OE4 PLANNING AND PROJECT LIST

March 28, 2016

Release planning and initiation process

Over 200 ideas and inputs from business owners and stakeholders

Analysis by PM and analysts to consolidate similar ideas, remove duplicates and obvious defects, and eliminate items that are obviously not possible (e.g., get rid of SES) resulting in 150 items

Identify business owners and PMs for the remaining 150 items, ask business owners to develop benefit descriptions, high level business cases and prepare to present to review board (CFO, CIO and CSSO). PMs get OOM from vendors where possible and confirm the items are new requirements not defects. Business owner and PMs further filter list and present only the most important to the review board. <50 projects presented to review board

Review board evaluated the recommended projects and further filtered out items based on size of effort and perceived ROI. *Final list includes 29 items that are either required / compliance items, have a potential for reducing operational costs in a significant and measurable way or will improve the customer experience and require little effort.*

Remaining candidates begin SDLC process. Next steps include business requirements definition; business case development and LOE estimation (to complete in 1st week of April) followed by FDD phase to complete by first week in May for items that are still 'on the list'

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Projects

Area	Number of Projects	Description of project(s)	Expected business benefit	Implementation ROM
Broker/agency functions	3	2 projects to enable client transfers to / from agencies / brokers 1 to create unique agency identifier	Improved broker efficiency and relationship	500-1000 hrs
Benefits display changes identified by carrier teams	6	3 compliance projects – to align the benefits and quality displays with regulations / SERFF template 3 additional minor enhancements to benefits display fields to improve usability and completeness	Compliance; and improved insurance literacy for customers	500-1000 hrs
Attestation / enrollment date selection	1	Revise functionality and processes that allow customers to select a different enrollment effective date during open enrollment if there are issues with their application process or carrier. The current and past processes have resulted in numerous issues for customers and carriers	Reduction in number of customer issues and escalations - currently have over 2500 open tickets related EDI coordination	Not available at this time
EDI changes	2	Payment Web Service (PWS) and effectuation status changes to reduce reconciliation, 1095 and APTC discrepancies	Reduction in operational costs and improved customer experience	Not available at this time
HCG / CAC selection and verification	2	Streamline the process for certifying and selecting HCG / CAC and allow HCG / CAC to have access to the CRM tool	Reduction in operating costs for HCG and CAC; improved efficiency for CAC/HCG resources	Not available at this time
Individual marketplace UI/UX improvements	1	Clean up individual marketplace UI including streamlining the shopping, payment and enrollment processes to reduce redundancies and eliminate 'clicks'	Streamlining the individual UI will improve efficiency for all channels and improve customer experience with the potential for increasing sales	500 – 1000 hrs
Special fee assessment	1	Need to make sure the system handles changes to or removal of Special Fee Assessment	System adherence to business practice	Small
Password reset	1	Modify the password reset function to be more user-friendly	Reduction in operational costs & user frustration	250 – 400 hrs
SHOP UI/UX	9	Various projects – mostly very small in scope – to improve the SHOP UI to improve usability	Streamlining the UI will improve efficiency of broker and CSC and improve customer experience	500 – 1000 hrs
SHOP operational improvements	1	Currently spending a lot of time processing workarounds for SHOP customers who are trying to modify effective dates for employees.	Significant ROI expected – technology costs will offset operations costs in CSC back office	Not available at this time
API for SHOP enrollments	1	Build and implement an API that brokers can use to submit SHOP enrollments using their own support systems	Increased SHOP sales	Not available at this time
SES/ compliance	1	Implement the OIT Pass-Through Interface for C4 RRV (H79).	Compliance	<240 hrs
Total	29			

Timeline

March – HLBR and business case development	April – functional design and final LOE	May – start technical design and development	June – continue design and development	July – finish development and start testing	Aug – Oct testing and implementation

Business requirements and business case complete, Level of Effort (LOE) estimates available, may refine project list again

Functional design complete, firm LOE available, final OE4 project list complete

Start defining post OE4 and OE5 projects

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