

# Meeting Agenda: Minnesota Eligibility Technology System Executive Steering Committee

---

August 27, 2024

10 a.m.-12 p.m.

Location: Room #1100, Minnesota Senate Building, 95 University Ave. W., St. Paul, MN 55155

## Agenda

### Call to Order & Welcome

#### *Facilitator - Dave Greeman*

Dave Greeman, (DHS) - called the Minnesota Eligibility Technology System Executive Steering Committee meeting to order at 10:06 a.m. The following ESC members were present: Co-chairs Dave Greeman and Jon Eichten, Libby Caulum, Julie Marquardt, Kari Ouimette, and Mike Wright. Others in attendance included: Jackie Hippen, Brian Sittarich, and Terry Okeefe. The quorum for the meeting was met and Dave reviewed the meeting agenda.

Reviewed the Meeting Agenda

### Administrative Items

#### Membership

Libby Caulum introduced the new ESC member David Rowley. David will fill the MNsure seat vacated by Kari Koob.

#### Minutes

The committee approved the May 28, 2024 meeting minutes; Kari Ouimette made a motion to accept the minutes as written, and Libby Caulum seconded the motion. Motion passed unanimously.

### METS Financial Update

#### *Presenter - Jackie Hippen*

Fiscal Qtr4 Report SFY24

Jackie Hippen, Director of Enterprise Planning and Administration, MNIT Services @ DHS/MNsure, presented the Minnesota Eligibility Technology System Fiscal Report for the quarter ended June 30, 2024, FY24 Q4 Financial Report

The report had 3 pages. The first page was an introduction that explains the statutory requirements for the report. The second page was a four-year view including information from the previous and current bienniums, and the third page showed quarterly details for fiscal year 24.

The presentation focused on the fiscal year 24 spend through all four quarters.

Page Two (Table 1) - The Overall Budget View table provided a four-year view with two bienniums shown in four columns across the top of the page. The top half of table one showed

expenditures and the bottom half showed financing with the top and bottom both subdivided into Development and Operations.

Page Three (Table Two) - The FY 2024 Budget vs YTD table layout is the same as Table one in that the top half of the page showed expenditures and the bottom half showed financing.

## **METS IT Program Status Update**

***Presenter - Brian Sittarich***

### **Approval Requests**

The METS ESC members were not asked for any approvals. The intent of the item was informational only.

### **METS Updates**

#### **Projects Activated by METS SGG**

No projects were activated by the SGG

#### **METS Renewals Improvement Efforts**

- **METS Automated Manual Renewal**, MNIT is continuing to run Auto Manual Renewals (APR) batches for cases flagged by DHS, including those with suppressed Need to Renewal (NTR) notices and those flagged by counties as unprocessable within the required timeframe. This batch process grants a new 12-month eligibility period for households with enrollees who should have been auto-renewed, eliminating the need for manual renewals. Changes to the process were made to align with Individual Renewals Part 2, and these updates were implemented on July 14th.
- **Auto-Renewal Future State**, On August 4th, the final three scoped items for the Auto-Renewal Future State were deployed, including key updates to renewal batches:
  - Annual Renewal Request Batch (Batch 2): Modified to request Medicare Part A data only for MCRE-eligible members who will remain eligible at the end of the current certification period.
  - Annual Renewal Electronic Response Batch (Batch 4): Updated the process for populating ES Income Details when DEED wage records are received.
  - Batch 2: Adjusted to collect Medicare data only for members subject to renewal for public programs.

With these updates implemented, the Auto-Renewal Future State project is now officially closed, as will be addressed in the third part of the agenda under Standing Topics.

- **METS Individual Renewals Phase 2**, the METS Individual Renewals Phase 2, deployed on July 14th, improved manual renewal processing for workers. This led to a steady increase in auto-renewal rates: 52% for May cohorts, 64% for June, and 77% for July. Key enhancements included:
  - METS Auto-Renewal Enhancements (Quick Wins): The update removed the requirement for Federal Tax Information consent to auto-renew, allowing other

data sources to be used. Additionally, reasons for auto-renewal failures are now tracked to identify improvement opportunities.

