



CalHEERS Release Notes – 17.2 Certified Enrollers

February 13, 2017

CalHEERS, also known as the online application, will be updated to version 17.2 on February 13, 2017. These release notes are intended to inform you of important changes to the functionality of the application.

Release Note: CalHEERS Eligibility Notice (NOD01) will now generate in 12 languages

Previously, the Covered California Eligibility Notice was generated in English and Spanish only.

Now, the NOD01 will generate in 1 of 12 languages. The language output which depend on the consumer's selected language preference setting for 'written' on the *Primary Contact* page.

These languages are:

- | | | |
|-------------|------------|----------------|
| 1) English | 5) Chinese | 9) Russian |
| 2) Spanish | 6) Hmong | 10) Tagalog |
| 3) Arabic | 7) Khmer | 11) Vietnamese |
| 4) Armenian | 8) Korean | 12) Farsi |

Release Note: Certified Enrollment Counselor Delegation Will not Remove after Effectuation

Previously, CalHEERS automatically removed the CEC delegation when a user enrolled and effectuated a plan.

Now, CalHEERS will not automatically remove the CEC delegation when a user enrolls and effectuates a plan.

- The CEC's delegation will persist after the application is submitted unless the CEE, CEC, SCR admin, or the consumer removes the delegation.
- The CEC's delegation will persist after the enrollment is effectuated unless the CEE, CEC, SCR admin, or the consumer removes the delegation.
- The CEC will continue to have the privileges to work on the case the same way as before enrollment (Report a Change, Submit Application, Plan Selection, Renewals, etc.)

Release Note: Verification Documents can now be uploaded to the Documents & Correspondence page regardless of eligibility or case status

Previously, documents could only be uploaded on the *Documents and Correspondence* page if the case was in a *Conditionally Eligible* status only.

Now, documents can be uploaded on the *Documents and Correspondence* page regardless of eligibility or case status (even if case is terminated). There are also two new buttons on the Documents and Correspondence page: **Upload New Document** and **Link to ECM Document**. The '**Link to ECM Document**' is used to link

Documents mailed or faxed in by the consumer to the Covered California back office. Certified enrollers should access the '**Upload New Document**' link to attach documents to the consumer's case.



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Release Note: Agent Book of Business *Consent Dates* and *Consent Years* Corrected

Previously, the ***Consent Date*** and ***Years of Consent*** details in the Agent Book of Business displayed incorrectly. It made it impossible to use the Book of Business as a tool to outreach consumers who were in danger of their consent expiring.

Now, the ***Consent Date*** and ***Years of Consent*** data extracted to the Agent Book of Business will be correct and the information will display correct on the active consumer page in the Agent, CEE and CEC portal.

Release Note: My Security Profile title added to the Agent and Certified Enrollment Counselor and Entity portals

Previously, there were two different areas in the CIA, CEC and CEE portals titled *My Profile*. Both links were used to perform different functions, but were labeled identically.

Now, the link previously titled *My Profile* in the upper right-hand corner of the portal will now be titled *My Security Profile*. This is better aligned to match the function of the page that enables users to change their password, personal details, PIN and One-Time Passcode.

Release Note: Employer Contact Information is now required for all online applications with APTC eligibility

Previously, the online application did not require users to complete the '**Employer Contact Information**' section of the *Personal Data – Health Insurance Information* page of the application before enrolling in a plan for APTC eligible/conditionally eligible consumers.

Now, consumers with APTC conditional eligibility or eligibility are required to provide this information on the online application in a new section titled *Employer Contact Information*, accessible via the *Actions* pane on the consumer homepage or after viewing the *Eligibility Results* page.

Release Note: Employer noticing will become automated to notify employers that their employees have coverage via the Exchange

Previously, when consumers provided Certified Enrollers with income information and optional employer contact information on the *Healthcare* page of the online application, there was no reconciliation or notification to employers regarding their employees enrolling in coverage via the California Health Exchange.

Now, Covered California will send notices to employers when their employees have a Covered California plan in the enrolled status and:

- 1) When a consumer has an Initial determination of eligibility for APTC with active employer income
- 2) When a consumer renews for the next benefit year, is eligible for APTC with active employer income
- 3) When a consumer, who is eligible for APTC, reports a new current employer
- 4) When a consumer, who is eligible for APTC, updates employer information and an employer notice has not been generated in the benefit year



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A copy of the employer notice will automatically upload to the consumer's *Documents & Correspondence* page for reference.

Release Note: Income Pages Enhancements

Previously, the online application contained income questions that created too much variance in the way income was entered. Depending on the end user, it was confusing and difficult to understand.

Now, there is a re-designed Income section of the Online CalHEERS Application that will change the way income is entered. The improvements include:

- Income page language upgrade
- Implemented income grouping with smart form technology
- New hover text added
- Added American Indian/Alaska Native (AI/AN) income subtype that is countable for Magi-Medical
- Income is now counted for Registered Domestic Partners
- Other Taxable Income replaces the 'Miscellaneous' option for the 'What type of Income?' Dropdown on the *Add Other Income* page
- Lump sum income reported in the month of application triggers an additional eligibility run (month of application and for the month after application) when at least one member is not found MAGI M/C eligibility

Review our [Income Enhancement Job Aid](#) for step-by-step instructions on the update.