Illinois Insurance Exchange Planning -- Project Work Plan

ID	Task Name	Start	Finish	
1	**Background Research Core Area****	**Mon 10/4/10**	**Tue 4/10/12**	
2	**Hire Exchange Planning Staff**	**Mon 10/4/10**	**Fri 7/29/11**	
3	**Hire Research Assistants in DOI/HFS**	**Mon 10/4/10**	**Fri 7/29/11**	
4	Develop Job Descriptions for Exchange Research Assistants	Mon 10/4/10	Fri 10/29/10	
5	Post Positions/Begin Interviewing for Exchange Research Assistants	Mon 11/1/10	Fri 12/31/10	
6	Make Offers/Draft Contracts for Positions	Mon 1/3/11	Mon 1/31/11	
7	Sign Contracts/Research Assts. Begin Work	Tue 2/1/11	Mon 2/28/11	
8	HFS Research Assist Contract Expires	Fri 7/1/11	Fri 7/29/11	
9	**Hire HFS Senior Policy Advisor**	**Wed 6/1/11**	**Fri 7/29/11**	
10	Develop Job Descriptions for Senior Policy Advisor	Wed 6/1/11	Fri 6/10/11	
11	Post Positions/Begin Interviewing for Senior Policy Advisor	Mon 6/13/11	Fri 6/24/11	
12	Make Offers/Draft Contracts for Positions	Mon 6/27/11	Fri 7/1/11	
13	Sign Contracts/Senior Policy Advisor Begin Work	Mon 7/4/11	Fri 7/29/11	
14	**Comprehensive Analysis of Illinois Current Insurance Marketplace**	**Mon 10/4/10**	**Tue 4/10/12**	
15	**Background Research Project**	**Mon 10/4/10**	**Mon 10/31/11**	
16	Draft PBC and Obtain PBC Approval	Mon 10/4/10	Fri 11/12/10	
17	Draft RFP for Background Research Consulting	Fri 10/8/10	Thu 11/18/10	
18	Post RFP for Consulting Services	Thu 12/9/10	Thu 12/9/10	
19	Review Submitted Bids/Choose and Post Winner	Tue 1/25/11	Wed 3/9/11	
20	Negotiate Contract with Winning Bidder	Thu 3/10/11	Fri 4/29/11	
21	Launch Project	Mon 5/2/11	Mon 5/2/11	
22	Midterm Report	Tue 7/5/11	Tue 7/5/11	
23	Obtain Funding to Complete Background Research	Thu 6/30/11	Mon 8/15/11	
24	Final Project Report Due	Wed 8/10/11	Wed 8/10/11	
25	Contract Expires	Mon 10/3/11	Mon 10/31/11	
26	**Extension of Needs Assessment Project**	**Thu 6/30/11**	**Tue 4/10/12**	
27	Request and Obtain Funding for Consulting	Thu 6/30/11	Mon 8/15/11	
28	Draft PBC and Obtain PBC Approval	Tue 8/16/11	Wed 9/14/11	
29	Draft Project Extension	Mon 7/18/11	Mon 8/15/11	
30	Obtain Project Extension Approval	Tue 8/16/11	Fri 9/16/11	
31	Post Project Extension	Mon 9/19/11	Mon 10/3/11	
32	Sign Contract for Project Extension	Mon 10/3/11	Fri 10/7/11	
33	Launch Project Extension	Mon 10/10/11	Mon 10/10/11	
34	Mid-term Report on Project Extension	Tue 1/10/12	Tue 1/10/12	
35	Final Report on Project Extension	Tue 4/10/12	Tue 4/10/12	
36	**Analysis of Employer Needs for the Exchange**	**Thu 6/30/11**	**Wed 12/7/11**	
37	**Employer Survey**	**Thu 6/30/11**	**Fri 11/18/11**	
38	Request and Obtain Funding for Survey	Thu 6/30/11	Mon 8/15/11	
39	Coordinate with Employer Community/Stakeholders	Tue 8/16/11	Mon 8/29/11	
40	Develop Draft Survey Questions	Thu 9/1/11	Fri 9/16/11	
41	Vet Questions with Employer Community	Fri 9/23/11	Fri 9/23/11	
42	Execute Survey	Mon 10/3/11	Fri 10/21/11	
43	Analyze Results	Mon 10/24/11	Fri 11/18/11	
44	**Behavioral Modeling of Employers**	**Thu 6/30/11**	**Wed 12/7/11**	
45	Request and Obtain Funding for Modeling	Thu 6/30/11	Mon 8/15/11	
46	Draft PBC and Obtain PBC Approval	Tue 8/16/11	Wed 9/14/11	
47	Draft RFP for Consulting	Thu 9/1/11	Thu 9/15/11	
48	Post RFP for Consulting	Fri 9/16/11	Fri 9/16/11	
49	Review Submitted Bids/Choose and Post Winner	Mon 9/19/11	Mon 10/3/11	
50	Negotiate and Sign Contract with Bidder	Tue 10/4/11	Wed 10/12/11	
51	Launch Project	Thu 10/13/11	Thu 10/13/11	
52	Midterm Report	Tue 12/6/11	Tue 12/6/11	
53	Final Project Report Due	Wed 12/7/11	Wed 12/7/11	

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ID	Task Name	Start	Finish	
54	**Stakeholder Consultation Core Area****	**Tue 7/6/10**	**Fri 6/29/12**	
55	**Hire Exchange Support Staff**	**Mon 6/20/11**	**Fri 10/28/11**	
56	**Hire Research Assistant in the Governor's Office**	**Mon 6/20/11**	**Fri 10/28/11**	
57	Develop Job Descriptions for Research Assistant	Mon 6/20/11	Fri 7/15/11	
58	Post Positions/Begin Interviewing for Exchange Research Assistants	Mon 8/15/11	Fri 9/16/11	
59	Make Offers/Draft Contracts for Positions	Mon 9/19/11	Mon 10/3/11	
60	Sign Contracts/Research Assts. Begin Work	Mon 10/3/11	Fri 10/28/11	
61	**Governor's Health Reform Implementation Council**	**Tue 7/6/10**	**Tue 3/1/11**	
62	Executive Order Establishing the Health Reform Implementation Council	Tue 7/6/10	Tue 7/6/10	
63	Request for Public Comment Paper	Fri 11/12/10	Fri 12/3/10	
64	Public Stakeholder Meeting in Chicago (Exchanges)	Thu 9/30/10	Thu 9/30/10	
65	Publish Final Recommendations of the Council	Tue 2/1/11	Tue 2/1/11	
66	Conduct Public Meeting to Accept Public Comment on Report	Mon 2/7/11	Mon 2/7/11	
67	Post a Final Report on the Governor's Website	Tue 3/1/11	Tue 3/1/11	
68	**Public Education on Exchanges**	**Thu 9/30/10**	**Fri 6/29/12**	
69	**Public Educational Webinars on Exchange**	**Tue 12/7/10**	**Thu 2/17/11**	
70	Prepare Basics of an Exchange Webinar	Tue 12/7/10	Mon 12/13/10	
71	Conduct Basics of an Exchange Webinar	Tue 12/14/10	Tue 12/14/10	
72	Prepare Exchange Governance and Long Term Stability Webinar	Mon 1/17/11	Fri 1/21/11	
73	Conduct Exchange Governance and Long Term Stability Webinar	Mon 1/24/11	Mon 1/24/11	
74	Prepare Exchange Operating Model Webinar	Thu 2/10/11	Wed 2/16/11	
75	Conduct Exchange Operating Model Webinar	Thu 2/17/11	Thu 2/17/11	
76	**Develop an Exchange Educational Toolkit**	**Mon 7/4/11**	**Fri 12/30/11**	
77	Exchange Planning Staff Develop Content for Pamphlets	Mon 7/4/11	Fri 7/15/11	
78	Exchange Planning Staff Work with CMS Staff to Design the Pamphlets	Mon 7/18/11	Fri 7/29/11	
79	Exchange Planning Staff Order Pamphlets/Pamphlets are Printed	Mon 8/1/11	Fri 8/26/11	