- Electronic Income Data Use: The second enhancement ensures only available electronic income data is used for eligibility, replacing the mix of electronic and attested data.
- Renewal Mitigation: Part of DHS's Mitigation Plan 2.0, this suppresses renewal notices for identified cases, with counties handling passive renewals. This action applies to cases from January 2024 and beyond.
- **QHP Eligibility System Transition (QEST) Project Update**, the QHP Eligibility System Transition Project (QEST) is still in the planning stage. Staffing resource constraints are causing delays, and the project team is looking for strategies to address these challenges. Team members from MNSure, DHS, and MNIT are collaborating to find the best path forward for a successful launch.

## **Standing Topics**

### **METS FFY24 Roadmap**

The METS FFY 2024 Roadmap was approved by the METS ESC in October 2023 and included several updates to key projects.

- **Infrastructure Improvements**: The IAM MNSure MFA & Dev Enhancements project is now complete, with only a closing report and transition plan remaining for the OAM team.
- **Completed Projects**: The Curam 8.1 Upgrade, METS Individual Renewals, and METS Automated Manual Renewals were all completed and deployed on July 14th, with the end date adjusted from June 23rd to July 14th to address critical fixes.
- **Data Mart 1.5**: The end date has been extended from July 31, 2024, to September 30, 2024, for continued performance improvements and a data issue fix.
- **Continuous Eligibility for Children**: Deployment has been shifted from December 16, 2024, to December 22, 2024, to meet the MNSure business deadline.
- **Architecture Planning and Application Security**: Middleware upgrades have updated the program funding and included necessary infrastructure changes for METS releases.
- **Expansion Projects**: The Expansion of MA for Former Foster Care and TEFRA Health Care Access projects shifted their end dates from February to May due to higher-priority projects and resource limitations.
- **HCCS IVR Phone System**: The schedule has been extended into spring to determine the test environment for end-to-end testing.
- **Auto Renewals (AR) Future State**: The project scope was delivered on July 14th and has now closed.

### **Rolling Deliverable Schedules - New Development**

The rolling deliverable schedule for new development projects provided a rolling view of recent and planned deliverables, both by project and release timeframe.

- **Infrastructure Improvements** - IAM MNSure MFA & Dev Enhancements project shifted from the Execution to the Do-Close Project phase as the project now reflects

Complete. As already mentioned, the only remaining item for the project is to transition to the operational support teams.

- **METS Individual Renewals Phase 2** shifted from In Progress to Complete. The project is planned to close in early September. This work effort included the work needed to allow workers to support individual manual renewal processing.
- **METS Automated Manual Renewal** shifted from In Progress to Complete. This effort extended the functionality to systematically grant a new 12-month eligibility certification period for households with one or more enrollees who should have been individually auto renewed, through a data update or one-time batch process in METS.
- **DataMart 1.5** shifted their delivery targeted date into the Fall Release timeframe. The development team continues working on performance improvements for the Person Eligibility Table (PELG) and a table built in the Dev environment.
- **MinnesotaCare for Noncitizens not Lawfully Present (MinnesotaCare NNLP)** shifted from the Planning to Preliminary status as the project team is targeting an October 20th deployment. The fall deployment will include only the “minimal viable product” with the remaining scope to be delivered in a future release.
- **Continuous Eligibility for Children Release 2** shifted from Planning to Do-Execute Phase as the project is targeting a release in the December timeframe.
- **HCCS IVR Phone System** shifted to an “In Progress” status for the Winter and Spring Timeframe until a release deployment is finalized.
- **Expansion of MA for Former Foster Care Basis of Eligibility** and Increasing Health Care Access and Affordability-TEFRA Planning phase was extended into the Spring Release Timeframe as program and release management finalize the release schedule.
- **QHP Eligibility System Transition Project (QEST)** reflects a Preliminary status for the Summer Release Timeframe.
- **Auto Renewals (AR) Future State** changed to a Closed status as the team deployed the last few fixes and enhancements on August 4th. in August. This work restructured and simplified the rules in METS for determining who is able to auto-renew.

#### Rolling Deliverable Schedules - Ongoing/Annual Work

The only update to the ongoing and annual work schedule is that the Curam 8.1 Upgrade project is now marked as complete, following its successful deployment in July. No other changes were noted for the ongoing or annual projects in this update.

