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# Transcript of Advisory Committee Meeting 

Date: June 21, 2022
Case: Health Benefit Exchange Advisory Committee Meeting

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Conducted on June 21, 2022



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| 1 to introduce you to Keven, who will provide |  | 1 with a pretty robust consumer assistance |  |
| 2 the director's update. |  | 2 center that will handle both telephone as |  |
| 3 MR. PATCHETT: All right. Thank you |  | 3 well as e-mail, direct mailings, paper |  |
| 4 Holly. And I'm very happy to be here. And |  | 4 applications, a lot of the core customer |  |
| 5 as Sabrina noted, it looks like a packed |  | 5 service functions of the Exchange. |  |
| 6 agenda, so I'm just going to dive right in |  | 6 So as we kick off that |  |
| 7 this morning. |  | 7 implementation, those implementation |  |
| 8 We have had a really busy couple of |  | 8 activities, it's really five key activities. |  |
| 9 months at the Exchange. A couple of things |  | 9 There's a lot that goes on during |  |
| 10 just to highlight. The RFP evaluation |  | 10 implementation, and those implementation |  |
| 11 process continues to advance. And it sounds |  | 11 plans are very long and very detailed. But I |  |
| 12 like we are still well on track for a |  | 12 wanted to focus on just these five areas. |  |
| 13 contract award by mid to late summer. We are |  | 13 So we will, of course, begin with |  |
| 14 continuing to staff up in HBE and brought on |  | 14 design. And this is where we'll make |  |
| 15 some new staff members just in the last |  | 15 decisions about what our -- what the various |  |
| 16 couple of weeks and expect a few more here in |  | 16 elements of the platform are going to look |  |
| 17 the very near future. |  | 17 like, how they're going to fit together with |  |
| 18 We successfully got our SMART audit |  | 18 each other, the platform of the call center, |  |
| 19 filed with CMS. Annually, the Exchange has |  | 19 as well as integrations with our partners at |  |
| 20 to file an independent financial, technical, |  | 20 DMAS and DSS as well as CMS and the federal |  |
| 21 and operational product, and we were pleased |  | 21 data service hub. |  |
| 22 that there were no material findings by our |  | 22 Once we get done with design, then |  |
| 23 auditors. And so that lets us continue the |  | 23 it's more of those systems integration. And |  |
| 24 work of transition. |  | 24 I just mentioned briefly what some of those |  |
| 25 We have a timeline here, although it |  | 25 systems are. This is an area that will get a |  |
|  | 10 |  | 12 |
| 1 looks like -- are you-all able to see the |  | 1 great deal of our focus, because it's |  |
| 2 slides here? |  | 2 absolutely critical to our success, and we |  |
| 3 MS. KUSIAK: Yes, I can see them. |  | 3 have -- we've really focused on a systems |  |
| 4 MR. PATCHETT: It looks like my |  | 4 integration approach that minimizes the |  |
| 5 Teams is a little slow in updating. So here |  | 5 impact of this transition not only for |  |
| 6 we have a snapshot of some of the key |  | 6 consumers but also, again, for our partners |  |
| 7 activities that we're going for on our |  | 7 at DMAS and DSS; we want to maintain as much |  |
| 8 timeline. And I want to just highlight these |  | 8 of the same processes and protocols that are |  |
| 9 last two. |  | 9 currently used by healthcare.gov so that that |  |
| 10 As I said, we're on track for a |  | 10 stays familiar and doesn't add unnecessary |  |
| 11 contract award for our platform and call |  | 11 workload during this transition time. |  |
| 12 center vendor, which is really going to be |  | 12 Data migration is obviously key, as |  |
| 13 the backbone that the Exchange needs in order |  | 13 we have to transition accounts for existing |  |
| 14 to make its transition from healthcare.gov to |  | 14 Exchange consumers over to our Virginia |  |
| 15 a state-based marketplace. Once we kick off |  | 15 platform as well as ensuring that we can send |  |
| 16 that implementation, hopefully at the end of |  | 16 data back and forth through the federal data |  |
| 17 the summer or very beginning of the fall this |  | 17 services hub to verify information for new |  |
| 18 year, we'll have about a 15 -month timeline to |  | 18 applicants. |  |
| 19 complete implementation and be ready for open |  | 19 Training will be ongoing throughout |  |
| 20 enrollment by November of 2023. |  | 20 the transition. And most of these pieces, |  |
| 21 This implementation at its core |  | 21 right, these are not linear. They're going |  |
| 22 really is a technology implementation. We |  | 22 to overlap. They're going to repeat. |  |
| 23 are going to be standing up what some of the |  | 23 Training will be one that, again, goes on |  |
