Massachusetts Health Connector Strategic Plan 2024–2028 Milestone Report

September 2024

About this report

The Health Connector is taking intentional steps to integrate the goals enumerated in the 2024-2028 Massachusetts Health Connector Strategic Plan into the day-to-day work of the agency and all of its staff. This approach is focused on bringing the strategic plan to life through tactical action plans, and bringing the tenets of the strategic plan front and center in the minds of staff and as organizational decisions are made. With this new endeavor, the Health Connector is developing tools to better track its work, remain aligned with its goals, and share its progress internally and with its external partners.

The 2024 Strategic Plan Milestone Report is intended to provide high-level insight into active Health Connector projects and their key components. The Health Connector has identified key milestones for over 25 project work tracks it will take on in its first year and the progress expected in each over the next 12 to 18 months. Each work track includes the project's expected impact on how residents experience Health Connector coverage and services, in the Health Connector's relationships with its market and its partners, or how the Health Connector operates as an agency.

This initial stage of the first year of the Strategic Plan is largely comprised of establishing baselines against which progress, and impact can be measured going forward. Key progress indicators may reflect a general direction the Health Connector expects the impact of its work to have, rather than yet being tied a specific measure or quantitative figure. After this year, the Health Connector expects to have established the baselines necessary to increase the precision with which it measures the specific progress and impact of its work.

The Health Connector remains grateful for the commitment and support of its Board of Directors and external stakeholders who support its mission to ensure that all Massachusetts residents have affordable, comprehensive health coverage, and looks forward to continuing to apprise the public of its progress implementing its 2024-2028 Strategic Plan.

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Strategic Focus: Improve and Modernize the Applicant and Enrollee Experience

Goal: Ensure residents can seamlessly and quickly enroll in and easily maintain coverage

Tactic 1: Reduce barriers to the Identity Proofing (IDP) portion of the application

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Formal recommendation of expanding acceptable IDP documents – **complete** ▪ Health Connector and MassHealth cross-agency team finalize a list of additional documents to accept for IDP - complete ▪ Begin accepting expanded proofs of ID by winter 2024	**90% complete** As of 6/7, 30% complete	**Expected Impact** ▪ Reduce enrollment friction points that disproportionately impact populations without credit histories or with limited access to identifying documents **Key Performance Indicator (KPI)** ▪ Increase in the number of individuals who respond to IDP verifications	▪ Dependency on CMS for approval of expanded proofs of ID ▪ Time needed to develop SOPs, training documents and to roll out training and communications plan

Tactic 2: Simplify and reorganize notice language and delivery method

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Identify and create editable documents for all 27 Softheon notices - **complete** ▪ Create user feedback and testing programming for material ▪ Improve material through editing and review process. ▪ Complete review of enrollment and premium billing notices and recommend changes and have library of notices for future updates	30% complete As of 6/7, 10% complete	**Expected Impact** ▪ Improved member experience through reorganization and simplification of member messaging through the most effective channels **KPI** ▪ Decrease in contact center calls related to member confusion in 2025	▪ Ability to improve Softheon notices and robocalls, texts and emails but these will not be aligned with HIX notices due to inability to move as quickly with changes on the HIX side ▪ New Softheon fulfillment vendor onboarding could create delays depending on timing

Tactic 3: Expand additional payment methods and channels

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Review expanded payment options in more detail, propose alternate payment methods, and develop a work plan	5% complete As of 6/7, 5% complete	**Expected Impact** ▪ Members will have more payment options to choose from **KPI** ▪ Increase in member satisfaction ▪ Decrease in the number of people delinquent for payments or terminated due to non-payment of premium	▪ Foundational systems work must be completed prior to moving forward with implementation ▪ Potential costs to consumer could be a barrier (credit card fees, processing fees, or transaction fees) ▪ Dependent on outcome of current procurements as well as some changes to current payment methods

Tactic 4: Expand language offerings in the Integrated Voice Recognition (IVR) system

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
• Planning for enhanced Interactive Voice Recognition system to be implemented in 2025	**0% complete** As of 6/7, 0% complete	**Expected Impact** • Improved ability for individuals who speak languages other than English to self-serve or be directed to the appropriate contact center agent the first time **KPI** • Increase in first-call resolutions in 2025	• Timeline dependency on contact center and technology procurements

