

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner



Maine Department of Health and Human Services
Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

December 22, 2020

Via Electronic Mail: paul.neutz@getinsured.com

Vimo, Inc. dba GetInsured
Paul Neutz
1305 Terra Bella Avenue
Mountain View, CA 94043

SUBJECT: Notice of Withdrawal of Conditional Contract Award under RFP
202010151, Health Insurance Marketplace Technology Platform and Consumer
Assistance Services – Project 2

Dear Mr. Neutz,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services (Department) for Health Insurance Marketplace Technology Platform and Consumer Assistance Services.

The purpose of this letter is to inform you that the Department is formally withdrawing the conditional contract award issued for Project 2 – Consumer Assistance Services on November 25, 2020.

The Department intends on issuing a new RFP for Health Insurance Marketplace Consumer Assistance Services in the near future.

Thank you for your interest in doing business with the State of Maine.

Sincerely,

A handwritten signature in blue ink, appearing to read "Debra Downer".

Debra Downer, Deputy Director
Division of Contract Management

State of Maine
RFP / Proposal Master Score Sheet

SCORESHEET FOR RFP# 202010151:

Health Insurance Marketplace Technology Platform and Consumer Assistance Services | Project 1

PROPOSAL SUBMITTED BY:		IdeaCrew, Inc.	New Fields Technologies LLC	OptumInsight, Inc. dba "Optum"	Vimo, Inc. dba GetInsured
COST:		Cost: \$13,632,048.00	Cost: \$31,070,000.00	Cost: \$53,162,893.00	Cost: \$24,938,447.00
EVALUATION ITEM	POINTS AVAIL.				
Section II: Organization Qualifications and Experience	20	16.00	9.00	16.00	19.00
Section III: Proposed Services	45	41.00		33.00	36.00
Section IV: Cost Proposal	35	35.00		8.97	19.13
TOTAL	<u>100</u>	<u>92.00</u>	<u>DISQUALIFIED at Stage Two</u>	<u>57.97</u>	<u>74.13</u>

SCORESHEET FOR RFP# 202010151:

Health Insurance Marketplace Technology Platform and Consumer Assistance Services | Project 2

PROPOSAL SUBMITTED BY:		Automated Health Systems, Inc.	Maximus US Services, Inc.	SaviLinx, LLC	Vimo, Inc. dba GetInsured
COST:		Cost: \$15,846,421.00	Cost: \$27,834,720.02	Cost: \$21,429,483.00	Cost: \$16,843,028.00
EVALUATION ITEM	POINTS AVAIL.				
Section II: Organization Qualifications and Experience	20		16.00	8.00	17.00
Section III: Proposed Services	45		40.00		31.00
Section IV: Cost Proposal	35		21.18		35.00
TOTAL	<u>100</u>	<u>DISQUALIFIED at Stage One</u>	<u>77.18</u>	<u>DISQUALIFIED at Stage Two</u>	<u>83.00</u>

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Award Justification Statement
RFP# 202010151 Health Insurance Market Place Technology Platform and
Consumer Assistance Services

I. Summary

Through RFP# 202010151, the Department sought proposals for a Health Insurance Market Place Technology Platform and Consumer Assistance Services. These services consisted of two separate projects, Bidders responding to each Project include:

Project 1: IdeaCrew, Inc., New Fields Technology LLC, OptumInsight, Inc. dba Optum, and Vimo, Inc. dba GetInsured

Project 2: Automated Health System, Inc., Maximus US Services, Inc., SaviLinx, LLC, and Vimo, Inc. dba GetInsured

Through the evaluation process: IdeaCrew, Inc. for Project 1 and Vimo, Inc. dba GetInsured for Project 2 were determined to provide the best value to the State of Maine.

II. Evaluation Process

An Evaluation Team comprised of State employees, used a staged approach to evaluate and score the proposals (project specific) and applied the consensus method in scoring the Bidders Qualifications & Experience, and Proposed Services. Scores for the Cost Proposal were assigned using a mathematical formula.

III. Qualifications & Experience

The Evaluation Team determined IdeaCrew, Inc. and Vimo, Inc. dba GetInsured bring quality experience which contributed to the overall scores assigned by the evaluation team. This experience for each of the Bidders will contribute to the Department's expectations for both Project 1 and Project 2.

IV. Proposed Services

The Evaluation Team determined IdeaCrew, Inc has proposed providing a Health Insurance Marketplace Technology Platform and Vimo, Inc. dba GetInsured has proposed providing Consumer Assistance Services which will greatly benefit Maine residents.

V. Cost Proposal

Project 1 - IdeaCrew, Inc proposed the lowest cost of \$13,632,048

Project 2 - Vimo, Inc. dba GetInsured proposed a cost \$16,843,028

VI. Conclusion

The Evaluation Team has determined the proposals submitted by IdeaCrew, Inc and Vimo, Inc. dba GetInsured represents the best value to the State of Maine.

From: [Charette, Thomas](#)
To: gtrautmann@automated-health.com
Cc: [Charette, Thomas](#)
Subject: Proposal Evaluation Notification for Office of the Commissioner RFP 202010151 - AHS
Date: Wednesday, November 25, 2020 3:53:55 PM
Attachments: [AL_RFP_202010151_AHS.doc.pdf](#)

Good afternoon Ms. Trautmann,

The Department's Evaluation Team concluded the evaluations of all proposals submitted for RFP 202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services. The attached letter identifies the awarded Bidder(s) selected through the evaluation process.

Thank you.

Tom Charette
Management Analyst
DHHS/Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, ME 04333
(207) 287-8604

RFP.DHHS@maine.gov

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Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

Via Electronic Mail: gtrautmann@automated-health.com

Automated Health Systems, Inc.
Gail Trautmann
9370 McKnight Road, Suite 300
Pittsburgh, PA 15237

SUBJECT: Notice of Conditional Contract Award under RFP #202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services

Dear Ms. Trautmann,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office of the Commissioner. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to:

- Project 1 – IdeaCrew, Inc.
- Project 2 – Vimo, Inc. dba GetInsured

IdeaCrew, Inc and Vimo, Inc. dba GetInsured received the evaluation team's highest rankings. The Department will be contacting IdeaCrew, Inc and Vimo, Inc. dba GetInsured soon to negotiate the contracts. As provided in the RFP, the Notice of Conditional Contract Awards is subject to execution of written contracts and, as a result, this Notice does NOT constitute the formation of a contract between the Department and IdeaCrew, Inc or Vimo, Inc. dba GetInsured. IdeaCrew, Inc or Vimo, Inc. dba GetInsured shall not acquire any legal or equitable rights relative to the contract services until the contracts containing terms and conditions acceptable to the Department are executed. The Department further reserves the right to cancel the Notice of Conditional Contract Awards at any time prior to the execution of the written contracts.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decisions are conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of the contracts.

Any person aggrieved by these award decisions may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract awards as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Division of Purchases, Chapter 120, § (2) (2).

Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

Debra Downer 11/25/2020

Debra Downer, Deputy Director
Division of Contract Management

From: [Charette, Thomas](#)
To: simon.henry@ideacrew.com
Cc: [Charette, Thomas](#); [Cohen, Dan](#); [Pruett, Jamie](#); [Garratt-Reed, Megan](#); [DHHS, RFP](#)
Subject: Proposal Evaluation Notification for Office of the Commissioner RFP 202010151 - Idea
Date: Wednesday, November 25, 2020 3:48:50 PM
Attachments: [AL_RFP_202010151_IdeaCrew.doc.pdf](#)

Good afternoon Mr. Henry,

The Department's Evaluation Team concluded the evaluations of all proposals submitted for RFP 202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services. The attached letter identifies the awarded Bidder(s) selected through the evaluation process.

Thank you.

