| **#**  **CalHEERS 24-Month Roadmap**  **2021 Initiatives – DRAFT – By Category**  **(As of 12/05/2019)** | **Initiative Name and Brief Descriptions** | **Suggested Target Release Timeline** | **Category** |
| --- | --- | --- | --- |
|  | 2021 Renewals CR -  *This is the annual CR to update the required contribution tables and may include automations of existing manual processes or small updates to program rules* | 2020 Q3 | Annual Renewals |
|  | Eligibility Preview/Standby (BREfS - Phase C Part 4) -  *The objective of this initiative is to modify the eHIT architecture to add a CalHEERS Eligibility Preview for CEWs in SAWS and may also provide the preview capability via the CalHEERS portal for use by Covered CA SCRs and designated state staff for state managed programs in CalHEERS.* | 2020 Q3 | Business Rule Exposure for SAWS (BREfS) |
|  | Next day eligibility determination/remediation (BREfS - Phase C Part 3) -  *The objective of this initiative is to allow CEWs remediation of CalHEERS eligibility determinations to occur via eHIT after eligibility was finalized the day prior. This remediation will be subject to existing county case management processes for effectuating correct Medi-Cal eligibility in SAWS. This initiative could also provide the next day remediation capability via the CalHEERS portal for use by Covered CA SCRs and designated state staff for state managed programs in CalHEERS.* | 2020 Q3 | Business Rule Exposure for SAWS (BREfS) |
|  | Override eligibility determination functionality (BREfS - Phase C Part 2) -  *The purpose of this initiative is to enable CEWs to override CalHEERS eligibility determinations via eHIT, which will be subject to existing county case management processes for effectuating correct Medi-Cal eligibility in SAWS. This initiative could also provide the override capability via the CalHEERS portal for use by Covered CA SCRs and designated state staff for state managed programs in CalHEERS.* | 2020 Q3 | Business Rule Exposure for SAWS (BREfS) |
|  | Verifications Only Service and Separation of Verifications by Source (BREfS - Phase D) -  *The intended outcome of this initiative is to modify both the CalHEERS portal and the eHIT architecture to add a separate Verifications Only service, while continuing to maintain the existing functionality for the combined verification and business rules services.* | 2021/2022 | Business Rule Exposure for SAWS (BREfS) |
|  | Mega mandatory aid determination/remediation (BREfS - Phase C Part 5) -  *The purpose of this initiative is to align CalHEERS with the mega mandatory program and determine the remediation process.* | 2022 | Business Rule Exposure for SAWS (BREfS) |
|  | Individual Level Eligibility -  *This initiative is intended to enhance and streamline the individual level eligibility functionality in CalHEERS.* | 2021 | CalHEERS - Efficiency Improvements |
|  | Automate and Streamline the Annual FPL Updates -  *The objective of this initiative is to automate functionality for the Annual FPL Updates, without requiring a production release to make this annual process more efficient.* | 2022 | CalHEERS - Efficiency Improvements |
|  | CalHEERS Cloud Performance and Stage Environments Migration – The purpose of these technical initiatives is to modernize CalHEERS environments to adapt to changes more efficiently and cost effectively moving forward. | 2020 Q3 | Infrastructure Enhancements |
|  | CalHEERS Cloud Production and Disaster Recovery Environments – These technical initiatives will distribute production and disaster recovery environments into cloud environments, enhancing opportunities for increased flexibility, stability and availability for future production releases. | 2021 | Infrastructure Enhancements |
|  | Infants Initiative -  *The objective of this initiative is to enhance functionality for Medi-Cal Deemed Infants, provide ability to add Medi-Cal Access Program infants (MCAIP) and renewal functionality in CalHEERS, and to enhance existing CCHIP functionality.* | 2021 | New Programs |
|  | SB260 - Auto-enrollment for members transitioning from MC to CC - | 2021 | New Programs |
|  | Medi-Cal Plan Selection -  *The objective of this initiative is to provide the ability for MAGI Medi-Cal consumers to select a plan within CalHEERS.* | 2021/2022 | New Programs |
|  | County Inmate - Medi-Cal Inmate Program (MCIEP)  *The objective of this initiative is to allow CalHEERS to accept applications for the County Medi-Cal Inmate Program (MCIEP) from the SAWS access channel.* | 2022 | New Programs |
|  | Explore integration of Family Planning into CalHEERS -  *The objective of this initiative is to explore and develop a solution for integrating Family Planning (State Program) applications and eligibility determination functionalities into CalHEERS.* | 2022 | New Programs |
|  | Explore Horizontal Integration Improvements - |  | New Programs |
|  | State Subsidy California 3895s -  This CR will generate State 3895 forms mirroring the Federal 1095-A forms sent to consumers and will set up an annual process of integration with the Franchise Tax Board (FTB). | 2020 Q3 | Notice Updates |
|  | 2020 20.9 Notice Change Request -  *The objective of this initiative is to update notice language to align with changes made this release within CalHEERS.* | 2020 Q3 | Notice Updates |
|  | Rewrite NOD12 and Reduce number of NOD12 - | 2020 Q4 | Notice Updates |
