Customer Experience Project (CXP): Status Report

VICKI COATES
Deputy Executive Director

MICHAEL PIANTANIDA
Senior Director of IT

Health Connector Board of Directors
February 13, 2020
Agenda for Today

- Mailroom (EDMC) implementation status
- CXP cutover plan and go-live date
- Enrollment, premium and billing (Softheon) status and risks
- Contact center and back office (Faneuil) status and risks
- NTT Contingency Amendment trigger date
Mailroom Implementation
Electronic Data Management Center (EDMC)* Implementation for Mailroom: Progress to Date and February work (Road to March 27, 2020)

- EHS IT development work continues to progress on schedule with no issues identified
- QA environment development is on track and slated to be available for business validation activities which are planned for mid February
- Cut-over plan has been developed which includes preparation for system access changes, inventory work-down and staff readiness
- Communications teams for MassHealth and Health Connector working to ensure all content including online references to the current address are identified and updated with the new post office box for the 3/30/2020 go-live
- Training documentation is currently being reviewed for finalization before roll-out to staff
- Operations progress continues as planned for 3/27/2020 system deployment and in preparation for the 3/30/2020 production go-live

*EDMC is managed by MassHealth and is located in New Bedford, MA
CXP Cut-Over Plan and Go-Live Date
Cut-Over Planning and Go-Live Date

- Cut-over planning and plan
  - Planning is underway with all vendors (current and new) to create a shared set of assumptions for the go-live weekend.
  - The outcome of this work will be a single, consolidated, day by day and hour by hour schedule of tasks and owners for bringing down the current systems and bringing up the new system.
  - The cut-over plan is targeted to be finalized by March 15, 2020.
  - Dry run of the cut-over plan will be conducted between 4/15/2020 and 5/15/2020.

- We are targeting moving the go-live date out by one week.
  - New date for planning purposes is June 8, 2020 instead of June 1, 2020.
  - The reason for this change is due to a new understanding of the NTT bill run mechanics which does not match our original assumptions.
    - NTT cannot execute a bill run prior to the first day of the month.
    - Impact of this change is being evaluated but we do not believe it introduces significant risk, and remains within NTT’s contract period (through June 30).
Enrollment and Premium Billing Implementation
Project Schedule Considerations

- Project schedule deliberately incorporated post-code-development buffers
  - Accelerated contracting/start to maximize implementation timeframe
  - Early targets for software development completion
  - Four months of scheduled test and readiness activity – February through May
  - Multiple rounds and types of testing (e.g., end-to-end, production-like)
  - Six weeks allotted to operational readiness testing

All of these activities have intrinsic purpose and value, but were also introduced to avoid introducing unstable or defective software platforms into production, allowing some contingencies where necessary.
Softheon Implementation for Enrollment & Premium Billing: Progress to Date (Road to June, 2020)

Notices (in progress - risks identified)

- Softheon had moved the date for development to be completed from 2/3/2020 to 2/14/2020
  - Not all development is complete. Some residual notice development will carry beyond 2/14/2020
  - This work continues to be monitored

Carrier Testing (in progress)

- The purpose of carrier testing is to confirm Electronic Data Interchange (EDI) transactions can be successfully transmitted and processed between Softheon and the carriers, with additional validation that effectuations are processed in HIX, where applicable
- Testing with carriers started 1/20/2020 and was originally slated to end on 3/6/2020
  - Six rounds of testing have been scheduled with focused scenarios in each round, testing 616 cases across 11 carriers
  - Actual time for each round of testing is running longer than originally planned. As not to short change this component of testing, we have extended the schedule with carriers through 3/20/2020
    - This can be accommodated without significant risk
Softheon Implementation for Enrollment & Premium Billing: Progress to Date *(Road to June, 2020)*

**End-to-end testing (in progress - risk identified)**

- The purpose of end-to-end testing is to confirm that a wide variety of transactions can be successfully transmitted and processed among the systems of our three primary vendors (Softheon, Optum and Faneuil)
  - Five rounds of testing are planned
  - All four integration points with HIX will be tested
  - A wide variety of scenarios to test enrollment and effectuation are included
  - All notices (current and new) are included
  - Member portal functionality is included

- End-to-end testing started on 2/3/2020 and was scheduled to end on 3/6/2020

- **The first round of CCA testing has yielded disappointing results**
  - The Member portal UI/UX is not as complete as expected given that the majority of development was to have ended on 1/31/2020
  - The number of defects logged to date are putting stress on the testing schedule since we now need to account for more time to retest

