Minnesota Health Insurance Exchange (MNHIX)

Solution Planning Document

Date: October 25, 2012

Version: 2.0

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Document History

Date	Document Version	Document Revision Description	Document Author
9/28/2012	1.0	Initial release.	Benni DeMarco
10/25/2012	2.0	In each sprint definition chapter the functional goals are related to an activity in the End-to-End process models. Other formatting changes were to functional and technical goals were also made. In addition, dependencies for technical goals were removed and are being tracked in another document.	Clay Rowland Benni DeMarco

Acronyms

ACA	Federal Patient Protection and Affordable Care Act
CCA	Child Care Assistance
CHIP	Children's Health Insurance Program
COTS	Commercial Off-The-Shelf
HHS	Health and Human Services
MAGI	Modified Adjusted Gross Income
MNHIX	Minnesota Heath Insurance Exchange
SERFF	System for Electronic Rate and Form Filing
SNAP	Supplemental Nutrition Assistance Program
TANF	Temporary Assistance for Needy Families

1. Introduction to the Solution Planning Document

1.1 Project Background

Under the Federal Patient Protection and Affordable Care Act (ACA) enacted in March of 2010 (Public Law 111-148 and 111-152), new mechanisms for comparing and obtaining health care coverage were created called Health Benefit Exchanges (Exchange). An Exchange must be operational in each State by January 1, 2014. By January 1, 2013, a State must have taken the necessary steps to have an Exchange operational by January 1, 2014 or the U.S. Department of Health and Human Services (HHS) will establish one on a State's behalf.

An Exchange is an organized competitive marketplace to facilitate the comparison, choice, and purchase of health care coverage for individuals and employees of small businesses. Through an Exchange, individuals and employees will have access to comparable information on costs, benefits, health care providers, quality, and customer satisfaction for an array of coverage options, and they can use this information to choose and enroll in the health benefit plan that best fits their personal and family needs. Exchanges will also assist eligible individuals and small businesses in receiving premium tax credits and cost-sharing reductions or help individuals enroll in Federal or State health care programs. By engaging consumers in a one-stop shopping experience with transparent information, Exchanges will make purchasing health insurance easier and more understandable, put more control and choice in the hands of individuals and employees of small businesses, and incent greater market competition.

An Exchange will carry out a number of functions that include:

- Ensuring that health insurers and health benefit plans meet certain standards for Exchange participation.
- Providing comparative information on costs, benefits, health care providers, quality, and customer satisfaction using a standard format.
- Determining individual, employer, and employee eligibility for Exchange participation, exemptions from individual coverage responsibilities, premium tax credits and cost-sharing reductions, Federal and State health care programs, and potentially other social service programs.
- Facilitating "real-time" eligibility determination and enrollment using a uniform format.
- Sharing information with Federal and State agencies regarding eligibility, administration of tax credits and cost-sharing reductions, exemptions from individual coverage responsibilities, etc.
- Communicating with employers regarding employee eligibility, coverage choices and defined contribution, coverage initiation and cancelation, potential employer coverage requirement liability, etc.
- Establishing a call center and website.
- Operating a "Navigator" program to provide outreach, education, and assistance to individuals and employers. Navigators may be brokers/agents, community-based organizations, or other types of individuals/organizations capable of meeting yet to be determined requirements to be certified as a Navigator.

The State of Minnesota Department of Commerce awarded MAXIMUS a contract to develop a fully functioning Health Benefit Exchange. The priority of the MNHIX project is to implement an Exchange that is compliant with the MAGI eligibility rules, as well as an Exchange that creates an organized competitive marketplace to facilitate the comparison, choice, and purchase of health care coverage for individuals and employees of small businesses. Through an Exchange, individuals and employees will have access to comparable information on costs, benefits, health care providers, quality, and customer satisfaction for an array of coverage options, and they can use this information to choose and enroll in the health benefit plan that best fits their personal and family needs. Exchanges will also assist eligible individuals and small businesses to receive premium tax credits and cost-sharing reductions or help individuals enroll in Federal or State health care programs.

By engaging Minnesotans in a one-stop shopping experience with transparent information, the Exchange will make purchasing health insurance easier and more understandable. It will put more control and choice in the hands of individuals and employees of small businesses, and will foster greater market competition.

1.2 Approach to Solution Planning

The Solution Planning Document describes both the solution planning process and the solution development process. It describes how that process is reflected in the Project Schedule and it describes the proposed content of each of the development sprints. It is a comprehensive document that describes the planning meetings, facilitated sessions, document updates, development tasks, and planned sprint content required in order to produce the MNHIX solution.

This document first provides an overview of the entire Solution Development Process, and then includes a chapter that describes the proposed activities and work to be accomplished during each sprint cycle. Like other project artifacts such as the Requirements Validation Documentation, The Solution Planning Document be reviewed and revised during each sprint cycle.

There are currently six development sprints defined in the Project Schedule. These sprints occur in overlapping sprint cycles as illustrated in Figure 1. Therefore, the Solution Development Process illustrated in Figure 2 will occur six times.

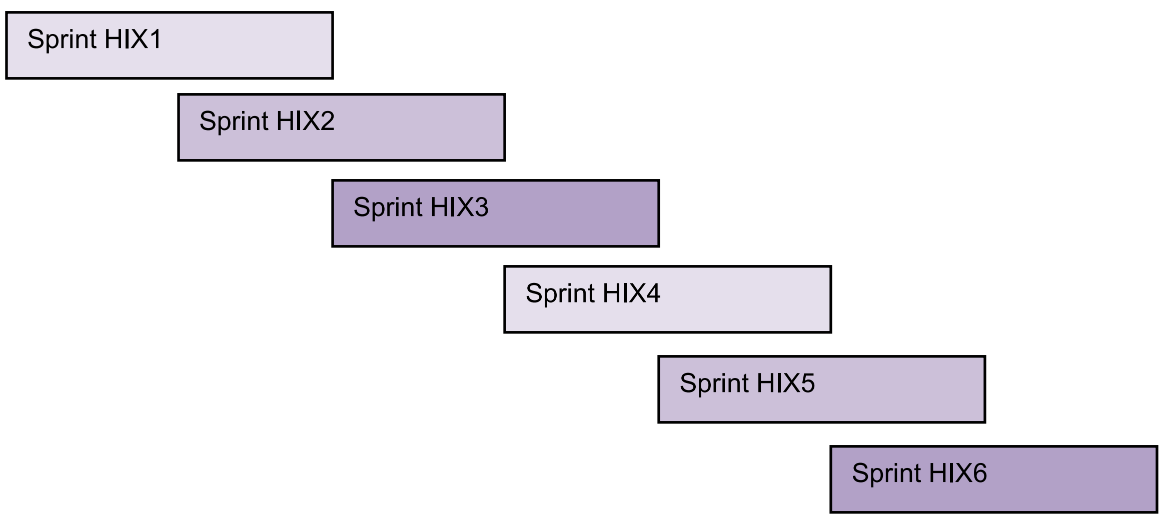

Figure 1 – Overlapping Development Sprint Cycles

1.3 The Solution Development Process

The Project Management Plan and Project Schedule originally described the use of Sprint Definition Documents to be created at the beginning of each sprint cycle which would define the sprint content. This document and the processes described within it, replace the use of Sprint Definition Documents. This new artifact and the manner in which it is to be updated are described in the Solution Development Process diagram shown below in Figure 2.

The Solution Development Process diagram identifies all the processes or tasks that occur in each development sprint cycle. In general, each process corresponds to a single task in each development sprint defined in the Project Schedule. There are currently six development sprints defined in the Project Schedule, so each of these tasks will occur six times. Each process in the diagram is numbered and then explained in the Solution Development Process Definitions Table. The description describes the work accomplished in each task, the team or roles responsible for completing the task, and the inputs and outputs of the task.

One consideration to use when looking at the diagram is that its primary purpose is to convey an overall understanding of the development process. It presents activities in a linear fashion when in reality tasks may overlap, occur simultaneously, or occur in iterations. For example, the process of conducting Business Architecture sessions and then updating the associated Requirements Validation documents may occur several times over several days within the same sprint cycle.

