Customer Experience Project (CXP): Status Report

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Health Connector Board of Directors, May 14, 2020
Agenda for Today

- Updated Project Schedule
  - Go-Live Date
  - COVID-19 Impacts
  - Cutover Planning and Readiness
- Enrollment, and Premium Billing (Softheon) Status
- Mailroom (EDMC) implementation status
- Contact Center and Back Office (Faneuil) Status
- Risk Management
Updated Project Schedule
Updated Project Schedule

Go-Live Date

- In February, we updated our production go-live date for the Contact Center and Enrollment and Premium Billing to **July 6, 2020**
  - Leverages the extended holiday weekend for cutover
  - Based on the calendar, allows NTT Data month-end processing to run as scheduled without any modification
  - Allowed more time for end-to-end testing

COVID-19 Impacts

- In March, the project team transitioned to full remote work, including CCA agency staff and all vendors
- Transition caused temporary delays in testing activities
- Rethinking of how to staff the contact center and walk in centers post go-live
- Delayed the implementation of the EDMC mailroom

The Health Connector is maintaining the go-live target date of July 6, 2020 and planning cutover activities.
Cut-Over Planning and Readiness

Planning is underway with all vendors (current and new) around the go-live date for July 6, 2020.

- Detailed hour-by-hour cutover plan documented and under review with all parties
- Dry run/Rehearsals of the cut-over plan will be conducted in June
- Operational readiness activities to ensure policies, procedures and training are in place will be conducted in June
- Change requests were submitted to CMS to expand the footprint to include Softheon and Faneuil
Enrollment and Premium Billing Implementation
Softheon Implementation for Enrollment and Premium Billing: Progress to Date (Road to July)

- System testing and business validation is nearing completion
- Targeting a system lock-down of **May 15, 2020**
  - All identified critical issues needed for go-live will be resolved
  - Production code base will be frozen and any carry over or new critical issues will be managed as a hot fix
  - Critical issues needed for renewals (Open Enrollment 2021) have been flagged for resolution in conjunction with the HIX R21/OE21 release, targeted for July 31, 2020
  - Other known issues leaked into production that have not been flagged as critical for go-live will be resolved and managed through the warranty period
- Areas tracking with special focus:
  - Lockbox Testing
  - Carry over items on 834 Audit File and 820
- Data conversion continues to be tested in preparation for full data conversion in production beginning **June 2, 2020**
Mailroom Implementation
Electronic Data Management Center (EDMC)* Implementation for Mailroom: May 18 Go-Live

- The new go-live date for EDMC Mailroom cutover has been set for May 18, 2020
- All EHS IT development work and UAT testing has been completed and the systems are ready for transition
- Notice updates are prepared and ready to be rolled out for the transition
- Weekly status meetings continue to occur with the project team. These will continue for an appropriate period even after go-live
- Communications to Assister and Navigator communities will be shared to provide notification of the changes and to avoid any delay in processing items
- Updates to website will be completed to coincide with the transition

*EDMC is managed by MassHealth and is located in New Bedford
Contact Center Implementation
Faneuil Implementation for Contact Center & Back Office: Progress to Date *(Road to July)*

**Call Center System Development Status**

- Customer Relationship Management (CRM)
  - 18 months of NTT Salesforce CRM contact history converted successfully
- Trajectory (proprietary guided workflow for call center agents)
  - Configuration and Testing complete
- Interactive Voice Response (IVR) (Risk being monitored)
  - Development delayed; as a result requested a revised test plan with focus on integration with Softheon to meet May 15 code freeze

**Staffing and Recruitment**

- Staffing plan, including hiring and training waves submitted and approved
- Dashboard to track agent hiring completed
  - Track day-over-day progress against sourcing, offers extended, staff hired, and training completed

**Facility Build Out**

- On track; final work suspended due to COVID-19

**Walk In Centers**

- Boston and Worcester leases scheduled to be finalized by May 15
Faneuil Implementation for Contact Center & Back Office: Remote Work Plan

