

<b>Distribution Date:</b>	June 20, 2014	<b>CIT #0107-14</b>																		
<b>Subject:</b>	<b>County - Processing the Backlog of Applications Pending in Open Enrollment</b>																			
<b>From:</b>	CalHEERS Project																			
<b>To:</b>	Covered California Exchange, DHCS, CWDA, Counties, Covered California Service Centers, SHOP Service Centers, CEC Assistance Service Centers, SAWS, and OSI SPOCs																			
<b>SPOC to Forward:</b>	<p><b>Please forward to appropriate impacted staff, contacts, or leads in your organization:</b></p> <p><input checked="" type="checkbox"/> General</p> <p><input type="checkbox"/> Contract/MOU/IAA</p> <p><input type="checkbox"/> Budget/Fiscal</p> <p><input type="checkbox"/> Policy</p> <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/> Eligibility</td> <td><input type="checkbox"/> Plan Management</td> <td><input type="checkbox"/> Financial Management</td> </tr> <tr> <td><input type="checkbox"/> Enrollment</td> <td><input type="checkbox"/> Assister Management</td> <td><input type="checkbox"/> Web Portal</td> </tr> <tr> <td><input type="checkbox"/> SHOP</td> <td><input type="checkbox"/> Navigators/Brokers</td> <td><input type="checkbox"/> Customer Service</td> </tr> <tr> <td><input type="checkbox"/> Notices</td> <td><input type="checkbox"/> Usability/ADA</td> <td><input type="checkbox"/> Languages/Translation</td> </tr> <tr> <td><input type="checkbox"/> Reports (<input type="checkbox"/> Fiscal <input type="checkbox"/> Caseload Movement <input type="checkbox"/> Management <input type="checkbox"/> ACA-specific)</td> <td colspan="2"></td> </tr> <tr> <td colspan="3"><input type="checkbox"/> Other _____</td> </tr> </table> <p><input type="checkbox"/> Application Development</p> <p><input type="checkbox"/> Technical</p> <p><input type="checkbox"/> Conversion</p> <p><input type="checkbox"/> Batch and Interfaces</p> <p><input type="checkbox"/> Testing</p> <p><input type="checkbox"/> Implementation</p> <p><input type="checkbox"/> Organizational Change Management</p> <p><input type="checkbox"/> Training</p> <p><input type="checkbox"/> Education and Outreach</p> <p><input type="checkbox"/> Service Center</p> <p><input type="checkbox"/> Other _____</p>		<input type="checkbox"/> Eligibility	<input type="checkbox"/> Plan Management	<input type="checkbox"/> Financial Management	<input type="checkbox"/> Enrollment	<input type="checkbox"/> Assister Management	<input type="checkbox"/> Web Portal	<input type="checkbox"/> SHOP	<input type="checkbox"/> Navigators/Brokers	<input type="checkbox"/> Customer Service	<input type="checkbox"/> Notices	<input type="checkbox"/> Usability/ADA	<input type="checkbox"/> Languages/Translation	<input type="checkbox"/> Reports ( <input type="checkbox"/> Fiscal <input type="checkbox"/> Caseload Movement <input type="checkbox"/> Management <input type="checkbox"/> ACA-specific)			<input type="checkbox"/> Other _____		
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<b>Description:</b>	<p><b>Purpose</b></p> <p>The purpose of this CIT is to provide information to Counties on the processing of the backlog of applications pending in Open Enrollment. When these cases are processed successfully in SAWS, county staff should use the attached Process Guide as a workaround to process APTC cases and enroll consumers in a Covered California plan in CalHEERS.</p> <p><b>Background</b></p> <p>Counties received cases via multiple pathways during open enrollment, including cases from CalHEERS via eHIT that were determined as potentially eligible for Medi-Cal (MC). As pending MC eligible cases are worked by County Eligibility Workers (CEW), some cases are actually determined as APTC or mixed APTC/MAGI MC household cases once the determination is finalized.</p> <p><b>Policy Assumptions</b></p> <p>The following policy assumptions are made regarding the processing of the backlog of Open Enrollment applications that were pended MC and ended up being determined as APTC eligible cases:</p> <ul style="list-style-type: none"> <li>✓ Applications are guided by open enrollment policies.</li> <li>✓ Applications are dated on or before 4/15/14.</li> <li>✓ Applications are processed based on original reported data.</li> <li>✓ Consumer may choose retro-effective period enrollment <u>only upon request</u>.</li> </ul>																			

- ✓ Consumer who is eligible for retro-effective enrollment may choose to begin enrollment in any month of the retro-effective period but premiums will then be due consecutively from that month on through to prospective month.