| 24 vendors in the industry refer to as |  | 24 throughout, probably a little more heavy |  |
| 25 essentially an e-commerce platform, along |  | 25 towards the end, as we start to stand up the |  |







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| 1 Good afternoon. I'll share my screen here. |  | 1 maybe that's pretty clear to most of you; go |  |
| 2 I am not a Teams user, in general, so just |  | 2 through some steps and some considerations |  |
| 3 bear with me. Can you see the slides in |  | 3 that we've come up with, as we've done this |  |
| 4 presenter view? |  | 4 with other states; and then just walk through |  |
| 5 CHAIR CORLETTE: Yes. |  | 5 a couple examples. |  |
| 6 MS. LUKANEN: Well, I can't see you, |  | 6 And I know we're running a little |  |
| 7 so if you have questions or want to stop me, |  | 7 short on time so I'm going to go through |  |
| 8 please do. Thank you very much for the |  | 8 things a little quickly. I am totally |  |
| 9 opportunity to be here. It's really -- the |  | 9 comfortable if you interrupt me with |  |
| 10 work that you're doing is really exciting, so |  | 10 questions; this can be informal. So please |  |
| 11 I 'm glad I can contribute to the discussion. |  | 11 jump in. I don't think I can see hands being |  |
| 12 I'm Elizabeth Lukanen. I'm the |  | 12 raised, so I think verbal interjections are |  |
| 13 deputy director of SHADAC, which stands for |  | 13 probably best. |  |
| 14 the State Health Access Data Assistance |  | 14 MS. MORTLOCK: I'll also try to |  |
| 15 Center. Before I get into talking about |  | 15 monitor that for you as well. |  |
| 16 Exchange monitoring, I'll just give you a |  | 16 MS. LUKANEN: Thank you very much, |  |
| 17 little bit of background of who SHADAC is. |  | 17 Holly. I appreciate that. If there's a view |  |
| 18 So we're a health policy research |  | 18 where I can see people, I have not found it. |  |
| 19 center at the University of Minnesota. We've |  | 19 So why do you want to create a |  |
| 20 been collecting and using data for about 20 |  | 20 framework? You know, first and foremost, I |  |
| 21 years to inform health policy, and our focus |  | 21 think it's actually the discussion and the |  |
| 22 is really on providing technical assistance |  | 22 goal setting that happens at the beginning |  |
| 23 to states, you know, in how they use data in |  | 23 that's the most important. It really will |  |
| 24 supporting analysis to inform policy and |  | 24 help the Exchange and the state as a whole |  |
| 25 decision-making. |  | 25 come to an agreement on goals and priorities |  |
|  | 34 |  | 36 |
| $1 \quad$ And we provided a lot of support to |  | 1 and think about how those goals are going to |  |
| 2 states as they've implemented the Affordable |  | 2 be measured. |  |
| 3 Care Act and all the choices and decisions |  | 3 I think, secondary, it avoids a |  |
| 4 that went into that. I saw some people on |  | 4 duplication of data collection and |  |
| 5 the call today that I think I've worked with |  | 5 consistency in measurement, both across the |  |
| 6 in the past in that capacity. So it's really |  | 6 (inaudible) again, maybe even across other |  |
| 7 exciting to be here. |  | 7 agencies, which we'll talk about a little bit |  |
| 8 We are a really small shop, but a |  | 8 later. |  |
| 9 range of people here, you know, economists, |  | $9 \quad$ As a former state analyst myself, a |  |
| 10 statisticians, evaluation experts, and then |  | 10 health economist for Minnesota, it also just |  |
| 11 sociology and journalism. So not only do we |  | 11 prepares your staff to respond to questions |  |
| 12 think about how to use data, but how to |  | 12 when they get them from policy makers; and I |  |
| 13 present it for a wide audience; how to do |  | 13 would say also the public, media, you know, |  |
| 14 data visualization, etc., and then the real |  | 14 all these groups are going to want a story to |  |
| 15 focus being on being non-partisan. |  | 15 tell and want numbers to go with that. And |  |
| 16 The technical assistance that we |  | 16 this kind of early thinking can help you to |  |
| 17 provide to states is supported by the State |  | 17 meet those needs. |  |
| 18 Health and Value Strategies program. This is |  | 18 You know, the "why now" is that, you |  |
| 19 a Robert Wood Johnson Foundation program out |  | 19 know, like I said, it will help establish a |  |
| 20 of Princeton, so I just want to thank them, |  | 20 baseline, either prior or just as you're |  |
| 21 as always, for their support. |  | 21 starting implementation, help you identify |  |
| 22 And today, I was asked to come talk |  | 22 successes, and just really prepare you for |  |
| 23 to you about data monitoring in the Exchange. |  | 23 the questions that you're going to get. And |  |
| 24 So I'm just going to talk a little bit about |  | 24 this is not -- does not downplay the |  |
