
Summary of Changes

Section, Page	Summary of Change
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Request for Information

TO: All Interested Vendors

FROM: Covered California

SUBJECT: RFI #2017-01, Covered California Customer Relationship Management

1. Purpose of the RFI

The Covered California program is releasing this Request for Information (RFI) to:

- Introduce potential bidders to the Covered California program and the systems that support the program.
- Determine the level of interest in the upcoming procurement for Customer Relationship Management (CRM).
- Receive feedback on questions and potential issues.
- Gather information on systems and new trends for CRM Solutions.

Information gathered as a result of this RFI may be used in in the procurement of a CRM Solution. The RFI responses will also be utilized to assist the State in identifying and understanding potential issues and risks.

Completion of this RFI will be performed at no cost to the State. All costs associated with responding to this RFI will be assumed by vendors who submit responses. This RFI is for information and planning purposes and does not constitute a solicitation. A contract will not be awarded based on this RFI.

Responses to this RFI will not be shared with other vendors until after the contract award that results from the above-mentioned procurement process. Questions that are submitted for clarification under Section 2, item C of this RFI, will be considered and if needed, an addendum to the RFI will be released by Covered California.

Please read this RFI document thoroughly and adhere to the response submission guidelines.

2. RFI Key Action Dates and Times

Listed below are the RFI Key Action Dates and Times by which actions should be taken or completed. If Covered California finds it necessary to change any of these dates, an addendum or an updated RFI will be posted on the following website:

<http://hbex.coveredca.com/solicitations>

TABLE 1, RFI KEY ACTION DATES

Item	Event	Date and Time
A	Release the RFI.	Monday November 20, 2017
B	Last day to submit questions for clarification purposes.	Monday December 11, 2017, by 3:00 p.m.
C	Questions that are submitted for clarification will be considered and if needed, an addendum to the RFI will be released by Covered California.	Week of December 18, 2017
D	RFI response due date.	Tuesday January 16, 2018, by 3:00 p.m.
E	Demonstration of Solution	February 12 – March 2, 2018

3. Background

This section presents information on the Covered California program.

3.1 Understanding Covered California

Soon after the passage of national healthcare reform through the Patient Protection and Affordable Care Act of 2010 (ACA), California became the first state to enact legislation to establish a qualified health benefit exchange. The California state law is referred to as the California Patient Protection and Affordable Care Act (CA-ACA). Covered California is the organization responsible for managing the State's exchange.

The goals and objectives of Covered California are to:

- Reduce the number of uninsured Californians by creating an organized, transparent marketplace for Californians to purchase affordable, quality healthcare coverage, to claim available federal tax credits and cost-sharing subsidies, and to meet the personal responsibility requirements imposed under the federal act(ACA);
- Strengthen the healthcare delivery system;
- Facilitate competitive processes to select participating carriers and other contractors;
- Require that healthcare service plans and health insurers issue coverage in the individual and small employers markets and compete on the basis of price, quality, and service (and not on risk selection); and
- Meet federal and state law requirements, guidance and regulations.

Covered California is an independent public entity within California State Government. It is governed by a five member board appointed by the Governor and Legislature. Four of the members are appointed for four year terms, two by the Governor, one by the Senate Rules Committee and one by the Speaker of the Assembly. The California Secretary of Health and Human Services is a voting ex-officio member of the Board. The Board elected the California Secretary of Health and Human Services Agency as Chair, signaling its intention to actively coordinate and collaborate with existing state agencies involved in providing health coverage to Californians.

Covered California works in close partnership with the Department of Health Care Services, which oversees and administers California's Medicaid Program (Medi-Cal) and other specifically focused health programs. It also works with the two agencies that regulate health insurance in California: the Department of Managed Care and the Department of Insurance, as well as a broad range of stakeholders whose constituencies will be impacted by healthcare reform.