80	Relevent State Department Staff Begin to Circulate Materials at Health Fairs, etc.	Mon 9/5/11	Fri 12/30/11	
81	**Create Formal Website for Public Education and Reporting**	**Thu 9/30/10**	**Fri 6/29/12**	
82	Create the Governor's Health care Reform Website	Thu 9/30/10	Thu 9/30/10	
83	Update Content on the Governor's Health Reform Website	Mon 7/4/11	Fri 7/29/11	
84	Establish Public Forum for Posting Stakeholder Meeting Minutes	Mon 7/4/11	Fri 7/29/11	
85	Establish Stakeholder Feedback Mechanisms Through Website	Mon 7/4/11	Fri 7/29/11	
86	Launch Updated Health Reform Website with Exchange Information	Mon 8/1/11	Fri 8/26/11	
87	Continually Update Website Content	Thu 9/1/11	Fri 6/29/12	
88	**Conduct Stakeholder Meetings On Legislative Policy**	**Wed 12/8/10**	**Tue 3/8/11**	
89	Conduct Meeting on Exchange Governance	Wed 12/8/10	Mon 12/13/10	
90	Conduct Meeting on Exchange Financing	Tue 1/4/11	Thu 1/6/11	
91	Conduct Meeting on Exchange Operating Model	Wed 1/26/11	Fri 1/28/11	
92	Conduct Meeting on Exchange Legislation	Wed 2/23/11	Fri 2/25/11	
93	Provide Opportunity for Public Comment on Legislation	Fri 2/25/11	Tue 3/8/11	
94	Publically Review Accepted Changes to Legislation	Tue 3/8/11	Tue 3/8/11	
95	**Engage Stakeholders As part of MAC Meeting**	**Fri 5/6/11**	**Thu 6/2/11**	
96	MAC Meeting	Fri 5/6/11	Fri 5/6/11	
97	Stakeholder White Paper Submitted	Thu 6/2/11	Thu 6/2/11	
98	**Establish Stakeholder Engagements for Exchange Operations**	**Wed 6/1/11**	**Fri 3/30/12**	
99	Integrated Eligibility Systems	Thu 9/1/11	Fri 3/30/12	
100	Customer Experience	Wed 6/1/11	Mon 10/31/11	
101	Navigator Role	Fri 7/1/11	Mon 10/31/11	
102	Options to Address Churning	Thu 9/1/11	Fri 12/30/11	
103	SHOP Exchange Operations	Fri 7/1/11	Fri 12/30/11	
104	Risk Adjustment and Reinsurance	Thu 9/1/11	Fri 12/30/11	
105	Essential Health Benefits	Thu 9/1/11	Fri 12/30/11	
106	Individual Exchange Business Operations	Fri 7/1/11	Fri 12/30/11	
107	**Establish Ongoing Role for Stakeholders Post 2014**	**Mon 1/2/12**	**Fri 4/27/12**	

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ID	Task Name	Start	Finish	
108	Consult With the Exchange Board to Develop Process	Mon 1/2/12	Fri 4/27/12	
109	**Legislative, Policy, and Regulatory Action Core Area****	**Wed 12/1/10**	**Fri 3/1/13**	
110	**Establish Legal Authority for Exchange**	**Wed 12/1/10**	**Mon 5/30/11**	
111	Draft Enabling Legislation	Wed 12/1/10	Wed 12/1/10	
112	Provide Opportunity for Public Input	Thu 12/9/10	Wed 3/2/11	
113	Finalize Recommendation/Legislation	Thu 3/3/11	Fri 3/11/11	
114	Send to Governor	Mon 3/14/11	Mon 3/14/11	
115	Introduce in GA	Thu 3/17/11	Thu 3/17/11	
116	Pass Legislation	Mon 5/30/11	Mon 5/30/11	
117	**Establish Governance and Sustainability Function in Statute**	**Fri 9/30/11**	**Thu 11/10/11**	
118	Draft Legislation Based on Study Committee Findings	Fri 9/30/11	Mon 10/31/11	
119	Pass legislation	Tue 10/25/11	Thu 11/10/11	
120	**Determine Appropriation for IES solution and Pass in Statute if Necessary**	**Tue 10/25/11**	**Thu 11/3/11**	
121	**Adopt/Issue Regulations/Policy Documents for Exchange**	**Mon 4/2/12**	**Fri 3/1/13**	
122	**Governance Core Area****	**Tue 5/31/11**	**Tue 12/31/13**	
123	**Establish Governance Structure**	**Tue 5/31/11**	**Wed 11/2/11**	
124	Launch Meetings of the Legislative Study Committee	Tue 5/31/11	Fri 7/15/11	
125	Draft Recommendations for Enabling Legislation	Fri 9/16/11	Fri 9/16/11	
126	Provide Opportunity for Public Input	Mon 9/19/11	Mon 9/26/11	
127	Finalize Recommendations to the Executive/Legislative Branches	Tue 9/27/11	Tue 10/4/11	
128	Introduce Legislation	Tue 10/25/11	Thu 10/27/11	
129	Pass Legislation	Fri 10/28/11	Wed 11/2/11	
130	**Appoint Governing Board**	**Thu 12/1/11**	**Fri 3/30/12**	
131	Exchange Board is Appointed	Thu 12/1/11	Wed 2/29/12	
132	Board Elects Chair	Thu 3/1/12	Fri 3/30/12	
133	Develop a Formal Operating Charter or Bylaws Consistent With State and Federal Requirements	Thu 3/1/12	Fri 3/30/12	
134	**Develop Standards for Governance**	**Tue 10/25/11**	**Fri 6/29/12**	
135	Draft Public Accountability Functions	Tue 10/25/11	Fri 3/30/12	
136	Draft Tranparency Functions	Tue 10/25/11	Fri 3/30/12	
137	Draft Conflict of Interest Functions	Tue 10/25/11	Fri 3/30/12	
138	Incorporate Standards into Exchange Charter	Mon 4/2/12	Fri 6/29/12	
139	**Develop Internal Administration**	**Mon 3/5/12**	**Tue 12/31/13**	
140	Board Appoints Executive Director	Mon 3/5/12	Tue 4/3/12	
141	Establish HR Function and Determine Employee Benefits	Wed 4/4/12	Mon 12/3/12	
142	Executive Director Hires Staff	Mon 4/2/12	Tue 12/31/13	
143	Identify Areas of Need for Consultants and Begin to Procure Professional Services	Wed 4/4/12	Mon 12/3/12	
144	Incorporate Exchange as Legal Entity With Tax ID, Mailing address, W9 Forms, etc.	Wed 4/4/12	Mon 12/3/12	
145	Aqcuire Office Space. Lease/Purchase Furniture and Fixtures	Wed 4/4/12	Mon 12/3/12	
146	Develop Internal Plan of Operations	Wed 4/4/12	Mon 12/3/12	
147	Acquire IT Infrastructure (Computers, Servers, Software, Phone System, Internet Wiring)	Wed 4/4/12	Mon 12/3/12	
148	Develop Financial and Data Security Policy and Procedures	Wed 4/4/12	Mon 12/3/12	
149	Open Bank Accounts and Implement Basic Payroll and Accounting System	Wed 4/4/12	Mon 12/3/12	
150	Develop Financial Plan and Administrative Budget	Wed 4/4/12	Mon 12/3/12	
151	**Program Integration Core Area****	**Thu 8/19/10**	**Tue 12/31/13**	
152	**Execute Necessary Interagency Agreements (IGA)**	**Tue 1/18/11**	**Sat 12/31/11**	
153	Execute Interagency Agreement Between DOI, HFS, and Governor's Office	Tue 1/18/11	Tue 2/22/11	
154	Execute Interagency Agreement Between DOI, HFS, and DHS	Mon 7/4/11	Fri 7/29/11	