| 25 reasons for doing this, although I think |  | 25 incredible amount of work -- I think Keven |  |


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| 1 talked about it -- that is ongoing, but we |  | 1 about is, is will issues of equity be |  |
| 2 have found that if you can just do a little |  | 2 elevated? So are you really interested in |  |
| 3 bit of preplanning around a monitoring or |  | 3 looking at variation by geography, age, |  |
| 4 data dashboard type work, you'll just be in a |  | 4 gender, etc.? These things can be really |  |
| 5 better position later. |  | 5 important as you're just thinking about the |  |
| 6 So I'll start with some of the steps |  | 6 framing and the focus. |  |
| 7 that we have come up with to, you know, |  | $7 \quad$ After you have a little bit of a |  |
| 8 support this work. And the first is, you |  | 8 sense for who this is intended for, your |  |
| 9 know, it's really some high-level discussions |  | 9 general focus, then it really is about |  |
| 10 that maybe this group can have and staff |  | 10 deciding on some goals. So what are you -- |  |
| 11 within the agency can have, you know, to |  | 11 and by you, I mean the Exchange -- trying to |  |
| 12 determine an audience and focus, to choose |  | 12 achieve? |  |
| 13 the measures and data, and then I'll walk |  | 13 I list just a few examples. I think |  |
| 14 through some considerations that we've, you |  | 14 this really depends on the state and where |  |
| 15 know, come up with over the years as we've |  | 15 you're at in this discussion, but, you know, |  |
| 16 worked with other state-based marketplaces on |  | 16 a few goal areas that we have discussed with |  |
| 17 this process. |  | 17 other states are ample choice for consumers, |  |
| 18 So the first thing that we really |  | 18 enrollee experience; some states really went |  |
| 19 recommend is to think about your audience for |  | 19 into this knowing they wanted to reduce |  |
| 20 this kind of work. Is this going to be an |  | 20 uninsurance, improve affordability, etc. |  |
| 21 evaluation framework or data dashboard? I |  | 21 I would recommend kind of getting |  |
| 22 think there's a million different things you |  | 22 into high-level goals before you get into |  |
| 23 can call this, so I'll just go with |  | 23 wordsmithing of, you know, actual goals |  |
| 24 framework, monitoring framework. You know, |  | 24 first, because I do think that it just helps |  |
| 25 is this going to be an internal framework? |  | 25 narrow focus. And then you can really get |  |
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| 1 Something that you're only going to be using |  | 1 into the nitty-gritty. |  |
| 2 for internal operations and decision-making? |  | 2 So one way to narrow this down is |  |
| 3 You know, maybe it would be just limited to |  | 3 what are policymakers in the state most |  |
| 4 the Advisory Committee or, you know, internal |  | 4 concerned about? You know, one thing that |  |
| 5 staff? |  | 5 I've had some discussions with members of |  |
| $6 \quad$ Is it just for federal requirements |  | 6 your group about is showing the value |  |
| 7 that I'll go through? Or is it going to be |  | 7 proposition of this state-based Exchange, |  |
| 8 more of a public-facing dashboard, you know, |  | 8 which is going to be brand-new. You know, it |  |
| 9 that the media and media relations staff and |  | 9 might be market stability. It might be |  |
| 10 consumers might look at? You know, I think |  | 10 continuity of coverage. |  |
| 11 it can be both. It could be either. But |  | 11 You know, whatever goals you come up |  |
| 12 that's probably something that you want to at |  | 12 with based on, you know, your priorities, the |  |
| 13 least think about early on. |  | 13 one thing I would say is you really want them |  |
| 14 The next set of questions is a |  | 14 to be realistic. And think about goals that |  |
| 15 little bit similar, at least the first is, is |  | 15 the Exchange can actually move the needle on. |  |
| 16 this going to be a policy-making tool, |  | 16 You know, there are some really, |  |
| 17 operational, so high-level or more detail? |  | 17 really I think admirable policy goals that |  |
| 18 Are you focused only on the work at the |  | 18 state-based Exchanges had early on, and they |  |
| 19 Exchange or are you also thinking about these |  | 19 put them out there and then they were held |  |
| 20 metrics in terms of the success of health |  | 20 accountable to them and maybe suddenly |  |
| 21 policy in the state overall? You know, I |  | 21 realized that they couldn't actually move the |  |
| 22 don't know if there's a huge evaluation going |  | 22 needle on the things that they were, you |  |
| 23 on in your state, but if there is, you'd want |  | 23 know, attempting to impact. So that's just |  |
| 24 to slap this in. |  | 24 sort of a coffin. |  |