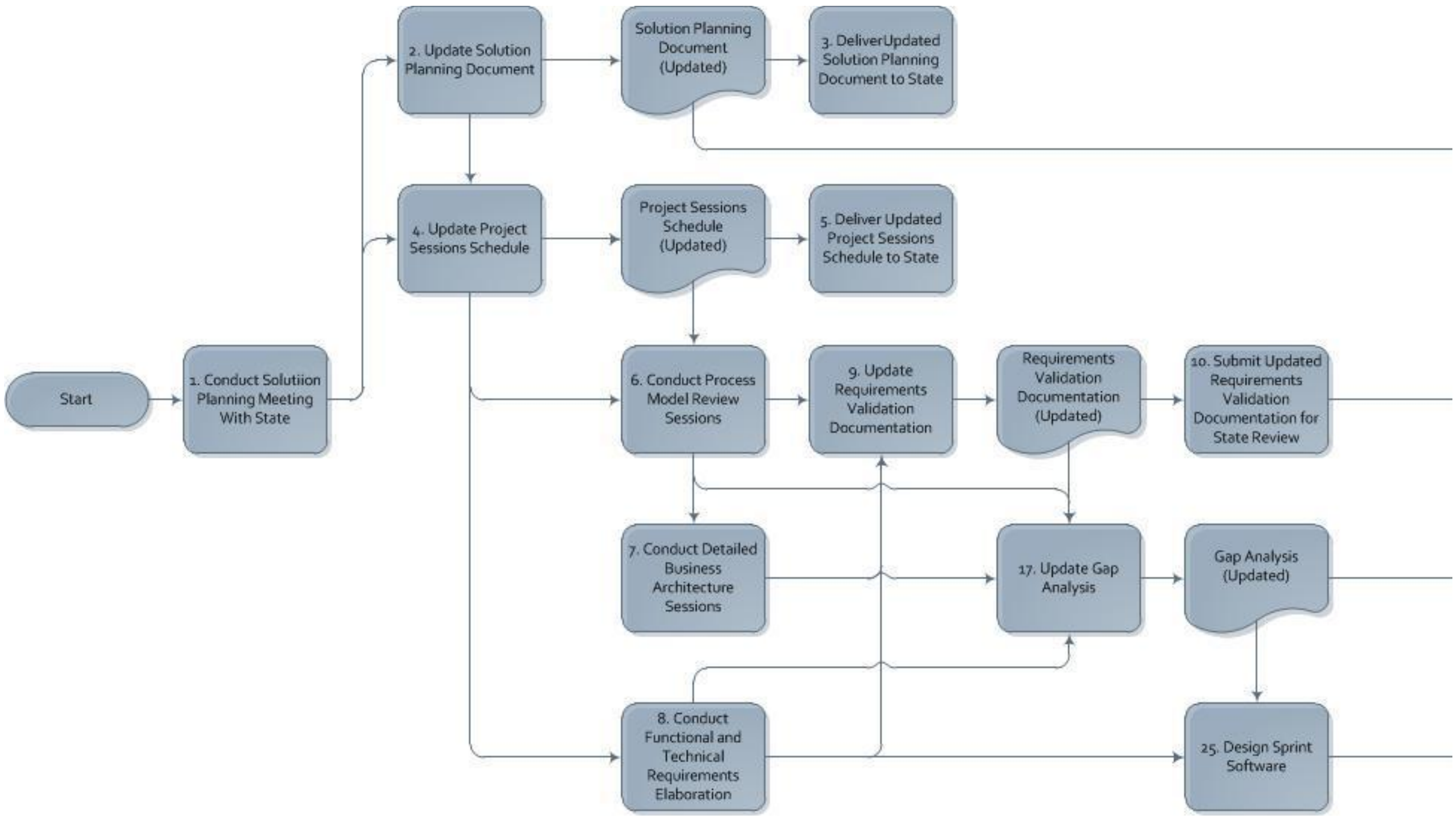

Figure 2 – Solution Development Process – Page 1

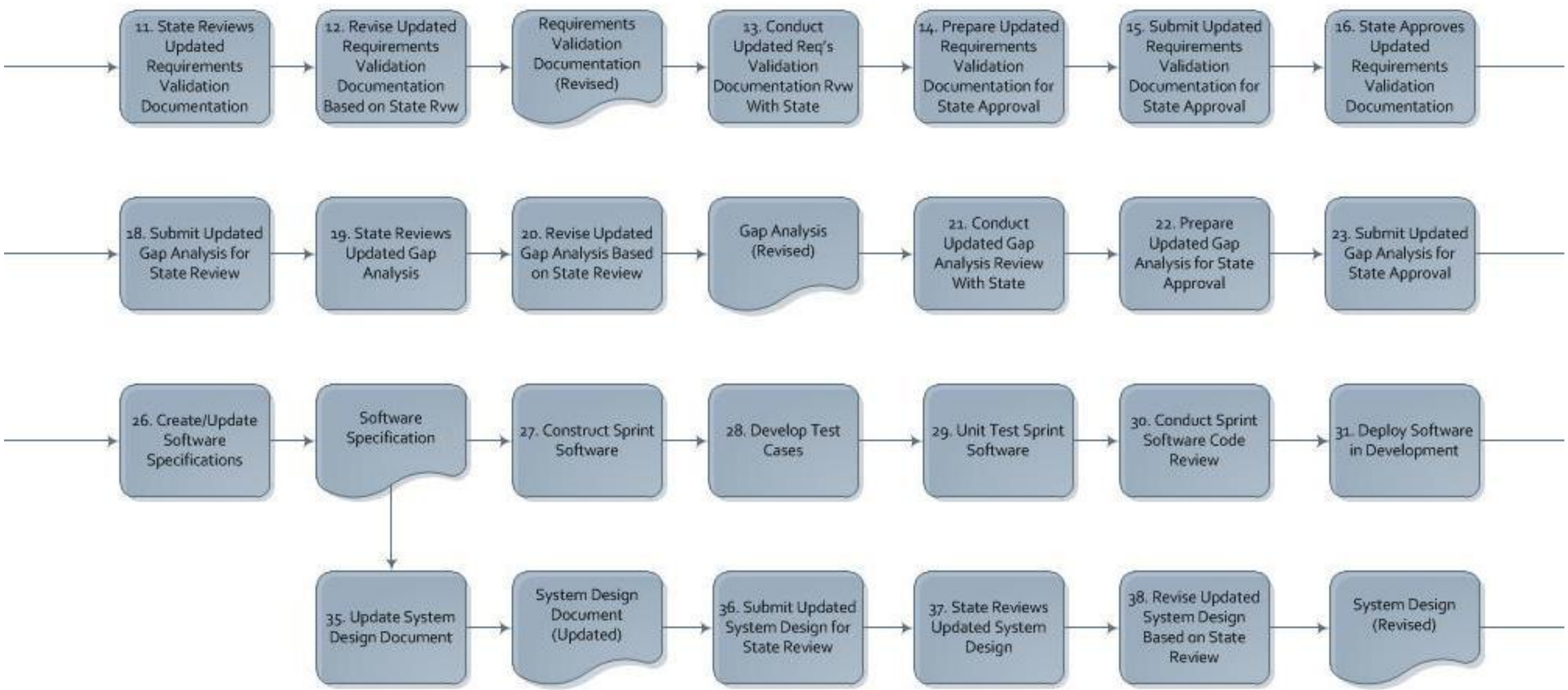

Figure 3 – Solution Development Process – Page 2

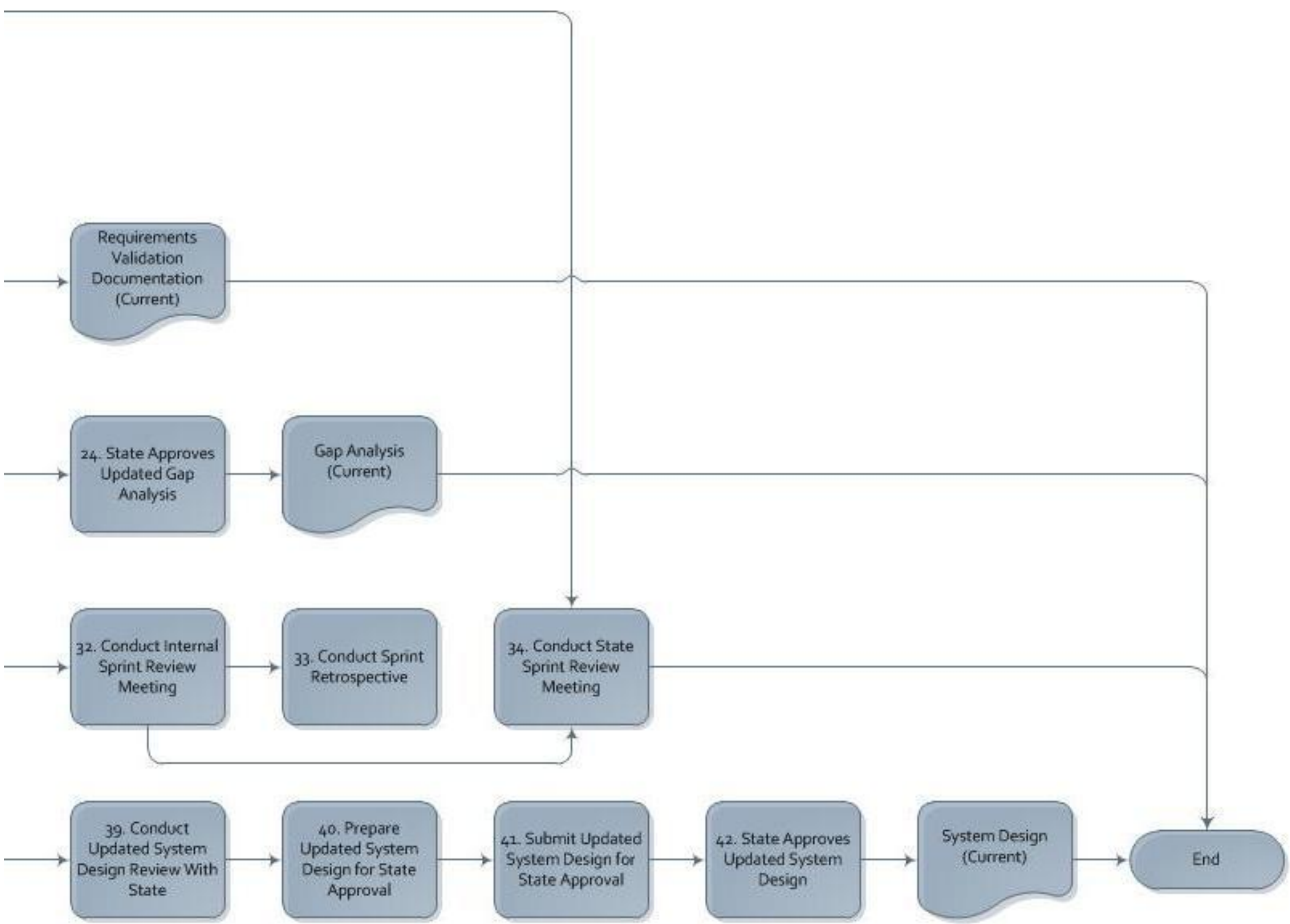

Figure 4 – Solution Development Process – Page 3

Solution Development Process Definitions		
Process #	**Process**	**Description**
1	Conduct Solution Planning Meeting With State	MAXIMUS conducts one or more meetings with State managers to discuss the Solution Plan for any remaining sprints. During these meetings, the participants review the currently planned sprint content, and then identify additions and changes that need to be made in the associated Sprint Definition chapter of the Sprint Planning Document.
2	Update Solution Planning Document	Based on the results of the Solution Planning Meeting, MAXIMUS updates the Solution Planning Document.
3	Deliver Updated Solution Planning Document to State	MAXIMUS delivers the updated Solution Planning Document to the State for review. The State reviews the document to ensure the proper updates were made.
4	Update Project Sessions Schedule	Based on the content defined for the current sprint in the updated Solution Planning document, MAXIMUS works with the State to update the Project Sessions Schedule which defines the business architecture and technical sessions that are necessary in order to gather information for the associated sprint content.
5	Deliver Updated Project Sessions Schedule to State	MAXIMUS delivers the updated Project Sessions Schedule to the State. The Project Sessions Schedule defines the important sessions that will be held, the days on which they will occur, and the location of the sessions.
6	Conduct Process Model Review Sessions	According to the Project Sessions Schedule, the Business Architecture Team conducts sessions to review and finalize the business process models for the Exchange. In other documents, these sessions may be referred to as “pre-sprint” activities or sessions. MAXIMUS gathers the information necessary to update the Requirements Validation Documentation., and in part the Gap Analysis.
7	Conduct Detailed Business Architecture Sessions	According to the Project Sessions Schedule, the Business Architecture Team conducts the Detailed Business Architecture sessions between MAXIMUS and the State. In other documents, these sessions may be referred to as “deep-dive” sessions. From these sessions, MAXIMUS gathers the information necessary to update the Requirements Validation Documentation., and in part the Gap Analysis.
8	Conduct Functional and Technical Requirements Elaboration	Requirements elaboration activities may be formal sessions or simple meetings between MAXIMUS and particular State stakeholder in order to elicit, validate or clarify requirements and business rules. In other documents, these sessions may be referred to as “pre-sprint” activities or sessions. These sessions are conducted by the functional and technical teams. MAXIMUS gathers the information necessary to update the Requirements Validation Documentation., and in part the Gap Analysis. The functional requirements elaboration activities are closely aligned with the business process model review sessions being conducted by the Business Architecture team.
9	Update Requirements Validation Documentation	Based on information gathered during the Process Model Reviews, Detailed Business Architecture Sessions, and the Functional and Technical Requirements Elaboration, the Business Architecture team updates the Requirements Validation Documentation. While the Business Architecture Team is responsible for compiling the documentation, some of the information such as the business rules documentation comes from the functional development teams.
10	Submit Updated Requirements Validation Documentation for Review	MAXIMUS submits the updated Requirements Validation Documentation to the State for review.
11	State Reviews Updated Requirements Validation Documentation	The State reviews the Requirements Validation Documentation updates for 5 business days and returns comments to MAXIMUS in the agreed upon format.