Tactic 5: Revise and update the contact center agent workflow system

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
• Enhancements and improvements delivered into the contact center agent customer relation management system in early 2025	**10% complete** As of 6/7, 10% complete	**Expected Impact** • Improved contact center experience for member **KPI** • Increase in first-call resolution • Increase in customer satisfaction as reported by contact center surveys	• Delays could be caused by timing of contact center and technology procurements

Goal: Provide a more user-friendly, streamlined online experience for residents and members engaging digitally with the Health Connector

Tactic 1: Update and reorganize content on the non-application portion of the Health Connector website

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Define website refresh goals and objectives - **complete** ▪ Update and develop content, maximizing for search engine optimization (SEO) development ▪ Implement updated content structure and functionalities for a seamless user experience ▪ Monitor performance, gather feedback, and make iterative improvements	30% complete As of 6/7, 5% complete	**Expected Impact** ▪ The Health Connector website will be easier for residents to find when searching on the internet, and once on the website will be able to find relevant information on Health Connector website more easily **KPI** ▪ Improved SEO performance metrics (i.e. keyword ranking, search engine visibility, site visitors) ▪ Positive trends in user engagement metrics (i.e. decrease in bounce rate or time on site).	▪ Staff bandwidth to evaluate and update over 600 published pages plus portable documents

Tactic 2: Enhance the non-group application platform

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
• Go-Live of the modernized Individual and Assister Portals for the application and enrollment site (HIX) in July 2024- **complete** • Go-Live of the modernized Agent (back office) Portal for the HIX in January 2025	75% complete As of 6/7, 40% complete	**Expected Impact** • Residents and assisters access an enhanced and modernized portal • Revised language and updated "look and feel" on the application will make it easier for members to understand and respond to **KPI** • Affirmative feedback from member, applicant, assister, and Navigator community to confirm improvements satisfy findings from the administrative burdens audit • System data confirms an improved member experience in navigating the application and enrollment process, as evidenced through factors such as abandonment rate	• HIX Modernization requires wide-sweeping changes to the HIX system which brings inherent risk and requires in-depth testing and validation to prevent disruption to members' use of the system

Strategic Focus: Maintain and Strengthen Organizational Structure and System Reliability

Goal: Foster an inclusive work environment that centers professional growth and staff empowerment

Tactic 1: Establish a program of professional development training and wellness opportunities for Health Connector staff

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Offer management training, professional development courses, and wellness sessions scheduled for the first half of 2024 – **complete** ▪ Invest in on-demand professional development training and skills course subscription for all Health Connector staff - **complete** ▪ Plan for the remainder of 2024 professional development sessions	75% complete As of 6/7, 60% complete	**Expected Impact** ▪ Health Connector staff have the support they need to thrive professionally **KPI** ▪ Increased use of professional development training subscription ▪ Increased reporting by staff of meaningful support for their professional growth	▪ Staff bandwidth to participate in and make significant progress on a number of development initiatives at once

Tactic 2: Establish a learning and development team and create a formal onboarding and training curriculum for staff

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
- Completion of the first phase of the multi-phase new hire onboarding curriculum by the end of June – **complete** - Facilitate first round of onboarding sessions for managers in August – **complete** - Facilitate second round of onboarding sessions by the end of September - Collect feedback from new hires of the onboarding experience to address future improvement	55% complete As of 6/7, 50% complete	**Expected Impact** - New and existing staff will have a strong foundation on the history, culture, and functions of the Health Connector **KPI** - Use of a 'learning library' by new hires and staff - Reduction in staff reporting feeling 'siloed' and improved understanding of processes across agency	- Time and staff constraints vis-à-vis development of content for training materials - Delays in the review and approval of content

Tactic 3: Creation of Health Connector Diversity, Equity, Inclusion, and Accessibility (DEIA) staff workgroup to center DEIA in the Health Connectors work

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
- Issue initial recommendation outlining proposed steps for the Health Connector to advance and center DEIA within the agency and in our work with members - Host the first in-agency Hispanic Heritage Month celebration in September 2024	50% complete As of 6/7, 30% complete	**Expected Impact** - Centering and advancing equity in its work, to contribute to the reduction of health inequities and disparities - Renewing its commitment to serving as a diverse and inclusive workplace **KPI**	- Challenges identifying priorities and recognition that this will require dedicated focus and phases in approach - Dependency on staff bandwidth to organize events

| | | ▪ Establish baseline data with respect to diversity of staff and leadership | |
| | | ▪ Increase in foundational DEIA training to enrich internal and member-facing work | |