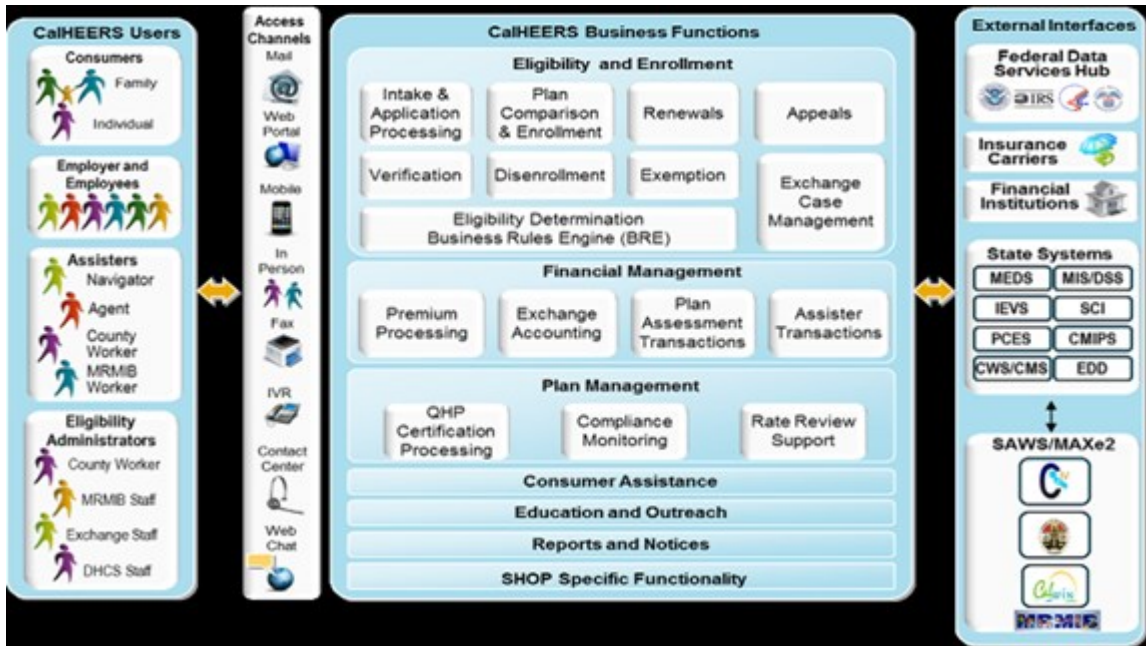
The California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS) is an automated system that:

- Serves as the consolidated system support for eligibility, enrollment, and retention for Covered California
- Provides eligibility information about affordable coverage;
- Enrolls eligible Californians into affordable coverage and provide access to federal subsidies; and
- Offers health plan choice information and helps people make informed choices among health plan options.

There are three (3) core consumer facing applications that make up the CalHEERS System:

- Eligibility – A custom application referred to as Accenture Health Benefit Exchange (AHBX)
- Enrollment – A commercial software product referred to as GetInsured Health Insurance Exchange (GHIX)
- Billing – A custom application referred to as Accenture Billing Engine (ABE)

The graphic below provides a CalHEERS business module overview including its users, business functions and interfaces.