155	Execute Interagency Agreement Between DOI, HFS, DHS, OHIT, and DPH	Thu 9/1/11	Sat 12/31/11	
156	**Establish an Interagency Working Group on Integrated Eligibility**	**Thu 8/19/10**	**Tue 12/31/13**	
157	Convene IES Intergovernmental Working Group	Thu 8/19/10	Thu 8/19/10	
158	Participate in Needs Assessment RFP Development	Thu 9/30/10	Wed 11/24/10	
159	Develop Strategies for "No Wrong Door" Compliance	Fri 10/1/10	Mon 12/31/12	
160	**Redefine Interagency Working Group as "IES Oversight Group"**	**Mon 1/3/11**	**Fri 12/27/13**	

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ID	Task Name	Start	Finish	
161	Conduct Ongoing Integration Planning Meetings	Mon 1/3/11	Fri 12/27/13	
162	**Define the New IES**	**Mon 5/2/11**	**Sun 10/30/11**	
163	Define the Role of DHS Existing and Future Systems	Mon 5/2/11	Sun 10/30/11	
164	Define the Role of HFS Existing and Future Systems	Mon 5/2/11	Sun 10/30/11	
165	Define the Role of the Exchange	Wed 6/1/11	Fri 9/30/11	
166	**Define Cost-Allocation Procedures**	**Tue 8/30/11**	**Tue 12/31/13**	
167	Refine Cost-Allocation Procedures as Necessary	Tue 8/30/11	Tue 12/31/13	
168	Define Standard Operating Procedures for Exchange and Public Programs	Mon 10/31/11	Fri 12/28/12	
169	**Procure Consulting Services on Options for Integrated Eligibility System (IES)**	**Thu 9/30/10**	**Tue 8/16/11**	
170	IES Drafted/ Incorporated into Needs Assessment RFP	Thu 9/30/10	Tue 12/21/10	
171	Needs Assessment RFP Posted	Tue 12/21/10	Tue 1/18/11	
172	Evaluate Vendor Proposals	Wed 1/19/11	Tue 2/15/11	
173	Select Vendor	Wed 3/9/11	Wed 3/9/11	
174	Negotiate Contract with Vendor	Wed 3/9/11	Tue 3/22/11	
175	Launch Needs Assessment Project	Mon 4/4/11	Mon 4/4/11	
176	Provide Information to Vendor as Needed	Tue 4/5/11	Sun 5/29/11	
177	Needs Assessment Midterm Report	Wed 6/15/11	Wed 6/15/11	
178	Provide Information to Vendor as Needed	Thu 6/16/11	Mon 8/15/11	
179	Final Presentation from Vendor	Tue 8/16/11	Tue 8/16/11	
180	**Conduct IT Gap Analysis for Program Integration**	**Mon 8/1/11**	**Fri 3/30/12**	
181	**Perform Detailed Business Process Documentation of "As-Is" Environment**	**Mon 8/1/11**	**Fri 3/30/12**	
182	Request Information through IES Planning Group	Mon 8/1/11	Tue 11/15/11	
183	Incorporate Information into Larger IT Gap Analysis for Level 2 Funding	Thu 3/1/12	Fri 3/30/12	
184	**Establish Integration with Department of Insurance (DOI) Duties**	**Thu 9/30/10**	**Wed 11/30/11**	
185	**Identify Business Operation Overlap with DOI**	**Thu 9/30/10**	**Fri 10/1/10**	
186	Roles/Responsibilities Related to QHPs	Thu 9/30/10	Thu 9/30/10	
187	Strategy to Address Adverse Selection and Indirect Selection	Fri 10/1/10	Fri 10/1/10	
188	Identify Data Connections with DOI	Mon 10/4/10	Mon 10/4/10	
189	Identify Necessary IT Functionality to Connect to DOI	Thu 9/1/11	Wed 11/30/11	
190	**Establish Integration with Office of Health Information Technology**	**Mon 10/3/11**	**Fri 6/29/12**	
191	**Identify Business Operation Overlap with OHIT**	**Mon 10/3/11**	**Fri 12/30/11**	
192	Master Patient Index	Mon 10/3/11	Fri 12/30/11	
193	Privacy and Security Hub	Mon 10/3/11	Fri 12/30/11	
194	Identify Data Connections with OHIT	Mon 1/2/12	Fri 3/30/12	
195	Identify Necessary IT Functionality to Connect to OHIT	Mon 4/2/12	Fri 6/29/12	
196	**Establish Integration with the Department of Public Health and Population Health Goals**	**Wed 6/1/11**	**Wed 11/30/11**	
197	Identify Business Operation Overlap with DPH	Wed 6/1/11	Thu 6/30/11	
198	Identify Data Connections with DPH	Fri 7/29/11	Fri 7/29/11	
199	Identify Necessary IT Functionality to Connect to DPH	Thu 9/1/11	Wed 11/30/11	
200	**Establish Integration with Federal Databases**	**Mon 8/1/11**	**Fri 3/30/12**	
201	Identify Business Operation Overlap with Federal Databases	Mon 8/1/11	Tue 8/30/11	
202	Identify Data Connections with Federal Databases	Thu 9/1/11	Mon 10/31/11	
203	Identify Necessary IT Functionality to Connect to Federal Databases	Tue 11/1/11	Fri 3/30/12	
204	**Exchange IT Systems Core Area****	**Wed 6/1/11**	**Tue 12/1/15**	
205	**Hire Exchange (HIX) Planning Staff**	**Mon 6/13/11**	**Fri 9/30/11**	
206	Develop Job Descriptions for Exchange (HIX) Project Manager	Mon 6/13/11	Fri 6/24/11	
207	Post Positions/Begin Interviewing for Exchange(HIX) Project Manager	Mon 7/11/11	Fri 8/12/11	
208	Make Offers/Draft Contracts for Positions	Mon 8/15/11	Fri 9/2/11	
209	Sign Contracts/Exchange IT Project Manager Begins Work	Mon 9/5/11	Fri 9/30/12	
210	**Hire IES Planning Staff**	**Mon 6/20/11**	**Fri 3/2/12**	
211	**Hire the IES Project Manager**	**Mon 6/20/11**	**Fri 10/28/11**	
212	Develop Job Description for IES Project Manager	Mon 6/20/11	Fri 7/15/11	
213	Post Positions/Begin Interviewing for IES Project Manager	Mon 8/15/11	Fri 9/16/11	
214	Make Offer/Draft Contract for Position	Mon 9/19/11	Mon 10/3/11	

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ID	Task Name	Start	Finish	
215	Sign Contracts/IES Project Manager Begins Work	Mon 10/3/11	Fri 10/28/11	
216	**Establish IES Project Team**	**Mon 6/20/11**	**Fri 3/2/12**	
217	**Hire Project Analysts**	**Mon 6/20/11**	**Fri 10/28/11**	
218	Develop Job Description for Project Analysts	Mon 6/20/11	Fri 7/15/11	
219	Post Positions/Begin Interviewing for Project Analysts	Mon 8/15/11	Fri 9/16/11	
220	Make Offer/Draft Contract for Positions	Mon 9/19/11	Mon 10/3/11	
221	Sign Contracts/Project Analysts Begins Work	Mon 10/3/11	Fri 10/28/11	
222	**Hire IT Staff**	**Tue 11/1/11**	**Fri 3/2/12**	
223	Develop Job Description for IES Project Manager	Tue 11/1/11	Mon 11/28/11	
224	Post Positions/Begin Interviewing for IES Project Manager	Mon 12/26/11	Fri 12/30/11	