12	Revise Updated Requirements Validation Documentation Based on State Review	MAXIMUS makes updates to the Requirements Validation Documentation based on the comments received from the State. MAXIMUS also responds to the specific comments from the State in the agreed upon format.

Solution Development Process Definitions		
Process #	**Process**	**Description**
13	Conduct Updated Requirements Validation Documentation Review With State	MAXIMUS and the State review comments from the State provided in process step12. Any comments that cannot be resolved will be discussed in this meeting. The purpose of this meeting is resolve any issues related to the document that would inhibit the possibility of the document being approved by the State.
14	Prepare Updated Requirements Validation Documentation For State Approval	MAXIMUS prepares the final Requirements Validation Documentation based on the review of the comments and other issues discussed in the meeting described in process step 13.
15	Submit Updated Requirements Validation Documentation for State Approval	MAXIMUS submits the updated Requirements Validation Documentation to the State for Approval.
16	State Approves Updated Requirements Validation Documentation	The State approves the updated Requirements Validation Documentation which includes the updates discussed and identified in process step 14.
17	Update Gap Analysis	Based on information gathered during the Process Model Reviews, Detailed Business Architecture Sessions, and the Functional and Technical Requirements Elaboration, as well as information provided in the Requirements Validation Documentation, the functional and technical development teams update the Gap Analysis.
18	Submit Updated Gap Analysis for Review	MAXIMUS submits the updated Gap Analysis to the State for review.
19	State Reviews Updated Gap Analysis	The State reviews the Gap Analysis updates for 5 business days and returns comments to MAXIMUS in the agreed upon format.
20	Revise Updated Gap Analysis Based on State Review	MAXIMUS makes updates to the Gap Analysis based on the comments received from the State. MAXIMUS also responds to the specific comments from the State in the agreed upon format.
21	Conduct Updated Gap Analysis Review With State	MAXIMUS and the State review comments from the State provided in process step19. Any comments that cannot be resolved will be discussed in this meeting. The purpose of this meeting is resolve any issues related to the document that would inhibit the possibility of the document being approved by the State.
22	Prepare Updated Gap Analysis for State Approval	MAXIMUS prepares the final Gap Analysis based on the review of the comments and other issues discussed in the meeting described in process step 21.
23	Submit Updated Gap Analysis for State Approval	MAXIMUS submits the updated Gap Analysis to the State for Approval.
24	State Approves Updated Gap Analysis	The State approves the updated Gap Analysis which includes the updates discussed and identified in process step 19.
25	Design Sprint Software	MAXIMUS functional and technical teams design the functional, technical and business intelligence services necessary for the solution. This design work may identify the manner in which the COTS software must be configured, existing software services must be modified, or new software components must be developed.
26	Create/Update Software Specifications	Based on the design activities in process step 25, MAXIMUS functional and technical development teams update existing software specifications or create new software specifications. These specifications will be included in the System Design Document.
27	Construct Sprint Software	Based on the software specifications created in process step 26, MAXIMUS functional and technical development teams configure the COTS software, modify existing software components and develop new software components.
28	Develop Test Cases	MAXIMUS functional and technical development teams create the test cases necessary to test the software configuration and modifications.