Tom Charette
Management Analyst
DHHS/Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, ME 04333

RFP.DHHS@maine.gov

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11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

Via Electronic Mail: simon.henry@ideacrew.com

IdeaCrew, Inc.
Simon Henry, VP-Strategic Initiatives
1150 Connecticut Avenue NW, Ste 710
Washington, DC 20036

SUBJECT: Notice of Conditional Contract Award under RFP #202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services

Dear Mr. Henry,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office of the Commissioner. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to:

- Project 1 – IdeaCrew, Inc.
- Project 2 – Vimo, Inc. dba GetInsured

IdeaCrew, Inc and Vimo, Inc. dba GetInsured received the evaluation team's highest rankings. The Department will be contacting IdeaCrew, Inc and Vimo, Inc. dba GetInsured soon to negotiate the contracts. As provided in the RFP, the Notice of Conditional Contract Awards is subject to execution of written contracts and, as a result, this Notice does NOT constitute the formation of a contract between the Department and IdeaCrew, Inc or Vimo, Inc. dba GetInsured. IdeaCrew, Inc or Vimo, Inc. dba GetInsured shall not acquire any legal or equitable rights relative to the contract services until the contracts containing terms and conditions acceptable to the Department are executed. The Department further reserves the right to cancel the Notice of Conditional Contract Awards at any time prior to the execution of the written contracts.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

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Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

Debra Downer 11/25/2020

45063078558482
Debra Downer, Deputy Director
Division of Contract Management

From: [Charette, Thomas](#)
To: MaximusHealthProposals@maximus.com
Cc: [Charette, Thomas](#)
Subject: Proposal Evaluation Notification for Office of the Commissioner RFP 202010151 - Max
Date: Wednesday, November 25, 2020 3:54:13 PM
Attachments: [AL_RFP_202010151_Maximus.doc.pdf](#)

Good afternoon Mr. Fisher,

The Department's Evaluation Team concluded the evaluations of all proposals submitted for RFP 202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services. The attached letter identifies the awarded Bidder(s) selected through the evaluation process.

Thank you.

Tom Charette
Management Analyst
DHHS/Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, ME 04333

RFP.DHHS@maine.gov

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11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

Via Electronic Mail: MaximusHealthProposals@maximus.com

Maximus US Services, Inc.
Kenneth Fisher
1891 Metro Center Drive
Reston, VA 20190

SUBJECT: Notice of Conditional Contract Award under RFP #202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services

Dear Mr. Fisher,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office of the Commissioner. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to:

- Project 1 – IdeaCrew, Inc.
- Project 2 – Vimo, Inc. dba GetInsured

IdeaCrew, Inc and Vimo, Inc. dba GetInsured received the evaluation team's highest rankings. The Department will be contacting IdeaCrew, Inc and Vimo, Inc. dba GetInsured soon to negotiate the contracts. As provided in the RFP, the Notice of Conditional Contract Awards is subject to execution of written contracts and, as a result, this Notice does NOT constitute the formation of a contract between the Department and IdeaCrew, Inc or Vimo, Inc. dba GetInsured. IdeaCrew, Inc or Vimo, Inc. dba GetInsured shall not acquire any legal or equitable rights relative to the contract services until the contracts containing terms and conditions acceptable to the Department are executed. The Department further reserves the right to cancel the Notice of Conditional Contract Awards at any time prior to the execution of the written contracts.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

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Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

Debra Downer 11/25/2020

4506307B8558482
Debra Downer, Deputy Director
Division of Contract Management

From: [Charette, Thomas](#)
To: shubh.singh@newfieldstech.com
Cc: [Charette, Thomas](#)
Subject: Proposal Evaluation Notification for Office of the Commissioner RFP 202010151 - NFT
Date: Wednesday, November 25, 2020 3:50:18 PM
Attachments: [AL_RFP_202010151_NFT.doc.pdf](#)

Good afternoon Shubh Singh,

The Department's Evaluation Team concluded the evaluations of all proposals submitted for RFP 202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services. The attached letter identifies the awarded Bidder(s) selected through the evaluation process.

Thank you.

Tom Charette
Management Analyst
DHHS/Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, ME 04333

RFP.DHHS@maine.gov

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Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

Via Electronic Mail: shubh.singh@newfieldstech.com

New Fields Technologies LLC
Shubh Singh, CEO
2500 Plaza 5, 25th Floor
Jersey City, NJ 07311

SUBJECT: Notice of Conditional Contract Award under RFP #202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services

Dear Shubh Singh,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office of the Commissioner. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to:

- Project 1 – IdeaCrew, Inc.
- Project 2 – Vimo, Inc. dba GetInsured

IdeaCrew, Inc and Vimo, Inc. dba GetInsured received the evaluation team's highest rankings. The Department will be contacting IdeaCrew, Inc and Vimo, Inc. dba GetInsured soon to negotiate the contracts. As provided in the RFP, the Notice of Conditional Contract Awards is subject to execution of written contracts and, as a result, this Notice does NOT constitute the formation of a contract between the Department and IdeaCrew, Inc or Vimo, Inc. dba GetInsured. IdeaCrew, Inc or Vimo, Inc. dba GetInsured shall not acquire any legal or equitable rights relative to the contract services until the contracts containing terms and conditions acceptable to the Department are executed. The Department further reserves the right to cancel the Notice of Conditional Contract Awards at any time prior to the execution of the written contracts.

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Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

Debra Downer 11/25/2020

Debra Downer, Deputy Director
Division of Contract Management

From: [Charette, Thomas](#)
To: mike.miller@optum.com
Cc: [Charette, Thomas](#)
Subject: Proposal Evaluation Notification for Office of the Commissioner RFP 202010151 - Opt
Date: Wednesday, November 25, 2020 3:51:38 PM
Attachments: [AL_RFP_202010151_Optum.doc.pdf](#)

Good afternoon Mr. Miller,

The Department's Evaluation Team concluded the evaluations of all proposals submitted for RFP 202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services. The attached letter identifies the awarded Bidder(s) selected through the evaluation process.

Thank you.

Tom Charette
Management Analyst
DHHS/Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, ME 04333

RFP.DHHS@maine.gov

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11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

Via Electronic Mail: mike.miller@optum.com

OptumInsight, Inc. dba "Optum"
Michael Miller
1325 Boylston Street
Boston, MA 02215

SUBJECT: Notice of Conditional Contract Award under RFP #202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services

Dear Mr. Miller,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office of the Commissioner. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to:

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Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

Debra Downer 11/25/2020

Debra Downer, Deputy Director
Division of Contract Management

From: [Charette, Thomas](#)
To: [Heather Blease](#)
Cc: [Charette, Thomas](#)
Subject: Proposal Evaluation Notification for Office of the Commissioner RFP 202010151 - Savi
Date: Wednesday, November 25, 2020 4:01:02 PM
Attachments: [AL_RFP_202010151_SaviLinx.doc.pdf](#)

Good afternoon Ms. Blease,

The Department's Evaluation Team concluded the evaluations of all proposals submitted for RFP 202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services. The attached letter identifies the awarded Bidder(s) selected through the evaluation process.

Thank you.

