

HBR Scorecard Job Aid

Background

Every month the State Health Plan sends scorecards to the HBRs on file for each group with enrolled members. The scorecard includes a count of the total number of employees and dependents enrolled and a timestamp for when the scorecard was created.

The total score each group has earned out of 10 possible points dictates what color the scorecard will be. Anything under 5 points is red, 5 to 7 points is yellow, and anything 8 points and above is green. The color is an indication of the success of your group's eligibility and enrollment management and HBR engagement with the Plan and vendors.

Total Enrolled: 3099	TotalScore: 10
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- ✓ Groups who consistently maintain a green scorecard will not have all Qualifying Life Events (QLEs) and new dependents audited.
- ✓ Scorecards are used to identify trends that drive priority of trainings and webinar topics.
- ✓ HBRs can use scorecards as an indication to leadership of the work done to maintain accurate health benefits for employees.

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QLE/DEVA Stats

On an ongoing basis, the Plan reviews members with recently approved changes for:

- Newly hired employees with dependents
- Newly added employees outside of their initial enrollment window
- Employees terminating coverage without an employment termination date
- Newly added or removed dependents where the employee is not terminated

This review does not include:

- Transferred employees and their accompanying dependents
- New hires without dependents
- Employee terminations

The QLE/DEVA Stats show how many members were reviewed in the past 90 days and the status of each member reviewed. Additionally, the stats show how many members with QLEs have not been reviewed yet.

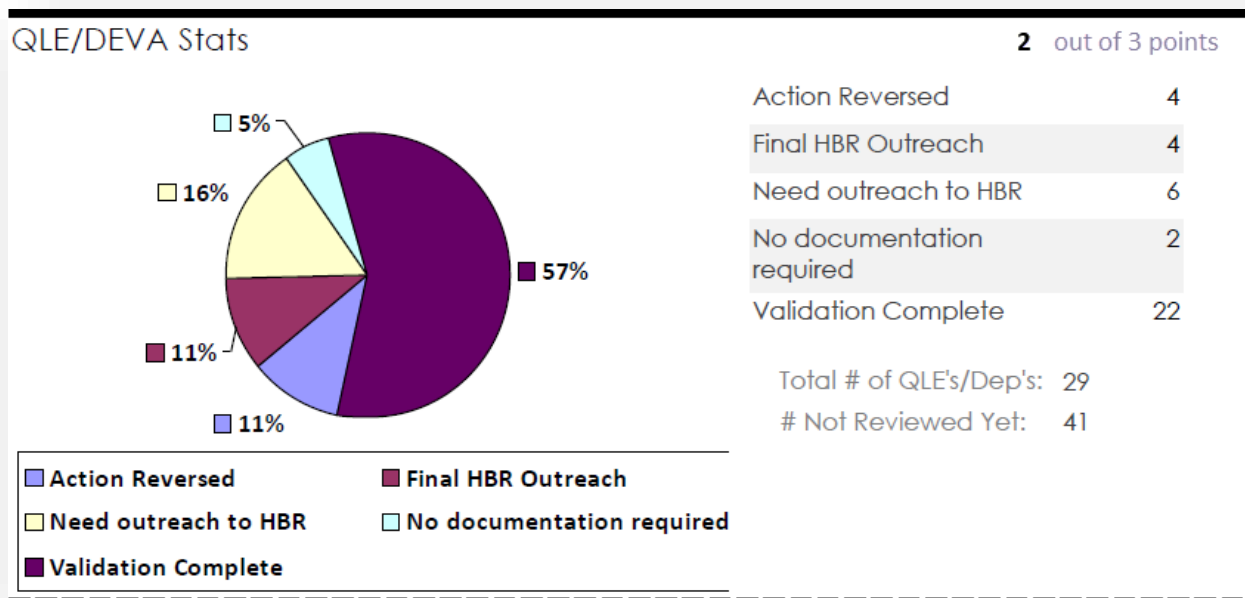


Chart Breakdown

Each status total is divided by the total count of all the statuses. In the example above, the total of the statuses is 38:

- Validation Complete - $22/38 = 57\%$
- Need Outreach to HBR - $6/38 = 16\%$
- Final HBR Outreach - $4/38 = 11\%$
- Action Reversed - $4/38 = 11\%$
- No Documentation Required - $2/38 = 5\%$

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Status Counts

The counts of statuses will not add up to the total number of people reviewed. A person who is reviewed can be counted multiple times depending on the status they end up in.