Solution Development Process Definitions		
Process #	**Process**	**Description**
29	Unit Test Sprint Software	MAXIMUS functional and technical teams unit test the software configuration and modifications. The development teams resolve any issues found during the testing process.
30	Conduct Sprint Software Code Review	MAXIMUS conducts a code review for any new or modified software components. The code review ensures that the required software coding standards have been followed.
31	Deploy Software in Development	MAXIMUS deploys the reviewed and unit tested components into the Development environment. This includes performing any necessary build process checks agreed to between MAXIMUS and the State.
32	Conduct Internal Sprint Review Meeting	MAXIMUS development teams conduct a review of what was accomplished during the sprint. The development teams compare the work that was actually accomplished during the sprint to that which was planned and prepare for the sprint review with the State.
33	Conduct Sprint Retrospective	MAXIMUS development teams conduct a meeting to discuss problems that were encountered, lessons learned and how the development process can be improved in the remaining sprints.
34	Conduct Sprint Review Meeting With State	MAXIMUS conducts a review of what was accomplished during the sprint with the State. MAXIMUS and the State compare the work that was actually accomplished during the sprint to that which was planned and prepare for the Solution Planning session. MAXIMUS may also demonstrate the new software capabilities that were created during the sprints.
35	Update System Design Document	Based on output of process step 25 and the software specifications created or updated in process step 26, of the development teams update the System Design document.
36	Submit Updated System Design for Review	MAXIMUS submits the updated System Design document to the State for review.
37	State Reviews Updated System Design Document	The State reviews the System Design document updates for 5 business days and returns comments to MAXIMUS in the agreed upon format.
38	Revise Updated System Design Based on State Review	MAXIMUS makes updates to the System Design based on the comments received from the State. MAXIMUS also responds to the specific comments from the State in the agreed upon format.
39	Conduct Updated System Design Review With State	MAXIMUS and the State review comments from the State provided in process step37. Any comments that cannot be resolved will be discussed in this meeting. The purpose of this meeting is resolve any issues related to the document that would inhibit the possibility of the document being approved by the State.
40	Prepare Updated System Design for State Approval	MAXIMUS prepares the final System Design document based on the review of the comments and other issues discussed in the meeting described in process step 39.
41	Submit Updated System Design for State Approval	MAXIMUS submits the updated System Design document to the State for Approval.
	State Approves Updated System Design	The State approves the updated System Design document which includes the updates discussed and identified in process step 37.

Table 1 – Solution Development Process Definitions

1.4 The Solution Develop Process and the Project Schedule

The Project Schedule includes tasks related to the steps within the Solution Development Process. The tasks in the Project Schedule for each development sprint can be directly traced to each of the steps in the Solution Development Process. Having the Project Schedule reflect the repeatable Solution Development Process tasks instead of defining tasks related to specific sprint content allows MAXIMUS and the State the flexibility to append and/or modify the work to be accomplished in each sprint cycle without forcing changes to Project Schedule. If tasks for specific functionality are included in the Project Schedule and the plan for when that specific functionality is going to be addressed changes, the necessary associated changes to the Project Schedule will have to be processed through the Perform Integrated Change Control process defined in the Project Management Plan (PMP). By defining the content of the sprints in this document and building tasks for updating it into the Solution Development Process, we can amend or modify the content of a sprint without impacting the Project Schedule.

1.5 Sprint Definition Chapters

Each of the remaining chapters in this document is dedicated to defining the content of each sprint. By “content” we mean the specific system business and technical capabilities that are going to be discussed, analyzed, designed and developed in each time-limited sprint cycle. Each chapter related to an incomplete sprint may be updated during the Solution Planning Document update process shown in the Solution Planning Process diagram in steps 1 through 4.

1.6 Notes

The primary difference between versions 1.0 and 2.0 is that in each sprint definition chapter the functional goals are now related to an activity in the Enterprise End-to-End process models.

Sprint start and end dates in Chapters 2 through 7 reflect the dates in Project Schedule version 1.1 to be released on October 26th.

The plan currently does not include a remediation sprint to make up for any items that could not be completed in the six defined sprints. If remediation becomes necessary, the exact scope and timing of the work will have to be defined and scheduled.

2. Sprint Definition – HIX1

2.1 Overview

This Chapter provides the sprint definition for the HIX1 sprint. Sprint definitions described the system development work and system capabilities that are going to be created in the associated sprint cycle. The HIX1 sprint is defined in the Project Schedule and is estimated to run between October 22nd, 2012 and December 28th, 2012. That time period includes all the “Pre-Sprint” work such as planning for the sprint and conducting analysis sessions, as well as the actual development work and documentation updates. The detailed work in each sprint falls into one of the following general categories:

- Solution Planning
- Analysis and Definition
- Development
- Documentation

2.2 Sprint HIX1 Functional Goals

Functional Goals describe the work products and system capabilities that MAXIMUS intends to complete during this sprint. In the Project Schedule, these goals represent the detailed work for tasks referred to as Functional Services.

The Owner column indicates the vendor who is implementing the activity. The Performer Model column indicates in which Performer End-to-End model this activity resides. The Activity Alias is the unique identifier of the activity as defined in the Performer End-to-End model. The Activity Name is the name of the activity as defined in the Performer End-to-End model.

Sprint/Release HIX1 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Health Plan	HP290	Load Health Plan Information (various sources and information)
Connecture	Health Plan	HP300	Calculate and Save Rating (Rating Engine)
Connecture	Health Plan	HP390	User Selects Option
Connecture	Health Plan	HP480	Perform Program Integrity Checks
Connecture	Health Plan	HP490	Trigger Further Processes/Review
Connecture	Individual	IND260	Anonymous Plan / Provider Information Search

Sprint/Release HIX1 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Individual	IND530	Shop for Eligible Health Plans (State Funded or QHP)
Connecture	Individual	IND540	Select Plan - OOTB with no MN text changes and no integration
Connecture	Individual	IND560	Enroll in Selected Plan (State Funded or QHP) - Individual enrollment - no integration
Connecture	Individual	IND570	Determine Household Premium Payments - No integration - estimate only
Curam	Individual	IND370	Complete Screen Inquiry (Anonymously)
Curam	Individual	IND380	Determine Potential Medicaid or CHIP Eligibility
Curam	Individual	IND390	Estimate Tax Credit
Curam	Individual	IND400	Enter Application Data - MAGI
Curam	Individual	IND480	Determine Potential Medicaid or CHIP Eligibility and Tax Credits - Eligibility (MAGI)
Curam	Individual	IND480	Determine Potential Medicaid or CHIP Eligibility and Tax Credits - Screening (Non-MAGI Family &Children)
Curam	Individual	IND490	Determine if Eligible for the Exchange
Curam	Individual	IND500	Determining Eligibility for Advance Payment of Premium Tax Credits & Cost Sharing Reductions and BHP

Table 2: Functional Sprint/Release Goals HIX1

2.3 Sprint HIX1 Technical Goals

Technical Goals describe the work products and system capabilities that MAXIMUS intends to complete during this sprint. In the Project Schedule, these goals represent the detailed work for tasks referred to as Technical Services.