225	Make Offer/Draft Contract for Position	Mon 1/9/12	Tue 1/31/12	
226	Sign Contracts/IES Project Manager Begins Work	Mon 2/6/12	Fri 3/2/12	
227	**Preliminary IT Gap Analysis for Level I Funding**	**Thu 6/16/11**	**Thu 6/30/11**	
228	Draft Preliminary Comprehensive Analysis for HHS	Thu 6/16/11	Fri 6/24/11	
229	Incorporate into Federal Grant Request for Level 1 Funding	Thu 6/30/11	Thu 6/30/11	
230	**Integrated Eligbility System (IES)**	**Wed 6/1/11**	**Tue 12/1/15**	
231	**Integrated Eligibility System (IES) -- Planning and Preparation**	**Wed 6/1/11**	**Fri 8/30/13**	
232	**Procure Consulting Services for the Planning and Preparation**	**Tue 7/5/11**	**Wed 8/15/12**	
233	Draft PBC and Obtain PBC Approval for IES Planning Vendor	Tue 7/5/11	Fri 7/29/11	
234	Draft Contract Extension for IES Planning Vendor	Tue 7/5/11	Fri 8/12/11	
235	Post Contract Extension for IES Planning Vendor	Mon 8/15/11	Thu 9/29/11	
236	Negotiate Contract Amendment with IES Planning Vendor	Mon 10/24/11	Fri 11/18/11	
237	Launch Project	Mon 1/2/12	Mon 1/2/12	
238	Finalize IAPD for IES	Wed 2/29/12	Fri 4/13/12	
239	Finalize RFP for IES DDI	Wed 2/15/12	Fri 3/30/12	
240	Conitnue as Independent Validations and Verification (IVV) vendor	Mon 4/2/12	Wed 8/15/12	
241	**Federally Required Program Activities**	**Wed 6/1/11**	**Fri 3/30/12**	
242	Define and Document Business Processes and Rules for IES and Existing Programs According to CMS Standards (Business Process Model tool?), Identifying Roles and Responsibilities for DHS, HFS, DOI, and HIX	Wed 6/1/11	Fri 3/30/12	
243	Fulfill MITA Condition for Self Assessments, Roadmaps, and Concept of Operations (COO)	Wed 6/1/11	Fri 3/30/12	
244	Identify and Describe All Interfaces According to CMS standard	Wed 6/1/11	Fri 3/30/12	
245	Define and Document an Industry Standard Systems Development Lifecycle Methodology According to CMS Standards	Wed 6/1/11	Fri 3/30/12	
246	Implement Support Required for SOA Architecture (service bus?)	Wed 6/1/11	Fri 3/30/12	
247	**Federally Required Technology Activities**	**Wed 6/1/11**	**Fri 3/30/12**	
248	Document Interfaces and SDLC, Establish SOA	Wed 6/1/11	Fri 3/30/12	
249	**State Program Staff Activities**	**Wed 6/1/11**	**Fri 8/30/13**	
250	Define and Implement the Necessary Governance Processes to Support IES and HIX Planning, Implementation, and Operation	Wed 6/1/11	Fri 8/31/12	
251	Define Requirements, Design, and Implement Organizational Support Structures for HIX Implementation, Including Call Centers, Program, and Technology Support	Wed 6/1/11	Fri 8/31/12	
252	Define Requirements, Design, and Implement Community Outreach and Training (Internal & External) Programs for IES and HIX	Wed 6/1/11	Fri 8/30/13	
253	**State Technology Activities**	**Wed 6/1/11**	**Fri 8/31/12**	
254	IT Gap Analysis: Evaluate the Existing Technology Infrastructure to Determine Hardware and Software Costs for IES and HIX Design and Operation	Wed 6/1/11	Fri 8/31/12	
255	Define and Implement the Application Development Environment	Wed 6/1/11	Fri 8/31/12	
256	Complete a Security Risk Assessment and Release Plan	Wed 6/1/11	Fri 8/31/12	
257	Define, Document, and Implement a Privacy and Security Architecture That Supports Industry and Federal CMS Standards	Wed 6/1/11	Fri 8/31/12	
258	**Integrated Eligibility System -- Core Development**	**Mon 10/3/11**	**Tue 12/31/13**	
259	**Procure IES Detailed Design and Implementation Vendor**	**Mon 10/3/11**	**Mon 3/5/12**	
260	Draft PBC and Obtain PBC Approval for DDI Vendor	Mon 10/3/11	Thu 10/27/11	

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ID	Task Name	Start	Finish	
261	Draft RFP for DDI Vendor (with IES Planning Vendor	Mon 10/3/11	Thu 11/10/11	
262	Post RFP for DDI Vendor	Fri 11/11/11	Wed 12/28/11	
263	Review Submitted Bids/Choose and Post Winner	Thu 12/29/11	Tue 1/31/12	
264	Negotiate Multi-Renewal Contract with Winning bidder	Mon 2/6/12	Fri 3/2/12	
265	Launch Project	Mon 3/5/12	Mon 3/5/12	
266	Define Requirements, Design, Build, and Implement Internet Portal with Common Application Management, Identity, and Authentication Functions	Mon 4/2/12	Fri 8/30/13	
267	Define Requirements, Design, Build, and Implement Multi-Modal Capability (Email, Phone, Mobile, Fax) to Support Public Facing IES Functions	Mon 4/2/12	Fri 8/30/13	
268	Select, Procure, Implement a Rules Engine Product and Define and Incorporate Business Rules for State Medical and HIX Eligibility, Provide for Eligibility Coordination and Interfaces to SNAP and	Wed 2/1/12	Tue 12/31/13	
269	Define Requirements, Design, Build, and Implement the IES Verification Component with Interfaces and Modifications to Medicaid and CHIP	Mon 4/2/12	Fri 5/31/13	
270	Define Requirements, Design, Build, and Implement the HIX Enrollment and Benefits Processing Components	Mon 4/2/12	Fri 5/31/13	
271	If Document Management Capabilities are Required, Select, Procure, and Implement a Document Management System and Incorporate into the Design and Build of IES Function	Mon 4/2/12	Fri 5/31/13	
272	**Legacy Eligibility System Migration**	**Mon 4/2/12**	**Tue 12/1/15**	
273	Front-End Medicaid and CHIP Enrollment Activities Moved to New IES	Mon 4/2/12	Tue 10/1/13	
274	Medicaid and CHIP Enrollment Functions Removed from Legacy System	Mon 2/3/14	Tue 12/1/15	
275	**HIX Operating System**	**Tue 7/5/11**	**Tue 10/1/13**	
276	**Phase 1, HIX-Specific Detailed System Design**	**Tue 7/5/11**	**Tue 5/1/12**	
277	Review Comprehensive Federal Guidance on HIX Operating Systems	Tue 7/5/11	Wed 8/31/11	
278	Complete a Review of Product Feasibility, Viability, and Alignment with Exchange Program Goals	Tue 7/5/11	Fri 12/30/11	
279	Draft PBC and Obtain PBC Approval for Systems Integrator (SI) Consulting Services	Tue 7/5/11	Fri 7/29/11	