#### Release Timeframes:

**Summer 2024 Release**, originally scheduled for June 23rd but shifted to July 14th to accommodate Critical Production Support fixes for the Curam 8.1 Upgrade, included the following:

- Curam 8.1 Upgrade
- METS Individual Renewals - Phase 2
- METS Automated Manual Renewal
- Architecture Planning and Application Security - Middleware Upgrades (MMIS Mod)
- M&O: Non-Project Work

**Fall 2024 Release Timeframe** is scheduled to deploy on October 20th, 2024.

The projects planning to deploy in this release include:

- MinnesotaCare for Noncitizens not Lawfully Present (MinnesotaCare NNLP)
- Architecture Planning and Application Security
- M&O Non-Project Work includes enhancements and fixes from the METS Input Group team.

Other Fall Release Timeframe deliverables include:

- Auto Renewals Future State (ARFS)
- Data Mart 1.5

**Late Fall 2024 Release** is scheduled for deployment on December 22nd, during the Open Enrollment period.

- Continuous Eligibility for Children Phase 2

**Winter 2025 Release**, scheduled for deployment on February 23, 2025, includes the following projects:

- Architecture Planning and Application Security
- M&O: Non-Project Work, which will cover tasks from the METS Input Group.

**Spring 2025 Release** is targeting the following projects:

- Expansion of MA for Former Foster Care Basis of Eligibility
- Increasing Health Care Access and Affordability - TEFRA
- HCCS IVR Phone System
- M&O: Non-Project Work

The exact deployment date is still to be determined, as the Release Plan for this timeframe is currently being finalized.

**Summer 2025 Release Timeframe** that is scheduled to deploy on July 13th, 2025, and include the following:

- QHP Eligibility System Transition Project (QEST)
- M&O: Non-Project work will include work from the METS Input Group.

#### Stoplight Status of Projects:

The report shows 11 ongoing projects; there are 6 projects in green status, 4 projects in RED status, and 1 project in yellow status.

#### QHP Eligibility System Transition Project (QEST):

- Issue: The project is at risk due to delays in several sections of requirements and design related to data transition between GetInsured and METS. These sections require complex analysis and discussion around policy, procedures, and business needs, causing missed deadlines.
- Progress: Completed sections have been handed over for development, which is currently in progress.
- Get to Green Plan: Once the remaining sections of requirements and design are finalized, the schedule will be re-evaluated. The current target for production deployment is July 2025.

#### HCCS IVR Phone System:

- Issue: This project remains in red status as the vendor's development code is now expected by 9/30/24, which delays the planned deployment. Additional time will be needed for setting up a test environment and completing various testing phases (SIT, Regression, and UAT).
- Get to Green Plan:
  1. Create a test plan and determine which environment will support the testing, with necessary data interfaces.
  2. Submit a change request.
  3. Establish a new timeline based on vendor code delivery, environment availability, and release schedule.
  4. Work with the business to get approval for the updated timeline and user testing.

Expansion of MA for Former Foster Care Basis of Eligibility and Increasing Health Care Access and Affordability-TEFRA projects:

- Issue: Both projects have been downgraded to red due to resource constraints, as higher-priority projects are being addressed first.

### **New Business**

Julie Marquardt, Deputy Assistant Commissioner for Healthcare Administration at DHS, presented an update on the eligibility and enrollment modernization efforts. The main points covered were:

- Current System and Challenges
- Impact on Workforce
- Lessons from the "Unwinding" Process
- Federal Regulations and Future Goals
- Plans for Modernization
- Funding and Next Steps

The presentation highlighted the challenges with the current eligibility and enrollment systems, the lessons learned from recent efforts, and the ongoing push for modernization to improve efficiency, compliance, and the user experience.

Kari Ouimette asked whether these modernization efforts would be brought before the METS (Minnesota Eligibility Technology System) SGG (System-Based Governance Group) for prioritization. Julie responded that it's difficult to say, as the work spans multiple systems (like MAXIS, MMIS, and METS) and the architecture and infrastructure don't align neatly with one specific system. This overlap makes it challenging to draw clear boundaries, so it's uncertain if all the efforts will be presented to the METS SGG for prioritization.

### **Public Comment**

Public Comment No public comments were made.

### **Adjourn**

The next METS ESC meeting is expected to be held September 24, 2024, at 10 a.m.

Dave adjourned the meeting at 11:05 a.m.