**Processing Backlog**

For cases deemed APTC eligible, Counties will need to contact consumers to determine what start month of their eligible enrollment period they want to effectuate plan enrollment. Refer to the attached Process Guide for specific steps.

**IMPORTANT – please explain to Consumer where noted:**

- ✓ CEW will set prospective enrollment date in CalHEERS for consumer, unless consumer requests retro-effective enrollment date.
- ✓ If a consumer requests retro-effective enrollment, CEW should:
  - help the consumer consider the cost of the medical expenses incurred compared to the total amount of premiums that will be owed.
  - ensure consumer is aware that all the premiums for retro-effective months of APTC eligibility must be paid.
- ✓ CEW should ensure the consumer understands the monthly premium amount, and that premiums are due to the plan provider – not Covered California.
- ✓ CEW should communicate to the consumer that contact information for plan providers is available at CoveredCA.com.
- ✓ CEW can withdraw application prior to enrollment at consumer’s request:
  - Refer to CalHEERS *Job Aid – Withdraw an Application* for functional steps.

**Consumer Access Code**

Consumers who do not have an account linked to their case will need an Access Code to set up a password and login to their CalHEERS account independently.

**Note:** After the consumer checks the box to agree to the Terms and Conditions of Use, on the following page, the consumer must select “Yes” when answering the question, “Do you have an existing case that you would like to link to this new account?” The “Yes” answer will prompt the consumer to enter the Access Code and to create a password.

Refer to CalHEERS *Job Aid – Link a Consumer Account to an Existing Application* for functional steps.

**IT Help Desk**

For Help Desk assistance, refer to CIT 0071-14 - CalHEERS Functional Support Center Closure – Counties.

**Referenced Job Aids**

Job Aids referenced in this CIT are attached for your convenience and are also available from the Covered California LMS.

If you have any questions regarding this CIT, please contact the primary or backup project contact.

<p><b>Primary Project Contact:</b></p>	<p>Contact this person for CalHEERS questions about the contents of this CIT.</p> <p>Jane Watson          (916) 999-3755  <a href="mailto:jane.a.watson@calheers.ca.gov">jane.a.watson@calheers.ca.gov</a></p>
<p><b>Backup Project Contact:</b></p>	<p>Lonnie Perez          (916) 999-2396  <a href="mailto:Lonnie.Perez@CalHEERS.ca.gov">Lonnie.Perez@CalHEERS.ca.gov</a></p>
<p><b>Primary Policy Contact:</b></p>	<p>Contact this person for POLICY questions about the contents of this CIT.</p> <p>Bianca Vargas          (916) 403-4415  <a href="mailto:Bianca.Vargas@covered.ca.gov">Bianca.Vargas@covered.ca.gov</a></p>
<p><b>Backup Policy Contact:</b></p>	<p>Anjonette Dillard          (916) 228-8273  <a href="mailto:Anjonette.Dillard@covered.ca.gov">Anjonette.Dillard@covered.ca.gov</a></p>
<p><b>Attachments:</b></p>	<p>Process_Guide_-_Processing_the_Backlog_of_Applications_Pending_in_Open_Enrollment.pdf          Job_Aid_-_Withdraw_an_Application.pdf          Job_Aid_-_Link_a_Consumer_Account_to_an_Existing_Application.pdf</p>
<p><b>SharePoint Link:</b></p> <p><b>NOTE:</b>  <b>SharePoint access is not available to counties</b></p>	<p><a href="#">CIT Folder</a></p> <p>OR</p> <p>If you have access to CalHEERS SharePoint, you may also retrieve the CIT document and attachments by following these steps</p> <ol style="list-style-type: none"> <li>1. In the left menu, click the “Shared Documents” hyperlink</li> <li>2. Click the “Communications” folder icon</li> <li>3. Click the “CIT” folder icon</li> <li>4. Click the “2014” folder icon</li> <li>5. Click the appropriate CIT # folder icon</li> </ol>