


**AB 1296 Stakeholder Workgroup**

**Meeting Notes**

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| <p><b>Date:</b> August 30, 2018<br/> <b>Time:</b> 10:00 AM – 12:00 PM<br/> <b>Location:</b> Department of Health Care Services, 1700 K Street, 1<sup>st</sup> Floor Conference Room, Sacramento, California<br/> <b>Conference Call:</b> 866-746-9446 ; Passcode: 9166982</p> |  |
| <p><b>Meeting Facilitators:</b> Doina Young &amp; Fei Collier</p>   |   |
| <p><b>Meeting Sponsors:</b> Katie Ravel (Covered California); Rene Mollow (DHCS); James Duckens (CalHEERS)</p>  |   |

**ATTENDEES:**

| <b><u>Covered California (CC)</u></b>               | <b><u>DHCS</u></b>                                  | <b><u>CalHEERS</u></b>                                   | <b><u>Stakeholder Community</u></b>                 |
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| <input checked="" type="checkbox"/> Katie Ravel     | <input checked="" type="checkbox"/> Rene Mollow     | <input checked="" type="checkbox"/> James Duckens        | <input checked="" type="checkbox"/> Cori Racela     |
| <input type="checkbox"/> Karen Johnson              | <input checked="" type="checkbox"/> Sandra Williams | <input checked="" type="checkbox"/> Chris Martinez       | <input checked="" type="checkbox"/> Jen Flory       |
| <input type="checkbox"/> Karen Ruiz                 | <input checked="" type="checkbox"/> Yingjia Huang   | <b><u>CWDA</u></b>                                       | <input checked="" type="checkbox"/> Alicia Kauk     |
| <input checked="" type="checkbox"/> CC Team Members | <input checked="" type="checkbox"/> Fei Collier     | <input type="checkbox"/> Cathy Senderling/Assmaa Elayyat | <input checked="" type="checkbox"/> Lucy Quacinella |

**AGENDA and NOTES**

|           | <b><u>Agenda Topic</u></b> | <b><u>Discussion Facilitator</u></b>  | <b><u>Notes</u></b>   |
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| <b>1.</b> | <b>Introductions</b>       | <ul style="list-style-type: none"> <li>Fei Collier/ Doina Young (DHCS)</li> </ul> | In the interest of time, introductions took place in the room only. Individuals on the phone only introduced themselves as they had comments or questions. An update has been provided regarding the room having a built-in conference phone system with microphones. |
|           | <b>AB1296 Web Page</b>     |   | <ul style="list-style-type: none"> <li>Fei highlighted the changes on the <a href="#">AB1296 webpage</a> done for</li> </ul>  |

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| 2. | Changes                          | <ul style="list-style-type: none"> <li>• Fei Collier (DHCS)</li> </ul>   | <p>the ADA compliance purpose.</p> <ul style="list-style-type: none"> <li>• Past meeting information can be located <a href="#">AB 1296 Stakeholder Meeting Archive</a>.</li> <li>• Some of the documents have been updated to comply with the ADA requirements (i.e. color, tables etc). The content has remained the same.</li> </ul>   |
| 3. | R18.6                            | <ul style="list-style-type: none"> <li>• Chris Martinez (CalHEERS)</li> </ul>  | <ul style="list-style-type: none"> <li>• Chris (CalHEERS) shared highlights of key change requests that were implemented on 06/03/2018.</li> </ul>  |
| 4. | R18.7                            | <ul style="list-style-type: none"> <li>• Chris Martinez (CalHEERS)</li> </ul>  | <ul style="list-style-type: none"> <li>• Chris (CalHEERS) shared highlights of key change requests that were implemented on 07/22/2018.</li> </ul>  |
| 5. | User Center Design (UCD) Updates | <ul style="list-style-type: none"> <li>• DHCS Team Members (Yingjia)</li> <li>• Cov CA Team Members (Valerie)</li> </ul> | <p><u>DHCS Overview</u><br/><i>What and Why UCD?</i></p> <ul style="list-style-type: none"> <li>• Two streams of UCD work were approved as part of the CalHEERS governance process to pilot greater efficiencies in the delivery of sponsor-requested system enhancements. UCD is currently a “pilot” and is experimenting with a mixture of agile approaches.</li> <li>• Two streams are: <ul style="list-style-type: none"> <li>• Feature Stream: Driven by Covered California and contains a backlog of user stories collected through stakeholder feedback and forums/workshops that discussed the user experience of the application.</li> <li>• CR-Initiated or Maintenance Stream: A stream of work driven by parallel functional CR(s) in the pipeline for upcoming CalHEERS releases. This stream “pulls” user-</li> </ul> </li> </ul> |

interface impacts, translates them into user stories, and moves through the UCD process to develop solutions.