The Owner column indicates the vendor who is implementing the activity. The Activity Alias is the unique identifier of the non-functional activity. The Activity Name is the name of the non-functional activity.

Sprint/Release HIX1 – Technical Goals		
Owner	**Activity Alias**	**Activity Name**
EngagePoint SI	NF001	Configure Dev/Test
EngagePoint SI	NF002	Publish Audit Services to be consumed by COTS (eZaudit)
EngagePoint SI	NF003	Document Conceptual Solution Architecture
EngagePoint SI	NF004	Document Conceptual Integration Strategy
EngagePoint SI	NF005	Design Identity Access Management

Table 3: Technical Sprint/Release Goals HIX1

2.4 Traceability

A table will be inserted that traces functional and technical goals to requirements.

3. Sprint Definition – HIX2

3.1 Overview

This Chapter provides the sprint definition for the HIX2 sprint. Sprint definitions described the system development work and system capabilities that are going to be created in the associated sprint cycle. The HIX2 sprint is defined in the Project Schedule and is estimated to run between November 11th, 2012 and January 25th, 2013. That time period includes all the "Pre-Sprint" work such as planning for the sprint and conducting analysis sessions, as well as the actual development work and documentation updates. The detailed work in each sprint falls into one of the following general categories:

- Solution Planning
- Analysis and Definition
- Development
- Documentation

3.2 Sprint HIX2 Functional Goals

Functional Goals describe the work products and system capabilities that MAXIMUS intends to complete during this sprint. In the Project Schedule, these goals represent the detailed work for tasks referred to as Functional Services.

The Owner column indicates the vendor who is implementing the activity. The Performer Model column indicates in which Performer End-to-End model this activity resides. The Activity Alias is the unique identifier of the activity as defined in the Performer End-to-End model. The Activity Name is the name of the activity as defined in the Performer End-to-End model.

Sprint/Release HIX2 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Individual	IND560	Enroll in Selected Plan (State Funded or QHP) - Initial Enrollment Form
Curam	Individual	IND400	Enter Application Data - State Programs
Curam	Individual	IND480	Determine Potential Medicaid or CHIP Eligibility and Tax Credits - Screening (Non-MAGI Adult)
Curam	Individual	IND520	Communicate Consolidated Household Eligibility Results - MAGI
EngagePoint FM	Individual	IND590	Receive and Process Household Premium Data

Sprint/Release HIX2 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
EngagePoint SI	Assister	ATR500	Login to MN HIX Account
EngagePoint SI	Assister	ATR510	Access Exchange Portal
EngagePoint SI	Assister	ATR530	Create Initial Account
EngagePoint SI	Employee	EME150	Log In (Staff log into Exchange)
EngagePoint SI	Employee	EME160	Access Portal Exchange to Determine Desired Action
EngagePoint SI	Employee	EME180	Update MNHIX Account Information (e.g. change password, update email, review notifications and account history)
EngagePoint SI	Employee	EME190	Create Initial Account
EngagePoint SI	Employee	EME200	Login MNHIX Account
EngagePoint SI	Employer	EMR100	Access Exchange Portal
EngagePoint SI	Employer	EMR130	Login MNHIX Account
EngagePoint SI	Employer	EMR140	Create MNHIX Account
EngagePoint SI	Health Plan	HP380	Login to MN HIX Account
EngagePoint SI	Health Plan	HP450	Access Portal -Provide general information via web request
EngagePoint SI	Health Plan	HP470	Create Initial Account
EngagePoint SI	Individual	IND110	Receive and Route Work
EngagePoint SI	Individual	IND112	Log In (Staff logs into Exchange)
EngagePoint SI	Individual	IND150	Access Portal Exchange to Determine Desired Action-Provide general information via web request
EngagePoint SI	Individual	IND160	Login to MN HIX Account
EngagePoint SI	Individual	IND170	Create Initial Account
EngagePoint SI	Individual	IND240	Access Program Information & FAQ

Sprint/Release HIX2 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
EngagePoint SI	Individual	IND420	Verify Citizenship, SSN, Lawful Presence
EngagePoint SI	Provider	PRO150	Login to MN HIX Account
EngagePoint SI	Provider	PRO190	Create Initial Account
EngagePoint SI	Provider	PRO200	Manage Account-Access Portal
EngagePoint SI	Provider	PRO210	Login to MN HIX Account

Table 4: Functional Sprint/Release Goals HIX2

3.3 Sprint HIX2 Technical Goals

Technical Goals describe the work products and system capabilities that MAXIMUS intends to complete during this sprint. In the Project Schedule, these goals represent the detailed work for tasks referred to as Technical Services.

The Owner column indicates the vendor who is implementing the activity. The Activity Alias is the unique identifier of the non-functional activity. The Activity Name is the name of the non-functional activity.

Sprint/Release HIX2 – Technical Goals		
Owner	**Activity Alias**	**Activity Name**
EngagePoint SI	NF006	Design MMIS Interface
EngagePoint SI	NF048	Design Maxis Interface
EngagePoint SI	NF007	Design Curam Interface
EngagePoint SI	NF008	Install Universal Semantic Layer (USL)
EngagePoint SI	NF009	Install Data Registry
EngagePoint SI	NF011	Develop Web Presentment Strategy
EngagePoint SI	NF012	Develop Data Management and Data Conversion Strategy
EngagePoint SI	NF013	Implement Single-Sign on
EngagePoint SI	NF014	Design Connecture Interface

Sprint/Release HIX2 – Technical Goals		
Owner	**Activity Alias**	**Activity Name**
EngagePoint SI	NF015	Design Services supporting enrollment processes as needed

Table 5: Technical Sprint/Release Goals HIX2

3.4 Traceability

A table will be inserted that traces functional and technical goals to requirements.

4. Sprint Definition – HIX3

4.1 Overview

This Chapter provides the sprint definition for the HIX3 sprint. Sprint definitions described the system development work and system capabilities that are going to be created in the associated sprint cycle. The HIX3 sprint is defined in the Project Schedule and is estimated to run between December 17th, 2012 and March 8th, 2013. That time period includes all the “Pre-Sprint” work such as planning for the sprint and conducting analysis sessions, as well as the actual development work and documentation updates. The detailed work in each sprint falls into one of the following general categories:

- Solution Planning
- Analysis and Definition
- Development
- Documentation

4.2 Sprint HIX3 Functional Goals

Functional Goals describe the work products and system capabilities that MAXIMUS intends to complete during this sprint. In the Project Schedule, these goals represent the detailed work for tasks referred to as Functional Services.

The Owner column indicates the vendor who is implementing the activity. The Performer Model column indicates in which Performer End-to-End model this activity resides. The Activity Alias is the unique identifier of the activity as defined in the Performer End-to-End model. The Activity Name is the name of the activity as defined in the Performer End-to-End model.

Sprint/Release HIX3 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Employee	EME170	Access Program Information & FAQ
Connecture	Assister	ATR540	Request Information
Connecture	Assister	ATR560	User Selects Option
Connecture	Assister	ATR630	View/Select Account Summary
Connecture	Individual	IND540	Select Plan - Plan advisor text customization

Sprint/Release HIX3 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Individual	IND570	Determine Household Premium Payments - Integration with Module 1 for premium calculations
Curam	Individual	IND270	Process Missing Information
Curam	Individual	IND310	Evaluate Reinstatement - Case Management
Curam	Individual	IND320	Reinstate Individual - Case Management
Curam	Individual	IND330	Provide Data Updates - Case Management
Curam	Individual	IND350	Perform Periodic Data Re-Verification (Individual) - Case Management
Curam	Individual	IND480	Determine Potential Medicaid or CHIP Eligibility and Tax Credits - Screening (Non-MAGI Med Needy)
EngagePoint FM	Individual	IND620	Generate Health Ins Premium Notice
EngagePoint FM	Individual	IND680	Identify Health Plans who support at least one employee
Connecture	Employee	EME220	Verify for employer (shop) coverage
EngagePoint SI	Employee	EME230	Verify Household Income (For all household members included in the application)
EngagePoint SI	Employee	EME240	Verify household composition
Connecture	Employer	EMR460	Load/update Employee Roster
EngagePoint SI	Health Plan	HP450	Access Portal-Provide updating of information and missing information capability via web request
EngagePoint SI	Individual	IND150	Access Portal Exchange to Determine Desired Action-Provide updating of information and missing information capability via web request
EngagePoint SI	Individual	IND180	Manage MN HIX Account
EngagePoint SI	Individual	IND410	Verify Individual Residency
EngagePoint SI	Individual	IND430	Verify Individual is not an Employee

Sprint/Release HIX3 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
EngagePoint SI	Individual	IND440	Verify Incarceration Status
EngagePoint SI	Individual	IND460	Verify Household Income
EngagePoint SI	Individual	IND470	Verify Household Composition
EngagePoint SI	Provider	PRO200	Manage Account-Create initial Account

Table 6: Functional Sprint/Release Goals HIX3

4.3 Sprint HIX3 Technical Goals

Technical Goals describe the work products and system capabilities that MAXIMUS intends to complete during this sprint. In the Project Schedule, these goals represent the detailed work for tasks referred to as Technical Services.