Tom Charette
Management Analyst
DHHS/Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, ME 04333

RFP.DHHS@maine.gov

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11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

Via Electronic Mail: hblease@savilinx.com

SaviLinx, LLC
Heather Blease
74 Orion Street, Unit Two, Ste 300
Brunswick, ME 04011

SUBJECT: Notice of Conditional Contract Award under RFP #202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services

Dear Ms. Blease,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office of the Commissioner. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to:

- Project 1 – IdeaCrew, Inc.
- Project 2 – Vimo, Inc. dba GetInsured

IdeaCrew, Inc and Vimo, Inc. dba GetInsured received the evaluation team's highest rankings. The Department will be contacting IdeaCrew, Inc and Vimo, Inc. dba GetInsured soon to negotiate the contracts. As provided in the RFP, the Notice of Conditional Contract Awards is subject to execution of written contracts and, as a result, this Notice does NOT constitute the formation of a contract between the Department and IdeaCrew, Inc or Vimo, Inc. dba GetInsured. IdeaCrew, Inc or Vimo, Inc. dba GetInsured shall not acquire any legal or equitable rights relative to the contract services until the contracts containing terms and conditions acceptable to the Department are executed. The Department further reserves the right to cancel the Notice of Conditional Contract Awards at any time prior to the execution of the written contracts.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

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Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

Debra Downer 11/25/2020

500630789558482
Debra Downer, Deputy Director
Division of Contract Management

From: [Charette, Thomas](#)
To: paul.neutz@getinsured.com
Cc: [Charette, Thomas](#); [Cohen, Dan](#); [Pruett, Jamie](#); [Garratt-Reed, Megan](#); [DHHS, RFP](#)
Subject: Proposal Evaluation Notification for Office of the Commissioner RFP 202010151 - Vimo
Date: Wednesday, November 25, 2020 3:46:54 PM
Attachments: [AL_RFP_202010151_GetInsured.doc.pdf](#)

Good afternoon Mr. Neutz,

The Department's Evaluation Team concluded the evaluations of all proposals submitted for RFP 202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services. The attached letter identifies the awarded Bidder(s) selected through the evaluation process.

Thank you.

Tom Charette
Management Analyst
DHHS/Division of Contract Management
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RFP.DHHS@maine.gov

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109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

Via Electronic Mail: paul.neutz@getinsured.com

Vimo, Inc. dba GetInsured
Paul Neutz
1305 Terra Bella Avenue
Mountain View, CA 94043

SUBJECT: Notice of Conditional Contract Award under RFP #202010151, Health Insurance Marketplace Technology Platform and Consumer Assistance Services

Dear Mr. Neutz,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office of the Commissioner. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to:

- Project 1 – IdeaCrew, Inc.
- Project 2 – Vimo, Inc. dba GetInsured

IdeaCrew, Inc and Vimo, Inc. dba GetInsured received the evaluation team's highest rankings. The Department will be contacting IdeaCrew, Inc and Vimo, Inc. dba GetInsured soon to negotiate the contracts. As provided in the RFP, the Notice of Conditional Contract Awards is subject to execution of written contracts and, as a result, this Notice does NOT constitute the formation of a contract between the Department and IdeaCrew, Inc or Vimo, Inc. dba GetInsured. IdeaCrew, Inc or Vimo, Inc. dba GetInsured shall not acquire any legal or equitable rights relative to the contract services until the contracts containing terms and conditions acceptable to the Department are executed. The Department further reserves the right to cancel the Notice of Conditional Contract Awards at any time prior to the execution of the written contracts.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decisions are conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of the contracts.

Any person aggrieved by these award decisions may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract awards as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Division of Purchases, Chapter 120, § (2) (2).

Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

11/25/2020

Debra Downer

Debra Downer, Deputy Director
Division of Contract Management

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: IdeaCrew, Inc

DATE: November 19, 2020 and November 23, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Victor Chakravarty, Philip Dubois, Megan Garratt-Reed, Jamie Pruet, David Simsarian

SUMMARY PAGE

<u>Pass/Fail Criteria</u>		
Section I. – Preliminary Information	<u>Pass:</u>	<u>Fail:</u>
<p>Project 1 - Marketplace Technology Platform: All interested parties who can provide an existing SBM technology platform which was successfully implemented by the proposing Bidder and/or its subcontractor(s) within the past six (6) years, and is currently in use in at least one (1) other State-based Marketplace, are invited to submit bids in response to this Request for Proposals. The proposed SBM solution must, at minimum, include components previously proven to successfully deliver the following functionality:</p> <ol style="list-style-type: none"> 1. Plan management; 2. Eligibility management (making accurate determinations for Marketplace eligibility, and accurate assessments of eligibility for MAGI Medicaid and CHIP); 3. Marketplace access and experience management including consumer shopping, comparison, and selection of plans; 4. Enrollment management; 5. Broker and Assister supports. 	X	
		<u>Points Awarded:</u>
Numerical Score:		
Section II. Organization Qualifications and Experience	(Max: 20 Points)	16.00
Section III: Proposed Services	(Max: 45 Points)	41.00
Section IV. Cost Proposal	(Max: 35 Points)	35.00
TOTAL POINTS		92.00
		(Max: 100 Points)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: IdeaCrew, Inc

DATE: November 19, 2020 and November 23, 2020

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

Total Points Available: 20

Score: 16.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • 1 project demonstrated a full state-based marketplace implementation. • Experience with implementing components of state-based marketplaces. • HRA Calculator which is utilized as part of all active state-based marketplaces. • Produced and submitted the Final Detailed Design Review (FDDR) and Operational Readiness Review (ORR) documentation required for CMS compliance approval. • Demonstrated track record of quick execution of high-profile/high-pressure projects. • Did not demonstrate federal to state migration.
2. Subcontractors
<ul style="list-style-type: none"> • Proposing to utilize Checkbooks as a subcontract to provide the solution's decision support tool. • Mature relationship between the Bidder and Checkbooks. • Strong decision support tool, being utilized in 7 states. • Indicated Checkbooks has received 2 awards.
3. Organizational Chart
<ul style="list-style-type: none"> • Met minimum requirements.
4. Litigation
<ul style="list-style-type: none"> • Indicated none.
5. Financial Viability
<ul style="list-style-type: none"> • Demonstrated an operating profit over the 3-year period provided. • Demonstrated an ability to meet short and long term obligations. • Nearly all revenue comes from contract from Federal, State and Local government sources. • Provided a letter of support from their bank, evidencing their ability to financially meet the obligations of implementing the solution.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met minimum requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: IdeaCrew, Inc

DATE: November 19, 2020 and November 23, 2020

**EVALUATION OF SECTION III
Proposed Services**

Total Points Available: 45 Score: 41.00

Evaluation Team Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • Provided a detailed response, including sample screenshots, to the requirements in this section. • SaaS solution hosted on AWS-Gov, is a secure platform that adds speed to implementation. • Strong, nuanced electronic data interchange plan. • Demonstrated understanding of operational integration. • User friendly interfaces. • Strong monitoring model, which can detect platform operating deficiencies and escalate to resolution. • Auto-renewals ‘dry-run’ to pre-identify and correct renewal errors. • Indicated the ability to utilize MAGI in the Cloud option to ensure timely implementation. • Strong support for IV&V certification and CMS gate reviews. • Extensive consumer decision support tools for individuals and businesses. • Incorporation of Department request for integration of Health Reimbursement Arrangement contributions in plan display. • Configurable options for business administrators. • Specifically addressed Special Enrollment Period enrollments on the federally facilitated marketplace during 2022 Open Enrollment Period. • Expressed a willingness to work with the Department to achieve the requested enhanced functionality. • Offering the team that built the DC HBX and Massachusetts Health Connector for Business state-based marketplace solutions.
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Explicit confirmation of willingness to integrate and collaborate with external vendors, including providing a basic viability architecture. • Leverages SugarCRM, a mature, mid-level CRM product.
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Explicitly vouches compliance with MARS-E 2.0, IRS 1075, HIPAA and HITECH. • Industry-standard Architecture. • Mature Security Model. • Mature Disaster Recovery Model. • Mature understanding of SOC 2 Type 2.
E. Document Repository Requirements
<ul style="list-style-type: none"> • Proposing a credible document repository model.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: IdeaCrew, Inc

