TECHNOLOGY UPDATE &
STRATEGIC OPERATIONAL PROJECTS FOR CY2016
Prepared for: Connect for Health Colorado Finance and Operations Committee
February 2016
Topics

• Technology Update
  o OE4 Planning and FY2017 Capital Budget
  o Overview of 3 Strategic Options
  o Contracts Update

• Strategic Operational Projects for CY 2016
OE4 planning and FY 2017 budget
OE4 Planning Timeline

Today

Gather ideas, requirements, and mandates for OE4 and beyond from stakeholders

Sort and prioritize list, get rough cost estimates for highest priority items

Reprioritize based on necessity and benefit / ROI; develop ‘Short List’ of projects for OE4

Gather detailed requirements for “Short List” of projects and provide to vendors for more accurate cost estimates

Further refine ‘Short List’ to those within budget and/or with the highest ROI

Ideas that fall out of the OE4 process get evaluated for OE5 and beyond

OE5 and Strategic Architecture Planning and Implementation

Continue development on highest priority items that fit within remaining budget and/or have high ROI

We are continuing to refine the list of the projects under consideration for OE4. The OE4 planning process is aligned with the FY2017 budget planning cycle.
Remaining FY2016 Capital Projects to be Evaluated

- **Regulatory Requirements**
  - “The CMS Letter” – Colorado (C4 and HCPF) MUST have a single FDSH connection and use IRS FTI data according to ACA requirements to verify income by June 1, 2016
  - Additional CMS and IRS reporting requirements
  - Quality star display
  - Changes to FDSH Renewals (RRV) service

- **Ongoing user experience improvements**
  - Password functionality improvements (#1 call driver in OE3)
  - Marketplace UI improvements (reduce number of clicks)
  - Benefits display improvements to improve insurance literacy and improve shopping experience
  - Additional improvements to SES UI and integration with Marketplace

- **SHOP improvements**
  - Ease of enrollment and renewal – reduce number of clicks and confusion
  - Continued improvements to system to allow for more flexibility to handle unexpected situations and to handle larger groups
  - Tools to load enrollment data in bulk from authorized brokers

- **Health Coverage Guide / CAC tools**
  - HCG / CAC do not have tools to accurately track enrollments or support customers through the enrollment process

- **Broker Portal and Access Improvements**
  - A number of improvements to improve broker productivity and reduce Connect for Health Colorado support costs have been identified

- **Carrier improvements**
  - Carrier portal to show status of enrollments between Marketplace and Carrier – could be accessed by service center reps at both carrier and Marketplace

- **BI improvements**
  - Improved access and data accuracy

- **Operational improvements**
  - Automated 1095 correction process
  - Continued EDI improvements
  - Improved ability for customers to request a different start date, improvements to EDI process with carriers when customers request a new start date
  - Work flow tool improvements to improve operational efficiency
  - More integration with CBMS CRM and other service center tool improvements

- **Support for ancillary products**
  - NOTE: would not come from C4HCO capital projects budget

We will not be able to do all of these projects. Most of the non-regulatory items are likely to be unachievable this year.
OE4 Planning Alignment with FY2017 Capital Budget Planning

### Critical Milestones

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**SES Phase 3 – Including “The CMS Letter” - Regulatory Requirements to Use FTI to Verify Income and Single FDSH Connection and non-mandated SES OE4 Enhancements**

- Requirements
- Design and Development
- Testing
- Security Compliance
- System Live
- Funding

**Non-SES OE4 Marketplace Projects**

- Requirements
- Design
- Development
- Testing
- System Live
- Funding

**Strategic Planning for OE5 and Beyond**

- Planning and Analysis
- Requirements and Design
- Development

**Key:** Vendors Impacted; Unfunded vs Funded

- hCentive and CGI
- Deloitte, CGI and hCentive

Remaining FY2016 Capital Budget (~$450K) must cover requirements and design work for all hCentive and CGI projects and development of CGI and hCentive code to align with June SES release (Deloitte work is already included in the committed spend).

**FY2017 capital projects buckets to include:**
- OE4 projects
- Strategic projects
- Contingency

**Situation:** Costs across all vendors for work to comply with “The CMS Letter” will likely use up all remaining FY2016 capital funds.

**Options to Discuss:**
1. Assume no additional capital projects will start before July 1, 2016, leaving little time to accomplish anything of significance before the start of OE4
2. Continue to evaluate high priority projects and request additional capital funding to cross FY2016 and 2017 once project costs / ROI are complete
3. Continue to evaluate high priority projects but stop work when the capital funds run out
Questions
Overview of Strategic Options for Connect for Health Colorado
### Status Quo
- Continue to have multiple systems that customers use to access insurance affordability programs (IAPs). The Shared Eligibility System will continue to determine eligibility for programs.
- Technology and operational projects would focus on improving the integration between the systems and organizations and/or improving Marketplace-only functions.

### “Closer Alignment with HCPF”
- Create synergies between the systems used by applicants seeking an IAP or reporting a change in circumstance that affects the program or eligibility for a program in which they are currently enrolled.
- Other modifications to reduce redundancy and improve coordination and synergies between Medicaid and Marketplace systems.

