

CalHEERS Release Notes – 17.9 Certified Enrollers

Release Date: September 25, 2017

CalHEERS will be updated to version 17.9 on September 25, 2017. These release notes are intended to inform you of important changes to the functionality of CalHEERS.

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Application Menu Simplifies Editing

The CalHEERS application returns to the "Application Menu" after every section to allow users to change their information before submitting.

- Green check marks provide high-level view of progress
- Users can review and edit household and member level information
- Users are prompted when sections are incomplete before moving on
- Household Information: Income and taxes
- Individual Information: Healthcare, SSN and immigration

Updated Look and Feel of Application

Previously, the CalHEERS application collected the same information for all consumers in a systematic, if non-user friendly process. The navigation and messaging provided in CalHEERS lead to frustration for many users. Also, there were some federal regulations that were not being met regarding the collection of information for some groups, such as veterans.

Now, the interface is easier to read and questions are user-friendly. Since not all questions are needed for all consumers, the application is now "dynamic" meaning questions that do not apply to a user are not displayed. This results in fewer questions and additional time savings for everyone.

Although the look and flow of the application has changed, users will continue to collect and input the same information as before.

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Application Menu		
Introduction	Review	
Household Information	Start	
Individual Information		
Review & Submit		
	Application Menu Introduction Household Information Individual Information	Application Menu Introduction Review Household Information Start Individual Information Sum

Application Menu



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Time Saving for Renewals

Previously, when a consumer wanted to renew their CalHEERS application, CalHEERS required them to review the entire application. This was a time consuming process, especially for those who knew no changes had occurred.

Now, enrollers may select t "No Changes to Report" and skip ahead to the end. If a consumer changes their mind, you can always edit their info on the review pages. There are no new data fields required to renew for 2018.

Renewal Landing Page

One Last Chance to Change

Previously, when the application was completed, the consumer or enroller was provided a list of questions to review.

Now, with the improved interface it is much easier to review the application for completeness and edit specific sections.

- Household members now display with distinctive icons
- All member info is easily editable
- Users can navigate to each member or edit primary contact info separately

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 Application Menu Your onswers will be saved 	
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Qualifying life event: N/A	Edit
Applying for free or low-cost health ca	are? No
Review Household Members:	Edit
66 yrs Maria W. 25 yrs	Max W. 13 yrs
Jamie W. Tanya W 18 yrs 28 yrs	ν.



New Language for Reasonable Opportunity Period (ROP) Status

Previously, when consumers failed to provide <u>required follow-up documentation</u> within their Reasonable Opportunity Period (ROP), they were automatically terminated in CalHEERS or given an extension by the Service Center. Unfortunately, it was difficult to find that information within CalHEERS indicating the reason for termination. Enrollers previously had no visibility into the cases they managed.

New messages have been added to indicate the ROP status on two pages within CalHEERS; the Eligibility Results Page and the Transaction History Page. These messages are designed to better inform enrollers and consumers about their ROP status:

Eligibility Results Page: The due date to verify income has passed.

Transaction History Page: Reasonable Opportunity Period Expiration Date Updated