



Broker-IT Working Group Kick-Off
March 29, 2018 3:00pm- 4:30pm

Meeting Notes

Workgroup Leadership

Janet Trautwein, Chair
Lee Bethel, Vice Chair

DC HBX Staff

Mila Kofman
Kenneth Taylor-Sutton
Andre Dixon

Attendees

Jonathan Lee
Steve Feldman
Katrina Reynold
Tamara Pearsall
Farren Baer
Brandon Quick
Janice Dicken
Alexandra Loyale
Margie Dilone
Alexandria Bishop
Dagmar Byrnes
Ileana Jarrin

Opening Remarks (Janet Trautwein and Mila Kofman)- opening introductions, followed by Janet Trautwein and Mila Kofman summarizing the intent of reconvening this working is to brain storm and proposed 3-5 IT development projects specific for the broker community that will help brokers and general agencies better manage themselves and service their clients.

Demo lead by Andre Dixon and narrated by Kenneth Taylor-Sutton- demo was high level and focused primarily on the broker portal functionality and SHOP functionality via the broker flow.

Discussions points during the open floor discussion-

- Broker portal does not enable brokers to service clients billing needs which a critical portion of the broker-client relationship is proposed enhancements are below;
 - Payment History Report exportable from the broker portal
 - Paid through date listed on the clients list page (swap out with FEIN column)
 - Color code ER clients on clients page list based on payment status (red to indicate delinquent)
 - Allow for credit card payments (note recommendation to pass fee to consumer- tabled for another advisory group)
- Client-List page is not conducive to aiding the broker with client management and therefore the following recommendations were made;
 - ER State is unclear and often buggy and often does not reflect the actual status of the group i.e. broker has client in new status and group has been active for 6 months now. (note: HBX Staff promised to review and discuss the various ER States during the next meeting)
 - Sort function was reported as buggy (note: HBX Staff flagged this as a bug for further off-line review with the IT team)
 - Recommendations made to utilize open space between page header and the top of the client list for a banner to indicate any upcoming deadlines
 - staff logins currently only one log-in per agency
 - Broker and broker staff Linking when multiple writing agents are under one broker agency
 - More robust mail box and broker copy of notices so they are able to help triage work, also proposed phase in approach to get current clients to opt in at renewal, but requesting to default to yes.



-Employer and Employee maintenance is not broker or consumer friendly when having special clients that fit outside of the happy path see details below;

- Need the ability to add non-roster POC to groups
- Need the ability for one POC to be able to access multiple groups (HR Administrator whom administers payroll and benefits for multiple groups has to have multiple log-ins
- Verification of employer eligibility after creating login and before beginning application. Option should be mandatory prior to signing up. As it is now the entire applications has to be completed prior to learning if you are eligible.
- Page prior to note above that clearly identifies an eligible small group in the District of Columbia
- The ability to terminate for future dates
- Mandatory eligibility checker for renewing groups flagged as ineligible prior to termination
- The ability to enroll employees without SSN/TIN

The working group also had discussions not IT related that will be discussed during the first 2018 producer advisory committee, those comments are below;

- the ability to offer flat dollar contributions
- the reinstatement process
- 50% contribution limits year around
- payment flexibility for groups experiencing hardships
- husband wife coverage issues when both are employees of the group

Wrap up- Kenneth summarized above discussions and initial ideas, and commits to finishing the broker quoting tool demo during the next session, as well as providing what the current ER States are that are currently in production. Janet reminds the group of the schedule and dismisses the meeting