280	Draft RFP for Systems Integrator (SI) Consulting Services	Tue 7/5/11	Fri 8/12/11	
281	Post RFP for Systems Integrator (SI) Consulting Services	Mon 8/15/11	Thu 9/29/11	
282	Review Submitted Bids/Choose and Post Winner	Fri 9/30/11	Fri 10/21/11	
283	Negotiate Multi-Renewal Contract with Winning bidder	Mon 10/24/11	Fri 11/18/11	
284	Launch Project	Mon 1/2/12	Mon 1/2/12	
285	Finalize IT and Integration Architecture	Wed 2/29/12	Fri 4/13/12	
286	Midterm Report	Wed 2/15/12	Wed 2/15/12	
287	Final Project Report Due	Mon 4/30/12	Mon 4/30/12	
288	Illinois-Specific HIX Business Rules Integrated into Illinois IES Rules Engine	Tue 5/1/12	Tue 5/1/12	
289	**Phase 2, HIX Build/Buy and Integrate (with SI Consulting Team)**	**Mon 4/2/12**	**Tue 4/30/13**	
290	Draft Request for Information (RFI) for IT Vendors and Exchange Technology	Mon 4/2/12	Fri 4/20/12	
291	Work with SI Contractor to Explore Available Existing Exchange Business Rules, Software and Hard	Mon 4/23/12	Thu 5/31/12	
292	Identify an Appropriate IT Solution and Initiate Subcontracting with Exchange	Fri 6/1/12	Fri 6/29/12	
293	Complete Final business Requirements and Interim Detailed Design and System Requirements Documentations (e.g. technical, design, etc.).	Fri 6/1/12	Tue 7/31/12	
294	SI Launches Process of Building and Testing Integrator Functionality with Exchange IT Solutions	Mon 7/2/12	Mon 12/31/12	
295	Training Materials on Exchange IT Solution are Drafted, Reviewed, and Finalized	Thu 11/1/12	Tue 4/30/13	
296	Beta Testing on Comprehensive Exchange IT Solution	Tue 1/1/13	Tue 4/30/13	
297	**Phase 3, Launch Illinois HIX Operating System for Open Enrollment**	**Tue 10/1/13**	**Tue 10/1/13**	
298	**Financial Management Core Area****	**Mon 1/3/11**	**Wed 12/31/14**	
299	**Interim Plan for Financial Management of Exchange Grant**	**Mon 6/20/11**	**Fri 10/28/11**	
300	**Hire DOI Fiscal Grants Specialist**	**Mon 6/20/11**	**Fri 10/28/11**	
301	Develop Job Description for DOI Fiscal Grant Specialist	Mon 6/20/11	Fri 7/15/11	
302	Post Positions/Begin Interviewing for DOI Fiscal Grant Specialist	Mon 8/15/11	Fri 9/16/11	
303	Make Offers/Draft Contracts for Position	Mon 9/19/11	Mon 10/3/11	
304	Sign Contracts/ DOI Fiscal Grant Specialist Begins Work	Mon 10/3/11	Fri 10/28/11	
305	**Hire IES Budget Manager/Admin**	**Mon 6/20/11**	**Fri 10/28/11**	
306	Develop Job Description for IES Budget Manager/Admin	Mon 6/20/11	Fri 7/15/11	

Illinois Insurance Exchange Planning -- Project Work Plan

ID	Task Name	Start	Finish	
307	Post Positions/Begin Interviewing for IES Budget Manager/Admin	Mon 8/15/11	Fri 9/16/11	
308	Make Offers/Draft Contracts for Position	Mon 9/19/11	Mon 10/3/11	
309	Sign Contracts/IES Budget Manager/Admin Begin Work	Mon 10/3/11	Fri 10/28/11	
310	**Develop and Implement a Long-Term Operational Plan for Financial Management of Exchange**	**Mon 1/31/11**	**Wed 12/31/14**	
311	Identify Requirements for a Chief Financial Officer	Wed 6/1/11	Fri 8/5/11	
312	**Define Management Structure**	**Wed 6/1/11**	**Fri 3/30/12**	
313	Define the Staff Organizational Chart	Wed 6/1/11	Fri 7/29/11	
314	Develop Accounting Policies and Procedures and Begin to Scope System of Internal Control	Mon 8/1/11	Fri 3/30/12	
315	**Identify Costs Associated with Financial Management**	**Mon 1/2/12**	**Mon 4/30/12**	
316	Assess and Implement Financial Reporting System for Exchange	Mon 1/2/12	Mon 4/30/12	
317	Develop Standard Financial Reporting Package of Exchange	Mon 1/2/12	Mon 4/30/12	
318	**Hire Financial Management Staff**	**Wed 6/1/11**	**Thu 1/31/13**	
319	Develop Job Descriptions for Financial Management Staff	Wed 6/1/11	Fri 8/5/11	
320	Post Positions with Job Descriptions	Mon 4/2/12	Tue 5/1/12	
321	Interview Candidates	Tue 5/1/12	Thu 5/31/12	
322	Hire Financial Management Team	Thu 1/31/13	Thu 1/31/13	
323	**Define Scope of Activities for Compliance**	**Tue 7/5/11**	**Fri 8/30/13**	
324	Identify Requirements of Federal Law Related to Finance	Tue 7/5/11	Fri 12/30/11	
325	Identify Appropriate Accounting and Auditing Standards	Tue 7/5/11	Fri 12/30/11	
326	Identify Transparency Mechanisms to be Incorporated into Exchange	Tue 7/5/11	Fri 12/30/11	
327	Identify Mechanisms to Identify and Address Fraud, Waste, and Abuse	Tue 7/5/11	Fri 12/30/11	
328	Assess Adequacy of Accounting and Financial Reporting System	Mon 1/2/12	Fri 8/30/13	
329	Conduct Third Party Objective Review of all Systems of Internal Control	Mon 1/2/12	Fri 8/30/13	
330	Hire Independent Audit Firm to Conduct Financial Audit	Mon 4/2/12	Mon 12/31/12	
331	Develop Transition Plan for Management of Grant Funding from State Agencies to the Exchange	Mon 1/2/12	Fri 3/30/12	
332	**Public Posting of Financial Information**	**Mon 10/3/11**	**Wed 12/31/14**	
333	Establish Protocols for Transparency in Exchange Financial Activities	Mon 10/3/11	Mon 4/30/12	
334	Publish Annual Financial Audit	Mon 12/31/12	Wed 12/31/14	
335	Comply with Ongoing Federal Reporting to Federal HHS	Mon 1/31/11	Wed 12/31/14	
336	**Institute a Long-Term Financial Sustainability Mechanism for Exchange**	**Mon 1/3/11**	**Tue 12/31/13**	
337	Consider Options for Financial Sustainability	Mon 1/3/11	Fri 9/30/11	
338	Incorporate Financial Sustainability in Enabling Legislation	Mon 10/3/11	Fri 11/18/11	
339	Incorporate Financial Sustainability Function in Detailed Exchange Design	Fri 11/18/11	Fri 3/30/12	
340	Demonstrate to HHS Capability to Manage the Finances of the Exchange Soundly	Thu 11/1/12	Mon 12/31/12	
341	Begin Collecting Funds for Sustainability	Mon 6/3/13	Tue 12/31/13	
342	**Develop Risk-Adjustment Mechanism**	**Fri 7/1/11**	**Wed 12/31/14**	
343	Review Federal Guidence Regarding Risk-Adjustment	Fri 7/1/11	Fri 9/30/11	