Status	Person Counted	Can be counted as	Example
No documentation required	1 time	No documentation required	A life event of overage dependent would require no validation. The Plan would review the dependents date of birth.
Need outreach to HBR	1 time	Need outreach to HBR	If an approved QLE or dependent has no documentation or insufficient documentation.
Final HBR outreach	2 times	Need outreach to HBR	If an additional outreach to the group is performed because the first outreach was unsuccessful.
Action Reversed	3 times	Need outreach to HBR Final HBR outreach	If the group does not respond at all to the first or second outreach attempts, the member is sent for reversal.
Validation Complete	Up to 4 times	Need outreach to HBR Final HBR outreach Action Reversed	The group replies at any time during the outreach process and the appropriate documentation is provided.

Calculating the Score

The QLE/DEVA score is a total of 3 points. One point is assigned to the three statuses below based on the percentages for each status:

	1 point	0 points
Need Outreach	Less than or equal to 25%	More than 25%
Final Outreach	Less than or equal to 20%	More than 20%
Action Reversed	Less than or equal to 10%	More than 10%

No points are assigned to Validation Complete or No documentation required. If the Plan reviews items and only those statuses are used, the group incurs no penalty. Penalty is only incurred if the Plan has to reach out for documentation that is insufficient or not provided.

In the example above, the group earned two out of three points:

- Need Outreach to HBR - 16% = 1 point
- Final HBR Outreach - 11% = 1 point
- Action Reversed - 11% = 0 points

$$\begin{aligned} \text{Need Outreach to HBR} + \text{Final HBR Outreach} + \text{Action Reversed} &= \text{Total Points} \\ 1 + 1 + 0 &= 2 \text{ points} \end{aligned}$$

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Exception Stats

The Exceptions Stats section reflects data for exceptions reviewed in the last 90 days. As exceptions are submitted to the Plan, a determination is made of who is at fault for the correction being requested. For denied exceptions, a denial reason is also included. Those determinations are included on the exception returned when the decision is rendered. That data is used in the Exception Stats section.

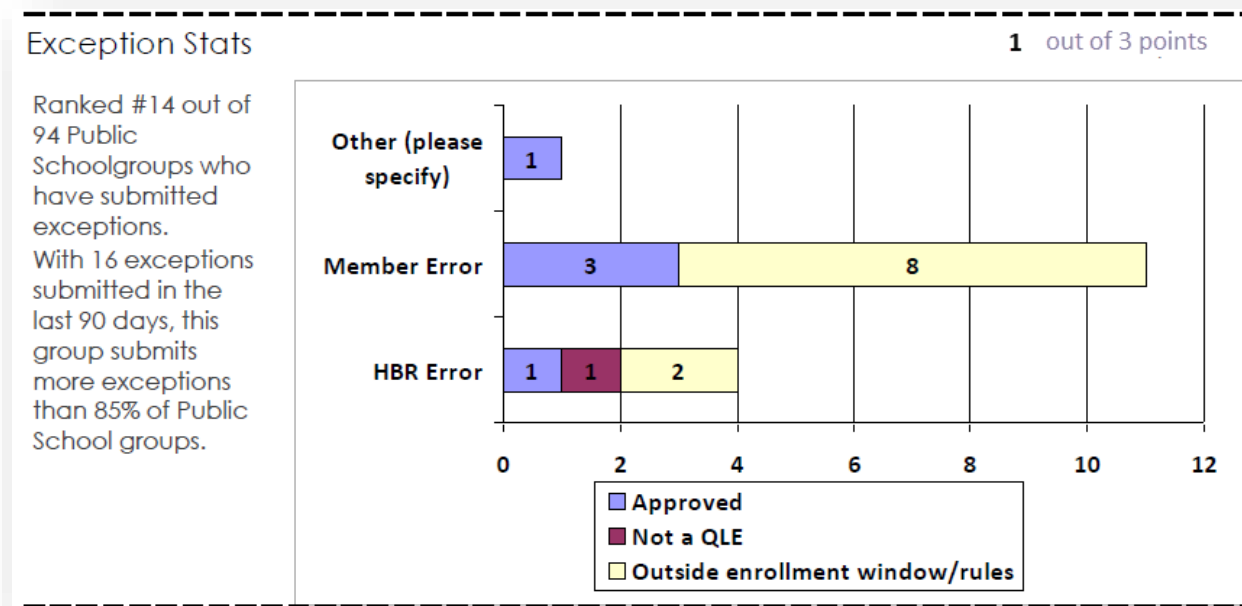


Chart Breakdown

All exceptions are shown on the chart based on the Error Type. Then the total number of exceptions is further broken down by the Denial reason. In the example above there were:

- 5 Approved exceptions
 - 3 were Member Errors
 - 1 was an HBR Errors
 - 1 was an “Other” Error
- 11 Denied exceptions
 - 10 were due to being outside the Plans enrollment window/rules
 - 8 were Member errors
 - 2 were HBR errors
 - 1 was due to not being a QLE

Ranking Explanation

The exception ranking compares the number of exceptions you submit to other “like” groups. The closer the number is to 1, the further your group is from the average number of exceptions received. You want this number to be as close to the total number of groups as possible. In the example above, the group being ranked #14 out of 94 indicates they submit a lot more exceptions than other Public School groups. They submit 85% more exceptions than the average Public School group. The ranking has no impact on your score for this section, it is for informational purposes only.

