

# Agent Town Hall

## Virginia Health Benefit Exchange

*Holly Mortlock, Chief of Government Affairs & Policy*  
*March 29, 2023*

# Housekeeping

Microphones and chat features are disabled.

If you have questions during the presentation, email them to:

[brokers@scc.virginia.gov](mailto:brokers@scc.virginia.gov)

This email address is monitored during the presentation.

Submitted questions will be answered as time permits.

HBE staff will follow up on all questions.

# Virginia Health Benefit Exchange Introductions

**Keven Patchett**

HBE Director

**Holly Mortlock**

Chief of Government Affairs and Policy

**Brionna Jones**

Marketing and Outreach Manager

**Kenyata Tyler-Moore**

Consumer Center Manager

**Toni Janoski**

Deputy Director Operations and Finance

**Christine Houchens**

Certification and Compliance Manager



# Agenda



Virginia's  
Transition Progress



Timeline



Staffing update



Stakeholder  
Engagement



Continuous  
Coverage  
Unwinding



State and Federal  
Policy Update



FAQs



Contact Info

# Transition Related Information

COMING SOON..... on the SCC/ HBE Website

- A schedule of upcoming Town Halls
- Town Hall meeting slide decks
- Transition-related reference materials
- FAQs



# Progress to Date

## Summer-Fall 2022

- ✓ Medicaid Coordination w/ three Work Groups: Eligibility and Enrollment, Customer Service Call Center, and Data Transfer and Verifications
- ✓ Platform and Consumer Assistance Center Procurement Award
- ✓ Vendor Onboarding
- ✓ Began Product Orientation Sessions
- ✓ Developed stakeholder engagement program
- ✓ Conducted (2) platform demonstrations for agents and carriers

## January 2023

- ✓ Concluded Product Orientation Sessions spanning 3 months and 25 product areas

- ✓ Completed mapping review of 816 contractual requirements
- ✓ Obtained SCC PMO approval for the HBE Project Management Plan
- ✓ Obtained SCC Enterprise Architecture Board Approval
- ✓ Conducted Internal Carrier Kickoff
- ✓ Continued Weekly Working Sessions with CMS
- ✓ Initiated Weekly Meetings with DMAS & DSS
- ✓ DMAS, DSS, & HBE agreed on VaCMS changes needed to support HBE Account Transfers (ATs)
- ✓ Began Continuous Coverage Unwinding preparation
- ✓ Convened Interagency Unwinding Communications Work Group
- ✓ Completed Platform Configuration Guide
- ✓ Single Streamlined Application

# Progress to Date

## February 2023

- ✓ Formal stakeholder engagement program commenced
- ✓ Conducted Carrier Kickoff Session with 21 Health and Dental Issuers
- ✓ Consumer Assistance Center Kickoff with GetInsured
- ✓ Review and editing of 43 platform notices that will automatically be triggered and sent to consumers, agents/assistors from the platform
- ✓ Weekly Working Sessions with CMS
- ✓ Obtained schedule alignment for VaCMS changes with DSS
- ✓ Unwinding marketing campaign developed
- ✓ Procurement for Learning Management System
- ✓ Submitted initial drafts for key security document for the IRS and CMS

## March 2023

- ✓ Transition communications plan submitted to CMS
- ✓ Made brand selection for HBE to include Exchange name and logo
- ✓ Completed configuration guide consisting of over 500 configurations for Virginia's platform.
- ✓ Ongoing unwinding preparation
- ✓ Training and certification parameters identified
- ✓ Safeguard Security Report for IRS
- ✓ Website procurement completed.