DATE: November 19, 2020 and November 23, 2020

<ul style="list-style-type: none"> Proposing to pre-load the document repository with project artifacts.
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> Proposes to utilize zero downtime deployment strategy to migrate code to ensure maximum availability. Platform provides high availability and resilience.
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> Provided a strong diagram and narrative and provided a detailed description to the benefit of utilizing them.
3. Staffing
<ul style="list-style-type: none"> Many proposed project staff members have state-based marketplace experience, including recent experience with the federally facilitated marketplace to state-based marketplace transitions.
4. Implementation- Work Plan
<ul style="list-style-type: none"> DDI Phase 1 is proposed to go until November 1, 2021. The team is concerned this may run to close to the open enrollment period. Visuals provided (Bidder proposal page #182) were unclear and difficult to read.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: IdeaCrew, Inc

DATE: November 19, 2020 and November 23, 2020

**EVALUATION OF SECTION IV
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 35

Score: 35.00

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$13,632,048.00	÷	\$13,632,048.00	x	35 points	=	35.00

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: New Fields Technologies LLC

DATE: November 19, 2020 and November 23, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Victor Chakravarty, Philip Dubois, Megan Garratt-Reed, Jamie Pruet, David Simsarian

SUMMARY PAGE

<u>Pass/Fail Criteria</u>		
Section I. – Preliminary Information	<u>Pass:</u>	<u>Fail:</u>
<p>Project 1 - Marketplace Technology Platform: All interested parties who can provide an existing SBM technology platform which was successfully implemented by the proposing Bidder and/or its subcontractor(s) within the past six (6) years, and is currently in use in at least one (1) other State-based Marketplace, are invited to submit bids in response to this Request for Proposals. The proposed SBM solution must, at minimum, include components previously proven to successfully deliver the following functionality:</p> <ol style="list-style-type: none"> 1. Plan management; 2. Eligibility management (making accurate determinations for Marketplace eligibility, and accurate assessments of eligibility for MAGI Medicaid and CHIP); 3. Marketplace access and experience management including consumer shopping, comparison, and selection of plans; 4. Enrollment management; 5. Broker and Assister supports. 	X	
		<u>Points Awarded:</u>
Numerical Score:		
Section II. Organization Qualifications and Experience	(Max: 20 Points)	9.00
Section III: Proposed Services	(Max: 45 Points)	
Section IV. Cost Proposal	(Max: 35 Points)	
TOTAL POINTS		(Max: 100 Points)

***Based on the Evaluation Teams consensus score for this section, the Bidder did not receive the minimum score of 12 as outlined in Part V.B.2. Stage Two of the RFP. Therefore, the Bidder is disqualified at Stage Two.**

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: New Fields Technologies LLC

DATE: November 19, 2020 and November 23, 2020

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

Total Points Available: 20

Score: 9.00*

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Re-architected and re-launched an existing state-based marketplace in Maryland and are the current support provider. • Did not demonstrate experience implementing a full “front to back” state-based marketplace solution.
2. Subcontractors
<ul style="list-style-type: none"> • Proposing to utilize two subcontractors, Global Alliant and SM Tech Solutions. • Appears the subcontractors will be responsible for significant elements of the implementation services, which raises concerns for the Team. • It is unclear what the role of SM Tech Solutions will be. • Did not provide an address or phone number for SM Tech Solutions.
3. Organizational Chart
<ul style="list-style-type: none"> • No apparent logic in the distribution of labor between the Bidder and subcontractors. • Vague reference to additional resources without detail. • Special Adviser has no state-based marketplace experience or health services experience described.
4. Litigation
<ul style="list-style-type: none"> • Indicated none.
5. Financial Viability
<ul style="list-style-type: none"> • Did not provide a copy of the Dun & Bradstreet Comprehensive Insight Plus Report or a financial statement for 2019. • Only provided financial statements for 2016 and 2017. The financial statement for 2018 was just a balance sheet. • None of the financial statements provided were audited. • Profitability decreased from 2016 to 2017 and 2017 to 2018.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met minimum requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: OptumInsight Inc. dba Optum

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Victor Chakravarty, Philip Dubois, Megan Garratt-Reed, Jamie Pruet, David Simsarian

SUMMARY PAGE

Pass/Fail Criteria		
Section I. – Preliminary Information	<u>Pass:</u>	<u>Fail:</u>
<p>Project 1 - Marketplace Technology Platform: All interested parties who can provide an existing SBM technology platform which was successfully implemented by the proposing Bidder and/or its subcontractor(s) within the past six (6) years, and is currently in use in at least one (1) other State-based Marketplace, are invited to submit bids in response to this Request for Proposals. The proposed SBM solution must, at minimum, include components previously proven to successfully deliver the following functionality:</p> <ol style="list-style-type: none"> 1. Plan management; 2. Eligibility management (making accurate determinations for Marketplace eligibility, and accurate assessments of eligibility for MAGI Medicaid and CHIP); 3. Marketplace access and experience management including consumer shopping, comparison, and selection of plans; 4. Enrollment management; 5. Broker and Assister supports. 	X	
		<u>Points Awarded:</u>
Numerical Score:		
Section II. Organization Qualifications and Experience	(Max: 20 Points)	16.00
Section III: Proposed Services	(Max: 45 Points)	33.00
Section IV. Cost Proposal	(Max: 35 Points)	8.97
TOTAL POINTS		57.97
		(Max: 100 Points)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: OptumInsight Inc. dba Optum

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

Total Points Available: 20

Score: 16.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • 26 years of combined Affordable Care Act, Eligibility and Enrollment, exchange, and Health and Human Service experience. • Provided system integration services as part of the federal marketplace. • Developed and implemented the FDSH (Federal Data Services Hub). • Assisting in completion of state-based marketplace implementations in Vermont and Maryland. • Experience implementing a state-based marketplace in Massachusetts, in 6 months. • Extensive state-based marketplace experience, however the experience with full implementations is more limited. • Experience migrating consumer data from the federally facilitated marketplace but limited to Small Business Health Options Program (SHOP).
2. Subcontractors
<ul style="list-style-type: none"> • Proposing to utilize NFP Health Services related to EDI Technology and call center services.
3. Organizational Chart
<ul style="list-style-type: none"> • Met minimum requirements.
4. Litigation
<ul style="list-style-type: none"> • Disclosed a list of litigation.
5. Financial Viability
<ul style="list-style-type: none"> • Demonstrate an ability to met short and long term obligations. • Demonstrate long term profitability. • Dun & Bradstreet indicated low risk of delinquency and financial stress.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met minimum requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: OptumInsight Inc. dba Optum

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

**EVALUATION OF SECTION III
Proposed Services**

Total Points Available: 45

Score: 33.00

Evaluation Team Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • Proposed solution is mobile responsive. • Indicated frequent reconciliation is performed. • Clear and helpful presentation for consumers. • Proposing printed material be made available in large print and braille. • SaaS solution hosted on AWS-Gov, is a secure platform that adds speed to implementation. • Demonstrated understanding of operational integration, however, the Team is concerned there will be a heavy reliance on the Department. • Reference the need for a third-party to provide decision support tool services however did not identify a third-party as a subcontractor which leads the Team to believe it is not included in the proposed solution. • Response to Clear Choice Design display lacks specificity regarding plan standardization. • Detailed collaborative approach to carrier electronic data interchange. • Small business support tool appears limited to model group coverage financial contributions but lacks Individual Coverage Health Reimbursement Arrangements/Qualified Small Employer Health Reimbursement Arrangements/MaineCare options.
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Proposing to utilize SalesForce CRM. • The Team is concerned with the Bidder’s rigid approach to collaboration with the Project 2 awarded Bidder.
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Strong outline of security practice, however, no clear indication of alignment to State OIT policies. • Industry-standard architecture has built-in compliance and functionality. • Proposing a Single Tenant model. • Mature Security Model. • Mature Disaster Recovery Model. • Mature understanding of SOC 2 Type 2.
E. Document Repository Requirements
<ul style="list-style-type: none"> • Proposing SharePoint, which is an application the State is familiar with. • Proposing to work with the State on mutual formatting and structure of the document repository.
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Proposing a Maine-specific security officer.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: OptumInsight Inc. dba Optum

