Training Overview 2014

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Training Certification / Recertification

- <u>Recertification</u>: a condensed version of training that is focused on the changes that have been made since last year
- <u>Certification</u>: All training courses that are applicable to that audience

- All material is available **online** starting Sept. 15, 2014
  - In-person training is not required this year, but is available as an option
  - Get Covered Event (Oct. 14-15) Sponsored by Colorado Health Foundation will provide in-person training by audience
  - Additional live Broker recertification sessions being held by health underwriter chapters around the state

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Training Courses and Materials

- Required:
  - Overview: 30 min (only for new trainees)
  - Partner Overview (HPF & DOI): 1 hour (only for new trainees)
  - Security: 1-2 hours (Required of all, but Licensed Agents take less)
  - Small Business: 1-2 hours
  - Individual Portal and Financial Assistance: 1-2 hours
  - Appeals: 30 min
  - Broker Functions: 1 hour
  - HCG Functions: 1-2 hours
  - ADA / CLAS: 30 min

- Additional Material Provided:
  - Renewal Process and Policies
  - PEAK tips
  - Medicaid Reference Material
  - Carrier and Plan Reference Material
  - Outreach / Customer Service and Support

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Plan Management
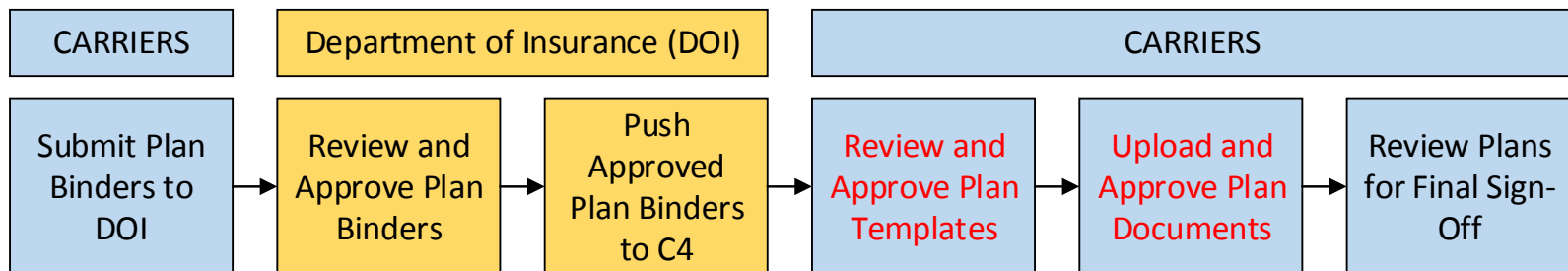
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Plan Management Module

The Plan Management Module is a tool to load, review, and approve Qualified Health Plans (QHPs) before the Plan data is available on the Consumer Shopping Portal (the Exchange).

Once Carriers have reviewed their Plans and verified that the data accurately reflects the information from their SERFF templates and approved by the DOI, C4 staff will publish the plans to the Exchange (before consumers have access).

After a review of their Plans in the Exchange, Carriers will give their final-sign off.

The process requires cooperation between the Carriers, the DOI and C4. The diagram below shows a summary of the process, with the Plan Management Portal activities in red :

CARRIERS	Department of Insurance (DOI)		CARRIERS		
Submit Plan Binders to DOI	Review and Approve Plan Binders	Push Approved Plan Binders to C4	Review and Approve Plan Templates	Upload and Approve Plan Documents	Review Plans for Final Sign-Off

