There is no sound through your computer. You must dial-in on the telephone in order to hear the sound.

What’s New:

• Updated Functionality for Auto-Enrollment
• Updated Information on Addresses
• Duplicate HX ID Numbers

Date: August 21, 2019
Time: 10:00am – 11:30am
Dial-In Number: 1-855-897-5763
Conference ID: 9954199
If you see this message when logging into the webinar…

Please find this email:
Subject Line: 2019 Spring Training Recertification Overflow Reminder I What’s Coming
and click on the second link in order to log in.

Dial-In Number: 1-855-897-5763
Conference ID: 9954199
TODAY’S WEBINAR (CONT…)

• There is no sound through your computer.
  o Dial in to listen to the audio portion of
    the webinar using the audio
    instructions on your WebEx control
    panel.
  o All participants will remain muted for
    the duration of the program.

• Questions can be submitted using the
  Q&A function on your WebEx control
  panel;
  o We will pause periodically to take
    questions.
Today’s Webinar (Cont…)

A recording of the webinar and any related materials will be available online at our Spring Training webpage at:

https://info.nystateofhealth.ny.gov/SpringTraining
Your Feedback: Privacy & Security

Webinar Statistics:
• More than 96% said the webinar increased your knowledge of the topic!
• 96% said information from the webinar will allow you to better assist consumers.

Here’s what you said:
➢ “More than 1,000 people should be able to access the live sessions.”
➢ “Knowledge is strength when applied. This webinar will make us more effective in doing our job.”
➢ “Your webinar will help me and assisting consumers so much.”
Presenters

Welcome

Gabrielle Armenia
Bureau Director of Child Health Plus & Marketplace
Consumer Assistance

Panelists

Ruchika Bajaj
Bureau Director, Bureau of Business Requirements and Notices

Sara Oberst
Bureau Director, Exchange Application Support

Stacy Tuck
Medical Assistance Specialist 1, Bureau of Business Requirements and Notices
NY State of Health
Auto-Enrollment Functionality Updates!
## Current Functionality

<table>
<thead>
<tr>
<th>Scenario #1:</th>
<th>Coming Soon! Functionality as of 8/25/2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumers who complete a late renewal and become eligible for a program DIFFERENT than their current program must proceed to plan selection.</td>
<td>NY State of Health will automatically enroll (auto-enroll) consumers into a health plan with the same issuer whenever possible, even when their program eligibility changes.</td>
</tr>
<tr>
<td>• As long as a plan with the same issuer is available.</td>
<td>Goal: Continuous enrollment for consumers without gaps in plan coverage whenever possible.</td>
</tr>
</tbody>
</table>

### Scenario #2
NY State of Health re-runs eligibility automatically under certain scenarios. Examples:
- When a child enrolled in CHPlus turns 19
- When an EP or Medicaid enrollee turns 65
- When the hub returns updated information on a consumer’s immigration status

If consumers are disenrolled as a result of the system re-run, a notice is posted asking them to proceed to plan selection.

### Under the above scenarios:
- Existing program start date rules are applied (i.e. 15th of the month rule).
- This may result in gaps in plan coverage.
When a Medicaid, Essential Plan, or Child Health Plus enrollee has their eligibility change from one program to another (MA, CHPlus, or EP) during an:

- Automatic Renewal
- Manual Renewal
- Late Renewal - System Re-run
- the individual will be auto-enrolled in that plan, to the maximum extent possible, as long as the issuer offers a plan for that program.

### Exception: There may be a gap in plan coverage if:
- the consumer chooses to enroll in a different plan than they had the previously, or
- the same plan is no longer available through the Marketplace.
What about QHPs?

Automatic Renewals with Auto-Enrollment
When eligibility changes from one program to another, if the same health plan exists, in most cases, the individual will be auto-enrolled in the same plan.
- QHP all types to MMC
- QHP all types to CHPlus (Subsidized only)
- QHP all types to EP

Late Renewals - QHPs do not offer late renewal.
If a QHP enrollee renews between 12/16-12/31, or after their coverage ends, existing start date rules apply based on the program they are now eligible for and when plan selection is completed.

