Release Date: February 12, 2018

CalHEERS will be updated to version 18.2 on February 12, 2018. These release notes are intended to inform you of important changes to the functionality of CalHEERS.

Medi-Cal Renewal Cases No Longer Prevent Covered California Enrollment

Previously, cases going through Medi-Cal Renewal for one member of the household prevented enrollment into a Covered California health plan for other members of the family. These cases required assistance from Covered California or counties to close the MAGI Medi-Cal renewal to complete enrollment. Cases were stuck when the county determines ineligibility or other negative action.

There were cases where the consumers were Covered California eligible, but they were unable to select a plan online. A Help Desk ticket was required to resolve many of these cases. This process was inefficient and consumers sometimes experience a gap in health care coverage.

Now, CalHEERS automatically closes Medi-Cal Renewal cases when all Medi-Cal members are found ineligible or discontinued. Consumers can change or select a plan so long as at least one member is eligible or conditionally eligible to a Covered California plan. Consumers that are eligible to Covered California will be able to select a plan without assistance from Covered California Service Center staff, the CalHEERS Help Desk staff, and county coordination.

Identification Verification Upgraded

Previously, when verification of the primary contact identity is required, and the consumer could not provide documents to the Certified Enrollers, the application would automatically contact the Federal Data Services Hub to perform the remote identity proofing process.

Now the Federal Data Hub has been upgraded to include new security features and the posting of new and modified messaging when using this process. The messages provide specific response codes to those who fail the process and directions to call the vendor Experian to resolve any issues. There are many new scenarios with associated messages. Examples of messages are:

- HE000050 – RF3 - Use Limit Violation - User has attempted to remote identity proof 6 times within 16 hours through Hub and must wait allotted time before attempting identity proofing again
- HE200037 - SSN required to access consumer's file, have consumer input SSN

Consumers who submitted an application prior to the implementation of the identity proofing functionality, must be identity proofed if they report a change to the primary contact page after the implementation of identity proofing.

Password and Security Question Updates

Previously, some consumers experienced frustration with the password and security questions and were forced to call an enroller or the Service Center for assistance.

Now, CalHEERS has updated the password and security criteria so the rules are easier to understand and would make it less likely to have calls made to the Service Center or Certified Enrollers to assist with the account. This enhancement does not change any current passwords or force consumers to choose new ones.
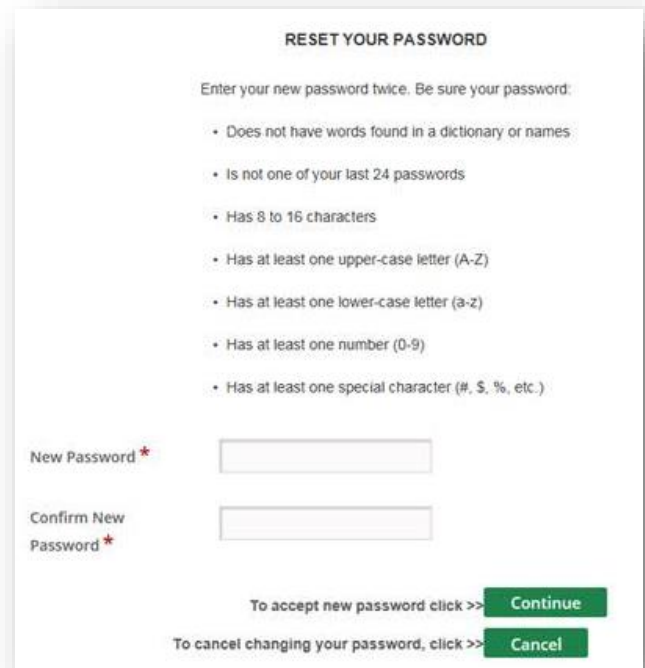
Enhanced Agency Portal

The enhanced functionality that will be implemented with CalHEERS Release 18.2 will help the Certified Insurance Agency Manager, manage all Covered California business for the Agency and provide tools to oversee Agents, Agency book of business, Agent delegations, consumer cases and the Agency account with a single integrated tool.

RESET YOUR PASSWORD

Enter your new password twice. Be sure your password:

- Does not have words found in a dictionary or names
- Is not one of your last 24 passwords
- Has 8 to 16 characters
- Has at least one upper-case letter (A-Z)
- Has at least one lower-case letter (a-z)
- Has at least one number (0-9)
- Has at least one special character (#, $, %, etc.)

New Password *

Confirm New Password *

To accept new password click >> Continue

To cancel changing your password, click >> Cancel

The Agency Portal has been developed so that Agency Managers can manage their business more efficiently. The Agency Manager owns the business, creates Agent accounts, and is the overall owner of the Agency book of business.

Please be aware that the Agency Portal is only accessible by the Certified Insurance Agent designated as the Agency Manager. All other Agents will continue to access their existing Agent portal and will see no changes.

Here is a list of the new functionality for Agency Managers that will be implemented with CalHEERS Release 18.2:

- Filter or sort Agents associated with the Agency
- Update Agent's contact and profile Information, and Active/Inactive Status
  - Review our Edit Agent Within Agency Job Aid >>
- View and export Book of Business for:
  - Agency
  - Agent within an Agency
  - Agency Manager
  - Review our Book of Business Export Job Aid >>
- Consumer delegations:
  - View, filter, and sort all delegated consumers for Agency
  - Complete and submit an application for a consumer on behalf of an Agent within the Agency
  - Accept an Agent's pending delegation request
  - Review our Acting On Behalf Of An Agent Job Aid >>
- Move some or all consumer delegations from one Agent to another within the Agency
  - Review our Transferring Consumers within an Agency Job Aid >>

"Get Help" Now Lists Agencies

Previously, when consumers were looking for an Agent's assistance, on their own or through the Service Center, the system provided a list of Agent names. Unfortunately, if the consumer did not know the name of the Agency, which they may have seen on a Storefront (Enrollment Center), they were unable to look that up the name of the Storefront. If the consumer noticed a Covered California logo on a business and remembered the name of the business, that information would not help them find their local agent.

Now, the "Get Help" experience has been improved to list both the Agent and Agency name in the contact information provided. When a consumer searches, as long as they know any part of the Agency name, the Agency will be listed. This new feature will help link a consumer to their local Agent and assist in the development of a closer relationship to the community.

17 Agents found 95815 Spanish				SEARCH AGAIN
Name	Contact Information	Distance	Product Expertise	Languages
Maria Camden	**Camden Insurance** 1601 Exposition Blvd Sacramento, CA 95815 916-222-8888	0.0m	Health, Dental, Vision	English, Spanish
Sarah Hart	**Insurance with a Hart** 123 Test st Test, CA 95833 875-877-8789	3.1m	Health, Dental, Vision, Life, Medicare, Medi-Cal, CHIP, Workers Compensation, Property/Casualty	English, Sahaptian, Spanish