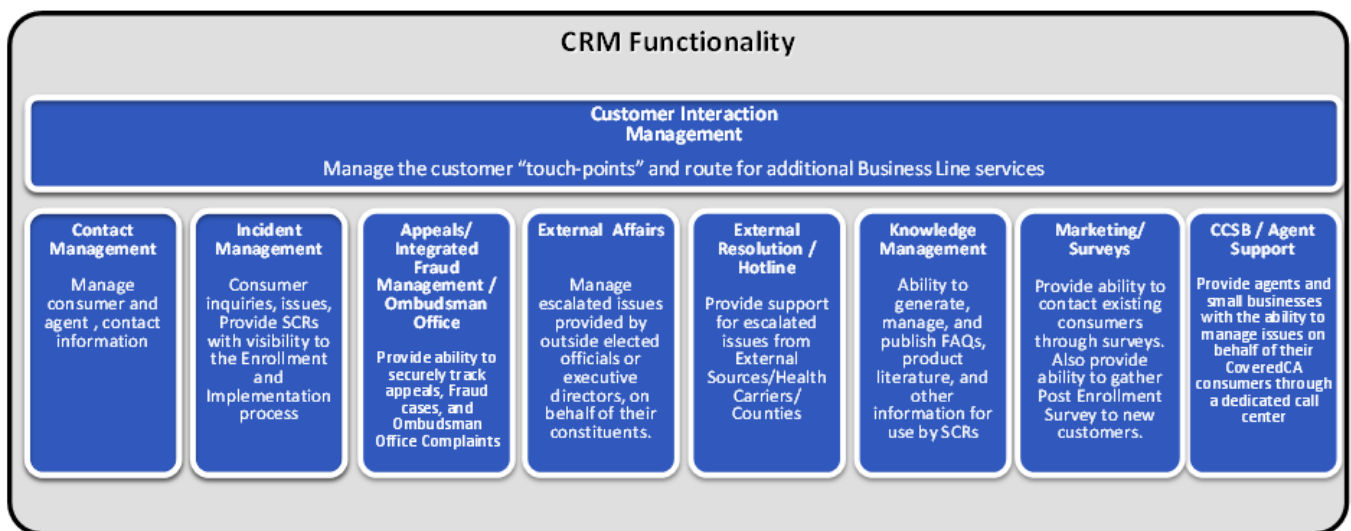
4. Current CRM Solution

As a part of the Patient Protection and Affordable Care Act of 2010 (ACA) implementation, Covered California established the Covered California Service Center (Service Center). The Service Center plays a major role in facilitating enrollment of customers into Qualified Health Plans. It addresses customer inquiries regarding healthcare policy changes, insurance eligibility, as well as the application, processing and appeals of customer healthcare options. The Oracle Service Cloud Customer Relationship Management (CRM) solution was selected to track customer interactions, requests from internal and external stakeholders, and manage case work. Covered California's current agreement with Oracle will expire in 2019.

Currently, the Oracle Service Cloud CRM (CRM Solution) interfaces with multiple business lines including:

- Service Center Operations utilizes the CRM Solution to manage customer interactions. These interactions come from two sources: phone and chat. The Service Center Operations unit consists of Service Center Representatives (SCRs) who are responsible for answering incoming calls, inbound chats, and initiating outbound calls. Hotline staff are responsible for answering incoming calls and requests from Health Plan (QHP), and County Eligibility Workers (CEW).
- Service Center Support Services utilizes the CRM Solution to manage multiple units including Appeals, External Resolution (Complaints), Quality Assurance, Priority Support Unit (PSU), and Workforce Management.
- Sales Agent Support Customer Engagement Center utilizes the CRM Solution to manage agent and community partner interactions, the channel these interactions are initiated from are via phone calls.
- Sales Small Business Customer Engagement Center utilizes the CRM Solution to manage customer interactions, the channel these interactions are initiated from are via phone calls
- Office of the Ombudsman utilizes the CRM solution to manage customer complaints and requests for review from Customers and Advocates.
- Integrated Fraud Management (IFM) utilizes the CRM solution to track requests for investigation in to potential fraud, waste, and abuse. These cases may come from Service Centers, internal staff, auditors, consumers, and advocates.
- Covered California University (CCU) Knowledgebase (KB) utilizes the CRM solution to create and manage knowledgebase articles. These articles are used by internal Covered California staff.
- External Affairs (EA) utilizes the CRM solution to track cases that are received from legislators and advocates. These requests are created and transferred to the unit that can most effectively complete the task requested in the most efficient time.
- Marketing utilizes the CRM solution to investigate and transfer escalated inquiries and complaints received through social media. Marketing also uses CRM survey functionality.

Each business line may have multiple workspaces and rules to meet the day-to-day business needs.



Current CRM license use as of 11/15/2017

- Named monthly licenses: 2,200
- Named monthly chat licenses: 45

5. Conceptual Solution/Proposed Services

Covered California is seeking a CRM Solution that can continue to meet its diverse and evolving business needs. The Solution should allow for future growth and changes that can be maintained by State staff. Due to the regulatory, statutory, and procedural needs of our environment the CRM Solution must be able to continue to meet the State's needs in a timely and efficient manner. The CRM Solution must be able to meet Covered California's current and future reporting requirements. Currently all reporting requests must come through the IT CRM Team for development. The State would like to have a solutions that would enable end users to customize, and maintain reports without the need for an expertise in the language the solution runs on.

Covered California's knowledgebase consists of thousands of articles that are available to internal users. However, the need for a customer facing knowledgebase has been identified as a critical project to assist Covered California in better serving it's consumers and improving the customer experience.

Currently Covered California is experiencing an issue with multiple contacts for the same individual. The State is seeking a solution that can assist in removing, reducing, and preventing this from happening while maintaining the full consumer historical data. The State is also looking for how to manage contacts in a hiercial style (e.g., being able to link the Primary Contact to the household members, to the insurance agent who assisted them). Doing this would enable Covered California representatives to see the 360° view of the consumer experience.