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

<ul style="list-style-type: none"> • Team has significant concerns regarding request for flexibility around service level agreements, especially during open enrollment period.
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Provided a strong diagram and narrative and provided a detailed description to the benefit of utilizing them.
3. Staffing
<ul style="list-style-type: none"> • Job descriptions did not require state-based marketplace experience. • Outside of the Implementation Manager, identified staff resources do not have state-based marketplace experience. • Several important positions, including Project Manager, were not defined as key roles.
4. Implementation- Work Plan
<ul style="list-style-type: none"> • The Team is concerned with the Bidder's willingness to collaborate with the Department around implementation. • Based on the Bidder's response in this section, the Team is concerned there are conditional statements which may make it difficult to meet the implementation timeline. • Did not propose an approach to onboard project team positions for implementation.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: OptumInsight Inc. dba Optum

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

**EVALUATION OF SECTION IV
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 35

Score: 8.97

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$13,632,048.00	÷	\$53,162,893.00	x	35 points	=	8.97

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: Vimo, Inc. dba GetInsured

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Victor Chakravarty, Philip Dubois, Megan Garratt-Reed, Jamie Pruet, David Simsarian

SUMMARY PAGE

<u>Pass/Fail Criteria</u>		
Section I. – Preliminary Information	<u>Pass:</u>	<u>Fail:</u>
<p>Project 1 - Marketplace Technology Platform: All interested parties who can provide an existing SBM technology platform which was successfully implemented by the proposing Bidder and/or its subcontractor(s) within the past six (6) years, and is currently in use in at least one (1) other State-based Marketplace, are invited to submit bids in response to this Request for Proposals. The proposed SBM solution must, at minimum, include components previously proven to successfully deliver the following functionality:</p> <ol style="list-style-type: none"> 1. Plan management; 2. Eligibility management (making accurate determinations for Marketplace eligibility, and accurate assessments of eligibility for MAGI Medicaid and CHIP); 3. Marketplace access and experience management including consumer shopping, comparison, and selection of plans; 4. Enrollment management; 5. Broker and Assister supports. 	X	
		<u>Points Awarded:</u>
Numerical Score:		
Section II. Organization Qualifications and Experience	(Max: 20 Points)	19.00
Section III: Proposed Services	(Max: 45 Points)	36.00
Section IV. Cost Proposal	(Max: 35 Points)	19.13
TOTAL POINTS		74.13
		(Max: 100 Points)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: Vimo, Inc. dba GetInsured

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

Total Points Available: 20

Score: 19.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • 7 state-based marketplace client states with 4 being migrated from a federally facilitated marketplace. • Full end-to-end Marketplace technology solution fully implemented in Nevada, and successfully launched in Pennsylvania and New Jersey. • Indicated their platform supports 12 million users. • State-based marketplace is the Bidder core business model. • Experience with a mix of implementation approaches relative to Medicaid integration. • Proven ability to execute federally facilitated marketplace to state-based marketplace transition in less than one year. • Recent CMS approval of platform’s ability to accurately process complex enrollments. • Previous experience in Marketplaces with plan standardization.
2. Subcontractors
<ul style="list-style-type: none"> • None proposed.
3. Organizational Chart
<ul style="list-style-type: none"> • Provided 3 organizational chart views (Functional, Project and Implementation).
4. Litigation
<ul style="list-style-type: none"> • Disclosed prior litigation.
5. Financial Viability
<ul style="list-style-type: none"> • Did not provide financial statements for 2017. • Based on the financial document provided the Bidder was liquid and solvent for the period captured.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met minimum requirements. • Provided proof a excess cyber liability insurance.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: Vimo, Inc. dba GetInsured

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

**EVALUATION OF SECTION III
Proposed Services**

Total Points Available: 45

Score: 36.00

Evaluation Team Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • Provided a detailed response, including sample screenshots, to the requirements in this section. • SaaS solution hosted on AWS-Gov, is a secure platform that adds speed to implementation. • Strong, nuanced electronic data interchange plan, as proven by 25 million EDI transactions completed through the proposed solution. • Demonstrated understanding of operational integration. • “Tile display” demonstrates user friendly interfaces. • Strong monitoring model, which can detect platform operating deficiencies and escalate to resolution. • Indicated the ability to utilize existing MAGI rules option to ensure timely implementation. • Strong support for IV&V certification and CMS gate reviews. • Extensive consumer decision support tools for individuals, including “Total Cost of Ownership”. • Strong response for employer decision support tools, but employee health reimbursement arrangement contribution display options were limited. • Reference the need for a third-party to provide provider directory however did not identify a third-party as a subcontractor which leads the Team to believe it is not included in the proposed solution. • Custom grouping for household members enrolling in different plans. • Indicated the proposed CRM does not have marketing tools. • Limited options for customized display of Clear Choice Design. • Indicated creating alignment between the Department’s and Bidder’s notices.
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Built in features, but not a full-fledged CRM. • Lacked details to support coordination between the Project 2 awarded Bidder, in the event a separate Bidder is awarded Project 2.
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Provided extensive details related to OIT policies. • Industry-standard architecture has built-in compliance and functionality. • Proposing a Single Tenant model. • Strong Security Model. • Lacked details related to Disaster Recovery and Recovery Point Objectives/Recovery Time Objectives.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: Vimo, Inc. dba GetInsured

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

<ul style="list-style-type: none"> • Response lacked understanding of SOC 2 Type 2. No mention of recruiting an accounting firm certified by AICPA.
E. Document Repository Requirements
<ul style="list-style-type: none"> • Proposing SharePoint, which is an application the State is familiar with. • Proposing to pre-load the document repository with project artifacts.
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Pro-active monitoring approach/protocol. • Proposing JIRA, a tool familiar to the State, for issue tracking.
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Provided a strong diagram and narrative and provided a detailed description to the benefit of utilizing them. • Provided multiple views of the architecture design.
3. Staffing
<ul style="list-style-type: none"> • Job descriptions did not provide minimum qualifications. • Staffing plan did not delineate the staffing time assigned to the project. • Proposing to implement a DDI, and Maintenance & Operation and Product teams. • Some crucial project roles were not defined as key roles.
4. Implementation- Work Plan
<ul style="list-style-type: none"> • Met minimum requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 1

BIDDER: Vimo, Inc. dba GetInsured

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

**EVALUATION OF SECTION IV
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 35

Score: 19.13

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$13,632,048.00	÷	\$24,938,447.00	x	35 points	=	19.13

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 2

BIDDER: Automated Health Systems, Inc.

DATE: November 19, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Victor Chakravarty, Philip Dubois, Megan Garratt-Reed, Jamie Pruett, David Simsarian

SUMMARY PAGE

<u>Pass/Fail Criteria</u>		
Section I. – Preliminary Information	<u>Pass:</u>	<u>Fail:</u>
<p>Project 2 - Consumer Assistance Center: All interested parties who have at least two (2) years' experience in the past five (5) years providing a comprehensive call center solution for another SBM are invited to submit bids in response to this RFP. The Department will take into consideration a Bidder's subcontractor's experience to meeting this requirement. The proposed Consumer Assistance Services solution must, at minimum, be proven to have successfully delivered the following business services:</p> <ol style="list-style-type: none"> 1. Call center; 2. Mailroom; 3. Broker and Assister training. 		X

Automated Health Systems, Inc. failed to submit File 1, Appendix A (Proposal Cover Page), Appendix B (Debarment, Performance and Non-Collusion Certification), and Appendix C (Project Specific Eligibility to Submit a Bid Form).

Pursuant to Part V, B.2. "Stage One - Eligibility: Proposals must meet the requirements of Part I.C. "Eligibility to Submit Bids." The Bidder must complete **Appendix C** (Eligibility to Submit Bids Form). Proposals which do not include **Appendix C** or do not meet Part I.C. "Eligibility to Submit Bids" requirements will be ineligible for award consideration...."