| 25 And you know, another thing to think |  | 25 So once you have kind of a general |  |


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| 1 audience of thinking about whether this is |  | 1 Because this is typically, when we talk to |  |
| 2 internal or external or operational or more |  | 2 states, where we recommend that they start. |  |
| 3 broad-based goals, and then you've thought a |  | 3 There are a whole host of measures that are |  |
| 4 little bit about what those goals are, it's |  | 4 going to be required reporting under federal |  |
| 5 time to choose measures. |  | 5 guidance. And they're good. And they're |  |
| 6 I think probably the most important |  | 6 useful. And you might as well consider those |  |
| 7 thing to think about here is to keep the |  | 7 as part of your monitoring frame. |  |
| 8 number of measures manageable. This is where |  | $8 \quad$ I am going to talk about this at a |  |
| 9 I'd really give some thought to analytic and |  | 9 stratospheric level. I don't know if Keven |  |
| 10 staff capacity, the ability to which, you |  | 10 is still on the phone. I'm sure that he can |  |
| 11 know, the vendor that developed the system |  | 11 speak to these reporting requirements in |  |
| 12 can create customized reports. You know, |  | 12 detail, and we can certainly get into more of |  |
| 13 what we always suggest is start small and |  | 13 it, but really, at a very high level, the |  |
| 14 maybe expand the list over time. So if you |  | 14 reporting requirements for state-based |  |
| 15 have a brain storming session, keep all those |  | 15 marketplaces, the biggest ones are |  |
| 16 good ideas. But maybe, I think, as Keven |  | 16 performance metrics and then some annual |  |
| 17 said, similar to implementation overall, you |  | 17 reporting into the SMART tool. |  |
| 18 want to start small and manageable and build. |  | 18 You know, I'm going to focus |  |
| 19 Kind of a no-brainer, but like I |  | 19 primarily on the reporting requirements |  |
| 20 said before, you want to choose measures that |  | 20 because this is where most state-based |  |
| 21 are directly related to your policy goals and |  | 21 Exchanges tend to, you know, look to for |  |
| 22 levers, so things that the Exchange can |  | 22 their own public reporting. |  |
| 23 actually make some progress on. |  | 23 So these are weekly and annual open |  |
| 24 You know, also, thinking about |  | 24 enrollment reports. There's about 300 |  |
| 25 near-, medium-, and long-term impacts and |  | 25 measures and also biennial reporting. And |  |
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| 1 having potentially some in each, and I would |  | 1 they are -- they're kind of the standard |  |
| 2 say most importantly, have some -- include |  | 2 stuff; it's plan selections, information |  |
| 3 some measures that will be some early success |  | 3 about new consumers, reenrollment, |  |
| 4 measures. So for example, you know, a lot of |  | 4 applications, determinations, cancellations, |  |
| 5 state Exchanges will -- and did early on -- |  | 5 a whole host of call center metrics, website |  |
| 6 show the percent of people with a subsidy or |  | 6 metrics, etc. |  |
| 7 the average subsidy. That's just a really |  | 7 Many of those are also required to |  |
| 8 feel-good number, typically, because it's |  | 8 be disaggregated by a variety of |  |
| 9 basically, you know, how are we supporting |  | 9 demographics, including race, ethnicity, age, |  |
| 10 people financially? |  | 10 sex assigned at birth, income meta-level, |  |
| 11 Call centers might be something that |  | 11 etc. One thing I will note is not every |  |
| 12 you struggle with over time. So let's say, |  | 12 single one of those measures is disaggregated |  |
| 13 you know, you might not want to have a ton of |  | 13 in that level of detail. So there's only |  |
| 14 measures for a brand-new call system where |  | 14 select measures that has a whole host of |  |
| 15 work flows are not perfect yet. Or maybe you |  | 15 demographics. |  |
| 16 add those in over time or don't lead with |  | 16 There's also some biennial reporting |  |
| 17 those. |  | 17 that is a little bit more operational and |  |
| 18 And then I'd also suggest |  | 18 maybe not as relevant about terminations and |  |
| 19 considering the feasibility of the measures. |  | 19 appeals, data matching, and special |  |
| 20 So, you know, you want to think about what |  | 20 enrollment activities. So this is a place |  |
| 21 data you have, the possibility of collecting |  | 21 where, you know, if you're going to start |  |
| 22 new data. Obviously, existing data is a lot |  | 22 thinking about getting into the list of |  |
| 23 easier. |  | 23 measures you might want to see on a periodic |  |
| 24 And that's where I want to go into a |  | 24 basis, you probably want to start here and |  |