The CRM Solution must be able to handle scripting for customer interactions received at the Customer Engagement Center. This will allow front line representatives to ensure that data is collected for calls and the consumer is taken down the correct path. A solution that that is able to handle multiple workflows for multiple workspaces is also important.

Most importantly the CRM Solution needs to be user friendly. Covered California's end users are quick to learn; however, if the system is difficult to learn or requires to much customization, then it may not meet the needs of Covered California.

Covered California hires a surge vendor to offer Customer Engagement Center services during peak periods. This vendor ramps increases staffing by approximately 600+ full time equivalent employees during a 6 month period. These vendor staff have a license assigned to them during these limited time frames. However, Covered California currently pays a 12 month fee even though they are only used for approximately 6 months per year. Covered California would like a vendor that is able to allow us to add and remove these licenses from the pool throughout the year.

Covered California's chat functionality is currently included as part of its CRM solution. The chat has been effective, but we are considering the option of moving our chat platform to our Cisco stack. Our current Cisco stack includes chat usage, however, it is not being utilized.

6. Vendor Questions

Vendors must submit questions regarding this RFI via e-mail by the specified date and time in Section 2, RFI Key Action Dates and Times. Questions should be submitted via email to the contact person listed in Section 9, Contact Information.

The following **must be included** in the e-mail inquiry:

- On the subject line of the e-mail, include: RFI #2017-01 Covered California Customer Relationship Management - Vendor Questions.
- Vendor name, contact person, telephone number, and e-mail address, as part of the sender's contact information.
- A description of the subject or issue in question, or discrepancy found in the RFI.
- RFI section, page number, and/or other information useful in identifying the specific problem or issue in question.
- The vendor's question(s).

At its discretion, the State may contact vendors to seek clarification of any inquiry received. The State may respond to questions directly to the vendor or if deemed necessary, release an addendum or updated RFI.

7. RFI Format and Submission

Responses to this RFI are due by the date and time stated in Section 2, RFI Key Action Dates and Times.

Responses must be submitted via e-mail to the State's contact identified in Section 8, Contact Information, and must include the following information in the e-mail subject line

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A vendor's response shall contain the following:

1. A signed cover letter that includes the following elements:
 - a. Vendor name, address, and telephone number.
 - b. Contact information including the name, title, address, phone number, and e-mail address of the vendor's primary contact person for this RFI.
2. A narrative no more than four pages describing the following:
 - a. The vendor's primary business focus, areas of expertise, certifications and/or credentials relevant to the content of this RFI, and experience with similar systems.
 - b. The vendor's experience doing business with the State of California.
 - c. The vendor's experience doing business with state-based exchanges.
 - d. The vendor's experience doing business with health care organizations.
 - e. The vendor's experience doing business with public and private sector customer engagement center(s).
3. The vendor's response to Attachment A, Vendor Questions. Please ensure that the format and numbering of the response correlates to that within Attachment A.

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4. The vendor's response to Attachment B, Vendor Checklist.
 5. While not required, vendors are encouraged to answer all questions. If a vendor elects not to respond to a question, please provide feedback on why.
 6. Any additional recommendations that the vendor might find relevant to the upcoming CRM effort.
 7. The total response to all inquiries in this section should not exceed 45 pages. Attachment B, collateral, and other marketing materials are not included in the page limit.

8. Contact Information

The RFI responses and all correspondence and/or questions related to this RFI shall be directed to the State contact person:

Austin Walls-Barcellos
Covered California, Information Technology Division
(916)-228-8799
Austin.Walls-Barcellos@covered.ca.gov

9. Demonstration

After receiving all RFI responses Covered California will request a live in-person demo of the CRM Solution from all vendors who participated.

Vendors should expect to demonstrate a solution that fulfills all requirements as identified in attachment B as possible.

10. RFI Disclaimer

This RFI is issued for information and planning purposes only and does not constitute a solicitation. A response to this RFI is not an offer and cannot be accepted by the State to form a binding contract. Responders are solely responsible for all expenses associated with responding to this RFI.

Responses to this RFI will not be shared with other vendors until after the contract award that results from the above-mentioned process. Questions that are submitted for clarification under Section 2, item C of this RFI, will be considered and if needed, an addendum to the RFI will be released by Covered California.