344	**Develop Detailed Design of the Mechanism**	**Tue 7/5/11**	**Tue 1/31/12**	
345	Draft an RFP for Actuarial Services to Assist with Design	Tue 7/5/11	Fri 7/29/11	
346	Post RFP for Risk-Adjustment Actuarial Services	Mon 8/1/11	Wed 8/31/11	
347	Reviews Bids/Select Winning Vendor/Execute Contract	Thu 9/1/11	Fri 9/30/11	
348	Launch Project	Mon 10/3/11	Mon 10/3/11	
349	Development of Risk Adjustment Methodology	Mon 10/3/11	Tue 1/31/12	
350	Develop IT Infrastructure Required to Accept and Store Carrier Claims Information	Wed 2/1/12	Thu 5/31/12	
351	Develop Analytical Capabilities to Apply Risk Adjustment Methodology	Wed 2/1/12	Thu 5/31/12	
352	Develop Payment Processes and Procedures to Support Risk Adjustment Payments/Recoupments	Wed 2/1/12	Thu 5/31/12	
353	Develop Carrier Data Specifications for Risk-Adjustment	Wed 2/1/12	Thu 5/31/12	
354	Define an Entity to Apply the Risk-Adjustment Mechanism	Wed 2/1/12	Thu 5/31/12	
355	Develop a Process for Re-evaluation of Risk-Adjustment	Wed 2/1/12	Thu 5/31/12	
356	**Initiate Risk-Adjustment Mechanism**	**Mon 6/3/13**	**Wed 12/31/14**	
357	Receive Test Data Submission from Particiapting QHP's	Mon 6/3/13	Fri 8/30/13	
358	Receive Final (Actual) Claims Submission from Carriers	Mon 6/2/14	Wed 12/31/14	
359	**Reinsurance**	**Fri 7/1/11**	**Wed 1/1/14**	
360	Review Federal Guidence	Fri 7/1/11	Fri 9/30/11	

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ID	Task Name	Start	Finish
361	Develop Detailed Design of the Mechanism	Mon 10/3/11	Fri 12/30/11
362	Define an Entity to Apply the Mechanism	Mon 1/2/12	Mon 4/30/12
363	Develop a Process for Re-evaluation	Mon 1/2/12	Mon 4/30/12
364	Initiate Reinsurance Mechanism	Wed 1/1/14	Wed 1/1/14
365	**Oversight and Program Integrity Core Area ****	**Fri 10/1/10**	**Wed 12/31/14**
366	**Ensure the Prevention of Fraud, Waste and Abuse of Exchange Grant Funds**	**Fri 10/1/10**	**Wed 12/31/14**
367	Implement a System Tacking All Exchange Funding and Activities	Fri 10/1/10	Fri 12/31/10
368	Hire Research Assistant to Assist with Financial Management and Grant Activity Tracking	Tue 2/15/11	Tue 2/15/11
369	Develop Federal Reporting Procedures on Fraud, Waste and Abuse	Tue 1/1/13	Fri 8/30/13
370	Comply with Federal Reporting Procedures	Mon 9/2/13	Wed 12/31/14
371	**Establish/Implement Permanent Oversight Program Integrity Requirements**	**Mon 8/1/11**	**Mon 12/31/12**
372	Find Consensus on Oversight and Integrity Rules for Exchange	Mon 8/1/11	Tue 10/25/11
373	Incorporate Oversight and Integrity Rules into Enabling Legislation	Mon 10/31/11	Thu 11/17/11
374	Board Executes Oversight/Program Integrity Provisions Upon Appointment	Thu 3/1/12	Mon 4/30/12
375	Exchange Hires Oversight and Program Integrity Staff	Mon 4/2/12	Mon 12/31/12
376	Establish Procedures for Independent External Audit	Mon 4/30/12	Mon 12/31/12
377	Establish Fraud Detection Procedures	Mon 1/2/12	Mon 12/31/12
378	**Health Insurance Market Reforms Core Area****	**Thu 9/30/10**	**Wed 12/31/14**
379	Prescribe Rules for Compliance for Carriers with Market Reforms	Thu 9/30/10	Thu 9/30/10
380	DOI Regulations for Ongoing Compliance of Carriers with Market Reforms	Fri 10/1/10	Wed 12/31/14
381	**Incoporate New Federal Law into State Statute**	**Mon 1/3/11**	**Thu 5/31/12**
382	Premium Rate Review	Tue 10/25/11	Thu 11/10/11
383	Medical Loss Ratio	Mon 1/2/12	Thu 5/31/12
384	External Review	Mon 1/3/11	Tue 5/31/11
385	Patient Protections	Mon 1/2/12	Thu 5/31/12
386	Health Care Cooperatives	Mon 1/2/12	Thu 5/31/12
387	**Assistance/Coverage Appeals/Complaints Core Area****	**Thu 9/30/10**	**Wed 10/31/12**
388	**Consumer Assistance Project Grant Activities**	**Thu 9/30/10**	**Thu 5/5/11**
389	Post RFP for CAP	Wed 12/29/10	Wed 12/29/10
390	Evaluate Submitted Proposals	Thu 2/24/11	Wed 4/20/11
391	Select CAP Vendor	Thu 4/21/11	Thu 4/21/11
392	Negotiate Contract with Vendor	Fri 4/22/11	Thu 5/5/11
393	**Launch Meeting for CAP Vendor**	**Thu 9/30/10**	**Thu 9/30/10**
394	Consider Data Analyzed Under the Grant for Incorporation into Project Plan	Thu 9/30/10	Thu 9/30/10
395	Midterm Report from Vendor	Thu 9/30/10	Thu 9/30/10
396	Final Report from Vendor	Fri 11/12/10	Fri 11/12/10
397	Implement Consumer Assistance Recommendations	Mon 11/15/10	Fri 12/10/10
398	**Identify DOI as the Primary Entity for Consumer Assistance with Appeals**	**Wed 6/1/11**	**Wed 10/31/12**
399	Establish Protocols for Exchange Communication	Mon 1/2/12	Mon 4/30/12
400	Draft Scope of Work for Building Capacity to Handle Coverage Appeals Functions	Wed 6/1/11	Mon 8/1/11
401	**Incorporate Consumer Asisstance Data into Accountability and Oversight of Qualified Health Plans in Exchange**	**Mon 1/2/12**	**Wed 10/31/12**
402	Establish an Ongoing Process for Oversight of Qualified Health Plans by DOI	Mon 1/2/12	Fri 6/29/12
403	Establish Process for Referrals to DOI from Exchange	Mon 1/2/12	Wed 10/31/12
404	**Business Operations/Exchange Functions Core Area****	**Wed 9/1/10**	**Wed 12/31/14**
405	**Preliminary Analysis on Exchange Operations**	**Mon 5/2/11**	**Thu 6/30/11**
406	Explore Current Technology in Existing State Programs	Mon 5/2/11	Thu 6/30/11
407	Review CMS Plan Management/Eligibility and Enrollment Supplements	Mon 5/2/11	Thu 6/30/11
408	Preliminary Identification of Staffing Needs	Mon 5/2/11	Thu 6/30/11
409	Draft Preliminary Disgram of "To Be" Environment for Exchange Business Operation Functionality	Mon 5/2/11	Thu 6/30/11
410	**Certification, Recertification, Decertification of Qualified Health Plans**	**Mon 8/1/11**	**Wed 12/31/14**
411	Begin Developing Standards for Certification	Mon 8/1/11	Wed 11/30/11

Illinois Insurance Exchange Planning -- Project Work Plan