|  | NOD62 (Federal) and Form 1095s - | 2020 Q4 | Notice Updates |
|  | SB 1341 AB 617 - Notice Improvements -  *The objective of this initiative is to align CalHEERS with Senate Bill 1341 and Assembly Bill 617 and consolidate and send notices for Mixed Households in SAWS.* | 2021 | Notice Updates |
|  | Build OPA-based CalNOD01 Noticing System and update CalNOD01 triggering conditions -  *The purpose of this initiative is to create a CalNOD01 noticing system that lives within the business rules engine that will have the ability to effectively, efficiently, and accurately notice consumers about their eligibility determination.* | 2021 | Notice Updates |
|  | 21.9 Notice Change Request  *The objective of this initiative is to update notice language to align with changes made this release within CalHEERS. This includes enhancements for accommodating State Subsidy changes in 2020.* | 2021 | Notice Updates |
|  | CalSAWS Migration Testing Support -  *The objective of this initiative is to facilitate the interface testing needs for LRS and C-IV migration into CalSAWS system, and subsequently CalWIN to CalSAWS*. | 2020 - 2023 | Partner Interface Updates |
|  | County of Responsibility/Case Linkage Updates -  *The objective of this initiative is to address the remaining scenarios that require a Help Desk ticket to update the County of Responsibility linkage with SAWS.* | 2021 | Partner Reconciliation Improvements |
|  | CalHEERS - SAWS Recon -  *The objective of this initiative is to develop a monthly reconciliation process of case eligibility data between CH and SAWS.* | 2022 | Partner Reconciliation Improvements |
|  | MAGI Medi-Cal Income Budget Periods -  *This initiative enhances the use of three budget periods to properly align with State law and Federal regulations and the budget period options selected in the SPA. As part of this initiative, the Projected Annual Income and Reasonably Predictable Future Income budget periods will be separated to allow for better alignment with current policy.* | 2020 Q3 | Program Updates |
|  | Placeholder CR to update State Subsidy program rules for year 2 | 2020 Q3 | Program Updates |
|  | ROP Batch Configuration Enhancements -  *The purpose of this initiative is to run the ROP Batch functionality in a controlled manner by running the ROP batch for a controlled number of consumers for attributes with verification statuses that are turned "On" in the ROP Batch configuration page. The change will also provide simulation functionality for the ROP Batch.* | 2021 | Program Updates |
|  | Consumer Protection Programs -  *The objective of this initiative is to determine eligibility for the Consumer Protection Programs (CPPs) in the event a consumer lose eligibility in their coverage group.* | 2021 | Program Updates |
|  | IAP Transition Enhancements -  The objective of this initiative is to improve the transition process for consumers moving between Covered CA and Medi-Cal programs. In addition, it will focus on when to evaluate an individual for Covered California Programs based on the Medi-Cal discontinuance reason. | 2020 Q3 | Report a Change (RAC)/Special Enrollment Period (SEP) |
|  | SEP Dropdowns and Workflow -  *The objective of this initiative is to update the SEP reasons in the online application and also update eHIT/SAWS accordingly.* | 2020 Q4 | Report a Change (RAC)/Special Enrollment Period (SEP) |
|  | Provide messaging – Remove a member  *The objective of this initiative is to ensure downstream processes occur when a consumer requests to remove a household member from a case in CalHEERS.* | 2021 | Report a Change (RAC)/Special Enrollment Period (SEP) |
|  | Semiannual examination of data sources for enrollees in APTC or CSR -  *The objective of this initiative is to align with federal and state regulations to examine data sources on a semiannual basis for changes in circumstances in households receiving APTC or CSR.* | 2021 | System Management Tools Software Enhancements |
|  | Implementation of GI PCP Selection Module and Provider Map -  *The objective of this initiative is to add functionality to the existing Provider Directory for physicians designated as Primary Care Providers (PCPs). The new functionalities are part of the GI PCP Module: 1) PCP Assignment for QHP 2 ) Network Density Tools: This feature will allows consumers to search an area where they desire coverage and determine in real-time how many providers are active in an area for a health plan issuer.* | 2021 | System Management Tools Software Enhancements |
|  | Documents and Correspondence - Functional Design - UI Updates (UCD)  *The objective of this initiative is to update the Document & Correspondence pages to improve the user experience.* | 2020 Q3 | User Experience Updates |
|  | Former Foster Youth: Hide Verifications for Former Foster Youth (UCD) -  *The objective of this initiative is to improve the upload document experience for Former Foster Youth.* | 2020 Q3 | User Experience Updates |
|  | GI Enrollment Enhancements (Update may not apply hover text, add sort feature for selected providers, and add “back to preferences” link to the plan tile) -  *Multiple benefit display enhancements requested by the Plan Management Division.* | 2020 Q3 | Worker Productivity Updates |
|  | Administrator Search Enhancements – User Centered Design Updates (UCD) - | 2020 Q3 | Worker Productivity Updates |