Therefore, Automated Health Systems, Inc. proposal is disqualified.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 2

BIDDER: Maximus US Services, Inc.

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Victor Chakravarty, Philip Dubois, Megan Garratt-Reed, Jamie Pruett, David Simsarian

SUMMARY PAGE

Pass/Fail Criteria		
Section I. – Preliminary Information	<u>Pass:</u>	<u>Fail:</u>
Project 2 - Consumer Assistance Center: All interested parties who have at least two (2) years' experience in the past five (5) years providing a comprehensive call center solution for another SBM are invited to submit bids in response to this RFP. The Department will take into consideration a Bidder's subcontractor's experience to meeting this requirement. The proposed Consumer Assistance Services solution must, at minimum, be proven to have successfully delivered the following business services: 1. Call center; 2. Mailroom; 3. Broker and Assister training.	X	
		<u>Points Awarded:</u>
Numerical Score:		
Section II. Organization Qualifications and Experience	(Max: 20 Points)	16.00
Section III: Proposed Services	(Max: 45 Points)	40.00
Section IV. Cost Proposal	(Max: 35 Points)	21.18
TOTAL POINTS		77.18
		(Max: 100 Points)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 2

BIDDER: Maximus US Services, Inc.

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

Total Points Available: 20

Score: 16.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Currently operate customer support services in 5 states. • Indicated handling 10 million state-based marketplace consumer calls and serving 11 million consumers. • Experience integrating with an existing state-based marketplace. • 2 ISO-certifications. • Currently provide services for the Department. • Prior experience integrating with a separate state-based marketplace technology vendor. • Experience supporting New Jersey's transition from FFM to SBM. • Limited objective performance information provided. • Currently operates the federally facilitated marketplace Contact Center Operations (CCO). • Proposing to bring continuity and lessons learned from previous projects and utilize their Standardized Operations and Analytics Project Management Office (SOA PMO) and library of resources.
2. Subcontractors
<ul style="list-style-type: none"> • Proposing to utilize 2 subcontractors Guidant and CSG.
3. Organizational Chart
<ul style="list-style-type: none"> • Provided 2 organizational charts (Implementation and on-going operations).
4. Litigation
<ul style="list-style-type: none"> • Disclosed a list of litigation.
5. Financial Viability
<ul style="list-style-type: none"> • Liquid and solvent. • Able to meet short and long term obligations. • Demonstrated sustained profitability from 2017-2019.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met minimum requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 2

BIDDER: Maximus US Services, Inc.

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

**EVALUATION OF SECTION III
Proposed Services**

Total Points Available: 45

Score: 40.00

Evaluation Team Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none"> • Proposed Citizen Journey Platform telephony solution. • Indicated best practices for consumers questions including use of the Bidder’s Center for Health Literacy. • Solid quality assurance processes in place to monitor call quality. • Able to effectively pivot to a virtual training model. • Expressed a commitment to recruiting in Maine. • Proposing a dedicated Health Liaison position. • Clear response to appeal process. • Strong security and privacy training program for staff. • Established translation call line and indication of being able to accommodate all language spoken in Maine. • Knowledge management system to provide call scripts and documented work instruction for staff to utilize. • Proposing a strong transfer model to the existing Department call center. • Offer tools for consumer for disabilities. • Bidder’s migration approach involves re-verifying user accounts for Phase 2.
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Would utilize a RACI chart to coordinate between Project 1 and Project 2. • Provided a detailed coordination approach. • Demonstrated an understanding of the training efforts needed to train staff on the Project 1 awarded Bidder solution.
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Demonstrated a commitment to OIT policies, security requirements and audit requirements.
E. Document Repository Requirements
<ul style="list-style-type: none"> • Provided a vague response, with limited detail, on the Bidder’s approach to the document repository requirements.
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Proposing JIRA, a tool familiar to the State, for issue tracking. • Proposing to have the call center operational by August 31, 2021.
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Strong architecture diagram and narrative. • Included multiple views of the architecture. • Provided a list of potential risks to be monitored or a mitigation strategy for those risks.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 2

BIDDER: Maximus US Services, Inc.

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

3. Staffing
<ul style="list-style-type: none">• Outlined a strong staff retention model, as indicated by the Bidder's 98% monthly retention of staff.• Identified call center experience as preferred, not required, under the call center manager job description.• Minimum qualifications for Project Manager and Implementation Manager appear light on project management experience.• Indicated the project managers, during Phase 1, would be allocated at 88% versus 100%.• Proposed Project Manager and Implementation Manager demonstrate strong experience.
4. Implementation- Work Plan
<ul style="list-style-type: none">• Clear distribution of accountability for tasks, including delineation between Project 1 and Project 2.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 2

BIDDER: Maximus US Services, Inc.

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

**EVALUATION OF SECTION IV
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 35

Score: 21.18

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$16,843,028.00	÷	\$27,834,720.02	x	35 points	=	21.18

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 2

BIDDER: SaviLinx, LLC

DATE: November 19, 2020 and November 23, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Victor Chakravarty, Philip Dubois, Megan Garratt-Reed, Jamie Pruett, David Simsarian

SUMMARY PAGE

<u>Pass/Fail Criteria</u>		
Section I. – Preliminary Information	<u>Pass:</u>	<u>Fail:</u>
Project 2 - Consumer Assistance Center: All interested parties who have at least two (2) years' experience in the past five (5) years providing a comprehensive call center solution for another SBM are invited to submit bids in response to this RFP. The Department will take into consideration a Bidder's subcontractor's experience to meeting this requirement. The proposed Consumer Assistance Services solution must, at minimum, be proven to have successfully delivered the following business services: 1. Call center; 2. Mailroom; 3. Broker and Assister training.	X	
		<u>Points Awarded:</u>
Numerical Score:		
Section II. Organization Qualifications and Experience	(Max: 20 Points)	8.00
Section III: Proposed Services	(Max: 45 Points)	
Section IV. Cost Proposal	(Max: 35 Points)	
TOTAL POINTS		(Max: 100 Points)

***Based on the Evaluation Teams consensus score for this section, the Bidder did not receive the minimum score of 12 as outlined in Part V.B.2. Stage Two of the RFP. Therefore, the Bidder is disqualified at Stage Two.**

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 2

BIDDER: SaviLinx, LLC

DATE: November 19, 2020 and November 23, 2020

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

Total Points Available: 20

Score: 8.00*

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Strong presence in Maine. • Currently contract by the Department of Labor to provide COVID-19 related services. • Currently provide call center services FEDVIP and Federal employees dental and vision insurance. • Did not demonstrate state-based marketplace specific experience.
2. Subcontractors
<ul style="list-style-type: none"> • Proposing to utilize two subcontractors Zelus LLP and MPX. • MPX, a Portland, ME based organization, would be utilized for printing. • Zelus LLP would be utilized to provide training services and has previous experience with the Massachusetts state-based marketplace.
3. Organizational Chart
<ul style="list-style-type: none"> • Unclear if the organizational chart is project specific.
4. Litigation
<ul style="list-style-type: none"> • Did not provide a response as directed in the RFP.
5. Financial Viability
<ul style="list-style-type: none"> • Did not provided the audited financial statements. • Dun & Bradstreet indicated low to moderate risk.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met minimum requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 2

BIDDER: Vimo, Inc. dba GetInsured

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Victor Chakravarty, Philip Dubois, Megan Garratt-Reed, Jamie Pruet, David Simsarian