- Mitigation plans for end-to-end test completion are as follows:
  - Requested path to green for gaps in development for member portal from Softheon leadership
  - Have sourced some testing resources from Optum and seeking additional resources
  - The end-to-end testing schedule will be extended until at least 3/13/2020
Softheon Implementation for Enrollment Premium Billing: Key Activities for February

- Finalize functional development and continue defect resolution
- Continue end-to-end and carrier testing throughout the month
- Continue preparation for CMS Authority to Connect (ATC) through the HIX program
  - This sign-off from CMS is needed in order to go-live
- Continue to develop detailed draft of the cut-over plan for go-live
  - Targeting new date of June 8, 2020
  - This includes identifying tasks needed on both daily and hourly basis
  - This includes working with all vendors (incumbent and future) to ensure their assumptions and activities are included in the plan
## Risk Management

<table>
<thead>
<tr>
<th>Risk</th>
<th>Mitigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>All core EPB business requirements not yet finalized</td>
<td>Business teams meeting with Softheon to finalize all business requirements by mid-January (Closed)</td>
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</tbody>
</table>
| Completion of the notice development track in time for end-to-end testing | • Softheon adding more development resources (Complete)  
  • Have adjusted test cases in end-to-end testing to match the close of development on 2/14 rather than 1/31 as originally planned |
| Carrier testing and defect remediation timeline                     | • Carrier testing will be moved out two weeks in order to ensure all cycles can be completed  
  • Prod-like testing with carriers will start following the completion of this testing |
| Member portal                                                       | • Softheon to develop a path to green for member portal the week of 2/10/2020  
  • Extending the end-to-end testing period through at least 3/13/2020 |
Contact Center Implementation
Faneuil Implementation for Contact Center & Back Office: Progress to Date (Road to June, 2020)

CRM (Customer Relationship Management) (in progress – risk identified)

- 18 months of NTT CRM data converted and loaded
- Validation of the data load showed call history was not converted as planned; as a result, Milestone 4 is still not complete
  - Faneuil resources working on creating new script and re-validating data load
  - This is a risk which is being actively managed

IVR (Interactive Voice Response) (in progress)

- Scripting and call flow development is underway, including API for payment processing, with goal to complete by 2/24/2020

Trajectory (proprietary guided workflow for call center agents) (in progress)

- Of the seven flows, five are 95 percent configured and in testing
- Remaining two flows will be finalized by 2/28/2020

Facility build out (in progress)

- Physical infrastructure for the Bristol, CT and Lexington, KY Contact Center facilities are targeted to be complete by 2/28/2020.
  - Site visits will be conducted in March 2020
- Walk in Centers (in progress – risk being monitored)
  - Finalizing leases in Boston and Worcester locations
Faneuil Implementation for Contact Center & Back Office: Key Activities for February

- Participation in end-to-end testing with specific focus on integration with Softheon
- Leadership and key role hiring begins for both contact center locations
- Training curriculum finalized
- Forecast and detailed staffing plan finalized
- IVR development to be completed
- Facilities build-out to be completed
- New leases for Boston and Worcester WICs available for internal review
- Salesforce to Oracle data migration completed, tested and validated
# Risk Management

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| Oracle subcontract signed in time for submission of CMS approval documents on 4/15/2020 | • CCA senior legal counsel engaged in escalation to Oracle senior staff. Faneuil has escalated as well  
• Currently only one issue remains open. Target is to have signed order by end of week 2/18/2020 |
| Transition of walk-in centers including current NTT employees        | • Faneuil developing formal transition plan to include employee assimilation and training                                               |
| CRM to Oracle data migration                                         | • Faneuil technical leads engaged in running new scripts and validation of data                                                            |
| Milestones 4 and 5 not completed on original schedule                | • Recalibrating with Faneuil all downstream milestones to ensure testing and go-live are not impacted                                         |
Additional Risk Management and NTT Contingency Extension
## Additional Risks Being Actively Managed:

<table>
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<th>Mitigation</th>
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<tbody>
<tr>
<td>Historical knowledge and data from NTT</td>
<td>• Meeting regularly with NTT leadership regarding transition, needs and timing</td>
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<tr>
<td>Final NTT bill run</td>
<td>• Working jointly with NTT and Softheon to determine best sequencing for cut-over activities</td>
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<tr>
<td>Schedule slippage</td>
<td>• Evaluating interim schedules to potentially extend end-to-end testing windows and potentially leverage scheduled buffer</td>
</tr>
<tr>
<td>Contact center notices pending finalization</td>
<td>• Business teams reviewing and finalizing business requirements and process flows</td>
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In August, 2019, the Health Connector Board of Directors authorized Health Connector staff to enter into an agreement with NTT for a contingency extension agreement if necessary.

