



OE4 F&O MEETING

June 2016

In light of changing circumstances, we have shifted some efforts for OE4

Reduction in carrier service areas / available plans

- Data analytics to support targeted outbound campaigns
- Develop tools to assist HCG network with stronger customer service

Loss of carriers

- Provide tools/information for channels to identify and target underserved customers

Carrier support for lead capture opportunity not mutually viable in 2016

- Completion of functional/technical designs for re-evaluation in 2017

Customers that were eligible for APTC and did not complete enrollment

- Data analytics to support targeted outbound campaigns for 2016 life change events
- Channel engagement

Accordingly, the scope of the previously communicated OE4 projects has changed in some cases

The highest value projects will be delivered for OE4:

- Password reset – Significant call driver and perceived as the number one issue
- Coverage start date attestation EDI Support – Desired by Carrier community and a major driver of operational cost and customer abrasion
- Benefit display – Necessary to complete for DOI compliance
- Remove Special Fee Assessment – Necessary to complete to prevent
- Ability to transfer clients – Desired by Broker community and a major cost driver
- Life change event modifications – Necessary to complete for compliance

The scope of some projects were reduced or eliminated during the design phase:

- Screenflow improvements – Cost estimates for payment screenflow exceeded allowable range. Other screenflow enhancements (including SHOP) will be addressed incrementally
- Out of process effectuations – Value of benefits / ROI questioned in light of design
- Carrier referral and lead capture – Major carrier unable to co-sponsor
- Selective pregnancy – Compliance concerns

Following slides are for appendix only

Current status of OE4 technology projects

ID	Project	Original estimate with contingency	Functional and technical design status	Expected final implementation status	Spend to date (6/20)	Expected final cost
1	Individual Marketplace Screen Flow Improvements	\$182,000	Designs for all components completed.	Payment screen changes and broker portal improvements will not be implemented.	\$77,000	\$82,000
2	Password Reset	\$182,000	Designs for all components completed.	Full scope will be implemented	\$59,000	\$240,000
3	Enrollment and EDI improvements	\$385,000	Designs for all components completed.	PWS support and EDI for coverage start date attestation will be implemented.	\$115,000	\$288,000
4	Carrier referral and lead capture for individual market customers	\$330,000	Designs for all components completed.	Major carrier unable to support functionality and will not be implemented.	\$166,000	\$170,000
5	Ability to Transfer Clients Between Broker and Agency	\$121,000	Designs for all components being re-worked.	Full scope will be implemented	\$65,000	\$192,000
6	BI Improvements	\$132,000	Design for all components being developed	Full scope will be implemented	\$12,000	\$120,000
7	Compliance projects	\$145,000	Designs for all components except selective pregnancy completed	Benefits display improvements, SFA changes and LCE rule changes will be implemented.	\$125,000	\$318,000
		\$1,476,000			\$619,000	\$1,410,000

SES Projects for OE are funded from FY2016 budget and not shown above