COVID-19 Contingency Planning Finalized

- Omni consulting retained to shepherd execution of Work-at-Home program (WAH)
- Faneuil dedicated WAH leadership positions onboarded and engaged:
  - Director, WAH operations
  - Process Implementation Manager, WAH operations
- Initial hiring waves will target permanent, work-at-home agents; minimum 40 percent with previous work-at-home experience
- Introduce basic WAH requirements for all new hires:
  - Customized skills assessment
  - Candidate survey to ensure dedicated office space, internet connectivity speed, etc.
  - Require photos of office space to ensure compliance
- Microsoft Teams will be used to conduct remote training sessions
  - Curriculum is being reviewed and reconfigured to foster more trainer-trainee engagement
  - Regular 1:1 sessions will be held with each trainee
- Technology plan including additional equipment needs have been developed and in process
Risk Management
# Risk Management

<table>
<thead>
<tr>
<th>Risk</th>
<th>Mitigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transition to 100 percent Work-at-Home program for Call Center employees</td>
<td>▪ Faneuil engaged Omni consulting for program design &amp; implementation and hired two dedicated individuals to lead program</td>
</tr>
<tr>
<td>Transition of Walk-in Centers</td>
<td>▪ Faneuil walk-in center manager and employees will be hired as remote workers with expectation they will work in retail setting once it is determined it is safe to do so</td>
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<tr>
<td>Delay of IVR Testing</td>
<td>▪ Testing is concentrated on Softheon integration to meet May 15 target date for code freeze</td>
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<td>Historical knowledge and data from NTT</td>
<td>▪ Meeting regularly with NTT leadership regarding transition, needs and timing</td>
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| Lockbox file testing delayed with Bank of America due to COVID-19    | ▪ Bank of America development needed to support splitting correspondence received at lockbox  
▪ Regular meetings with Bank of America, the Health Connector and Softheon to monitor progress and adjust schedule as needed |
| Transition of Ownership of Phone lines                              | ▪ Target date of transition allows for ability to move if any issues encountered in testing                                               |
Appendix
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
▪ The current NTT contract expires on June 30, 2020
▪ 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

<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>December 2019</td>
<td>Completed</td>
</tr>
<tr>
<td>3. Member-facing portal readiness (Equity Portal)</td>
<td>June 1, 2020</td>
<td></td>
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<tr>
<td>4. Integration</td>
<td>May 1, 2020</td>
<td>Under Review</td>
</tr>
<tr>
<td>5. Prod-like Testing/System Lockdown</td>
<td>June 1, 2020</td>
<td></td>
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<tr>
<td>6. Full Solution Pre Production</td>
<td>June 1, 2020</td>
<td></td>
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<tr>
<td>7. Operational Readiness</td>
<td>June 15, 2020</td>
<td></td>
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<tr>
<td>8. <em>Full Solution – Go-Live</em></td>
<td><em>July 5, 2020</em></td>
<td></td>
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<tr>
<td>9. Warranty Period</td>
<td>6 months post go-live</td>
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## Faneuil: Implementation Milestones

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<th>Primary Implementation Milestones</th>
<th>Projected Completion Date</th>
<th>Status</th>
</tr>
</thead>
<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>
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<tr>
<td>4 CRM Stage 1 Build and Primary Data Migration</td>
<td>December 2019 (Moved to January, 2020 via mutual agreement)</td>
<td>Completed</td>
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<tr>
<td>5 Facility Connectivity and Staffing – Stage 1</td>
<td>April 15, 2020</td>
<td>Under Review</td>
</tr>
<tr>
<td>6 Base Development &amp; Configuration</td>
<td>April 3, 2020</td>
<td>Under review</td>
</tr>
<tr>
<td>7 Integration Testing with all External Systems</td>
<td>April 3, 2020</td>
<td>Under review</td>
</tr>
<tr>
<td>8 Operational Readiness including Staffing</td>
<td>June 26, 2020</td>
<td></td>
</tr>
<tr>
<td>9 Full Solution – Go-Live</td>
<td>July 5, 2020</td>
<td></td>
</tr>
<tr>
<td>10 Warranty Period – all defects resolved</td>
<td>6 months</td>
<td></td>
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