The Owner column indicates the vendor who is implementing the activity. The Activity Alias is the unique identifier of the non-functional activity. The Activity Name is the name of the non-functional activity.

Sprint/Release HIX3 – Technical Goals		
Owner	**Activity Alias**	**Activity Name**
EngagePoint SI	NF010	Publish Fed Hub
EngagePoint SI	NF016	Implement ID management including role base security
EngagePoint SI	NF017	Implement Connector for MMIS
EngagePoint SI	NF019	Implement Verification Services
EngagePoint SI	NF049	Implement Curam Interface
EngagePoint SI	NF020	Implement Connecture Interface - Appeals, Curam Integration, Employer eligibility, SERFF etc

Table 7: Technical Sprint/Release Goals HIX3

4.4 Traceability

A table will be inserted that traces functional and technical goals to requirements.

5. Sprint Definition – HIX4

5.1 Overview

This Chapter provides the sprint definition for the HIX4 sprint. Sprint definitions described the system development work and system capabilities that are going to be created in the associated sprint cycle. The HIX4 sprint is defined in the Project Schedule and is estimated to run between January 21st, 2013 and March 29th, 2013. That time period includes all the “Pre-Sprint” work such as planning for the sprint and conducting analysis sessions, as well as the actual development work and documentation updates. The detailed work in each sprint falls into one of the following general categories:

- Solution Planning
- Analysis and Definition
- Development
- Documentation

5.2 Sprint HIX4 Functional Goals

Functional Goals describe the work products and system capabilities that MAXIMUS intends to complete during this sprint. In the Project Schedule, these goals represent the detailed work for tasks referred to as Functional Services.

The Owner column indicates the vendor who is implementing the activity. The Performer Model column indicates in which Performer End-to-End model this activity resides. The Activity Alias is the unique identifier of the activity as defined in the Performer End-to-End model. The Activity Name is the name of the activity as defined in the Performer End-to-End model.

Sprint/Release HIX4 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Assister	ATR640	Break Link with Assistee
Connecture	Assister	ATR650	Decertify/Expire Assister Account
Connecture	Health Plan	HP290	Load Health Plan Information (SERFF integration)
Connecture	Health Plan	HP300	Calculate and Save Rating (Rating Engine) -SERFF
Connecture	Health Plan	HP310	Publish (Update) Health Plan Information (SERFF integration)
Connecture	Health Plan	HP320	Remove/Expire Health Plan Information from Exchange (SERFF Integration)

Sprint/Release HIX4 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Health Plan	HP390	User Selects Option (SERFF integration)
Connecture	Health Plan	HP420	Review Exchange Health Plan Information (SERFF integration)
Connecture	Health Plan	HP480	Perform Program Integrity Checks (SERFF)
Connecture	Health Plan	HP490	Trigger Further Processes/Review (SERFF integration)
Connecture	Individual	IND550	Capture / Record Tax Credit Selection
Connecture	Individual	IND560	Enroll in Selected Plan (State Funded or QHP) - Open enrollment
Curam	Individual	IND300	Manage Assister Link for Individual
Curam	Individual	IND310	Evaluate Reinstatement - Life Events
Curam	Individual	IND320	Reinstate Individual - Life Events
Curam	Individual	IND331	Provide Data Updates - Life Events
Curam	Individual	IND340	Process Individual Changes
Curam	Individual	IND350	Perform Periodic Data Re-Verification (Individual) - Life Events
Curam	Individual	IND480	Determine Potential Medicaid or CHIP Eligibility and Tax Credits - Screening (Non-MAGI Other)
Curam	Individual	IND520	Communicate Consolidated Household Eligibility Results - Screening
EngagePoint FM	Assister	ATR390	Calculate any Exchange Related Fees
EngagePoint FM	Individual	IND600	Aggregate Enrolled Employer Premium Data: Determine Payment Options - Generate/aggregate employer premium invoice
EngagePoint FM	Individual	IND650	Resolve Billing, Invoice and Payment Disputes
EngagePoint SI	Assister	ATR520	Update Account (e.g. change password)
EngagePoint SI	Employee	EME140	Receive and Route Work
EngagePoint SI	Employee	EME231	Verify if currently receiving State-Sponsored insurance (e.g. Medicaid)

Sprint/Release HIX4 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
EngagePoint SI	Employer	EMR150	Update MNHIX Account Information
EngagePoint SI	Employer	EMR210	Perform Employer Identity Management
EngagePoint SI	Employer	EMR440	Receive and Route Work
EngagePoint SI	Health Plan	HP280	Receive Health Plan Information from SERFF
EngagePoint SI	Health Plan	HP330	Receive Inbound Information and Route Work
EngagePoint SI	Health Plan	HP450	Access Portal Provide ability to appeal, dispute payments and apply for insurance exemption; presumptive eligibility
EngagePoint SI	Individual	IND111	Receive and Route Health Plan Information
EngagePoint SI	Individual	IND150	Access Portal Exchange to Determine Desired Action-Provide ability to appeal, dispute payments and apply for insurance exemption; presumptive eligibility
EngagePoint SI	Individual	IND450	Verify Indian Status
EngagePoint SI	Provider	PRO130	Receive Inbound Information and Route Work
EngagePoint SI	Provider	PRO200	Manage Account Send Notifications (notices) to provider

Table 8: Functional Sprint/Release Goals HIX4

5.3 Sprint HIX4 Technical Goals

Technical Goals describe the work products and system capabilities that MAXIMUS intends to complete during this sprint. In the Project Schedule, these goals represent the detailed work for tasks referred to as Technical Services.

The Owner column indicates the vendor who is implementing the activity. The Activity Alias is the unique identifier of the non-functional activity. The Activity Name is the name of the non-functional activity.

Sprint/Release HIX4 – Technical Goals		
Owner	**Activity Alias**	**Activity Name**
EngagePoint SI	NF018	Implement Connector for MAXIS

Sprint/Release HIX4 – Technical Goals		
Owner	**Activity Alias**	**Activity Name**
EngagePoint SI	NF021	Develop admin User Interface
EngagePoint SI	NF050	Publish Document Services
EngagePoint SI	NF022	Implement MAXIS Connector
EngagePoint SI	NF023	Install USL 2.0
EngagePoint SI	NF024	Install Data Registry 2.0
EngagePoint SI	NF025	Publish Notification Services for COTS
EngagePoint SI	NF026	Design interface with Systematic Alien Verification for Entitlements System
EngagePoint SI	NF027	Design Interface with Public Assistance Reporting System (PARIS)
EngagePoint SI	NF029	Design Interface with Social Service Information System (SSIS)
EngagePoint SI	NF030	Design Interface with Department of Public Safety, Driver and Vehicle Division (DVS) for addresses
EngagePoint SI	NF032	Design Interface with SWIFT

Table 9: Technical Sprint/Release Goals HIX4

5.4 Traceability

A table will be inserted that traces functional and technical goals to requirements.