System Re-run Scenarios
If a QHP enrollee is re-determined for MMC, subsidized CHPlus, or EP, the individual will be auto-enrolled in that plan, if the same health plan exists.
Exceptions

Auto-Enrollment is NOT possible when:

- A consumer is newly eligible for Full-Pay CHPlus.
  - **Reminder:** If the child was previously enrolled in Subsidized CHPlus and the family chooses the same Full-Pay CHPlus plan before the subsidized coverage ends, coverage will continue in that plan without any gaps.

- A consumer is newly eligible for a QHP (Subsidized or Full-Pay).

- A consumer goes from a QHP to a QHP in another county.

- A consumer completes a manual renewal and goes from a QHP to MMC/EP/CHPlus.

When Auto-enrollment is not possible, the consumer **must** proceed to plan selection during the timeframe specified in their notice.
  - they can select: [Pick a New Plan]
  - enrollment for the new plan will be based on existing program rules.
When the subscriber on a CHPlus policy has their coverage cancelled or terminated (for reasons other than non-payment), the entire policy is cancelled.

<table>
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<th>Coming Soon!</th>
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<tbody>
<tr>
<td>The family needs to take additional steps to re-enroll their remaining eligible children.</td>
<td>Remaining eligible children will be auto-enrolled back into the same plan.</td>
</tr>
<tr>
<td></td>
<td>• Youngest member of the household will become the subscriber.</td>
</tr>
<tr>
<td></td>
<td>• Premium responsibility amount will be re-evaluated.</td>
</tr>
<tr>
<td></td>
<td>• A notice will be sent to the consumer.</td>
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<tr>
<td></td>
<td>• The plan will also be notified.</td>
</tr>
</tbody>
</table>
NY State of Health is working to make sure that enrollment in a plan will be automatically completed whenever possible.

- Many accounts will be auto-enrolled.
- Some accounts may still need plan selection.

**Assistor Key Responsibility:**
- Assistors should always help the consumer proceed to plan selection and complete the process if needed.

**Plan Selection:**
- Consumer will see if a plan has already been selected for them and they have been auto-enrolled in that plan.
- Consumer can change their plan if they choose.
- Consumer will see that plan selection may still be needed.
Poll Question #1

You help Mona to complete her renewal, and her income has decreased. She is now eligible for Medicaid Managed Care (MMC). She would like to enroll in the same plan that she had when she was previously in Essential Plan 2. What do you say to her?

A. You can re-enroll in the same plan, but you may have a month or two (2) of coverage under Medicaid Fee-For-Service only before your MMC plan coverage starts.

B. NY State of Health will automatically enroll you in the same plan you had before, so we are all set with your appointment today.

C. In order to keep your plan, we need to call the Customer Service Center to request that coverage in the same plan be reinstated without any gaps.

D. The system will auto-enroll you in the same plan, as long as its available. Let’s go into your “plans tab” and make sure that the plan is still available and double check that your enrollment has been completed.
Questions?

• Updated Functionality for Auto-Enrollment
Updated Information for Assistors on Addresses
Modifications to “Account and Identity” Page

➢ Home Address is now referred to as “Household Address”. Instructions for this section have also been updated.

➢ Mailing Address section has also been updated to provide more instructions.
Account & Identity Page

• The “Click here if you want your mail sent in care of another person” button has been removed from this page.
Account & Identity Page

- Although the button has been removed, a new “care of” (aka c/o) feature has been added above the Mailing Address Line 1 field allowing the consumer to enter the name of a friend or family member who will be responsible for receiving their mail. The c/o field can be removed at any time via “Editing Account Information” or updating consumer’s application.