Goal: Ensure, invest in, and cultivate reliable Health Connector organizational functions

Tactic 1: Make incremental process improvements to the annual Seal of Approval (SOA)

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Earlier SOA 2025 launch – **complete** ▪ Additional process improvements planned for 2026 and in process ▪ Identify SOA process areas for potential automation, enhanced technology/system support	55% complete As of 6/7, 33% complete	**Expected Impact** ▪ Improved stability in the SOA process and predictability for carrier partners **KPI** ▪ Improved carrier engagement, understanding of, and satisfaction with the SOA as a business process	▪ Dependency on/need to align with various federal and state processes and deadlines ▪ Building capacity to accelerate 2026 process while still completing 2025 review and implementation ▪ Potential dependency on carriers' resource and responses, bandwidth, timing constraints, etc.

Tactic 2: Enhance relationships with carrier partners

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
- Internal reorganization of carrier functions – **complete** - Conduct exec-to-exec level meetings with carrier leadership on an annual basis, starting in 2024 - **complete** - Create a 2025 Health Connector road map to aid carriers in planning	33% complete As of 6/7, 33% complete	**Expected Impact** - Health Connector and carriers can jointly strategize regarding market, policy, and business issues with greater ease **KPI** - Decrease in the overall volume of avoidable expedited high-priority carrier issues handled by the Carrier Relations team in 2024 - Increase in identification, calendaring, proactive planning, and execution of both Health Connector and carrier-driven projects	- Dependency on carriers to disclose a comprehensive and accurate list/information for carrier initiatives portion of this scope - Dependency on vendors and Health Connector leadership to approve projects, resources, and meet finalized timelines - Dependency on vendor resources and potential conflicting priorities to create project plans, execute project plans and meet deadlines that are published to carriers - Difficult to account for "unknown" projects that may arise as the result of system defects, new regulatory or statutory requirements, etc.

Tactic 3: Improve carrier financial reconciliation and reporting

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
- Adoption of manual fix by early summer 2024 - Improve financial visibility by providing carriers two new reports: - Grace Period Write Off (GPW) Report: This monthly report will include	30% complete As of 6/7, 30% complete	**Expected Impact** Fewer discrepancies between Health Connector and carrier reports resulting in improved member experience and improved efficiencies in processes **KPI**	- Potential competing projects and resources can delay the rollout of the new reports - Importance of explaining how the reports can be used to decrease the number of false discrepancies to avoid carrier confusion

ConnectorCare and subsidized members and the applicable month for which a GPW applies.		Decrease in contact center calls due to member confusion Decrease in the overall volume of avoidable expedited high-priority carrier issues handled by the Carrier Relations team in 2024	
▪ Accounts Receivable Aging Report: This is a monthly report that will include all outstanding member premium balances.			

Tactic 4: Improve definition and documentation around agency processes and responsibilities

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Procure for and onboard external vendor to provide support to agency effort to document all business processes - **Pending Board approval** ▪ Complete early stages of project launch by end of 2024	10% complete As of 6/7, 0% complete	Expected Impact ▪ Increased clarity in internal team responsibilities, subject matter expert roles, compliance management, and quality assurance responsibilities ▪ More standardized and organized process documentation ▪ Highlighted and documented handoffs in complex, cross-agency processes that have evolved over many years ▪ Centralized library that serves as a living staff resource KPI ▪ Improved staff efficiencies ▪ Decrease in incidence of internal business process gaps	▪ Constraints of staff time and bandwidth to provide expertise needed for documentation project

Strategic Focus: Improve Equitable Access to Affordable Health Insurance Coverage

Goal: Expand equitable access to affordable health coverage

Tactic 1: Conduct Navigator Re-procurement

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Issue 2024-2027 Navigator grant cycle Notice of Grant Opportunity - **complete** ▪ Complete procurement and finalize 3-year contracts by July 1- **complete**	100% complete As of 6/7, 80% complete	**Expected Impact** ▪ Meet current linguistic and cultural needs in communities throughout the Commonwealth by providing community-based enrollment support directly to communities of highest need ▪ Increase coverage acquisition and retention among high priority populations in Commonwealth's coverage expansion efforts **KPI** ▪ Final organizations will be located in communities with the highest need as identified through internal reporting and external sources ▪ Outreach and enrollment goals continue to be met by Navigators	▪ N/A