6. Sprint Definition – HIX5

6.1 Overview

This Chapter provides the sprint definition for the HIX5 sprint. Sprint definitions described the system development work and system capabilities that are going to be created in the associated sprint cycle. The HIX5 sprint is defined in the Project Schedule and is estimated to run between February 18th, 2013 and April 26th, 2013. That time period includes all the “Pre-Sprint” work such as planning for the sprint and conducting analysis sessions, as well as the actual development work and documentation updates. The detailed work in each sprint falls into one of the following general categories:

- Solution Planning
- Analysis and Definition
- Development
- Documentation

6.2 Sprint HIX5 Functional Goals

Functional Goals describe the work products and system capabilities that MAXIMUS intends to complete during this sprint. In the Project Schedule, these goals represent the detailed work for tasks referred to as Functional Services.

The Owner column indicates the vendor who is implementing the activity. The Performer Model column indicates in which Performer End-to-End model this activity resides. The Activity Alias is the unique identifier of the activity as defined in the Performer End-to-End model. The Activity Name is the name of the activity as defined in the Performer End-to-End model.

Sprint/Release HIX5 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Employee	EME232	Verify if receiving APTC (Advanced Premium Tax Credit)
Connecture	Employee	EME364	Notify Individual to Select a Health Plan
Connecture	Employer	EMR180	Provide Information (logged in)
Connecture	Employer	EMR200	Apply for Qualified SHOP status
Connecture	Employer	EMR230	Determine Eligibility
Connecture	Employer	EMR240	Determine Estimated Employer Tax Credit

Sprint/Release HIX5 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Employer	EMR260	Support Shopping
Connecture	Employer	EMR290	Set-up Employer Plan Options
Connecture	Employer	EMR300	Shop and Choose Health Options
Connecture	Employer	EMR320	Determine Employer Tax Credit
Connecture	Employer	EMR340	Set Employer Contribution
Connecture	Employer	EMR360	Provide Information (anonymous)
Connecture	Employer	EMR370	Determine Estimated Employer Tax Credit
Connecture	Employer	EMR380	Support Shopping
Connecture	Employer	EMR861	Load Employer Disenrollment Request File
Connecture	Employer	EMR895	Update Billing Options
Connecture	Health Plan	HP400	Test QHP Ratings
Connecture	Health Plan	HP410	Capture Test Results
Connecture	Individual	IND560	Enroll in Selected Plan (State Funded or QHP) - Special enrollments
Curam	Assister	ATR210	Remove Assister Link to Individual
Curam	Assister	ATR240	View Individual Assister Links
EngagePoint FM	Assister	ATR400	Pay Assister Organizations and Transfer Funds
EngagePoint FM	Assister	ATR410	Process Assister Transaction Payments
EngagePoint FM	Assister	ATR420	Aggregate Payments per Assister
EngagePoint FM	Assister	ATR450	Issue Credit/Refund
EngagePoint FM	Assister	ATR610	Manage Overpayment
EngagePoint FM	Assister	ATR620	Resolve Payment Disputes

Sprint/Release HIX5 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
EngagePoint FM	Individual	IND600	Aggregate Enrolled Employer Premium Data: Determine Payment Options - Define and enforce valid payment options
EngagePoint FM	Individual	IND610	Calculate any Exchange Related Fees
EngagePoint FM	Individual	IND630	Receive and Record Premium Payment
EngagePoint FM	Individual	IND640	Verify Complete Payment Received
EngagePoint FM	Individual	IND660	Monitor for Employer Unpaid Invoices and Discrepancies
EngagePoint FM	Individual	IND670	Notify Employer of Unpaid Invoice and Payment Discrepancies
EngagePoint FM	Individual	IND690	Match Individuals to Invoices Sent and Payments Received
EngagePoint FM	Individual	IND700	Aggregate Payments for each Health Plan
EngagePoint FM	Individual	IND710	Include additional Fees for Health Plan payment processing
EngagePoint FM	Individual	IND720	Pay Health Plan and Transfer Funds
EngagePoint FM	Individual	IND730	Process Premium Payment Information from Health Plans
EngagePoint FM	Individual	IND750	Manage Overpayment
EngagePoint SI	Assister	ATR190	Receive and Route Inbound Request
EngagePoint SI	Assister	ATR490	Receive and Route Inbound Requests
EngagePoint SI	Health Plan	HP350	Process Payment Information File
EngagePoint SI	Health Plan	HP460	Update Account (e.g. change password)

Table 10: Functional Sprint/Release Goals HIX5

6.3 Sprint HIX 5 Technical Goals

Technical Goals describe the work products and system capabilities that MAXIMUS intends to complete during this sprint. In the Project Schedule, these goals represent the detailed work for tasks referred to as Technical Services.

The Owner column indicates the vendor who is implementing the activity. The Activity Alias is the unique identifier of the non-functional activity. The Activity Name is the name of the non-functional activity.

Sprint/Release HIX5 – Technical Goals		
Owner	**Activity Alias**	**Activity Name**
EngagePoint SI	NF020	Design Reports Using State Identified Tool
EngagePoint SI	NF028	Design Interface with TALX/Work number system
EngagePoint SI	NF031	Design interface with Department of Employment and Economic Development Services (DEED)
EngagePoint SI	NF033	Design Interface with PRISM (State Child Support Enforcement Program)
EngagePoint SI	NF034	Design Interface with DHS Shared Master Index (SMI)
EngagePoint SI	NF035	Design interface with DHS warehouse
EngagePoint SI	NF037	Implement and test Data Conversion
EngagePoint SI	NF038	Integrate with Systematic Alien Verification for Entitlements System
EngagePoint SI	NF039	Implement with Public Assistance Reporting System (PARIS)

Table 11: Technical Sprint/Release Goals HIX 5

6.4 Traceability

A table will be inserted that traces functional and technical goals to requirements.

7. Sprint Definition – HIX6

7.1 Overview

This Chapter provides the sprint definition for the HIX5 sprint. Sprint definitions described the system development work and system capabilities that are going to be created in the associated sprint cycle. The HIX5 sprint is defined in the Project Schedule and is estimated to run between March 18th, 2013 and May 24th, 2013. That time period includes all the “Pre-Sprint” work such as planning for the sprint and conducting analysis sessions, as well as the actual development work and documentation updates. The detailed work in each sprint falls into one of the following general categories:

- Solution Planning
- Analysis and Definition
- Development
- Documentation

7.2 Sprint HIX6 Functional Goals

Functional Goals describe the work products and system capabilities that MAXIMUS intends to complete during this sprint. In the Project Schedule, these goals represent the detailed work for tasks referred to as Functional Services.

The Owner column indicates the vendor who is implementing the activity. The Performer Model column indicates in which Performer End-to-End model this activity resides. The Activity Alias is the unique identifier of the activity as defined in the Performer End-to-End model. The Activity Name is the name of the activity as defined in the Performer End-to-End model.

Sprint/Release HIX6 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Assister	ATR230	Remove Assister Link to Employer
Connecture	Assister	ATR260	View Employer Assister Links
Connecture	Employee	EME290	Shop for Eligible QHP(Employer Plans Only)
Connecture	Employee	EME300	Select Health Plan
Connecture	Employee	EME340	Determine Household Premium Payments
Connecture	Employee	EME350	Process Disenrollment

Sprint/Release HIX6 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Employee	EME360	Enter Application Data
Connecture	Employee	EME361	Offer option to apply through the Individual Exchange
Connecture	Employee	EME362	Offer option to apply through the Individual Exchange
Connecture	Employee	EME363	Offer Option to apply through the Individual Exchange
Connecture	Employee	EME365	Determine if Health Plan Selection was made
Connecture	Employee	EME366	Auto-assign Health Plan
Connecture	Employee	EME367	Prepare Coverage Information for Notification to Appropriate Parties
Connecture	Employee	EME400	Process Missing Information
Connecture	Employee	EME410	Select / Manage Assister
Connecture	Employee	EME420	Process Exemption Request
Connecture	Employee	EME430	Process Employee Changes
Connecture	Employee	EME440	Communicate Employee Verification Error and Direct to Apply as Individual
Connecture	Employee	EME450	Perform Periodic Data Re-Verification (Employee)
Connecture	Employee	EME451	Perform Program Integrity Checks
Connecture	Employee	EME452	Trigger Additional Processes / Review
Connecture	Employee	EME830	Process Employee Disenrollment File
Connecture	Employer	EMR190	Manage Employee On-going Changes
Connecture	Employer	EMR250	Disenroll Employer
Connecture	Employer	EMR270	Select / Manage Assister (includes de-selecting)
Connecture	Employer	EMR280	Update Employee Roster
Connecture	Employer	EMR310	Update Employee Roster

