



# *Operations Plan: Quarterly Review*

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## *Moving from Plan to Execution*

- Prioritization of major initiatives
- Create a change management infrastructure to support new work and projects in an operational environment
- Execute work and major projects through program management infrastructure

# *Identification of Operational Priorities*

1. Grow/Retain Customer Base
2. Streamline Eligibility
3. Process Improvement & Cost Effectiveness
4. Usability

## Grow and Retain Customer Base

Business Activity	Status
Recertification of QHPs, brokers/agents and HCGs	Initiated and on track
Broker/agent relationship management	Initiated and on track
Direct employer engagement strategy	In development
Strategy to build APIs and engage brokers, carriers and web-based entities	Strategy being developed
Direct engagement with MGAs to support training/facilitation	Initiated and on track
Preparing for an updated training environment	Initiated – plan being developed
Ongoing SHOP training for brokers/agents and HCGs	Initiated and on track
Assistant Network performance analysis and identification of best practices	In development

## Grow and Retain Customer Base (cont.)

Business Activity	Status
Ongoing retention outbound campaign and associated training	In development
Renewal training/retention training for all channels	In development
Carrier-based designated sales representatives strategy	In development
Enabling renewals of existing customer base	Initiated – requirements / plan being developed
Product development strategy	In development
Coordinated retention campaign on website, social media and paid media	Initiated
Brand awareness and tax credit awareness messaging through website, social media and paid media	Ongoing
Support of brokers and HCGs through collateral, outreach and paid media	Ongoing
Outreach and marketing to potential customers	Ongoing

# Streamlining Eligibility

Business Activity	Status
Dedicated, integrated project team and governance framework	Initiated and on track
Engaging stakeholders in re-design of application and informing training strategy	Initiated and on track
Improving application (single application, dynamic questions, medical-only online experience)	Initiated and on track
Increasing percentage of real time determinations	Initiated and on track
Combining eligibility rules (APTC/CSR + Medicaid)	Initiated and on track
Expanding and enhancing interfaces (between C4 + CBMS, incorporating additional electronic verification sources)	Initiated and on track
Simplifying account creation and secured access to accounts and services across C4 + CBMS	Initiated and on track

## *Process Improvement and Cost Effectiveness*

<b>Business Activity</b>	<b>Status</b>
Stabilization and complete automation of EDI transactions	Initiated and on track
Sourcing strategy to evaluate technology and service center options	Initiated and on track
Business process improvement in service center	In development
OCX enhancements	Initiated and on track
Plan management automation	Initiated – requirements / plan being developed

# Improving System Usability

Business Activity	Status
User input	Initiated and on track
Building plan management module	Initiated – requirements / plan being developed
Enabling renewals	Initiated – requirements / plan being developed
SHOP portal redesign	Initiated – requirements / plan being developed
Individual portal enhancements	Initiated – requirements / plan being developed
Integration with shared application service development	Initiated – requirements / plan being developed
Agent portal enhancements	Initiated – requirements / plan being developed



# *Strong Change Management Infrastructure Supports the Execution of Work and Projects*

**Project leads are responsible for ensuring that the appropriate resources are engaged to facilitate end-to-end execution in a consistent manner:**



- Service Center
- Brokers / Agents
- Health Coverage Guides
- Health Plans
- Financial Management
- Eligibility / Enrollment
- Technology
  - Internal
  - External Partners
- Communications
- Training
- Financial Partners
- Government Agencies
- Conflict Resolution and Appeals
- Security and Privacy