Background

The California Healthcare Eligibility, Enrollment and Retention System (CalHEERS) is the web-based system that determines eligibility and facilitates plan enrollment for Covered California health plans and federal subsidies. It also refers individuals to their county social services office if they appear to qualify for the Modified Adjusted Gross Income (MAGI) Medi-Cal program. Medi-Cal is administered by the California Department of Health Care Services (DHCS).

On November 12, 2014, CalHEERS released new functionalities to the Covered California online application that impact users. The release contains defect fixes and new functionality, and these notes provide information regarding new or modified functionality, fixes and alternative procedures to use if a change cannot be implemented.

Job Aids for New Functionalities

Job aids illustrate functionality and serve as desk references and training material for Covered California online application users. As changes in functionality are implemented, job aids are updated and distributed. There are six new job aids, dated November 7, 2014, titled as follows:

1. Job Aid – Report a Change for 2014
2. Job Aid – Change Plan
3. Job Aid – Initial Consumer Premium Payment – Pay Now Button
4. Job Aid – Apply for 2014
5. Job Aid – Address Validation
6. Job Aid – CalHEERS Global Header and Footer

The job aids contain content related to the renewal and open enrollment periods, and new functionality implemented on November 12, 2014. They are intended for Covered California Service Center Representatives (SCRs), County Eligibility Workers (CEWs), Plan-Based Enrollers (PBEs), Certified Enrollment Counselors (CECs), and Certified Insurance Agents (CIAs) who may be assisting consumers to complete a renewal or an application, or report changes for 2014 and 2015.

Summary:

1. **Report a Change for 2014**

    - The "Report a Change" functionality is active for the 2015 benefit year.
    - Only Covered California SCRs, CEWs and CIAs will be able to use the "2014 Report a Change" link.
    - There are two places where the "2014 Report a Change Link" will display:
        - Before 2015 Renewal is completed, it will display under the Actions menu from the *Individual Landing* page – **Do not use this link to complete any changes for 2014**

- After 2015 Renewal is complete, you will see the "Report a Change for 2014" link next to the yellow Report a Change button – CIAs may use this link to complete a change report for 2014,
- CECs and PBEs will need to contact the CEC/PBE Help Line at 1-855-324-3147 or refer the consumer to the Covered California Service Center to report changes to their 2014 benefit year.

2. **Change Plan**

- Consumers who have completed their Renewal or submitted a new application during this open enrollment period and would like to select a new plan for 2015 benefit year can now do so by clicking the new "Change Plan" link available under the "Actions" column on the online application *Individual Landing* page.
- This new functionality will be especially useful for those consumers that were auto-renewed in to last year's plan and decide to change their plan. This link will be deactivated once open enrollment ends.
- Consumers no longer need to use the Report a Change function for a new plan selection during the renewal or open enrollment period.
    - Once open enrollment ends, consumers with Qualifying Life Events and American Indians and Alaskan Natives (AI/AN) will need to use the Report a Change function for a new plan selection.

3. **Initial Consumer Premium Payment – Pay Now Button**

- Covered California Health Plan carriers will be accepting the initial 2015 premium payment directly through a link on the Covered California online application system. This payment is only for consumers with an effective date of coverage starting in 2015, as early as January 1, 2015.
- The "Pay Now" button will appear on the *Household Enrollment Summary* online application page if the consumer's health plan accepts the initial payment online. By clicking the "Pay Now" button, an external website will open. Please remind consumers that the "Pay Now" button is only available for the first 2015 payment. All other payments will need to be made directly to the health plan.
- Here's a list of the health plan carriers and their start date of accepting the "Pay Now" button feature:
    - Western Health Advantage – currently accepting
    - Chinese Community – currently accepting
    - Blue Shield – currently accepting
    - Anthem Blue Cross – starting 11/15/14
    - Molina Healthcare – starting 11/15/14
    - Kaiser Permanente – expected start date: 11/22/14
    - Health Net – expected start date: January 2015
- SCRs, CEWs, and CECs shall not enter or retain the consumer's payment information. Only consumers, CIAs, and PBEs can enter this information.
- Additional information will be forthcoming on this topic.

4. **Apply for 2014 (Special Enrollment only)**

   - During open enrollment, consumers cannot use the online application to apply for special enrollment 2014 coverage.
   - ONLY Covered California SCRs, CEWs, and CIAs will have an "Apply Now_2014" link display on their online application portal to help consumers apply for special enrollment 2014 coverage.
   - CECs and PBEs will <u>not</u> have the "Apply Now_2014" link display on their online application portal and will need to refer consumers to the Covered California Service Center or call the CEC/PBE Help Line at 1-855-324-3147 to assist consumers with special enrollment 2014 coverage.