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Calculating the Score

Using the total number of submitted exceptions divided by the total number of denied exceptions, an **Exceptions Success Rate** is created. We understand that every denied exception isn't the HBR/Group's fault. To accommodate this, the denied exception reason and type of error is evaluated and weighted appropriately. Point values range from 0.5 to 1. These values are evaluated early as trends change.

Denial Reason	Points	Example
Duplicate Request	1	A denied exception is resubmitted for additional consideration.
Ineligible for Review	1	Active HBR submitting an exception for a member that previously retired from their group.
Insufficient Documentation/Information	0.5	Submitting a request to reinstate coverage from a DEVA termination, where no new documentation has been provided.
Invalid Request	1	NC Flex exception submitted to the Plan
Non-Issue	0.5	Exception submitted to waive attestation due to location when member attested they don't use tobacco products.
Non-payment	0.5	Member is termed due to nonpayment in June and exception is submitted in August by HBR because the member is willing to pay.
Not a QLE	1	Exception is submitted for a member who moved and wants to add a dependent.
Outside enrollment window/rules	1	Exception is submitted to terminate an employee retroactively 90 days.
Submitted past exception request deadline	1	OE exception submitted in March.

The Exceptions score is a total of 3 points and is derived by assigning points to the Exception success rate:

Success Rate	Points Earned
>=75%	3
55% - 75%	2
31% - 54%	1
<30%	0

In the example above with 16 submitted exceptions, there were 11 denied exceptions with 10 being outside the enrollment window/rules and 1 was not a QLE.

$$\begin{aligned} & \text{Total Number Submitted} - (\text{Denied Exceptions} \times \text{Weight}) / \text{Total Number Submitted} \\ & 16 - (1 \text{ Not a QLE (1 point)} + 10 \text{ Outside Enrollment Window (1 point)}) / 16 \text{ Total Number Submitted} \\ & 16 - ((1 \times 1) + (10 \times 1)) / 16 \\ & (16 - 11) / 16 \\ & 5 / 16 \\ & 31\% \\ & \text{Exception Success Rate} = 31\% \\ & \text{Exception Points} = 1 \end{aligned}$$

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Engagement

The Engagement Section will show:

- The group attendance at the last three monthly webinars
- Activity from the last 30 days:
 - The number of tasks declined by Benefitfocus because they expired after 45 days
 - The number of errors corrected by Benefitfocus
 - The number of inquiries made to Benefitfocus

<i>Engagement</i>		2 out of 4 points
<i>Webinar Attendance</i>		
12/11/2019	1 attended	
11/13/2019	1 attended	
10/16/2019	0 attended	
<i>Tasks Declined after 45 Days:</i>		0
<i>Errors Corrected By Benefitfocus:</i>		1
<i>Inquiries To Benefitfocus:</i>		4

Calculating the Score

The Engagement Section is the combination of two points for Webinar Attendance, 1 point for task management and 1 point for error correction. The total number of inquiries to Benefitfocus is informational only and does not impact the score.

The Webinar Attendance score is based on the participation in webinar polls, survey questions, and attentiveness to the presentation. If multiple HBRs attend from your group, the participation score is an average. If you are unable to attend the webinar, you can still get credit by viewing the saved live presentation before the end of the month. Links to those saved presentations will be located in HBR University. Those who view the webinar after the live broadcast will automatically receive a 50% participation score, since you will be unable to interact.

Participation Rate	Points Earned
>=75%	2
50% - 75%	1
<50%	0

The expectation is that HBRs are reviewing tasks on a timely basis and reviewing/declining them as necessary. If there are any tasks that require Benefitfocus to decline them due to expiration, you will not earn the 1 point for task management.

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Errors corrected by Benefitfocus is based on calls and tickets opened with Benefitfocus to correct keying errors within the platform. If there are more than 2 errors that require Benefitfocus intervention, you will not earn the 1 point for error correction.

In the example above, there were two webinars attended and one not attended. The participation rate for the December was 70%, November was 95%, October is automatically 0%. The average participation rate is $70\% + 95\% + 0\% / 3 = 55\%$ (or 1 Point + 2 points + 0 points / 3 = 1 point) earning the HBR 1 point for webinar attendance.

In the example above, there were no tasks declined and 1 error corrected – earning the group 2 points for task management and error correction.

The total engagement score is 2.