DC Health Benefit
Exchange Authority

Broker-IT Working Group Projects
April 24, 2018 2:00pm- 3:30pm

Meeting Notes

Proposed Projects:

Attendance:
Janet Trautwein (Work Group Chair)
Lee Bethel (Work Group Vice Chair)
Mila Kofman (Executive Director- HBX)
Kenneth Taylor-Sutton
Andre Dixon
Olufunmilayo Hall
Farren Baer
Jonathan Lee
Steve Feldman
Katrina Reynolds
Ileana Jarrin
Tamara Pearsall

Meeting Kick-Off- Janet summarizes the purpose of the meeting today is to go through the list of proposed enhancements to ensure all proposals are captured and then to prioritize the order of the projects. All projects are listed below.

Employer Application
-Need the ability to add non-roster POC to groups- **(Priority #3)**
-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 defines an eligible small group in the District of Columbia
-The ability to terminate, hire, and enroll for future dates trigger in the system to start the time frame for enrollment should begin based on the date of event. (i.e. employee is hired on 2/25 for a 3/1 effective date, system should allow that employee to be entered on 2/25 and the clock should start on 3/1 with regards to time line to complete application)- **(Priority #1)**
-Mandatory eligibility checker for renewing groups flagged as ineligible prior to termination
-The ability to enroll employees without SSN/TIN **(Priority #7)**
-Need the ability to un-publish a plan year- **(Priority #2)**

Notices
-Improved mail box functions to improve the ease of sorting, filing/archiving notices received on behalf of the clients- **(Priority #4)**
-The ability to receive client notices as brokers are often carved out of the communication exchange once they have raised a case on behalf of their client (especially min SEPS) –Currently In Flight
-HBX Driven Renewal Package – Non- IT but Business Priority

Broker/General Agency Portals
-Exportable payment report from employer clients – (Priority #6)
-"Return to Employer" link to be placed in EE's account so a broker may easily get back to the employer account after maintenancing an employee's account. – (Priority #6)
-Removal of EIN Column and addition of "Paid Through" column - (Priority #6)
-Color Code ER Clients (highlight clients in arrears in red)- (Priority #6)
-Revisit credit card payments (tabled from broker IT working group) – tabled for producer advisory committee
-Staff Log-Ins- Currently in flight
-Ability to link multiple Writing-Agents (brokers) and their staff under One Agency to allow staff to easily move between writing agents when maintenance multiplying broker clients for multiple brokers under one agency. – Currently in flight with staff log ins
-Employer States be changed to Employer Status. –(Priority #4)

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-Employer Active Status be changed to the following – (Priority #4)

- *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

-Employer Inactive Status be changed to the following;- **(Priority #4)**

-Termination for Non-Payment
-Pending Termination (for groups whom are receiving their 2nd delinquency notice-trigger)
-Voluntary Termination
-Termination Non-Payment (Binder)- new groups only
-Terminated- Failed Eligibility- New and renewing groups)

-Broker Quoting Tool- based off of CCA Code – **(Priority #5)**

-Quoting tool be allowed for GA's and Brokers
-Quoting tool allow quoting throughout the year but only allow quotes to be claimed when they fall within 90 days of the effective date.

- *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 total 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 total 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

-Super User Access to reset client password (alt expand forgot password option to forgot username, and forgot email/email account no longer in use).- will incorporate feasibility w. staff log-in work as it is all security related.- note HBX Staff advised super user access to reset passwords is not an option that can be explored.

Bugs:

-Sort function on client list page- will be investigated by HBX PM team
-ER States do not change- will not be investigated considering the proposed remake from priority #4 above
-Password Reset does not work most of the time (need IT analysis) - will be investigated by HBX PM team
-Web-Form defect - will be investigated by HBX PM team
-Employee Changes do not flow back to employer accounts- will be investigated by PM/SHOP teams
- Need confirmation of employer lock-out after 120 days similar to broker, and if so can it be adjusted- Andre to investigate.

Other:
Need to review the lift with adjusting the census export. Brokers need employer, dependents, and home zip code- PM to investigate how to fit this in to scope mentioned above as it last minute add.

Other (tabled for a different audience):

-HBX Revisit of accepting CC payments
-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
-Allowing HRA products in the market place

Closing Remarks: Kenneth concludes the talking points by mentioning the final occurrence can now be cancelled as we have complete two occurrences worth of work into one session. Kenneth, Mila, and Janet all agreed to convene the group quarterly to provide an status on where we are with projects 1-5 above over the next 4 quarters followed by 6 and above for time frames into the 2020 PY.