| 25 little bit about required reporting metrics. |  | 25 draw from this first. |  |


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| I also wanted to put out just one |  | 1 more complicated example is churn; you know, |  |
| slide on the Medicaid and CHIP performance |  | 2 who is included in the denominator for that? |  |
| 3 indicators. I will admit that I don't know |  | 3 Is it at six months or a year? Or a month? |  |
| 4 how integrated Virginia's Exchange is going |  | 4 If you're going to primarily choose |  |
| 5 to be or is with Medicaid. But Ithink it's |  | 5 measures from required federal reporting, the |  |
| 6 worth saying Medicaid and CHIP has a whole |  | 6 good news is that they have really nice |  |
| 7 set of indicators that they also have to |  | 7 definitions already stated. If you're going |  |
| 8 report on. |  | 8 to go your own way on something, I think |  |
| 9 And some of them are kind of |  | 9 that's also totally appropriate, as long as |  |
| 10 similar, you're going to see. These are |  | 10 you document it. And then you might want to |  |
| 11 monthly indicators. They are not |  | 11 think about whether another agency or |  |
| 12 disaggregated. They do not require |  | 12 stakeholder reports something similar and try |  |
| 13 disaggregation in quite the same way. |  | 13 to align your definition with theirs. |  |
| 14 They're typically a little bit more high |  | 14 After you have a definition, you're |  |
| 15 level. There's some age breakdowns and then |  | 15 going to want to think about what level of |  |
| 16 some MAGI, non-MAGI, but not a lot of |  | 16 disaggregation you want. So you know, as I |  |
| 17 additional breakdowns. |  | 17 ran through some of the disaggregation points |  |
| 18 And CMS, at least in theory, has |  | 18 for CMS, like age and geography, but the |  |
| 19 sought to align these requirements with the |  | 19 state might choose to report even more than |  |
| 20 state-based marketplace requirements, at |  | 20 that as part of their monitoring frame or |  |
| 21 least in terms of the definitions. In both |  | 21 dashboard. It just depends on your goals and |  |
| 22 cases, the Medicaid and CHIP and the Exchange |  | 22 level of interest. |  |
| 23 measures, they're publicly reported, at least |  | 23 And then finally you're going to |  |
| 24 a subset of them. |  | 24 identify your data source. Once you have the |  |
| 25 And then it's worth noting that for |  | 25 measures and how you want to define them, |  |
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| 1 these Medicaid and CHIP performance |  | 1 think about where that data comes from. I |  |
| 2 indicators, new measures will be required to |  | 2 will be totally honest, when we started |  |
| 3 track the end of the public health emergency. |  | 3 working with state-based marketplaces on this |  |
| 4 So concerns about people falling off, states |  | 4 topic back in probably 2013, we talked a lot |  |
| 5 are going to be required to report more than |  | 5 about getting data from all sorts of |  |
| 6 is just on this list, which includes |  | 6 different areas, including survey data. |  |
| 7 information about call centers, work loads, |  | $7 \quad$ The reality is most marketplaces |  |
| 8 renewals and transfers, determinations, and |  | 8 really focus on the data that they have, and |  |
| 9 then total enrollment. |  | 9 that's probably where I'd recommend that you |  |
| 10 So once you've selected your list of |  | 10 start. If there are gaps, which we'll talk |  |
| 11 measures -- and again, my recommendation is |  | 11 about a little bit later, that's certainly |  |
| 12 to start with what you're already going to |  | 12 something that SHADAC can help you think |  |
| 13 have to report -- you have to operationalize |  | 13 about where you might get data, you know, |  |
| 14 it . And this is a step that I think you can |  | 14 outside the Exchange. But I think, at least |  |
| 15 sort of get lost when you're choosing from |  | 15 as a starting point, you're probably just |  |
| 16 the menu of options. You know, there has to |  | 16 going to focus on data that is generated |  |
| 17 be a working definition or preferred method |  | 17 either by the Exchange itself or another |  |
| 18 for calculating whatever measure you come up |  | 18 agency. |  |
| 19 with. And this is more important than it |  | 19 I just put this in here as a |  |
| 20 sounds. |  | 20 reminder of the type of breakdowns that you |  |
| 21 So, for example, you're probably |  | 21 might consider. So, you know, if you think |  |
| 22 going to abort enrollment in some way, shape, |  | 22 about enrollments, the easiest way to think |  |
| 23 or form, and you need to think about what |  | 23 about this, you might report enrollment by |  |
| 24 that actually means. Is it at mid month? Is |  | 24 entry point or coverage site or what subsidy |  |