### Federally-facilitated Exchange
- HHS operates; however, State may elect to perform or can use Federal government services for the following activities:
  - Reinsurance program
  - Medicaid and CHIP eligibility; assessment or determination
Status Quo – Relevant System Components*

- **hCentive**
  - Marketplace Account Set Up and Maintenance
  - Online Navigation
  - Plan Management
  - Life Change Events
  - On Behalf Of / Agent Portal for Brokers and SC
  - Non-Financial Assistance Application
  - Shop for a Plan
  - Eligibility Status & History
  - Plan Shopping, Enrollment Status & History

- **CGI**
  - SES Payload Processing
  - Carrier EDI
  - CMS and IRS reporting
  - Operational Reports
  - Financial Management
  - Service Center Tools and CRM Integration
  - Batch Renewals
  - Marketplace Noticing
  - 1095A Processing

- **SES/PEAK**
  - CBMS / PEAK Account Set Up and Maintenance
  - Online Navigation
  - SES Payload Processing
  - Carrier EDI
  - CMS and IRS reporting
  - Operational Reports
  - Financial Management
  - Service Center Tools and CRM Integration
  - Batch Renewals
  - Marketplace Noticing
  - 1095A Processing

- **CBMS**
  - Eligibility Determination
  - Eligibility Noticing
  - Reports
  - Interfaces to Verification Sources
  - 1095B Processing
  - Mobile App

*Note: Individual Market Only
What Could “Closer Alignment with HCPF” Look Like?*

*Note: Individual Market Only
OE1
- Two separate eligibility systems, dual data entry
- Life Change Events processing for APTC not fully functional

OE2
- Shared eligibility system for initial enrollments
- Life Change Events processing for APTC not fully functional

OE3
- Expedited Financial Assistance path
- Enhanced determination of Life Change Events
- Enhanced shopping experience

OE4?
- Consolidate 1095 reporting across CBMS and Marketplace?
- Begin database consolidation to support shared reporting requirements?

OE5?
- ????

OE 6 & Beyond

Timeline?

Today
Under the FFM model, The Exchange remains responsible for the majority of Marketplace functions, including administration, operations, plan management, in-person assistance/navigator/broker programs, consumer outreach and education, stakeholder engagement, and potentially the SHOP marketplace.
Questions
Update on Contracts
Contract Update

• We are working on a project to retire the implementation statement of work that we have in place with CGI - it was very broad and covered a wide variety of services.

• The goal is to: (i) eliminate obsolete implementation language; (ii) break out subject matter into specific service statements of work (M&O, carrier coordination, hosting, business intelligence); (iii) memorialize the processes and procedures that are reflective of reality & current practices; and (iv) mirror the structure established with our service center SOW in terms of KPIs, SLAs and service credits.

• Benefits we are trying to achieve:
  o Discrete invoicing for discrete projects;
  o Better documentation of services provided for audit trail;
  o Reducing the need for change requests and change orders – greater efficiency.

• We are engaging in a similar process simultaneously with hCentive as we centralize how M&O services should be provided and coordinated.

• This is a natural progression as C4HCO matures and we move away from implementation towards sustainability.

• As specific SOWs requiring Board input are created as a function of the project they will be brought before this Finance & Ops Committee linking procurement requirements with budgetary processes.
Strategic Operational Projects for CY 2016
2017/ OE4 Key Strategic Initiatives: Operations, Sales, and Marketing

Key Initiatives:

- **Broker Team** - Develop and implement Master Certified Broker criteria, Create Tier 2 Broker Development Program, Assist with Non-QHP Products Launch, Deepen Partnership with CSAHU, Deploy 2nd Generation Broker Lead Tool

- **Community Based Programs** – Renew TCHF Grant, Re-contract with Key Assistance Sites, Deploy Word-class Technology to Support CBPs, Deepen Relationships in Key Communities, Develop Robust CAC Programming

- **Training and Performance** – Create Advanced Training Curricula for Sales Channels, Refresh Learner Paths for all 7,000 users of the LMS, Overhaul Service Center Training, Support Master Broker Certification, Partner with HR on C4HCO New Employee Engagement, Partner with Counties

- **Carrier Team** – Recruit Carriers to SHOP, Conduct Strategic Planning with Eight Carriers, Develop Carrier Toolkit for Key Transactional Processes, Partner with Carriers on OE4 Readiness
2017/ OE4 Key Strategic Initiatives: Operations, Sales, and Marketing (continued)

- Rural Outreach Team- Deepen Partnerships with rural Carriers, Brokers and CBPs, Develop Earned, In-Person Media, Partner with Key Stakeholders, Deepen Partnership with Tribes and Counties, Increase Social Media Presence, Strengthen on-the-ground Presence in Low Penetration Counties

- Service Center Team- Implement Multiple Process Improvement Processes, Drive Password Reset Project, Deepen Expertise of Front Line, Drive Call Length and Wait Times Down

- MA SiteTeam – Insorce Contract, Improve Performance in Verifications, Case Assignment, Partner with Counties and HCPF, Decrease Cycle Time for Non-RTE Resolution

- Marketing and Outreach Team- Leverage Data to Target Sub Populations, Develop Targeted Media and Marketing Approach for OE4, Lead Launch of OOP Estimator, Utilize Harvard/Wakely Findings to Fuel Renewal Communications, Collect Feedback on Materials to Optimize for OE4, Create New Resources to Fill Info Gaps in Low Penetration Counties, Identify Key Community-Based Events and Sponsorships to Engage Target Audiences, Partner with Counties

- Business Enterprise (CSO)– Create Plan for Customer Satisfaction Surveys, Define Next Phase of SHOP, Insorce MA Site, Drive Enrollments Through Sales Initiatives, Launch Public Benefit Corporation and Non-QHP Products
Questions