Note: The “Care of” option will appear for all mailing address fields in the application.
Modifications to “Where You Live” Page

- Instructions and help text added or modified
- Home Address label changed to “Household Address”
- Mailing Address is added to the page to allow the consumer to view address with a link to also make changes
- Household address confirmation pop-up screens added
- The consumer can assign residential and legal addresses to other members of the household
- New mailing address question appears when “No Fixed Residential Address” is selected
- New pop-up screens/help/instructions for New York State Address Confidentiality Program (ACP)
Tell us where you live

Mailing Address field with help text added to allow the consumer to view and link to edit/change address

- Modified residential questions and help text
- Assign or update residential address for other members of the household

- Modified legal question and help text
- Assign or update legal address to other members of the household
When the consumer answers “No” to the Residential Address question, a follow-up question will be asked:

**Who does not live at the Household Address shown above?**

The consumer can select household member(s) and click the edit button to update their residential address.
When the consumer clicks the “Edit” button (previous slide) for a household member, a new pop-up will display allowing them to enter or modify the residential address of that household member.

1) A new feature was added allowing the option to assign this new residential address to other household members.

2) When this link is selected, the consumer can then select the member(s) to assign the residential address to.

Note: If the consumer selects all members to apply the new Residential Address, an error message will display.
Tell us where you live – No Fixed Residential Address

When editing residential address, the consumer will see the option for No Fixed Residential Address.

No Fixed Residential Address applies to persons who may be homeless, are temporarily living with friends or family, travel continually for work, or have no fixed residential address.

A new conditional question will only be presented to the Account Holder when the “No Fixed Residential Address” is selected for this person:

Do you have access to a reliable mailing address where you are able to receive mail that is delivered by the US Postal Service?
Tell us where you live – No Fixed Residential Address

When “No Fixed Residential Address is selected, the following fields will be cleared and disabled:

- Address Line 1
- Apt/Suite
- Address Line 2
- City

Consumer must enter in their zip code and county.
- Allows for appropriate plan selection based on where the consumer is sleeping/staying.
Address Confidentiality Program is administered by the NYS Department of State for victims of domestic violence. When ACP is selected, participants are given identification cards with a substitute post office box address (PO Box 1110, Albany NY 12201-1110).

- NY State of Health will update the consumer's mailing address using this substitute address to send all notices/mail to the consumer.
- Consumer must enter in their zip code and county.
  - Allows for appropriate plan selection based on where the consumer is living.

Household Address is concealed and mailing address is changed to match the ACP PO Box address.
Tell us where you live – New York State Address Confidentiality Program (ACP)

Consumers who selected the Address Confidentiality option prior to August 26, 2019 and are returning to update their application will be presented with an ACP confirmation box.

Note: This screen will not appear again once the consumer has confirmed their selection to the ACP question.
Consumers who select the Address Confidentiality option on or after August 26, 2019 will be presented with an ACP confirmation box to abort or proceed with NY State of Health updating the consumer’s mailing address to the post office box used for the ACP.

Note: This screen will always appear when a consumer has confirmed their selection to the ACP question.
Tell us where you live – Legal Address

When the consumer answers “No” to the Legal Address question, a similar follow-up question will be asked.

The consumer can select any member and click the Edit button to change their legal address.
Tell us where you live – “Next”

- NEW Pop-up screen
- One-time confirmation of household address for existing NY State of Health accounts created prior to August 26, 2019.
- Please check the address and make any updates as needed.

Note: When “Yes” is selected, and the consumer clicks on “next” to move to the next page of the application, this confirmation box will appear.

Residential Address

Does everyone live at the Household Address shown above?

☑ Yes  ○ No

Confirm Your Household Address

Please confirm the Household Address listed below is correct. This address will be used as the residential address for everyone in the household.

4563 Surprise Result Rd
Surprise, NY 12167

If you would like to update this address, go back and use the Change this Address link to make the changes.
Tell us where you live – “Next”

Note: When “No” is selected, and the consumer clicks on “Next” to move to the next page of the application, a similar confirmation box will appear.