| 25 it at the first or last day of the month? A |  | 25 they have, you know, by plan, etc. |  |


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| 1 So there's a lot of different |  | 1 every month, but then you have less frequent |  |
| 2 disaggregation you can do. It can be a |  | 2 full reporting, so maybe you do a biannual or |  |
| 3 little bit overwhelming, so you certainly |  | 3 annual report with a lot more detail. Again, |  |
| 4 don't want to disaggregate every single |  | 4 this is also just a time saver. |  |
| 5 metric. But you want to align the |  | 5 The other thing I wanted to raise, |  |
| 6 disaggregation with your goals. |  | 6 you know, as part of a step in developing a |  |
| 7 Reporting frequency is another thing |  | 7 monitoring framework is data visualization. |  |
| 8 to consider. I think, you know, we tend to |  | 8 SHADAC spends a lot of time thinking about |  |
| 9 value higher frequency reporting. Obviously, |  | 9 how to present data in a way that's |  |
| 10 this has benefits; you know, a good, early |  | 10 meaningful to a broad audience. And if you |  |
| 11 warning sign definitely engages stakeholders |  | 11 put it in the form of a figure or an |  |
| 12 and the media. I mean, if they know they're |  | 12 infographic or chart, it tends to be a little |  |
| 13 going to get new data every week, they're |  | 13 bit easier to understand and digest. You can |  |
| 14 going to get super excited and look for it. |  | 14 really highlight progress and challenges and |  |
| 15 Definitely a sign of transparency |  | 15 equities. And these are just a couple kind |  |
| 16 and it could lessen the need for ad hoc data |  | 16 of sample graphics. |  |
| 17 runs by your staff. You know when things |  | 17 All that being said, I want to note |  |
| 18 come up, because you'll always have fresh |  | 18 that you don't have to do this. And you |  |
| 19 data available. |  | 19 definitely don't have to do this early on. |  |
| 20 I tend to think that the challenges |  | 20 And I think a lot of this depends on the kind |  |
| 21 actually outweigh the benefits because of the |  | 21 of staff you have, the kind of expertise you |  |
| 22 burden it places. There's a staff burden. I |  | 22 have in-house. And you're going to see when |  |
| 23 think that some states have found that if |  | 23 I go through the state examples that some |  |
| 24 they have really frequent reporting, you |  | 24 states have highly graphical frameworks and |  |
| 25 spend more time pulling and publishing and |  | 25 data reporting and some don't. And I think |  |
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| 1 quality checking data than you actually do |  | 1 it just really depends on your capacity. |  |
| 2 looking at what it means. |  | 2 So, you know, one thing, before I |  |
| 3 I think it also tends to kind of |  | 3 move to considerations, is the data gaps. |  |
| 4 overstate normal fluctuations in the data, |  | 4 You know, once you've picked your audience |  |
| 5 and it highlights data anomalies that you |  | 5 and you're focused and you've got your goals |  |
| 6 might never really totally understand why |  | 6 and your measures, it is very possible that |  |
| 7 they happen, and it probably doesn't matter |  | 7 you're going to see, when you kind of map |  |
| 8 in some cases. You know, it's just sort of a |  | 8 your final list of measures back to your |  |
| 9 misplaced attention on the short term, and |  | 9 goals, which I recommend that you do, that |  |
| 10 sometimes it can mean that you're not really |  | 10 there are places where there's just not a lot |  |
| 11 thinking about the long-term strategies. |  | 11 of data to inform a goal that you have. |  |
| 12 And then I think something that's |  | 12 A couple areas where, in the past in |  |
| 13 really, again, my experience as a state |  | 13 other states, there have been some gaps is |  |
| 14 analyst is stakeholders are going to ask you |  | 14 transitions and churn, because that requires |  |
| 15 about blips in the data that they see. They |  | 15 a level of analysis that isn't always |  |
| 16 typically don't really like to accept the |  | 16 available to state. There's often not a lot |  |
| 17 answer that, "You know, it's a data anomaly; |  | 17 of good information within the Exchange about |  |
| 18 we don't really know." If you look at the |  | 18 off-Exchange enrollees or the potential |  |
| 19 trend over time, it doesn't mean that much. |  | 19 eligibles; that's often where you have to |  |
| 20 You just might spend a lot of time answering |  | 20 look for a different source of data. |  |
| 21 questions on things that are not meaningful. |  | $21 \quad$ Provider and system capacity and |  |
| 22 So I think a longer time period is |  | 22 then also consumer experience; you know, |  |
| 23 probably better. And you know, one thing |  | 23 obviously, through call center metrics, |  |