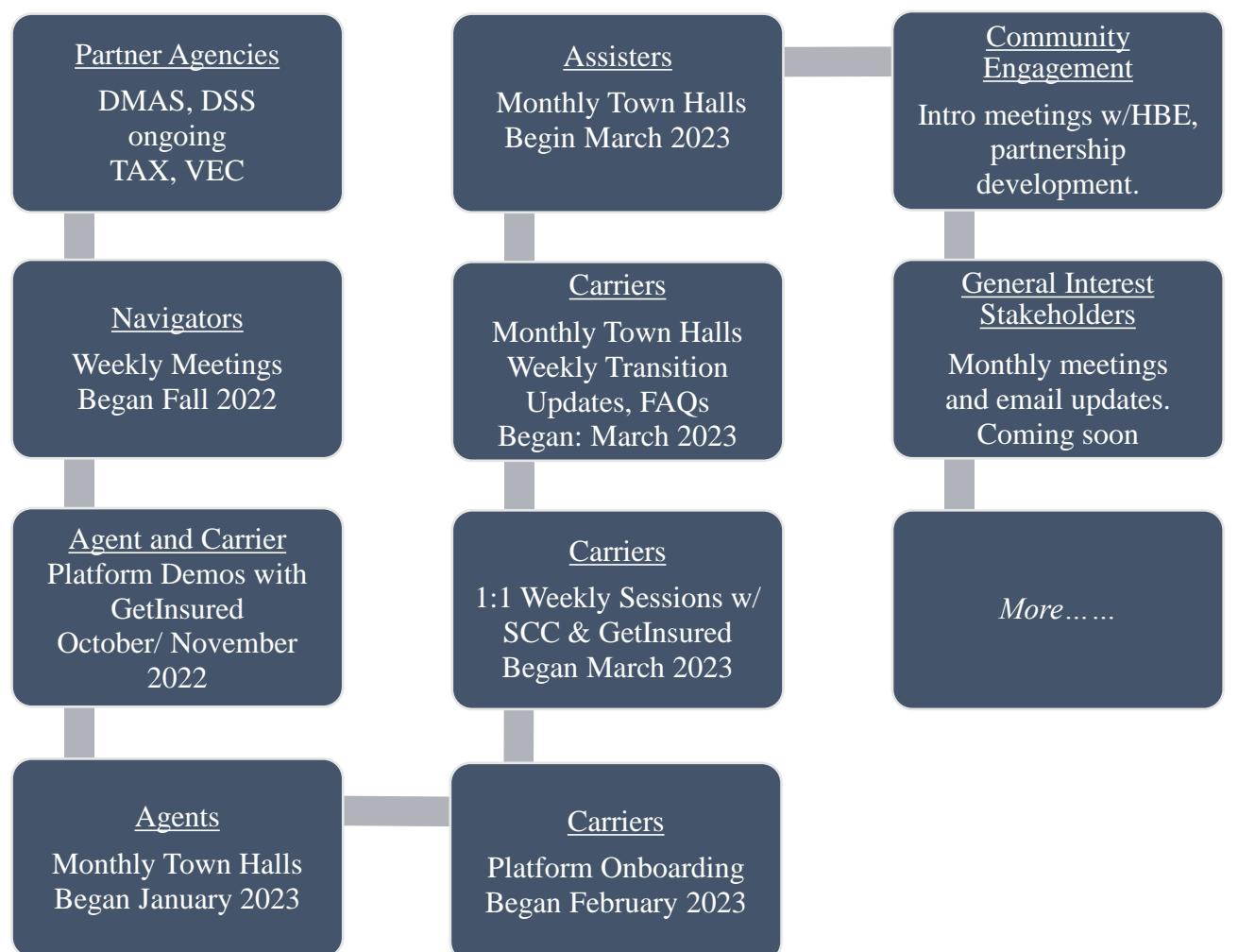
# Transition Timeline

DATE	EVENT
Winter/Spring	FFE Data Migration Testing
Spring/Summer	Systems Integration & Carrier Electronic Data Integration (EDI) Testing
March 31	Federal Unwinding Special Enrollment Begins
April 1	Medicaid Redeterminations Begin
Summer	Carrier Onboarding Continues PY 2024 Plans loaded into Platform
Summer	Agent/Assister Training and Certification
September 1	Platform and Consumer Assistance Center Soft Launch (for Agents and Assisters)
August 4	CMS Approval to Go Live
Late Summer	Actual FFE Consumer Data Migration
Late September	Agent Books of Business Created in Platform
October 2	Auto-reenrollment Begins
Around October 10	Platform and Consumer Assistance Center Soft Launch and Plan Preview (for Consumers)
November 1	Plan Year 2024 Open Enrollment Begins on Virginia's Platform
January 15	Open Enrollment Ends
July 31	Virginia/Federal Unwinding SEP Ends

