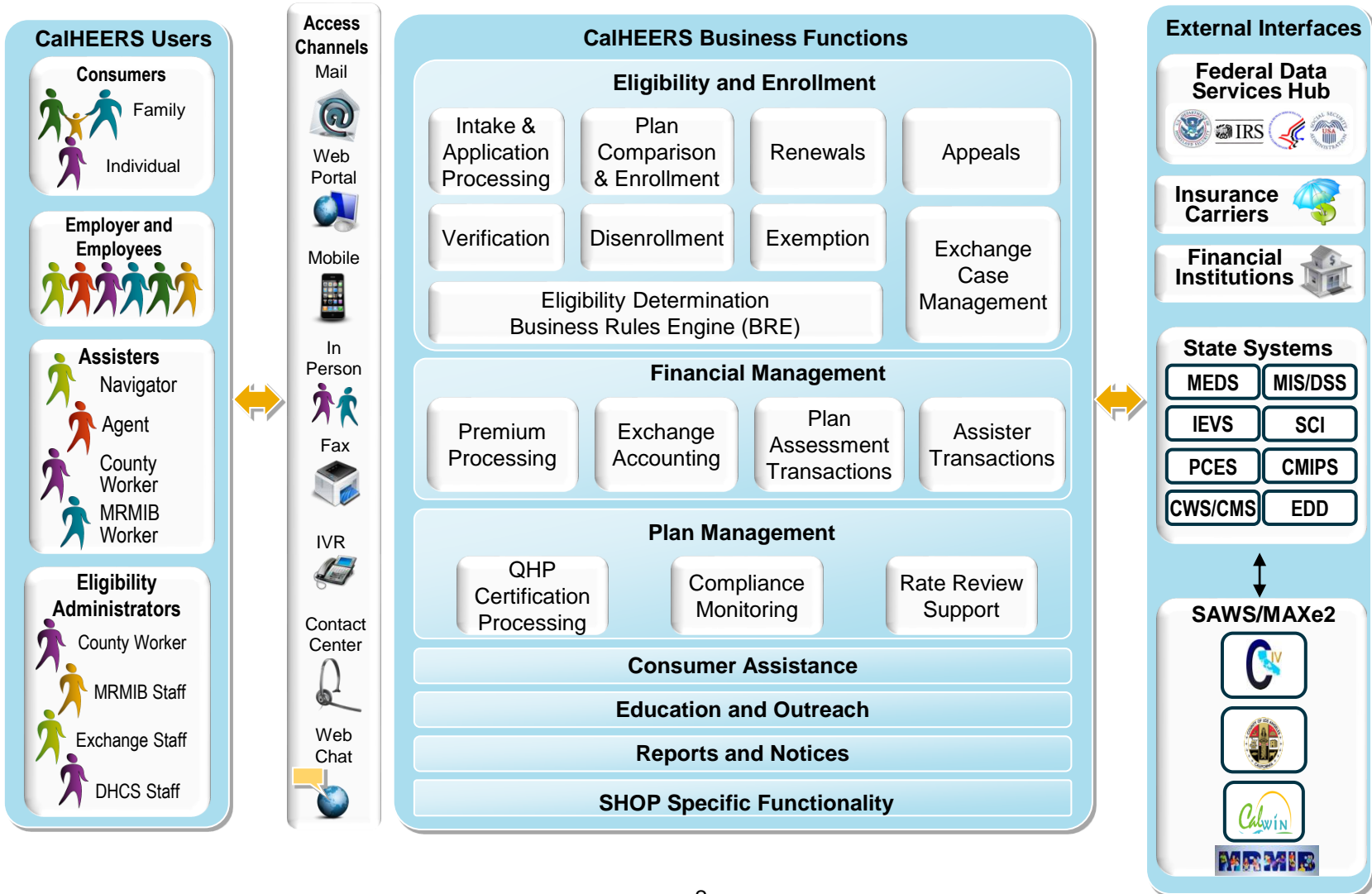
*Universal Access.*
*Personal Choice.*

# CalHEERS System Overview

**CalHEERS System will include following functionality:**

- First Class User Portal

- Shop and Compare Tools

- Assister Registration

- SHOP Employer Registration and Setup

- Online Help

- Eligibility and Enrollment

- Plan and Benefits Assistance

- Financial Management

- Plan Management

- Reporting

- Education and Outreach Reports
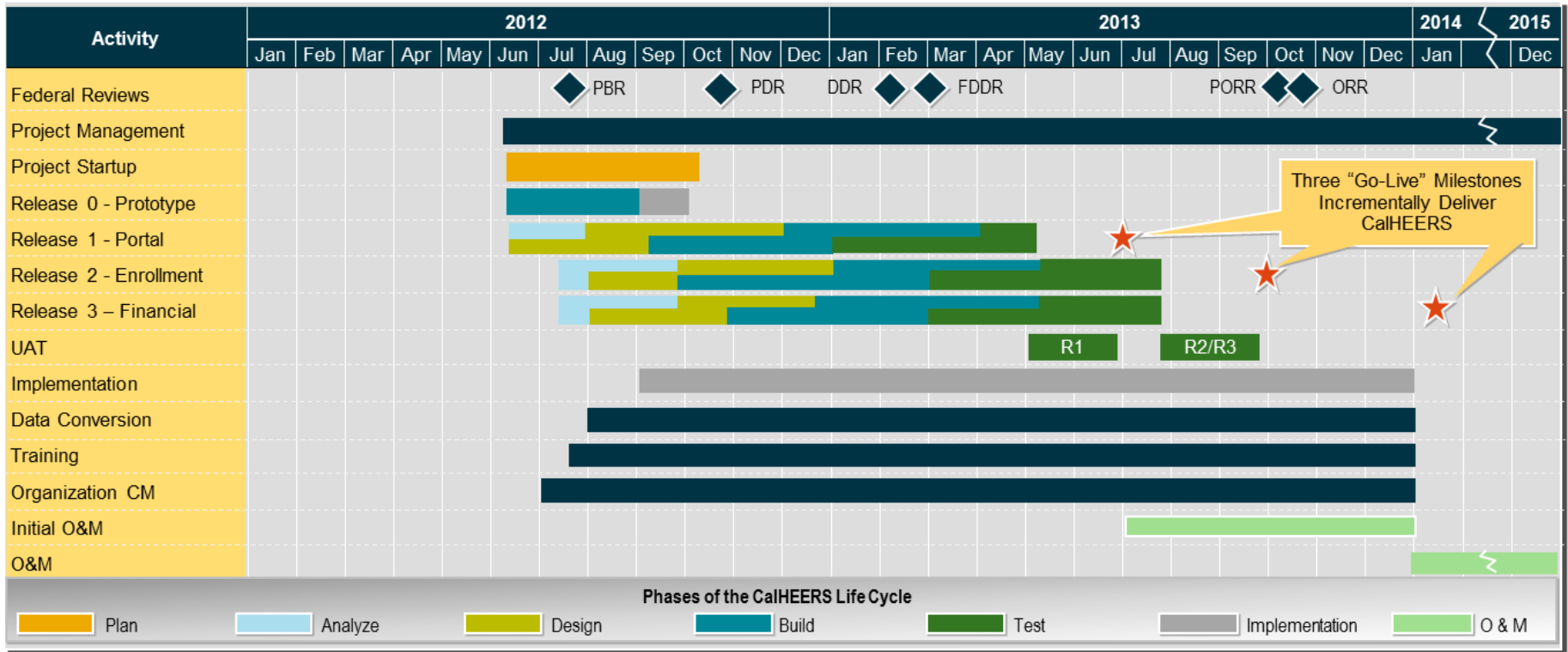
# CalHEERS Business Model Overview

## CalHEERS Users

### Consumers
Family

Individual

### Employer and Employees

### Assisters
Navigator

Agent

County Worker

MRMIB Worker

### Eligibility Administrators
County Worker

MRMIB Staff

Exchange Staff

DHCS Staff

## Access Channels
Mail

Web Portal

Mobile

In Person

Fax

IVR

Contact Center

Web Chat

## CalHEERS Business Functions

### Eligibility and Enrollment

| Intake & Application Processing | Plan Comparison & Enrollment | Renewals | Appeals |
| Verification | Disenrollment | Exemption | Exchange Case Management |
| Eligibility Determination Business Rules Engine (BRE) | | | |

### Financial Management

| Premium Processing | Exchange Accounting | Plan Assessment Transactions | Assister Transactions |

### Plan Management

| QHP Certification Processing | Compliance Monitoring | Rate Review Support |

### Consumer Assistance

### Education and Outreach

### Reports and Notices

### SHOP Specific Functionality

## External Interfaces

### Federal Data Services Hub
IRS

### Insurance Carriers

### Financial Institutions

### State Systems

| MEDS | MIS/DSS |
| IEVS | SCI |
| PCES | CMIPS |
| CWS/CMS | EDD |

### SAWS/MAXe2

C-IV

CalWIN

MRMIB

accenture

# CalHEERS Project Overview

**CalHEERS Project will include:**

- System Design, Development and Testing

- Training

- Implementation

- Facilities

- Operations and Maintenance

- Hosting Services and Service Desk for technical infrastructure and telecommunications

# CalHEERS Schedule Overview

# Implementation Timeline

| Functional Releases | Key Functions | Function Description |
|---|---|---|