| 24 that we've suggested to other states is maybe |  | 24 you're going to have some information on |  |
| 25 you have monthly indicators that you produce |  | 25 customer experience, but typically it's not |  |


|  | 53 |  | 55 |
| :---: | :---: | :---: | :---: |
| 1 super rich. So there are definitely ways you |  | 1 rapidly, because they know who to talk to, |  |
| 2 can collect that data outside of the |  | 2 where, and which agency, if they're trying to |  |
| 3 Exchange, through surveys; you know, we've |  | 3 respond to a data request. And then more of |  |
| 4 worked with a number of states on |  | 4 a pie in the sky ideal is just developing a |  |
| 5 internet-based enrollee and disenrollee |  | 5 broader vision for how each agency can |  |
| 6 surveys. You can do qualitative data |  | 6 contribute to a bigger health policy picture. |  |
| 7 collection, you know, interview enrollees, |  | 7 You mentioned -- Keven mentioned |  |
| 8 for example. |  | 8 stakeholder leveraging. It sounds like |  |
| 9 And then also think about enlisting |  | 9 that's already underway at a high level. I'd |  |
| 10 support from others. So data from other |  | 10 also suggest leveraging stakeholders when it |  |
| 11 agencies, like I said, leveraging federal |  | 11 comes to this monitoring or evaluation or |  |
| 12 surveys; you know, for example, to think |  | 12 data dashboarding. You know, information |  |
| 13 about your potentially eligible group, |  | 13 from any monitoring plan can be great for |  |
| 14 looking to assisters and brokers, either |  | 14 stakeholders. They can be champions or |  |
| 15 through data collection requirements that you |  | 15 critics with this data. So engaging them |  |
| 16 put on them as a condition of participation |  | 16 early can really help them, I think, be |  |
| 17 or grants, or just by talking to them and |  | 17 champions. |  |
| 18 doing some sort of informal interviews with |  | 18 And you know, if you're going to |  |
| 19 them. |  | 19 develop sort of a feedback or monitoring or |  |
| 20 One thing I would note is this |  | 20 have a decision with stakeholders about this, |  |
| 21 doesn't have to happen right away. If you |  | 21 the only thing that I'd recommend is that you |  |
| 22 identify a gap, consider filling the gap in a |  | 22 definitely give them something to react to |  |
| 23 future phase of your evaluation and |  | 23 first and set clear boundaries. I think if |  |
| 24 monitoring. Keeping things manageable is so |  | 24 you go to a stakeholder and you say, "What do |  |
| 25 important early on. And this kind of thing |  | 25 you want to know," it's going to be a pretty |  |
|  | 54 |  | 56 |
| 1 doesn't happen right away; I just recommend |  | 1 long list. |  |
| 2 documenting it and not forgetting about it. |  | 2 So I'd recommend sort of doing some |  |
| 3 I want to run quickly through just |  | 3 of that early thinking well in advance of |  |
| 4 some considerations based on our work with |  | 4 talking to stakeholders is important. |  |
| 5 other states. You know, we really recommend |  | 5 And then finally, don't reinvent the |  |
| 6 that the Exchange coordinating with other |  | 6 wheel. I think Keven put this just |  |
| 7 agencies, you know, Medicaid is obviously the |  | 7 perfectly: There's other states that have |  |
| 8 most obvious one in this case, mainly because |  | 8 done this, they do it well, and they have |  |
| 9 you avoid duplication. If you're getting the |  | 9 great ideas. So I'm just going to jump right |  |
| 10 same data requests from one group, you can, |  | 10 into some of the state examples, with the |  |
| 11 you know, hopefully one of you can field it, |  | 11 full disclosure that this is a completely |  |
| 12 if it's similar. You avoid data |  | 13 You know, I tried to just pick |  |
| 14 I remember, early on, a state coming |  | 14 states where they did a couple interesting |  |
| 15 to us, and they kept -- Medicaid kept putting |  | 15 things. We worked with some of these states; |  |
| 16 on enrollment and the Marketplace kept |  | 16 we haven't worked with others. And this is |  |
| 17 putting on enrollment like a day later, and |  | 17 not limited to, like, the absolute best or |  |
| 18 they would differ. And then they were |  | 18 the worst; just a quick sampling. |  |
| 19 accused of, you know, misreporting. And it |  | 19 So in terms of variation, you're |  |
| 20 really was just that one was reporting mid |  | 20 going to see a lot of the same metrics, you |  |
| 21 month and one was reporting at the end of the |  | 21 know, call center metrics, enrollment broken |  |
| 22 month enrollment dates. So just talking and |  | 22 out in different ways, financial assistance |  |
| 23 coordinating on that can go a long way to |  | 23 broken out in different ways. But the |  |
| 24 avoid confusion. |  | 24 breadth of information released really varies |  |