- As stated at time of authorization:
  - Utilization of the NTT extension will only be triggered if there is substantial lack of progress on the CXPP project and other risk mitigation strategies have failed to address the issues
  - A stipulation in the contingency extension agreement is the Connector must notify NTT no later than March 1, 2020 if we choose to exercise or forego the three month extension
  - The Connector is currently weighing whether to trigger this extension, or not, but based on current status of the CXP project, current thinking remains to forego the extension
  - The Board will be notified of our planned decision by February 27, 2020
Customer Experience Procurement Project (CXP) - Refresher

Background:

- There are two major components of the overall service delivery that the Health Connector provides to its members, one being, the contact center, back office, and document processing and verification services and the other being premium billing.
- In 2017 a Customer Experience team was launched to create a strategy and path for procurement which included smooth transition of services at the end of the contract with NTT.

Goals of the CXP team:

- Maintain operational stability in key areas of Enrollment, Premium Billing, and Contact Center.
- Improve customer experience to meet members’ expectations.
- Rebase the cost structure so as membership grows, economies of scale are realized.
Current and Future State: Customer Service and Business Operations for Non-group Membership (Refresher)

Current State: NTTData Customer Service and Business Operations

- Enrollment and Premium Billing, Member Bills and HIX Notices, Payment Portal
- Ombudsman
- Contact Center & Back Office, CRM, Document Processing, Mailroom
- Walk in Centers

Future State: Multiple vendors selected through ongoing procurements and other service opportunities

- Member Portal (Softheon)
- Enrollment and Premium Billing, Member Bills and HIX Notices, Payment Processing (Softheon)
- Ombudsman (CCA Staff)
- Mailroom (EDMC)*
- Contact Center, Back Office, & Document Processing and Verifications (including Walk in Centers) (FANEUIL)

*EDMC is the Electronic Data Management Center managed by MassHealth and located in New Bedford, MA
Softheon: Implementation Milestones

The Health Connector has worked with Softheon to identify critical milestones that must be achieved throughout the implementation.

<table>
<thead>
<tr>
<th>Implementation Milestone</th>
<th>Projected Completion Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Business Requirements</td>
<td>June 2019</td>
<td>Completed</td>
</tr>
<tr>
<td>2 Primary Data Conversion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Member-facing portal readiness (Equity Portal)</td>
<td></td>
<td></td>
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<tr>
<td>4 Integration</td>
<td></td>
<td></td>
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<tr>
<td>5 Pre Production</td>
<td></td>
<td></td>
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<tr>
<td>6 Operational Readiness</td>
<td></td>
<td></td>
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<tr>
<td>7 Full Solution – Go-Live</td>
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## Faneuil: Implementation Milestones

The Health Connector has worked with Faneuil to identify critical milestones that must be achieved throughout the implementation.

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<th>Primary Implementation Milestones</th>
<th>Projected Completion Date</th>
<th>Status</th>
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<tbody>
<tr>
<td>1  Facility build out plans and approach</td>
<td>October 2019</td>
<td>Completed</td>
</tr>
<tr>
<td>2  Initial Mobilization and Baseline Project Plan</td>
<td>October 2019</td>
<td>Completed</td>
</tr>
<tr>
<td>3  CRM Requirements Gathering &amp; Discovery</td>
<td>November 2019</td>
<td>Completed</td>
</tr>
<tr>
<td>4  CRM Stage 1 Build and Primary Data Migration</td>
<td>December 2019 (Moved to January, 2020 via mutual agreement)</td>
<td>Awaiting revalidation of data conversion</td>
</tr>
<tr>
<td>5  Facility Connectivity and Staffing – Stage 1</td>
<td>January 2020</td>
<td>Final review of Documents being conducted</td>
</tr>
<tr>
<td>6  Base Development &amp; Configuration</td>
<td>February 2020</td>
<td>At risk</td>
</tr>
<tr>
<td>7  Integration Testing with all External Systems</td>
<td>March 2020</td>
<td>At risk</td>
</tr>
<tr>
<td>8  Operational Readiness including Staffing</td>
<td>April 2020</td>
<td></td>
</tr>
<tr>
<td>9  <strong>Full Solution – Go-Live</strong></td>
<td><em>June 1, 2020</em></td>
<td></td>
</tr>
<tr>
<td>10 Warranty Period – all defects resolved</td>
<td>6 months</td>
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