# Staffing Update

- HBE is now a staff of 18. Since September 2022, we have hired:
  - Deputy Director for Organizational Change and Program Governance
  - Marketing and Outreach Manager
  - Call Center Operations Manager
  - Finance and Audit Manager
  - Financial Analyst
  - Administrative Coordinator (2)
  - Project Manager
  - Program Coordinator
  - Business Process Analyst (2)
  - Quality Assurance Analyst
  - Security Analyst
- Active recruitments for Quality Assurance Analysts, Stakeholder Engagement, and other program coordination and business process support.
- Through Q2 of 2023, we will be recruiting for positions in the areas of Appeals, Training and Certification, Consumer Service, and Stakeholder Engagement.

# Stakeholder Engagement



# Agent Engagement



## Monthly Town Hall meetings

February 15

March 29

April 28 (Friday)

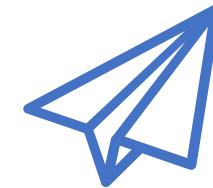
May 24

June 28

Bi-monthly sessions beginning in July



Regular email newsletters with  
updates and FAQs



To sign up, please send an email indicating  
your interest to:  
[Brokers@scc.virginia.gov](mailto:Brokers@scc.virginia.gov)

# Continuous Coverage Unwinding

Virginia will adopt the Federally Facilitated Marketplace Unwinding Special Enrollment Period-March 31, 2023 - July 31, 2024

With the resources of a State-Based Exchange, Virginia will implement strategies in three key phases to help eligible consumers successfully transition from Medicaid to Marketplace.

1. Increased investments in **Marketing, Outreach, and Education**
2. **Direct Consumer Assistance** tailored to Virginians
3. **Consumer-Level Data** to inform specific outreach plans and policy decisions to improve the Exchange's reach of consumers.

# Phase 1: Marketing and Outreach

## **Unwinding Marketing and Outreach Plan**

- The Exchange has developed an Unwinding Marketing plan that will begin in April 2023 and run through July 2024.
- Applies researched strategies to best target individuals based on a wide variety of demographic and geographic information, including areas of high concentrations of Medicaid enrollees.
- Messaging framework tailored to six key audience segments.

Examples of the types of outreach/education include:

## **Digital Marketing and Advertising**

- Statewide radio and streaming audio advertisements
- Google Search Ads
- Digital Display Ads

## **Social Media Posts**

- Facebook, Twitter, LinkedIn.

We welcome the opportunity to coordinate with our state and community partners to amplify the message and support individuals in enrolling in Qualified Health Plans.

# Phase 2: Direct Consumer Assistance

Virginia-trained assister programs and a Virginia only call center to provide consumer assistance.

## 1. **Virginia Assisters (Year-round, Ongoing)**

- 35 Navigators and 34 Certified Application Counselor Designated Organizations (CDOs), and 1400 agents statewide.
- Outside open enrollment- Inform consumers about the unwinding, redetermination letters, and direct to appropriate site / assister for coverage. Focus on individuals eligible for special enrollment periods and support to transition to marketplace coverage.

## 2. **Outreach: Develop Community Partnerships** - to help target locations/populations of Medicaid enrollees, uninsured, and underserved, including: health clinics, hospitals, community centers, food banks, faith based organizations, and homeless shelters.

## 3. **Ongoing Assister Education (Summer/Fall 2023)**

# Phase 3: Leverage Consumer Level Data

## **1. Marketplace Account Transfers – (Fall 2023)**

- VAHBE will have account transfer data from all current healthcare.gov enrollees. Current enrollees will be auto-renewed unless they choose different coverage.