5. **Address Validation**

   - Consumers will now be required to select their county of residence if the zip code falls under more than one county. A new pop-up window will display to prompt the consumer to select the correct county. This is an effort to ensure that applications with Medi-Cal eligible consumers are referred to the correct county social services office.

6. **CalHEERS Global Header and Footer**

   - A new header and footer was created to standardize the look and feel of both the CoveredCA.com website and the Covered California online application. The header and footer will remain constant whether consumers are logged in to their Covered California online application account or just visiting the CoveredCA.com website.

Alternate Procedures

Alternate procedures provide workarounds and serve as desk references until the functionalities are fixed for Covered California online application users. As fixes in functionality are implemented, job aids will be developed and distributed. The alternate procedures listed below are for known issues that may impact you while helping consumers.

1. Newly added member name is not displayed once plan selection is completed for that group.
2. On some subsidized applications, the child is grouped separately and is incorrectly allowed to select a different plan.
3. Only one income is shown on the *Income Summary* page before submitting the application.
4. The expected start dates are <u>different</u> on the *Program Eligibility by Person* page and the *Plan Enrollment by Person* page on some applications. The date is correct on the *Program Eligibility by Person* page and incorrect on the *Plan Enrollment by Person* page.
5. The expected start dates are <u>incorrect</u> on both the *Program Eligibility by Person* page and the *Plan Enrollment by Person* page on some applications.

The workarounds on the next pages are intended for SCRs, CEWs, PBEs, CECs, and CIAs assisting consumers with a renewal, application, or reporting changes for 2014 and 2015.

Alternate Procedures Summary:

1. **Newly added member name is not displayed once plan selection is completed for that group.**

Users Impacted	All Users
Area Impacted	Plan and Enrollment
What's Happening Now	For custom grouping scenarios in unsubsidized applications, the newly added member information does not appear during plan selection; however, the *Enrollment Summary* page displays the information correctly.
Actions to Take	This is a display issue only. Please verify enrollment by checking that the newly added member displays on the subsequent *Enrollment Summary* page.

2. **On some subsidized applications, the child is grouped separately and is incorrectly allowed to select a different plan.**

Users Impacted	All Users
Area Impacted	Subsidized Individual Application
What's Happening Now	On some subsidized applications, the child is grouped separately and is incorrectly allowed to select a different plan.
Actions to Take	When directed to the *Plan Selection* page, the user needs to navigate back to the *Enrollment Introduction* page and click on the "Continue Health Plan Update" button. This will display the *Keep/Shop* page. The user should select one plan for the family.

3. **Only one income is shown on the *Income Summary* page before submitting the application.**

Users Impacted	All Users
Area Impacted	Individual Application
What's Happening Now	Only one income is shown on the *Income Summary* page before submitting the application. This happens only when the start dates for multiple incomes are different.
Actions to Take	Once the application has been submitted, the user must return to the *Income Summary* page. It will show all incomes and calculate the household with all incomes.

4. **The expected start dates are different on the *Program Eligibility by Person* page and the *Plan Enrollment by Person* page on some applications. The date is correct on the *Program Eligibility by Person* page and incorrect on the *Plan Enrollment by Person* page.**

Users Impacted	All Users
Area Impacted	Plan Summary
What's Happening Now	The expected start dates are different on the *Program Eligibility by Person* page and the *Plan Enrollment by Person* page on some applications. The date is correct on the *Program Eligibility by Person* page and incorrect on the *Plan Enrollment by Person* page.
Actions to Take	Only the Service Center, CEC/PBE Help Line, and Pinnacle Service Center representatives can correct the effective date for enrollment. CIAs should call the Agent Service Center at 1-877-453-9198. CECs and PBEs should call the CEC/PBE Help Desk at 1-855-324-3147.

5. **The expected start dates are <u>incorrect</u> on both the *Program Eligibility by Person* page and the *Plan Enrollment by Person* page on some applications.**

Users Impacted	All Users
Area Impacted	Plan Summary
What's Happening Now	The expected start dates are incorrect on both the Program Eligibility by Person page and the Plan Enrollment by Person page on some applications.
Actions to Take	Only the Service Center, CEC/PBE Help Line, and Pinnacle Service Center representatives can correct the effective date for enrollment. CIAs should call the Agent Service Center at 1-877-453-9198. CECs and PBEs should call the CEC/PBE Help Desk at 1-855-324-3147.