Tactic 2: Establish a strategy for community engagement

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Identify approach and finalize goals by June 2024 – **complete** ▪ Begin hosting community input/perspectives forums end of 2024	65% complete As of 6/7, 25% complete	**Expected Impact** ▪ Institutionalization of a way for the public and members to have a seat at the table and detail experiences and perceptions of the Health Connector to inform Health Connector decision-making and strategy **KPI** ▪ Increase in resident and member feedback to the Health Connector and create mechanism to respond back to communities	▪ Forming a forum format that engages participants while not overwhelming moderators (yet to be identified) and allows for expansive viewpoints while working through identified areas of inquiry ▪ Recruitment of attendees appropriately reflecting a community's needs and perceptions may be beyond existing resources and community partnerships

Tactic 3: Enhance approach to public education and outreach

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Improve the collection and utilization of information gathered during webinar registration and follow-up for attendees ▪ Distribution of multi-lingual educational material in 25 MassHire Career Centers ▪ Engage with specific employer/ business locations to provide custom client support	75% complete As of 6/7, 60% complete	**Expected Impact** ▪ Share Information and resources with residents interested in coverage offerings, but not able to attend a scheduled Zoom session ▪ Reach more potential members in their preferred languages when experiencing life transitions ▪ Leverage new and strengthen existing touchpoints to better	▪ Establishing relationships with over 25 individual MassHire Career Centers and Rapid Response coordinators with varying responsibilities and priorities ▪ Soliciting feedback from the MassHire Career Centers about their collateral needs

▪ Work with Rapid Response EOWLD team on high profile and large scale lay-off or closures, provide staff and Navigatos on-site support as needed		understand the needs of communities and provide supports **KPI** ▪ Increase in conversion of public webinar registrants to attendees ▪ Gain metrics on email open rates for those who registered for Health Connector sponsored webinars ▪ Distribution of Health Connector collateral to MassHire Career Centers in Fall 2024 ▪ Presented Health Coverage presentation (webinar) for Brockton MassHire attendees. Due to positive feedback, they've requested ongoing sessions	

Tactic 4: Continuation of Community Specialist Program

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Expand the in-person support in community spaces ○ Community specialists are in 11 community-based locations (i.e. libraries and nonprofits) on a recurring and consistent basis ▪ Expand regional geographic footprint ▪ Strengthen the new network of recurring, in-person support in community spaces	60% complete As of 6/7, 60% complete	**Expected Impact** ▪ Application, enrollment, and coverage support available in high-need communities and locations to increase in-person presence in areas with limited community support to expand reach and engagement **KPI** ▪ Increase in the number of in-community support locations in 2024	▪ Dependency on availability and willingness of community organizations to host the Community Specialists at their locations

		▪ Increase in the number of residents assisted by Community Specialist ▪ Increase in the number of residents enrolled in the Health Connector	

Goal: Evaluate and address health equity initiatives through data analytics and community engagement

Tactic 1: Increase enrollment supports for immigrants

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Research programs in other states designed to support immigrant coverage by mid-2024- **complete** ▪ Participate in a multi-state work group first half of 2024- **complete** ▪ Implement new eligibility changes for DACA recipients	50% complete As of 6/7, 25% complete	**Expected Impact** ▪ Health Connector can better understand enrollment support and coverage best practices for immigrant populations to shape recommendations for future consideration, and close the uninsurance gap for immigrant populations **KPI** ▪ Recommendation of potential pathways for the Commonwealth to consider by the end of 2024	▪ Federal administration/policy changes that could impact any pathway the Health Connector may want to pursue that may have a federal component ▪ Outreach to the newly eligible DACA recipients, given that MassHealth definitions were not impacted

		▪ Enrollment of DACA recipients who newly qualify for coverage during Open Enrollment 2025	

Tactic 2: Implement new data tools to enhance eligibility and enrollment analytics

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ CMS security approval of new technology– **complete** ▪ Development and implementation of a new business intelligence platform by August 2024 – **complete** ▪ Use new business intelligence platform to design and monitor metrics to indicate disparities in the eligibility and enrollment process ▪ Institutionalize the business intelligence tool and internal dashboards to provide business owners with information needed	75% complete As of 6/7, 65% complete	**Expected Impact** ▪ Ability to monitor metrics that indicate disparities in eligibility and enrollment and inform future policy decisions **KPI** ▪ Implementation of the business intelligence platform by August 2024 ▪ Development of internal dashboard to support Open Enrollment by fall 2024 ▪ Development of customer experience dashboard to support	▪ Quality of underlaying vendor data to populate/power the business intelligence tool

| to assess performance and overall customer experience | | broader Health Connector business needs by February 2025 | |