*Current UCD Approach*

- Sprint Ceremonies and Purpose (Attendees are Feature Stream Co-Leads and CR-initiated/Maintenance Stream Co-Leads)
  - Sprint Planning (every other Thursday)
    - Generate and prioritize user stories based on Executive Sponsors' Prioritization of Theme/Epic/Feature
    - Generate and finalize Acceptance Criteria for Sprint user stories
    - Point Estimation as needed
    - Decide on the readiness of bundling several sprints or user stories into CRFI, which will lead to an assignment of an official CalHEERS CR number, and later an appropriate CalHEERS release.
  - Core Team Working Session (the following Thursday after Sprint Planning)
    - Working session for in-progress design stories.
    - Real-time feedback to CalHEERS
  - Sprint Demo + Refine (usually Wednesday after Core Team Working Session)
    - Sprint demo to review user stories for acceptance
    - Real-time feedback to CalHEERS
    - Refine backlog
    - Sponsors' opportunity for retrospective
- UCD Executive Sponsor Team (Executive Sponsor Team)

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|    |       |   | <p>In effort to better coordinate and provide visibility of the user story backlog and the CR pipeline, CalHEERS has formed an “executive sponsor team” to prioritize the “themes” or “epics” for the Feature Stream and the prioritize the functional CRs for the CR-Initiated/Maintenance Stream. This group meets every other Thursdays (always on the same Thursday as the Sprint Planning ceremony), where the objective is to narrow the priorities for the UCD Sponsor Core Team. The priorities identified in this “UCD Prioritization” forum with the executive sponsor team will frame the working priorities of the Feature and the CR-initiated/Maintenance Streams.</p> <p><u>Covered California UCD update</u></p> <ul style="list-style-type: none"> <li>Reviewed the <a href="#">User Centered Design - Updates</a> document</li> </ul>   |
| 6. | R18.9 | <ul style="list-style-type: none"> <li><b>DHCS Team Members</b></li> <li><b>Cov CA Team Members</b></li> <li><b>CalHEERS</b></li> </ul> | <p>DHCS CRs</p> <ul style="list-style-type: none"> <li>CR# 109700- The intended outcome of this change request is to update FDSH verification triggers and caching rules to be in compliance with CMS guidance. This CR is currently in User Acceptance Testing (UAT) and is scheduled to be implemented in R18.9.</li> </ul> <p>CC CRs</p> <ul style="list-style-type: none"> <li>CR# 115338- Each year, CalHEERS and Covered CA include updates to the system for the next Renewal and Open Enrollment. This CR includes updating the Fair Share percentage based on federal provision and resolving user pain points from the most recent Renewals and Open Enrollment.</li> <li>CR# 117094- The purpose of this CR is to move the Fax Cover Page from the back of the notice to the front of the notice to better inform Covered CA consumers that are Conditionally Eligible that</li> </ul> |

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|    |       |   | <p>they need to provide documentation or more information. CR is scheduled for R18.9 implementation.</p> <p>CH CRs</p> <ul style="list-style-type: none"> <li>• CR# 112835- This CR is intended to meet accessibility requirements covered by Section 508 of the Rehabilitation Act of 1973. Specifically, there are areas that will be updated to meet updated regulations published on January 30, 2018.</li> <li>• CR# 115166- A majority of CalHEERS Portal consumer pages are on the React Framework. The major difference between the classic and redesigned pages is that the classic pages are not mobile-responsible. This CR is intended to update the remaining consumer pages to the React Framework in order to create a seamless experience for the consumer throughout the online process regardless of the device the consumer is using.</li> </ul> |
| 7. | R19.2 | <ul style="list-style-type: none"> <li>• <b>DHCS Team Members</b></li> <li>• <b>Cov CA Team Members</b></li> <li>• <b>CalHEERS</b></li> </ul> | <p><u>DHCS CRs</u></p> <ul style="list-style-type: none"> <li>• CR# 109927- This CR will allow CalHEERS to transmit data received from the federal hub to MEDS/SAWS and to provide state-funded PRUCOL immigrants full scope Medi-Cal eligibility based solely on a document.</li> <li>• CR# 92298- With the implementation of this CR, Title II income information received from Social Security will be included in determining reasonable compatibility with electronic sources. Additionally, a new disability indicator will be used to correctly place individuals into the L6/L7 aid code. This CR is currently in build and is scheduled for deployment in the 19.2 release.</li> <li>• CR# 126279- The purpose of the CR is to align the functionality with the State and Federal regulations regarding income</li> </ul>                                  |