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Plan Management – Pre-OEP Activities
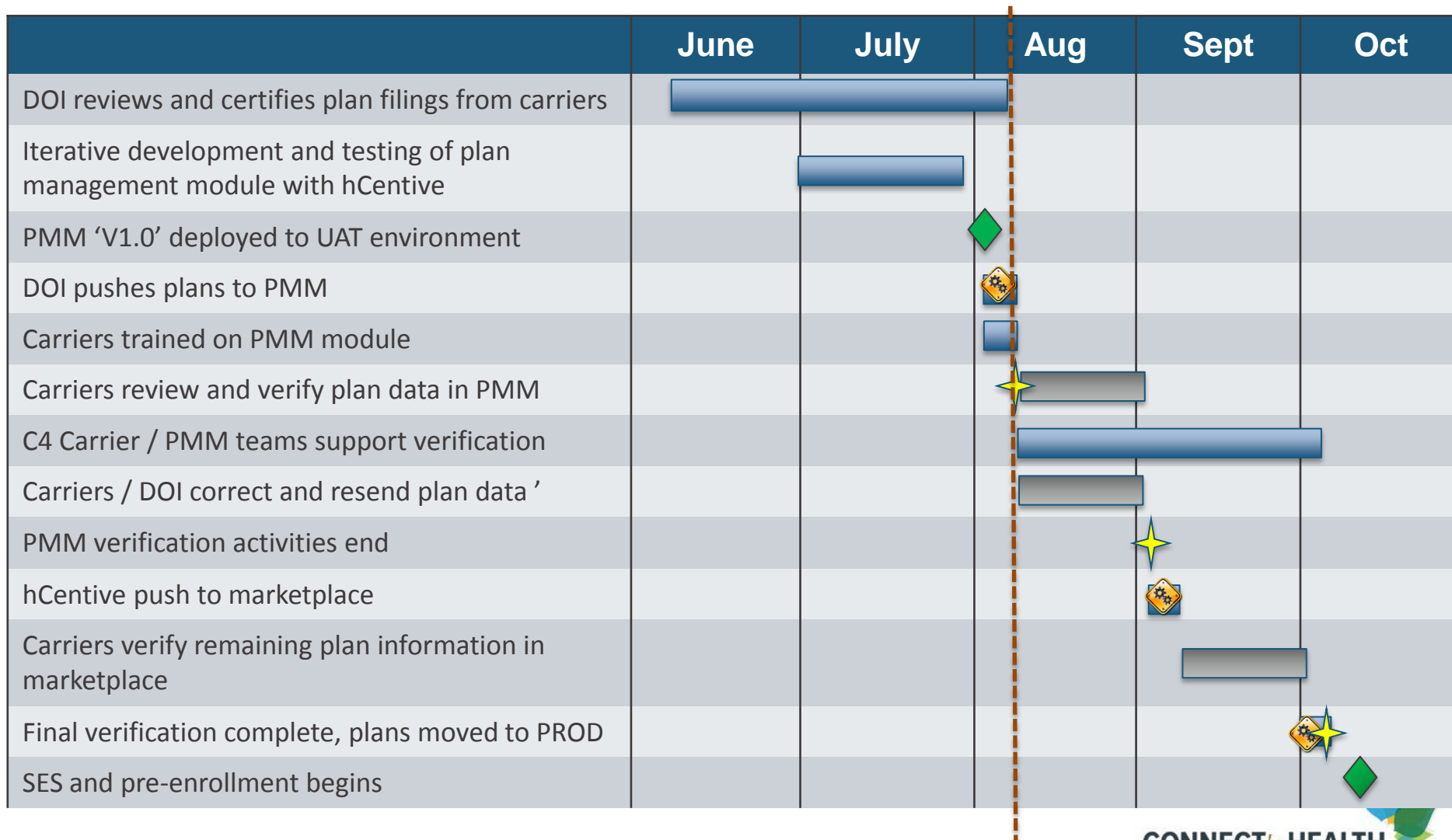
- **Carriers and DOI**
    - o Carrier filings to DOI (complete)
    - o Identify plans that have reasonable modifications or are discontinued (July)
    - o Identify plan ids for auto-renewal processing (July)
    - o DOI reviews and certifies plans (to complete by 8/4)
    - o DOI sends certified plans to C4HCO (to complete by 8/11)
    - o Carriers review and verify plan data sent to C4 and makes corrections as needed, corrections go back through DOI and SERFF (final plan corrections to DOI by 8/29 and final verification by 9/5)
    - o Carriers review and verify remaining plan data (marketing materials, SBC, presentation on shopping pages, etc.) and provide approval to C4 to publish (to complete by 10/6)
- **C4HCO**
    - o Deploy new Plan Management Module (PMM) for initial plan verification (by 8/4)
    - o Load certified plans from DOI into PMM (by 8/11)
    - o Create user accounts and provide training on new PMM (by 8/8)
    - o Support carriers throughout verification process, receive modified plans from DOI
    - o Push verified plans to UAT marketplace and load remaining non-SERFF data (by 9/8)
    - o Move final verified plans to PROD (by 10/15)

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Plan Loading and Verification – Timeline

	June	July	Aug	Sept	Oct
DOI reviews and certifies plan filings from carriers	▬▬▬▬	▬▬			
Iterative development and testing of plan management module with hCentive		▬▬▬			
PMM 'V1.0' deployed to UAT environment		◆			
DOI pushes plans to PMM		⬡			
Carriers trained on PMM module		▬			
Carriers review and verify plan data in PMM		✦ ▬▬▬			
C4 Carrier / PMM teams support verification		▬▬▬▬▬▬▬			
Carriers / DOI correct and resend plan data '		▬▬▬			
PMM verification activities end			✦		
hCentive push to marketplace			⬡		
Carriers verify remaining plan information in marketplace				▬▬▬	
Final verification complete, plans moved to PROD					⬡✦
SES and pre-enrollment begins					◆

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C4HCO Plan Management Module
Carrier Support

- **Plan Management Module Support**
  - Training Dates – 8/4 & 8/5 from 10 to 12 MST In person & Webinar

  - Follow-up Q&A – 8/8 from 12 to 1 MST (Dial-in)

  - Kick-off meeting – 8/11 from 2 to 3 MST (Dial-in)

  - Weekly Status Calls – 8/14, 8/21, & 8/28 from 12 to 1 MST (Dial-in)

  - Daily Support Hour from 9 to 10 MST (Dial-in) Starting 8/12 to 8/29

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