| **Release 1** July 2013 | Portal | ▪ Shop and Compare Tools<br>▪ Plan Offerings<br>▪ Assister Registration<br>▪ SHOP Employer Registration and Setup<br>▪ Web Portal Online Help |
| **Release 2** Sept 2013 | Eligibility and Enrollment | ▪ Eligibility and Enrollment (Individual & SHOP)<br>▪ Notices<br>▪ Premium Payment Processing<br>▪ Plan and Benefits Assistance |
| **Release 3** Jan 2014 | Financial Management | ▪ Financial Management<br>▪ Plan Management<br>▪ Reporting<br>▪ Education and Outreach Reports |

# Keys to Achieving the Schedule

○ **Get Moving!**

- Rapid team staffing and buildup

- Requirements confirmation

- Key federal dependencies and oversight steps are understood and built into the schedule

- Develop a culture of "Relentless Forward Motion"

○ **Integrate all schedules**

- Project Sponsors , contractors, and service providers understand and agree to milestone dates

- Complementary workstreams that fit together, aligned for dependencies and deliverables

- "One view" – a common plan that defines roles, relationships

○ **Collaboration and Governance**

- Finalize business processes

- Transparent, "evidence-based" progress tracking

- Timely and definitive decision making

- Quick escalation of issues

# Near Term Areas of Focus and Activity

○ **Facilities**

- Development & Implementation facility established
- Data Center facilities prepared with focus on development environments

○ **System Development**

- Core development infrastructure implemented
- Project Management Plan and Schedule submission and approval
- Requirements Traceability processes in place under Exchange oversight
- Key components of application architecture implemented in development environment

○ **Training and Implementation**

- Training needs identified and content development underway
- Release 1 data requirements developed

○ **Governance**

- Clear decision processes with Project Sponsors (Exchange, DHCS and MRMIB) and OSI
- Other key Exchange initiatives (i.e., branding) integrated into development and implementation plan
- Schedule tracking, issue management, steering committee and CMS review/interaction processes in place