ID	Task Name	Start	Finish	
412	Engage Stakeholders in the Process	Mon 8/1/11	Wed 11/30/11	
413	Develop Clear Certification Policy	Thu 12/1/11	Tue 1/31/12	
414	Integrate into Detailed Design and Build for IT	Wed 2/1/12	Fri 3/30/12	
415	Develop RFP for Certification of Qualified Health Plans	Mon 4/2/12	Fri 6/29/12	
416	Draft Certification Documents	Thu 3/1/12	Fri 6/29/12	
417	Provide Evidence of Staff Capacity to Support Certification Evaluation	Mon 7/2/12	Fri 9/28/12	
418	Release Solicitation for Certification of QHPs	Mon 7/2/12	Fri 9/28/12	
419	Begin Training Health Plans on QHP Requirements	Mon 10/1/12	Mon 12/31/12	
420	Collect Submissions/Evaluate Proposals from Health Plans	Tue 1/1/13	Fri 3/29/13	
421	Solicit Premium Quotes from Health Plans	Tue 1/1/13	Fri 3/29/13	
422	Launch Plan Management and Bid Evaluation System	Tue 1/1/13	Fri 3/29/13	
423	Complete Certifications/Negotiations/Contracting	Mon 4/1/13	Fri 6/28/13	
424	Issue Announcement Publically	Mon 4/1/13	Fri 6/28/13	
425	Conduct Readiness Reviews	Mon 7/1/13	Mon 9/30/13	
426	Initiate DOI Oversight of QHPs	Tue 10/1/13	Wed 12/31/14	
427	**Quality Rating System**	**Mon 7/4/11**	**Wed 12/31/14**	
428	Review Federal guidance for Quality rating tool	Mon 7/4/11	Fri 9/30/11	
429	Incorporate Quality Rating Business Requirements into IT Requirements for Exchange	Mon 10/3/11	Fri 12/30/11	
430	Complete System Development of Quality Rating Functionality	Mon 1/2/12	Fri 9/28/12	
431	Complete Testing and Validation of Quality Rating Functionality	Mon 10/1/12	Fri 6/28/13	
432	Post Quality Information on the Exchange Website	Thu 8/1/13	Tue 12/31/13	
433	Continually Update Quality Information and Process for Collecting	Wed 1/1/14	Wed 12/31/14	
434	**Health Coverage Eligibility Determinations**	**Wed 9/1/10**	**Tue 12/31/13**	
435	Begin Coordination with OASHSPs	Wed 9/1/10	Wed 9/1/10	
436	Begin Coordination with DOI	Wed 9/1/10	Wed 9/1/10	
437	Begin Developing Eligibility Requirements For Exchange and Public Programs, Including Appeals	Thu 9/30/10	Mon 4/30/12	
438	Begin Systems Development -- For Exchange and Public Programs	Mon 4/2/12	Fri 9/28/12	
439	Establish Resources to Handle Appeals Deteminations/Training	Mon 4/2/12	Mon 12/31/12	
440	Begin Beta Testing of Systems	Mon 10/1/12	Mon 12/31/12	
441	Initiate Communication with HHS on Appeals Process	Mon 6/3/13	Mon 6/3/13	
442	Begin Conducting Eligibility Determinations for Public Programs/Receiving Referrals from OASHSPs	Mon 6/3/13	Tue 12/31/13	
443	**Enrollment and Billing Process**	**Mon 9/5/11**	**Tue 10/1/13**	
444	Develop Technical Specifications for Enrollment, Billing, and Collections, Including Connectivity to QHPs, Eligibility system, and Online Account Management	Mon 9/5/11	Fri 3/30/12	
445	Develop RFP for Billing and Collections System Vendor	Thu 3/1/12	Fri 3/30/12	
446	Post RFP for Billing and Collections System Vendor	Mon 4/2/12	Mon 4/30/12	
447	Select Winner/Sign Contract/Launch Work	Tue 5/1/12	Thu 5/31/12	
448	Begin Systems Development -- Build or Buy and Customize	Fri 6/1/12	Fri 9/28/12	
449	Begin Beta Testing of Systems	Mon 10/1/12	Mon 12/31/12	
450	Begin Final User Testing	Tue 1/1/13	Fri 3/29/13	
451	Begin Open Enrollment	Tue 10/1/13	Tue 10/1/13	
452	**Applications and Notices**	**Fri 7/1/11**	**Tue 10/1/13**	
453	Review Federal Requirements for Applications and Notices	Fri 7/1/11	Fri 12/30/11	
454	Draft Initial Options for Applications and Notices	Fri 6/1/12	Fri 8/31/12	
455	Conduct User Testing/Translation/etc. of Applications and Notices/Amend Notices	Mon 9/3/12	Mon 9/30/13	
456	Begin Using Applications and Notices to Support Eligibility and Enrollment	Tue 10/1/13	Tue 10/1/13	
457	**Administration of Premium Tax Credits and Cost-Sharing Reductions**	**Mon 9/5/11**	**Tue 10/1/13**	
458	Begin Developing Requirements for Systems and Program Operations	Mon 9/5/11	Fri 3/30/12	
459	Begin Systems Development	Mon 4/2/12	Fri 9/28/12	
460	Begin Beta Testing of Systems	Mon 10/1/12	Mon 12/31/12	
461	Begin Final User Systems	Tue 1/1/13	Fri 3/29/13	
462	Launch Systems for Open Enrollment	Tue 10/1/13	Tue 10/1/13	
463	**Individual Responsibility Determinations**	**Mon 9/5/11**	**Tue 10/1/13**	
464	Begin Developing Requirements for Systems and Program Operations	Mon 9/5/11	Fri 3/30/12	

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ID	Task Name	Start	Finish	
465	Begin Systems Development	Mon 4/2/12	Fri 9/28/12	
466	Begin Beta Testing of Systems	Mon 10/1/12	Mon 12/31/12	
467	Begin Final User Systems	Tue 1/1/13	Fri 3/29/13	
468	Launch Systems for Open Enrollment	Tue 10/1/13	Tue 10/1/13	
469	**Information Reporting to IRS and Enrollees**	**Mon 9/5/11**	**Tue 10/1/13**	
470	Begin Developing Requirements for Systems and Program Operations	Mon 9/5/11	Fri 3/30/12	
471	Begin Systems Development	Mon 4/2/12	Fri 9/28/12	
472	Begin Beta Testing of Systems	Mon 10/1/12	Mon 12/31/12	
473	Begin Final User Systems	Tue 1/1/13	Fri 3/29/13	
474	Launch Systems for Open Enrollment	Tue 10/1/13	Tue 10/1/13	
475	**SHOP-Specific Functions**	**Mon 1/3/11**	**Wed 12/31/14**	
476	Review Federal Requirements/Consider Options for SHOP Structure and Goals	Mon 1/3/11	Fri 12/30/11	
477	Begin Developing Requirements for Systems and Program Operations	Mon 9/5/11	Fri 3/30/12	
478	Begin Systems Development	Mon 4/2/12	Fri 9/28/12	
479	Begin Beta Testing of Systems	Mon 10/1/12	Mon 12/31/12	
480	Begin Final User Systems	Tue 1/1/13	Fri 3/29/13	
481	Launch Systems for Open Enrollment	Tue 10/1/13	Tue 10/1/13	
482	Institute Mechanism for Employer/Employee Feedback on SHOP	Tue 10/1/13	Wed 12/31/14	
483	**Employer Responsibility -- Notification and Appeals**	**Mon 9/5/11**	**Tue 10/1/13**	