## **2. Medicaid Account Transfers- (November 1, 2023 + ongoing)**

- VAHBE will begin accepting account transfers of Medicaid enrollees who were redetermined and found ineligible for Medicaid coverage.

## **3. Ability to Provide Automatic Notices and Pre-populated Applications-(November 1, 2023 + ongoing)**

- VAHBE will have the ability to automatically email a person to get connected to coverage and a pre-populated application. The individual then logs in and chooses a plan.

## **4. Application and Enrollment Reports- (November 1, 2023 + ongoing)**

- VAHBE will know when an application has been started but not completed, or when an individual has shopped but not completed a plan selection. The Exchange will pull reports and conduct appropriate outreach to consumers to encourage them to complete applications, enrollment, and to select a plan.
- Consumer will then need to log in, submit the pre-populated application for eligibility and marketplace coverage.

# Federal and State Policy Update

- 2024 Draft Notice of Benefit and Payment Parameters
- Essential Health Benefits Benchmark Plan (SB 1399 / HB 2198)
- Elimination of the Tobacco Surcharge (SB 1011)
- Reinsurance for 2024
- Facilitated Enrollment for PY 2025

# Agent FAQs

## **1. Will we still be able to use a different WBE for 2024 enrollments, such as INSX?**

While the Exchange appreciates advances in WebBroker enrollment technology, the only enrollment solution available to Agent/Brokers for PY 2024 will be the Virginia platform. The functionality of this new system will offer improvements over healthcare.gov's functionality with Agent/Broker's features similar to, or even better than, today's popular WebBroker tools, such as: Agent Account Creation, Agent Dashboard, a robust Book of Business lookup/filter tool, Consumer Designation of an Agent/Broker, and Consumer Shopping. You can find more details about these features in the January Town Hall PPT.

VAHBE will also be providing a demonstration of the portal and these features in the coming months.

## **2. Can we please have a specific team / department for brokers only?**

Yes. There will be a dedicated line for agents and assisters to ensure inquiries are handled as expeditiously as possible. There will be dedicated HBE staff to assist with complex cases and appeals for those inquiries that require direct HBE staff assistance.

## **3. Are there any changes in the dynamic of VA being a Medicaid determination state?**

No. With the Virginia platform, Virginia remains a Medicaid determination state.

## **4. Any more discussion on the ability to send a quote to an existing or new potential client with a link that encodes the broker's NPN from the broker portal?**

The Exchange is working with our vendor on this functionality for possible future development and will provide this information as it becomes available.

# Agent FAQs

## 5. Will call center service be available 24/7 like it is with the FFM?

With the enhanced functionality of vendor platforms, state-based marketplaces have not adopted 24/7 call center availability. However, after talking with Virginia agents, the Exchange is exploring enhanced hours for open enrollment periods. We will provide additional details as they become available.

## 6. Do we have an estimated timeline on when resources will be available to brokers, portal training, access, test environments?

Training will begin in the summer of 2023 and a soft launch of the Platform and Consumer Assistance Center will be available around September 1. This will allow brokers to become familiar with the basic platform. Books of Business will be loaded in October.

## 7. Can agents still use FFM training for 2024?

The VA Exchange will be offering state-based training and certification to agents, navigators, and assisters.

- A Virginia-specific learning management system will be available in summer 2023.
- FFE-certified agents who completed plan year 2023 registration and training will be eligible to complete a shorter training program for plan year 2024 along with Virginia-specific modules.
- Agents new to the Exchange or who are not currently FFE-certified will be required to take the full VA Exchange training program for plan year 2024.
- Agents will continue to be required to be licensed and in good standing through the Virginia Bureau of Insurance.
- Agents will be required to sign a Virginia-specific agent agreement.
- Updates to requirements will be published on the HBE's website and communicated in Monthly Townhalls and via emails.

# Contacts

**Questions, updates, and requests to be added to Monthly Town Halls:**

[brokers@scc.virginia.gov](mailto:brokers@scc.virginia.gov)

**Virginia Health Benefit Exchange**

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