- NEW Pop-up screens
- One-time confirmation of household address for existing NY State of Health accounts created prior to August 26, 2019.
- Please check the addresses and make any updates as needed.
When the system has identified an account of having a mailing address discrepancy, for a change of address found with the US Postal Service, (2) different outcomes will occur:

1. An “Address Discrepancy Flag” will display on the Assistor’s dashboard.

2. The individual will be automatically be navigated to the “Account and Identity Information” page (once they log into their account) where a warning message is displayed indicating that an address discrepancy was identified.
   - The consumer will be forced to resolve the address discrepancy before proceeding further.
NYS Correctional Facility/Parole

If a consumer is incarcerated and found to be Medicaid eligible, the coverage they qualify for is **Medicaid, inpatient hospital only coverage.**

- Alerts are presented to 1-person households in this scenario when the mailing address is updated from NYS DOCCS incarceration file to a NYS correctional facility or parole office.
- When the account is opened, and the consumer clicks on “Update Application”, they will be presented with a pop-up message notifying them of the change.
- Help the consumer to check their address on their overview page and update the address if needed.
Important Information

NY State of Health will send important information to the consumer’s mailing address.

• Even if the consumer chooses to “go paperless,” some information will still be mailed, such as insurance cards.

• Consumers must update their residential address and mailing address (if different) with NY State of Health, not just with their insurance plan.
Undeliverable Mail

When a notice mailed to the consumer is returned by the US Postal Service as undeliverable with no forwarding address, the system will check to determine if a change of mailing address was made to the consumer’s application after the original notice was generated by the system.

If the mailing address was updated after the notice was initially generated, then the system will resend the notice to the consumer to the updated/changed mailing address in the application.

Sent to updated mailing address

NOTICE – RESENDING RETURNED MAIL

You are getting this letter because NY State of Health sent you information, by U.S. mail, to the mailing address provided in your account. However, this mailing was returned to the Marketplace as undeliverable.

We are resending this information to your new address. Enclosed is the original notice that was sent to you and returned to us as undeliverable.
Undeliverable Mail

When a notice is mailed to the consumer and is returned by the US Postal Service as undeliverable with no forwarding address and **NO CHANGE** of mailing address was made to the consumer application after the original notice was generated by the system:

- The mailing address will show as invalid in the consumer’s account.
- A notice will be posted to the account indicating the eligibility determination made based on the invalid address.
  - MA/CHPlus/EP eligible consumers will be determined ineligible for coverage.
  - APTC/CSR eligible consumers will have their eligibility changed to Full Pay QHP.
- Consumer should update their address ASAP.
- Assistors can suggest consumers “go paperless”. Consumers will receive an email from NY State of Health when a notice has posted to their account to log in to view the notice.
Poll Question #2

While looking at your dashboard, you notice a flag that says “address discrepancy” for one of your consumers. What should you do?

A. Ignore the flag because there is no way for you to help the consumer since they are not with you currently.

B. Run a search on the internet to try and verify the address.

C. Contact the consumer to make an appointment to update their account. Let the consumer know that having a valid address is important and may impact their eligibility for health insurance.

D. Contact the US Postal service and ask if the consumer has recently moved.
Questions?

• Updated Information on Addresses
New Information on Duplicate HX Identification Numbers
NY State of Health is working to improve the efficiency of the HX ID matching process.

- When changes are made to the demographic section of a consumer’s application, new HX ID pop-up screens may appear. These messages will let you know that:
  - A match was found – NY State of Health recognizes this consumer (they are known to the system).
  - A potential match was found – NY State of Health *may* recognize this consumer.
    - They will be asked to enter their existing Marketplace ID number (HX ID number).
  - No update can be made.
    - They will be asked to call Customer Service.

- Sometimes the system will recognize an information change and need confirmation from the consumer of their intentions in changing the demographic information.
  - Is the consumer updating a current household member’s information?
  - Is the consumer adding a new household member?
  - Is the consumer trying to remove one household member and add a different household member?
Pressing “Cancel” reverts the changes made, closes the pop-up, and returns the consumer to the Build Your Household page.

Pressing “Save Changes” updates the demographic information and navigates the consumer to the income section.
Potential Match Found

Pressing “Cancel” returns the consumer to Build Your Household or Account Page.

Pressing “Save Changes” navigates to the existing Account Information Page, Reasons for Removal Screen, or Income or Build your Household.

If the consumer presses “Save Changes” without inputting text into the “Marketplace ID” field, the message “Marketplace ID is required” is shown.