484	Begin Developing Requirements for Systems and Program Operations	Mon 9/5/11	Fri 3/30/12	
485	Begin Systems Development	Mon 4/2/12	Fri 9/28/12	
486	Begin Beta Testing of Systems	Mon 10/1/12	Mon 12/31/12	
487	Begin Final User Systems	Tue 1/1/13	Fri 3/29/13	
488	Launch Systems and Begin Communication with Employers	Tue 10/1/13	Tue 10/1/13	
489	**Call Center**	**Mon 1/2/12**	**Tue 10/1/13**	
490	Complete Assessment of Existing Call Center Capacity in the State: Medicaid, FSD, CAP, MCHCP	Mon 1/2/12	Thu 2/2/12	
491	Define Call Center Plan of Action	Fri 2/3/12	Wed 5/30/12	
492	Develop Procurement Specifications for Call Center Vendor	Fri 6/1/12	Tue 7/31/12	
493	Post RFP for Call Center Capabilities	Wed 8/1/12	Wed 8/1/12	
494	Select Winner/Sign Contract/Launch Work	Thu 8/2/12	Thu 8/2/12	
495	Launch Contract to Develop Call Center Protocols	Fri 11/30/12	Fri 11/30/12	
496	Develop Training Materials for Call Center Staff	Mon 12/3/12	Thu 2/28/13	
497	Train Call Center Staff	Fri 3/1/13	Mon 9/30/13	
498	Launch Call Center Functionality/Publicize 1-800 Number/Post Online	Tue 10/1/13	Tue 10/1/13	
499	**Exchange Consumer Interface/Web Portal**	**Tue 10/1/13**	**Thu 3/27/14**	
500	Review HHS Requirements for Exchange Website and Consumer Information	Tue 10/1/13	Wed 11/27/13	
501	**Begin Drafting System Requirements for Website**	**Tue 10/1/13**	**Thu 3/27/14**	
502	Online Comparison Shopping -- Informed by UX Project	Tue 10/1/13	Thu 3/27/14	
503	Online Application and Selection fo Qualified Health Plans	Tue 10/1/13	Thu 3/27/14	
504	Premium Tax Credit/Cost-Sharing Reduction Calculator	Tue 10/1/13	Thu 3/27/14	
505	Requests for Assistance	Tue 10/1/13	Thu 3/27/14	
506	Links to Other Illinois Public Health Care Programs	Tue 10/1/13	Thu 3/27/14	
507	Online Plan Management Tools for Consumers	Tue 10/1/13	Thu 3/27/14	
508	Begins Systems Development/Procure "Off the Shelf" Products -- In Coordination with SI Consultant	Tue 10/1/13	Tue 11/26/13	
509	Collect and Verify Plan Data for Comparison Tool	Tue 10/1/13	Fri 12/27/13	
510	Test Comparison Tool (Including Consumer Beta-Testing)	Tue 10/1/13	Mon 12/30/13	
511	Launch Functioning Comparison Tool	Tue 10/1/13	Tue 10/1/13	
512	**Exchange Outreach and Education**	**Wed 6/22/11**	**Wed 12/31/14**	
513	**Develop a Comprehensive Marketing and Outreach Strategy**	**Thu 9/1/11**	**Wed 12/31/14**	
514	Draft a Outreach, Marketing, and Avertisting RFP	Thu 9/1/11	Mon 10/3/11	
515	Post Marketing and Outreach RFP	Tue 10/4/11	Fri 11/4/11	
516	Review bids/Select Winning Vendor/Execute Contract	Mon 11/7/11	Fri 12/30/11	
517	**Phase 1: Perform Market Analysis/Environmental Scan of Outreach Needs**	**Mon 1/2/12**	**Thu 5/31/12**	
518	Marketing and Outreach Vendor Completes Analysis/Presents Findings	Mon 1/2/12	Fri 3/30/12	

Illinois Insurance Exchange Planning -- Project Work Plan

ID	Task Name	Start	Finish	
519	Obtain Input/Refinement of Materials from Stakeholders and HHS	Mon 4/2/12	Thu 5/31/12	
520	**Phase 2: Finalize Marketing and Outreach Campaign**	**Mon 6/4/12**	**Mon 12/31/12**	
521	Design Media Strategy and other Information Dissemination Tools	Mon 6/4/12	Mon 12/31/12	
522	Develop a Tool-kit for Outreach/Education Materials	Mon 6/4/12	Mon 12/31/12	
523	Develop Performance Metrics and Evaluation Plan	Mon 6/4/12	Mon 12/31/12	
524	Conduct Testing of Materials	Thu 11/1/12	Fri 11/30/12	
525	Submit Final Outreach Plan to HHS for Approval	Mon 12/3/12	Mon 12/31/12	
526	**Phase 3: Launch Marketing and Outreach Campaign**	**Tue 1/1/13**	**Wed 12/31/14**	
527	Develop Evaluation Tactics for Marketing and Outreach	Tue 1/1/13	Tue 12/31/13	
528	Refine Approach and Launch Subsequent Phases	Wed 1/1/14	Wed 12/31/14	
529	**Develop and Launch Exchange Informational Website**	**Mon 7/2/12**	**Fri 3/29/13**	
530	Submit Content for Informational Website to HHS for Comment	Mon 7/2/12	Fri 9/28/12	
531	Complete Systems Development and Final User Testing for Informational Website	Mon 12/31/12	Mon 12/31/12	
532	Launch Informational Website	Fri 3/29/13	Fri 3/29/13	
533	**Develop a Navigator Program**	**Wed 6/22/11**	**Mon 7/1/13**	
534	Develop High-level Milestones and Timeframes for Establishing Program	Wed 6/22/11	Wed 8/31/11	
535	Determine Financial Model for Navigator Program Including Grant Fund Size and Revenue Stream to Support	Thu 9/1/11	Fri 12/30/11	
536	Develop Certification Process for Navigators	Thu 9/1/11	Fri 12/30/11	
537	Develop Exchange Oversight/Quality Control for Navigator Program Including Consumer Feedback	Thu 9/1/11	Fri 12/30/11	
538	Prepare Navigator Application Process	Mon 1/2/12	Mon 4/30/12	
539	**Initiate certification process for Navigators**	**Mon 1/2/12**	**Fri 3/29/13**	
540	Identify Targeted Organizations in State to Serve as Navigators	Mon 1/2/12	Thu 5/31/12	
541	Identify Navigator Grant Organization	Fri 6/1/12	Mon 12/31/12	
542	Award Contracts/Grants to Navigators	Tue 1/1/13	Fri 3/29/13	
543	Train Navigators	Mon 4/1/13	Fri 6/28/13	
544	Begin Operations of Navigators	Mon 7/1/13	Mon 7/1/13	
545	## HHS Grant Reporting and Applications Core Area**	**Fri 6/17/11**	**Fri 6/29/12**	
546	Prepare & Submit Application for First Round of Level I Grant Funding	Fri 6/17/11	Thu 6/30/11	
547	Prepare & Submit Q3 Planning Grant Quarterly Report	Mon 7/25/11	Fri 7/29/11	
548	Prepare and Submit Q4 Planning Grant Report	Tue 10/25/11	Mon 10/31/11	
549	Prepare and Submit Planning Grant Final Report	Mon 12/26/11	Sat 12/31/11	
550	Final Deadline to Apply for Level I Establishment Funding	Fri 12/30/11	Fri 12/30/11	
551	Final Deadline to Apply for Level II Establishment Funding	Fri 6/29/12	Fri 6/29/12	
552	Submit Illinois Exchange 6-Year Operational Plan/Business Plan to HHS	Fri 9/30/11	Fri 12/30/11	