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|    |   |   | <p>counting for dependents.</p> <p><u>CC CRs</u></p> <ul style="list-style-type: none"> <li>CR# 92295- This CR will upgrade the VLP service from H59 version 33 to H104 version 37, implement enhancements to the eHIT Service to allow information exchange between CalHEERS and SAWS for steps 1, 1a, 1b, 2 and 3 to be performed, and to implement enhancements to the CalHEERS Portal to capture additional information required by the upgraded service.</li> </ul> <p><u>CH CRs</u></p> <ul style="list-style-type: none"> <li>CR# 124966- The major difference between the classic and redesigned pages is that the classic pages are not mobile-responsible. This CR is intended to update the Admin pages to the React Framework in order to create a seamless experience for the user throughout the online process regardless of the device the user is using.</li> </ul> |
| 8. | <p><b>Stakeholder Requested Topic</b></p> | <ul style="list-style-type: none"> <li><b>Fei Collier (DHCS)</b></li> <li><b>Alicia Kauk (Stakeholder)</b></li> </ul> | <p><u>New Tax Filing Threshold:</u></p> <p>From advocates: Tax Cuts and Jobs Act of 2017 established a new filing threshold of \$12,000 for individuals under age 65, which applies to the 2018 tax year. This change means that more families are MC eligible because the income of dependents, which would have been included in total household income under the old rule, is now excluded. Discussion with DHCS, Covered CA, and CalHEERS:</p> <ul style="list-style-type: none"> <li>How is this new standard being adopted in CalHEERS and by counties?</li> <li>What action can be taken to ensure that consumers are aware of the new tax filing threshold</li> </ul>  |

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|    |                                    |  | <ul style="list-style-type: none"> <li>• Can a CH maintenance release advise consumers of the new tax filing threshold, an updated IRS link via CH, and other consumer messaging?</li> <li>• Healthcare.gov has already adopted the new tax filing – any change updates and an updated IRS link can be shared?</li> </ul> <p><u>MCAP Related/Concerns</u></p> <ul style="list-style-type: none"> <li>• Several policy issues to discuss on 09/10 meeting. <ul style="list-style-type: none"> <li>○ Eligibility for MCAP (pregnant women) is being posted late to MEDS.</li> <li>○ Pregnant women- eligibility in pregnancy related Medi-Cal in one month and next month their eligibility shows in MCAP. The only difference in the eligibility criteria is the income.</li> <li>○ Women dually enrolled in MCAP and in Medi-Cal with the SOC.</li> </ul> </li> </ul> <p>See action item noted below.</p> |
| 9. | <p><b>Next AB 1296 Meeting</b></p> | <ul style="list-style-type: none"> <li>• <b>Fei Collier (DHCS)</b></li> <li>• <b>Doina Young (DHCS)</b></li> </ul> | <ul style="list-style-type: none"> <li>• The date is forthcoming. The group will be notified via the AB1296 inbox.</li> <li>• The next AB1296 meeting will be hosted at Covered CA.</li> </ul>  |

**NEW ACTION ITEMS:**

| # | <u>Action Item</u>  | <u>Owner</u>   | <u>Due Date</u> |
|---|---|--|-----------------|
| 1 | Unplanned Pregnant Woman (UPW) - R18.6; R18.9 glossaries contain this acronym that doesn't have an explanation. CH to take this item back, review, and provide the definition of the UPW if applicable/used in the document.                      | Chris (CalHEERS)   | TBD             |
| 2 | Alicia Kauk informed the group regarding a broken link on the IRS website. The expectation is that consumers are informed and guidance to the county is issued. Alicia will share the link webpage via the AB1296 inbox 9email received on 09/10) | CalHEERS and DHCS & CC will follow up with Accenture (who is the federal liaison) and work on more facts findings with the internal team |                 |
| 3 | DIVS- how many documents are received by fax  | Covered CA   |                 |