Sprint/Release HIX6 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Employer	EMR330	Coordinate Employee Participation
Connecture	Employer	EMR350	Set Billing Information and Payment Preferences
Connecture	Employer	EMR390	Search Assisters
Connecture	Employer	EMR800	Determine if Employer is still eligible to be a SHOP
Connecture	Employer	EMR850	Perform Program Integrity Checks
Connecture	Employer	EMR860	Trigger Additional Processes / Review
Connecture	Individual	IND250	Anonymous Search Assister
Connecture	Individual	IND280	Provide Assister Information
Connecture	Provider	PRO140	Load Provider Data - Doctor & Plan
Connecture	Provider	PRO140	Load Provider Data - Integration into Exchange
Connecture	Provider	PRO160	Load Appeal Outcome Data
Connecture	Provider	PRO220	User Selects Option - Doctor & Plan
Connecture	Provider	PRO220	User Selects Option - Integration into Exchange
Connecture	Provider	PRO230	View Appeal Status
Connecture	Provider	PRO240	Update Provider Supplemental Data
Connecture	Provider	PRO250	Approve Supplemental Updates
Connecture	Provider	PRO270	Publish Provider Data - Doctor & Plan
Connecture	Provider	PRO270	Publish Provider Data - Integration into Exchange
Connecture	Provider	PRO280	Preview Provider Data (only owner can preview their information)
Curam	Individual	IND290	Process Exemption Request
EngagePoint FM	Assister	ATR440	Reconcile Payments

Sprint/Release HIX6 – Functional Goals			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
EngagePoint FM	Individual	IND740	Perform Planned Reconciliation
EngagePoint SI	Assister	ATR200	Manage Links
EngagePoint SI	Assister	ATR270	Determine if Assister Payment Required
EngagePoint SI	Assister	ATR280	Notify Individual, Employee, Employer and Navigator Organization of Broken Assister Link
EngagePoint SI	Health Plan	HP280	Receive Health Plan Information from other sources
EngagePoint SI	Health Plan	HP370	Process Payment Reconciliation File

Table 12: Functional Sprint/Release Goals HIX6

7.3 Sprint HIX 6 Technical Goals

Technical Goals describe the work products and system capabilities that MAXIMUS intends to complete during this sprint. In the Project Schedule, these goals represent the detailed work for tasks referred to as Technical Services.

The Owner column indicates the vendor who is implementing the activity. The Activity Alias is the unique identifier of the non-functional activity. The Activity Name is the name of the non-functional activity.

Sprint/Release HIX6 – Technical Goals		
Owner	**Activity Alias**	**Activity Name**
EngagePoint SI	NF040	Implement Interface with TALX/Work number system
EngagePoint SI	NF041	Implement with Social Service Information System (SSIS)
EngagePoint SI	NF042	Implement interface with Department of Public Safety, Driver and Vehicle Division (DVS) for addresses
EngagePoint SI	NF043	Implement interface with Department of Employment and Economic Development Services (DEED)
EngagePoint SI	NF044	Implement Interface with SWIFT
EngagePoint SI	NF045	Implement Interface with PRISM (State Child Support Enforcement Program)
EngagePoint SI	NF046	Implement Interface with DHS Shared Master Index (SMI)

Sprint/Release HIX6 – Technical Goals		
Owner	**Activity Alias**	**Activity Name**
EngagePoint SI	NF047	Implement interface with DHS warehouse

Table 13: Technical Sprint/Release Goals HIX 6

7.4 Traceability

A table will be inserted that traces functional and technical goals to requirements.

8. Unassigned Activities

8.1 Overview

A number of activities defined in the Performer End-to-End models have yet to be assigned to a Sprint for implementation. These activities require further elaboration in order to flesh out the functional requirements and make a determination on scope and responsibility. This need to determine the scope for these activities is currently identified in the Issues Log.

Unassigned Activities			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Assister	ATR100	Process Assister Organization Exchange Onboarding Request
Connecture	Assister	ATR110	Determine Assister Organization Exchange Onboard Request Status
Connecture	Assister	ATR120	Establish Assister Organization
Connecture	Assister	ATR130	Update Assister Organization/Assister Roster
Connecture	Assister	ATR140	Determine Assister Organizations for Renewal
Connecture	Assister	ATR150	Receive and Route Assister Organization Request
Connecture	Assister	ATR160	Process Assister Organization/Assister Decertification Request
Connecture	Assister	ATR170	Re-assign Assisters
Connecture	Assister	ATR180	Update Assister Links
Connecture	Assister	ATR220	Remove Assister Link to Employee
Connecture	Assister	ATR250	View Employee Assister Links
Connecture	Assister	ATR290	Process Assister Organization/Assister Account Update Request
Connecture	Assister	ATR300	Process Assister Organization/Assister Status Request
Connecture	Assister	ATR310	Update Assister Roster
Connecture	Assister	ATR330	Determine if Assister Requires Further Training or Certifications
Connecture	Assister	ATR550	Provide Assister Information

Unassigned Activities			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
Connecture	Assister	ATR660	Create Assister MN HIX Account
Connecture	Assister	ATR670	Perform Program Integrity Checks
Connecture	Assister	ATR680	Trigger Further Processes/Review
Connecture	Employee	EME233	Verify if applying as an individual in Exchange or is receiving insurance as an individual thru the Exchange
Connecture	Employer	EMR120	Update Appeals Status
Connecture	Health Plan	HP340	Process Disenrollment File
Connecture	Individual	IND580	Process Disenrollment
EngagePoint FM	Assister	ATR380	Process Assister Blocked Grant Payments
EngagePoint FM	Assister	ATR430	Determine if Block Grant or Transaction Payment is Owed
EngagePoint SI	Assister	ATR320	Perform Assister Verifications (CIRCON)
EngagePoint SI	Assister	ATR360	Collect Assister Payment Transactions
EngagePoint SI	Assister	ATR370	Prepare and Send Assister Payment Transactions
EngagePoint SI	Assister	ATR570	Capture Complaint
EngagePoint SI	Assister	ATR580	Manage and Resolve Complaints
EngagePoint SI	Assister	ATR600	Process Appeal Status Input
EngagePoint SI	Employee	EME249	Capture Complaint
EngagePoint SI	Employee	EME250	Manage and Resolve Complaints
EngagePoint SI	Employee	EME260	Process Appeal Status Input
EngagePoint SI	Employee	EME270	Notify Employees of Open Enrollment
EngagePoint SI	Employer	EMR160	Capture Complaint

Unassigned Activities			
Owner	**Performer Model**	**Activity Alias**	**Activity Name**
EngagePoint SI	Employer	EMR170	Manage and Resolve Complaints
EngagePoint SI	Employer	EMR220	Perform Potential Verifications
EngagePoint SI	Employer	EMR450	Select Work
EngagePoint SI	Health Plan	HP360	Process Enrollment/Disenrollment Reconciliation File
EngagePoint SI	Health Plan	HP430	Capture Complaint
EngagePoint SI	Health Plan	HP440	Manage and Resolve Complaints
EngagePoint SI	Individual	IND150	Access Portal Exchange to Determine Desired Action
EngagePoint SI	Individual	IND190	Capture Complaint
EngagePoint SI	Individual	IND200	Manage and Resolve Complaints
EngagePoint SI	Individual	IND220	Process Appeal Status Input
EngagePoint SI	Individual	IND230	Select Available Action & Provide Information (Anonymously)
EngagePoint SI	Provider	PRO180	Access Portal
EngagePoint SI	Provider	PRO200	Manage Account
EngagePoint SI	Provider	PRO340	Capture Complaint
EngagePoint SI	Provider	PRO350	Manage and Resolve Complaints

Table 14: Unassigned Activities