The consumer is given 3 attempts to enter a valid HX ID.

When input is invalid, the message “Marketplace ID is invalid” will display.

If the consumer does not check the check box before pressing the “Save Changes” button, they are presented with an “Attestation is required” message.
After the third failed attempt, the screen changes instruction.

The consumer should contact customer service.
No Update Can Be Made

Some consumers will be directed to call customer service to resolve the HX ID pop-up screen.

Pressing “Close” returns the consumer to the screen underneath.
Information Change

If the consumer selects “Update existing household member” and then presses “Next” the change is made.

If the consumer selects “Add new household member” and presses “Next” the screen is closed, they are taken to the Build your Household Screen.

- If they select this option, all the demographic changes are reverted and the Assistor should help the consumer to add the new member to the application.

Pressing “Cancel” reverts all changes and navigates to the “Build Household” section.
If the consumer selects “Remove existing household member and add new household member” the pop-up expands to show a warning message.

- If the consumer agrees that they are trying to remove 1 household member, and add a different household member, and clicks on “next” they are shown the Reasons for Removal Page for the member that they are removing from the account.

**Information Change**

- Update existing household member
- Remove existing household member and add new household member

Clicking “Next” means that Nicole M Profterole (21) will be removed from your account, and if enrolled, their healthcare coverage will end. Nicole Profterole (21) will be added to your account.

You must complete and submit your application, with the changes you made, to receive an eligibility determination for all newly added and current household members.

If you click “Cancel” none of your demographic changes will be saved.

- Add new household member

---

**Nicole Marie Profterole (21)**

Please provide a reason for removal (optional).

- Will be covered by another plan
- Deceased
- Divorce or annulment
- No longer eligible due to age
- Legal separation
- Moved out of state
- End of domestic partnership
- No longer in household
- Other reasons
Messaging

Read and review all messages and notices.

- Existing consumers will have their coverage ended at the end of the current month.
- New consumers and existing household members need to be re-determined.

You must finish running through the application for a new eligibility determination.

Clicking “Save Changes” means that Nicole M Profiterole (21) will be removed from your account, and if enrolled, their healthcare coverage will end. Nicole Profiterole will be added to your account.

You must complete and submit your application, with the changes you made, to receive an eligibility determination for all newly added and current household members.

If you click “Cancel” none of your demographic changes will be saved.
Changes to the HX ID Process when calling the Customer Service Center
When calling NY State of Health as the result of receiving a HX ID pop-up:

• The process to resolve the HX ID pop-up will be faster!

• New screens and new matching techniques are being implemented for Call Center Representatives which will improve the efficiency of these calls.

• Some consumers will be able to have the HX ID pop-up resolved without being transferred.
Poll Question #3

After helping your consumer to add a SSN to someone in their household who previously didn't have one, you receive this HX ID pop-up message that tells you that NY State of Health knows who this person is. You help the consumer to check the checkbox and hit “Save Changes.”

What is the **most important** thing you must do next?

A. Close the application to make sure the updated information gets saved.
B. Explain to the consumer that no HX ID was required since the consumer was “known” to the system.
C. Ask the consumer why this person was initially entered with no SSN.
D. Complete and submit the consumer’s application to make sure that eligibility and plan selection is complete for all household members.
Questions?

- Duplicate HX ID Numbers.
Recertification Process

- All Assistors who are registered or completed the in-person or online Assistor Certification training by **10/31/2019** will be required to view the recertification webinars.

- Keep track of the date you watched the live webinar or the recording.

- In November, supervisors will be emailed a Recertification Report or spreadsheet and must attest to the accuracy of each date the Assistor said they viewed the webinar.

- The four (4) webinars that are required for 2019 will be posted here: https://info.nystateofhealth.ny.gov/SpringTraining
Thank you for joining us!

- Please complete the survey
  - Evaluation of Webinar: What’s Coming

- As always, watch for the video and materials to be posted to: http://info.nystateofhealth.ny.gov/SpringTraining

<table>
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<th>Recertification Webinars</th>
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<tr>
<td>October 23 - 2020 QHP and EP Line-Up</td>
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