| 25 It also helps analysts respond more |  | 25 by states. The method of release goes from, |  |



|  | 61 |  | 63 |
| :---: | :---: | :---: | :---: |
| 1 It has a fairly limited number of metrics. |  | 1 group has thought about goals or if there's |  |
| 2 But what I find really interesting about it |  | 2 states that looked interesting or states |  |
| 3 is they actually, next to the metric, they |  | 3 you're already looking at. |  |
| 4 put some narrative text, which situates the |  | 4 MS. KUSIAK: We're just beginning |  |
| 5 most recent data point within the context of |  | 5 our process, but this has been extremely |  |
| 6 their benchmark. And I'll show you that in a |  | 6 helpful. I think we will start small, |  |
| 7 second. They have prominent and clear |  | 7 because I've done this before, and I think |  |
| 8 definitions as part of that. |  | 8 that we can get very audacious and fall on |  |
| $9 \quad$ And then as part of their annual |  | 9 our face. But I sure hope you can help us |  |
| 10 report, they also release interactive county |  | 10 along our journey. |  |
| 11 maps, which are really cool, created through |  | 11 MS. LUKANEN: Yeah, absolutely. |  |
| 12 an Excel product. So you can see, you know, |  | 12 This, like I said, was kind of a |  |
| 13 I can't do it here, but you can click on that |  | 13 quick-and-dirty, some state examples, but we |  |
| 14 map, drill down into counties and get more |  | 14 are happy to do a more systematic review of |  |
| 15 information on financial assistance. |  | 15 what other states are doing. Because like I |  |
| 16 The Marketplace dashboard, you can |  | 16 said, it's always the best place to start. |  |
| 17 see here they have pretty simple images, just |  | 17 CHAIR CORLETTE: Yeah, we definitely |  |
| 18 a handful of data points, and then some text |  | 18 have our work cut out for us. |  |
| 19 on the right; talks about how to |  | 19 Any other questions, comments, deep |  |
| 20 contextualize those numbers, which I think is |  | 20 thoughts? |  |
| 21 pretty interesting. |  | 21 All right. Well, Elizabeth, thank |  |
| 22 I flew through that in the interest |  | 22 you to SHADAC. Thank you to the Robert Wood |  |
| 23 of time. And I did include my contact |  | 23 Johnson Foundation and the State Health and |  |
| 24 information. Let's see if I can figure out |  | 24 Value Strategies Project. We really, really |  |
| 25 how to stop sharing here. There we go. |  | 25 appreciate your time today. And I think this |  |
|  | 62 |  | 64 |
| 1 I'll take a breath, see if there's |  | 1 is just the perfect grounding for the work, |  |
| 2 questions, comments, places, you know, more |  | 2 actually, I think Julie, for both |  |
| 3 information, if there's ways SHADAC can help. |  | 3 subcommittees, I would imagine. |  |
| 4 Looks like maybe Sabrina, you had your hand |  | 4 MS. KUSIAK: Right. |  |
| 5 up? |  | 5 CHAIR CORLETTE: So stay tuned for |  |
| 6 CHAIR CORLETTE: Yeah. That was |  | 6 more from our subcommittee leads, our next |  |
| 7 fantastic; really, really helpful |  | 7 step with that. And if you haven't already |  |
| 8 presentation. Thank you. I did just want to |  | 8 volunteered for one of those subcommittees, |  |
| 9 ask, you had mentioned that there may be data |  | 9 it's never too late to do so. So feel free |  |
| 10 collection and analytics that you do solely |  | 10 to reach out to me and Julie and Jane for |  |
| 11 for internal or operational purposes. It |  | 11 that. |  |
| 12 sounds like what you were showing us from the |  | 12 So let's see. I think, am I right, |  |
| 13 other states was really what they decided to |  | 13 Holly, we do not have any comments from the |  |
| 14 share externally, but there may be a whole |  | 14 public? Or should we ask if we have any |  |
| 15 other level of data that they are using |  | 15 comments from the public at this point? |  |
| 16 internally; is that correct? |  | 16 MS. MORTLOCK: We did not have |  |
| 17 MS. LUKANEN: Absolutely. I did the |  | 17 anyone signed up to make public comments. |  |
| 18 public because I think that when we spoke, |  | 18 And people do need to register in advance of |  |
| 19 there was some interest on your end, Sabrina, |  | 19 the meeting. |  |
| 20 that this might be public. And those just |  | 20 CHAIR CORLETTE: That's right. |  |
| 21 tend to be easier to find more up to date. |  | 21 Okay. So in the absence of any public |  |
| 22 So yeah, that is the public reporting that |  | 22 comments, Ithink just in terms of a couple |  |
| 23 they do. |  | 23 of business items, like I said, I along with |  |
| 24 CHAIR CORLETTE: Great. Thank you. |  | 24 maybe a couple others had some technical |  |
| 25 MS. LUKANEN: So I don't know if the |  | 25 difficulties during the closed session, so |  |



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