Broker-IT Working Group Kick-Off
April 19, 2018 3:00pm- 4:30pm

Meeting Notes

Workgroup Leadership
Janet Trautwein, Chair

DC HBX Staff
Brian Schwartz
Kenneth Taylor-Sutton
Andre Dixon

Attendees
Jonathan Lee
Steve Feldman
Milton Foster
Katrina Reynold
Tamara Pearsall
Janice Dicken
Dagmar Byrnes
Ileana Jarrin
Stephanie Cohen
Laura Chaney

Opening by Janet Trautwein- Summarized the agenda and reshuffled the agenda to go through the broker quoting tool first followed broker employer states, and a demo of new GA Edit functionality.

Broker Quoting Tool Demo lead by Brian Schwartz- a demo of the Massachusetts broker quoting tool was led by Plan Management team member Brian Schwartz. The purpose of the demo was to provide DC Brokers the opportunity to view functionality scheduled to roll out to the DC brokers in advance of release and solicit feedback. A holistic note is GA access must be given to tool. Other recommended changes from the discussion and demo are below;

- Quoting New groups
  -tool should allow the user to change the effective date while within the quoting process
  -user should be able to type into contribution amounts for accuracy in addition to using the contribution slider
  -contributions should be set to defaults (user preference)
  -remove the compare limits (brokers ok with having to scroll over to see plans)
  -CSV import is a must for the DC Tool
  -output should show employer vs employee vs dependent cost
- Quoting Renewing Groups
  -Group demographics (contribution amount and existing reference plan and plan offering(s)) should export from account to quote for comparison of existing set-up with the quoted set-up.
  -Dependent count should be included
  -include a optional drop down row under each employee to list dependent details
  -output should show employer vs employee vs dependent cost
  -when changes are made to the roster during the quoting phase employee demographics should flow back to the employer once the quote is claimed

Additional comments/request post the quoting tool discussion-
-An option to unpublish benefit packages is needed to help broker community correct user errors. Currently these requests require SHOP team intervention which takes a significant amount of time to complete.
-Roster management functionality needs to be reviewed. Dependent adds & employee demographics should flow back to employer portal when the change takes place via the EE account/portal.

ER Active States Conversation led by Kenneth Taylor-Sutton- this is part II of the discussion that took place during last week's occurrence on various employer states. The final recommendations for employer states are below;

- New Groups
  -Account Created- triggered when a prospective client is between creating an account and publishing a benefit package.

-Published Plan Year- triggered when a prospective client is between the points where they have published their benefit package through the close of the group's open enrollment.
-Pending Binder Payment- triggered once the open enrollment has closed through the deadline for the binder payment
-Transmitted to the Insurer- triggered once the XML has been transmitted to the carrier
-Active- triggered on the effective date of the coverage

- Renewing Groups
  -Renewing- triggered between the time the system opens for a renewing group to the time the benefits are published
  -Published Plan Year- triggered when a prospective client is between the points where they have published their benefit package through the close of the group's open enrollment.
  -Enrollment Completed- triggered between the end of open enrollment through EDI Transmission
  -Transmitted to the Insurer- triggered once the XML has been transmitted to the carrier
  -Active- triggered on the effective date of the coverage

Additional comments/request post the quoting tool discussion-
- The following inactive status must also be available "Terminated Non-Pay of Binder" (a group doesn't make the required binder payment) and "Terminated Failed Eligibility"- when a group fails eligibility prior to the renewal or post the open enrollment period.

Demo led Andre Dixon on General Agency Edit functionality- Andre provided demo of new functionality released to the general agency portal that allows the agency to make certain edits without having to escalate it for action from HBX business team members.

Discussions points during the open floor discussion-
- General Agent advises the ability to set passwords for brokers and employers would be a value add as clients often do not want to contact the contact center to have this completed and the "forgot password" function often does not work. Kenneth Taylor-Sutton inquires on examples and will have a ticket raised to review the issues once the evidence is received. Kenneth also commits to reviewing a possible enhanced password option function to include forgot username, forgot username and password, and email address no longer in use.
- General agent participants report issues utilizing webform. Tamara Pearsall advises when submitting a lengthy case the webform gives an error and deletes the submission. Kenneth is fully committed to addressing as a bug as this is not the expected behavior of the system.

Wrap up- Janet introduces adhoc meeting to take place on Tuesday April 24, 2018 from 2-3:30pm. Kenneth agrees and sets the agenda for the final two meetings.