Strategic Focus: Deliver High-Value Coverage Options to the Residents of Massachusetts

Goal: Ensure Health Connector coverage is comprehensive, affordable, and meets residents' needs

Tactic 1: Implementation of communication efforts with carriers to reduce forgone preventive care among lower-income enrollees and members from communities of color

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Coordinate and ensure carriers distribute communications (via email, text, or mail) to members encouraging cancer screenings and other high-value preventive care by the end of 2024 ▪ Carriers to report data on campaign engagement, outcomes, changes in utilization tied to forgone care ▪ Carriers executing on their campaigns; reporting on 2024 carrier activity and outcomes expected in ~Feb 2025	50% complete As of 6/7, 25% complete	**Expected Impact** ▪ Decrease in forgone preventive care, particularly among lower-income enrollees and members from communities of color **KPIs** ▪ New carrier report delivered to the Health Connector detailing member engagement with the campaign, and known utilization trends in the plan year 2025 ▪ Decrease in reports of forgone care via carriers or members in a survey relative to prior years beginning in 2025 and 2026	▪ Identifying the timing of outreach to carriers and further coordination

Tactic 2: Incorporation of maternal health and cardiometabolic disorders into Seal of Approval (SOA) quality metrics

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
- Discussion and coordination with MassHealth on quality metrics - **complete** - Issuance of Quality Improvement Strategy (QIS) documents in July 2024 as part of the 2025 SOA - **complete** - Receipt of QIS baseline data in October 2024	75% complete As of 6/7, 30% complete	**Expected Impact** - Shared goals and methods across agencies will allow for targeted improvements and more member-focus **KPI** - Establish a baseline of existing carrier programs and efforts to impact maternal and cardiometabolic health positively	- Ensuring selected measures are relevant across populations - Observing improvements may take time and be confounded by other market activity

Tactic 3: Leverage the expertise of stakeholders and Board members to identify and pursue Seal of Approval approaches that deliver high value for members

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
- Develop future Seal of Approval in collaboration with input from range of stakeholders (e.g., providers and health experts, patient advocates, carriers, researchers, and others) - Continuation of Board work group to address specific topics tied to the key issues of affordability, equitable access, and quality coverage - Focus on positively impacting equity health topics: maternal	25% complete As of 6/7, 25% complete	**Expected Impact** - Deliver high-value plan options to members that demonstrate incremental improvements to patient outcomes **KPI** - Convene at least two forums during 2024 to gather Board and stakeholder input on the development of the 2026 Seal of Approval	Building capacity to accelerate 2026 process while still completing 2025 review and implementation

health and cardiometabolic (CMB) health			

Tactic 3: Advance access to linguistically appropriate and culturally sensitive health care

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies
▪ Conduct a review of best practices among State-Based Marketplaces and the broader health care landscape to identify opportunities to improve impact on access to culturally sensitive care and review potential pathways to implement in the Commonwealth	25% complete As of 6/7, 25% complete	**Expected Impact** ▪ Increase utilization of health care services among populations more likely to forgo care due to a lack of providers who provide culturally sensitive care **KPI** ▪ Reduction in reported barriers to care due to lack of culturally responsive providers	▪ Health Connector is unlikely to solve "upstream" problems related to the provider pipeline

Goal: Increase awareness of the value and brand of Health Connector products

Tactic 1: Develop "Value Plan" for small group market

Key Milestone(s)	Milestone Progress	Key Progress Indicators	Challenges and Dependencies

▪ Go live with the "Value Plan" model by November 2024 (PY2025 Open Enrollment), which includes highlighting small group plans within the Health Connector for Business (HCB) shopping experience that are beating market average premiums ▪ Wrap with outreach campaigns highlighting Health Connector for Business's flexibility and premium rebates for small employers	**40% complete** As of 6/7, 25% complete	**Expected Impact** ▪ Provide small employers of the Commonwealth with a more simplified way to identify lower-cost employee health plans that continue to provide value **KPI** ▪ Increased interest in products demonstrated through increased quoting, and enrollment activity for Health Connector for Business small group offerings in 2025	▪ Articulating a framework to support employers in defining what "value" means to them where they may have varying priorities beyond premiums (e.g., network access and other plan features)