SUMMARY PAGE

<u>Pass/Fail Criteria</u>		
Section I. – Preliminary Information	<u>Pass:</u>	<u>Fail:</u>
Project 2 - Consumer Assistance Center: All interested parties who have at least two (2) years' experience in the past five (5) years providing a comprehensive call center solution for another SBM are invited to submit bids in response to this RFP. The Department will take into consideration a Bidder's subcontractor's experience to meeting this requirement. The proposed Consumer Assistance Services solution must, at minimum, be proven to have successfully delivered the following business services: 1. Call center; 2. Mailroom; 3. Broker and Assister training.	X	
		<u>Points Awarded:</u>
Numerical Score:		
Section II. Organization Qualifications and Experience	(Max: 20 Points)	17.00
Section III: Proposed Services	(Max: 45 Points)	31.00
Section IV. Cost Proposal	(Max: 35 Points)	35.00
TOTAL POINTS		83.00
		(Max: 100 Points)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 2

BIDDER: Vimo, Inc. dba GetInsured

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

Total Points Available: 20

Score: 17.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience
1. Overview of the Organization
<ul style="list-style-type: none"> • Currently providing state-based marketplace customer assistance services within 2 states. • The Bidder's Atlanta, GA call center has been operating for 10 years. • Indicated their Pennsylvania call center was fully staffing during the pandemic as well as going remote as part of their disaster recovery plan. • Did not demonstrate experience integrating with an external CRM. • Indicated 92% consumer satisfaction for the Bidder's Nevada call center. • Indicated a remote model to hire people in Maine. • Successful Nevada implementation and apparently successful system in Pennsylvania are both highly relevant federally facilitated marketplace to state-based marketplace transition states.
2. Subcontractors
<ul style="list-style-type: none"> • None proposed.
3. Organizational Chart
<ul style="list-style-type: none"> • Included sections of the organizational for both the state-based marketplace product team and the consumer assistance center implementation team.
4. Litigation
<ul style="list-style-type: none"> • Disclosed litigation.
5. Financial Viability
<ul style="list-style-type: none"> • Did not provide financial statements for 2017. • Based on the financial document provided the Bidder was liquid and solvent for the period captured.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met minimum requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 2

BIDDER: Vimo, Inc. dba GetInsured

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

**EVALUATION OF SECTION III
Proposed Services**

Total Points Available: 45

Score: 31.00

Evaluation Team Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none"> • Proposing Evolve IP as their proposed telephony solution. • The Bidder’s response only identifies their solution to Project 1 and not for any solution awarded to Project 1. • Strong model for selection and training of staff. • Focus on first call resolution. • Provided a detailed response and routing procedure for call operations. • Strong call center key performance indicators. • Proposing a dedicated phone line to handle calls from the Department’s call center. • Response related to carrier support does not demonstrate strong prioritization of carriers. • Proposing post-call and web-based customer satisfaction surveys.
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Met minimum requirements.
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Demonstrated a commitment to OIT policies, security requirements and audit requirements.
E. Document Repository Requirements
<ul style="list-style-type: none"> • Proposing SharePoint, which is an application the State is familiar with. • Proposing to pre-load the document repository with project artifacts.
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Met minimum requirements.
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Strong architecture diagram and narrative. • Included multiple views of the architecture. • Did not provide specific details related to limitations and risk.
3. Staffing
<ul style="list-style-type: none"> • Did not provide position-specific job descriptions. • Proposing a strong team with good project experience.
4. Implementation- Work Plan
<ul style="list-style-type: none"> • Met minimum requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

PROJECT: 2

BIDDER: Vimo, Inc. dba GetInsured

DATE: November 19, 2020, November 23, 2020, and November 24, 2020

**EVALUATION OF SECTION IV
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 35

Score: 35.00

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$16,843,028.00	÷	\$16,843,028.00	x	35 points	=	35.00

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: IdeaCrew

DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • P: Two states/jurisdictions actually deployed: DC, MA. Two states currently in dev: VT, CO. Some involvement in KY as well. The subcontractor is involved in seven states, of which, OR is cited as reference. • P: Created in 2015. Stable product. Low DDI risk. • P: Won two innovation awards from AWS
2. Subcontractors
<ul style="list-style-type: none"> • N: One subcontractor. Critical for success.
3. Organizational Chart
<ul style="list-style-type: none"> • P: Credible
4. Litigation
<ul style="list-style-type: none"> • P: None
5. Financial Viability
<ul style="list-style-type: none"> • N: Medium-sized company
6. Certificate of Insurance
<ul style="list-style-type: none"> • P: Meets

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: IdeaCrew

DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
• P: Pure SaaS (Single Point-of-Accountability), back-ended on AWS-Gov
• P: Explicitly vouches compliance w/ MARS-E 2.0, IRS 1075, HIPAA, HITECH
• P: Explicit commitment to Agile, DevOps, Open Source
• Q: SMS is future tense (“will make available”). Unclear if exists out-of-the-box.
• P: Strong EDI Portfolio
• P: Covers all use cases, w/ actual screen shots
• P: Detailed, Anonymous Pre-screener, plus Authenticated Screener
• P: Demonstrates understanding of the complexity of the ACES-SBM interfacing
C. Coordination and Collaboration between Project 1 and Project 2
• P: Leverages SugarCRM
• P: Willing to work w/ a any P2-provider. Provides basic viability architecture.
• I: Suggested in-house call center for cost containment
D. Technical and Security Requirements
• P: Blanket compliance w/ mentioned OIT policies
• P: Industry-standard Architecture
• P: Single Tenant
• P: Mature Security Model
• P: Mature DR Model
• P: Mature understanding of SOC 2 Type 2
E. Document Repository Requirements
• P: Amazon S3. Mature model.
F. Operations and Maintenance Requirements
• P: Credible Plan
2. Architecture Diagram and Narrative
• P: Mature Architecture Diagram
• P: Strong Architecture narrative
3. Staffing
• P: Robust Bench
4. Implementation- Work Plan
• P: Robust Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: IdeaCrew, Inc.

DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • Full-service technology system integrator and consultancy (p1) • Currently provides the technology services for two state-based exchanges in the District of Columbia and Massachusetts (p1) • Provided description of projects within the past five years: (1) DC Health Benefit Exchange Authority, (2) Commonwealth Health Insurance Connector Authority, (3) Oregon Health Insurance Marketplace – plan comparison tool (p4)
2. Subcontractors
<ul style="list-style-type: none"> • Indicated that subcontractor Center for the Study of Services / Consumers’ Checkbook would provide the key decision support services (p8)
3. Organizational Chart
<ul style="list-style-type: none"> • Org chart provided (p10)
4. Litigation
<ul style="list-style-type: none"> • Indicated none currently or within past 5 years (p11)
5. Financial Viability
<ul style="list-style-type: none"> • Four years of financial statements were provided, three years audited (2017 – 2019) • The company earns virtually all of its revenue under contract originating from federal, state, or local governments (p28) • The company has remained liquid and solvent during the period of 2018 through 2020 • The company has demonstrated an operating profit over the three-year period of 2018 through 2020 • Financial statements demonstrate the company’s ability to meet short-term and long-term obligations

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: IdeaCrew, Inc.

DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

6. Certificate of Insurance
<ul style="list-style-type: none"> • Certificate provided (p66)

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • Provides a hosted, isolated technology environment – hosted in AWS (p14) • Provides user authentication (p14) • Includes pre-screening of eligibility through “Checkbook” suite of tools (p16) • Includes anonymous plan comparison (p19) • Includes eligibility determination (p23) • Has handled DC’s enrollment renewals since 2016 (p24) • Contains integrated eligibility and enrollment functionality (p27) • “Checkbook” provides plan comparison, provider directory, and formulary lookup (p32) • Able to provide scaled-down SHOP functionality (p44) • Able to process electronic, telephonic, and paper application (p49) • Includes functionality for consumer accounts (p59) • Includes SugarCRM and can integrate with Project 2 vendor (p72) • Manages IRS and CMS reporting (p77) • Would avoid replicating rules between ACES and The MAGI-in-the-cloud rules engines (p88) • Will implement shopping experience that leverages Clear Choice Design (p92) • System is built with a modular approach (p100) • IdeaCrew will utilize the three phased approach required by the RFP (p109)
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Cites experience working with vendors on state based marketplace projects (p111)
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Indicates intent to comply with State OIT policies, standards, and procedures referenced in the RFP (p112)
E. Document Repository Requirements
<ul style="list-style-type: none"> • SBM solution includes secure document repository functionality (p126)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: IdeaCrew, Inc.

DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

F. Operations and Maintenance Requirements
<ul style="list-style-type: none">• Provided strategy to address operations and maintenance requirements as outlined in the RFP (p130)
2. Architecture Diagram and Narrative
<ul style="list-style-type: none">• Provided the required architecture diagram and narrative (p138)
3. Staffing
<ul style="list-style-type: none">• Provided the required job descriptions and staff resumes (p158)
4. Implementation- Work Plan
<ul style="list-style-type: none">• Included the required work plan with project timelines (p175)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: IdeaCrew

DATE: 11/21/2020

EVALUATOR NAME: Megan Garratt-Reed

EVALUATOR DEPARTMENT: Commissioner’s Office, DHHS

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • P: HRA calculator experience (p.1) • I: track record of quick execution of high pressure projects, though not necessarily full end-to-end Marketplace product (p. 4-6)
2. Subcontractors
<ul style="list-style-type: none"> • P: appreciate significant experience with consumer decision support (p. 1-2 App E)
3. Organizational Chart
<ul style="list-style-type: none"> • Q: is Project Lead equivalent to Project Manager?
4. Litigation
<ul style="list-style-type: none"> • P: none.
5. Financial Viability
<ul style="list-style-type: none"> • I: note of commitment from bank to supporting the financing model we need. • Q: financial stress score a concern?
6. Certificate of Insurance
<ul style="list-style-type: none"> •

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: IdeaCrew

DATE: 11/21/2020

EVALUATOR NAME: Megan Garratt-Reed

EVALUATOR DEPARTMENT: Commissioner’s Office, DHHS

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
• N: first direct FDSH connection (p. 23)
• P: approach for addressing/preventing APTC over-allocation (p.24)
• P: extensive consumer decision support tools
• P: Renewals dry run (p. 25)
• P: Plan for addressing SEP FFM enrollments during 2022 OEP. (p. 26)
• P: Good plan laid out for carrier EDI planning (p. 54)
• P: Very strong employer support tools (p. 91-98)
• P: Administrator interfaces so developer work isn’t needed for all business changes (p. 103)
C. Coordination and Collaboration between Project 1 and Project 2
• P: explicit confirmation of experience and willingness to integrate and collaborate with external vendors
D. Technical and Security Requirements
• P: acknowledgement of role in developing the System Security Plan.
E. Document Repository Requirements
•
F. Operations and Maintenance Requirements
• P: expression of confidence in ability to meet all SLAs.
2. Architecture Diagram and Narrative
•
3. Staffing
• P: Required SBM experience for several leadership roles.
4. Implementation- Work Plan
•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: IdeaCrew

DATE: 11/19/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • P – provides technology services for 2 State Based Exchanges (SBE): The District of Columbia Health Benefit Exchange Authority (DCHBX) and the Massachusetts Health Connector (MHC). • I – developed a custom-built SBE solution and implemented in October 2015. • I – Currently supports Massachusetts Small Business Health Options Program “SHOP” • I – provided a premium billing concept for Vermont Health Connect and provided consulting to Connect for Health Colorado. • I - delivered an “HRA calculator tool” in 2019 that all SBEs were able to use. • P – Hired Business Analysts who helped to implement Kentucky’s SBE “Kynect” • I – offering Agile approach with open-source software and hosted on Amazon Web Services (AWS) cloud. • I – utilizes Infrastructure as Code (IaC) approach to DevOps • I - built two major solutions 1.) Benefits Marketplace which allows sponsor, shop and enroll in insurance benefits and 2.) Electronic Data Interchange (EDI) Database. • I – error in this section indicating they are proposing this for “NJ SBE” instead of Maine. • P - produced and submitted the Final Detailed Design Review (FDDR) and Operational Readiness Review (ORR) documentation required for CMS compliance approval. • I – shared services model between the 2 SBE’s they support.
2. Subcontractors
<ul style="list-style-type: none"> • Proposes to utilize Center for the Study of Services / Consumers’ Checkbook for decision support services.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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<ul style="list-style-type: none"> • I – the Checkbook suite provides Pre-Screening of Eligibility, Provider Directory, Formulary Lookup, and Out-of-Pocket Cost Estimates • P - Checkbook tool is used as a support tool in both state-based health plans and Federal platforms for many states.
3. Organizational Chart
<ul style="list-style-type: none"> • Met and easy to read and understand.
4. Litigation
<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • Provided the Dun & Bradstreet Comprehensive Insight Plus Report. • Statements for December 2019, 2018 and 2017
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided – Dated 11/13/2020

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • Agreed to meet requirements in A.1 and their solution is hosed in AWS US East 1 cloud (with back-up in US East 2) • All the below are related to A.1: • Prescreening met, solution includes Checkbook. • P - Tools can calculate eligibility for unique state programs, if needed • P – prescreener will direct users to the appropriate resources and sites for next steps, provided visuals as examples. • Q – prescreener has limited questions to keep the client engaged, ensure they do collect all needed information to pass for eligibility determination purposes though or note that here as a negative. • P - Prescreener “NAV mode,” for advanced users (Navigators, Assisters, Counselors, and Brokers) provides the ability to input more complicated household scenarios. • Anonymous plan comparison: Met and solution includes Checkbook and a good description of what is included, and how it functions (after prescreener)

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- Marketplace eligibility determination - engine uses open source MAGI-in-the-Cloud code, this is used by a multi-state technology group managed by the New England States Consortium Systems Organization (NESCO).
- I - Been used in 3 open enrollment periods.
- Q - For income verification the solution access Federal Tax Information (FTI) through the Medicaid system. What do they mean by the Medicaid System? Further indicates that for Maine, they believe the need to safely access and store FTI and want to discuss with Maine which approach works best. Then on Pg.29 they refer to “MaineCare” eligibility determination system.
- I – pg. 24 Features regarding APTC algorithms to allow the lowest tax payback rates.
- P - Pg. 25 auto-renewals dry-run to pre-identify renewal errors, conducted with the DC HBX for the last 4 open enrollments.
- P – the special considerations for the 2021 year.
- I – journaling database
- N – Pg.27 Coordinated and integrated (RFP A.1.e); focus was on the functions, but they didn’t necessary speak to the coordination from a technical standpoint.
- Plan Comparison – proposes Checkbook.
- QHP – Didn’t describe the data/member matching methodology from the Medicaid system.
- I - District of Columbia and Massachusetts Health Exchanges accept self-attestation
- Q – Pg. 41 If the applicant fails FDSH identity proofing, they are directed to customer service.
- SHOP – customizable for Maine’s requirements.
- Simulated Transactions – utilizes jMeter and Blazemeter for dynamic sets of inputs, locations and platforms
- Verification of Special Enrollment Period – solution is customizable towards simplified acceptance or stricter work-flow processes, and Qualifying Life Events are also customizable.
- Data Persistence: utilizes MongoDB as its primary data store as it handles large volumes of structured and unstructured data content and its “superiority” over relational databases mapping data between the database and objects in memory.
- P - data will be protected in transit and at rest, and all storage clusters are in the US.
- N – Pg.48 sharded and shard

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- I – no visual depiction of data persistence or flow.
- P - Applications: encourage states transitioning to an SBM to use the transition as an opportunity to eliminate non-electronic applications but can do all version via the call center resources data entry.
- I - Document management: PDF Viewer in browser, didn't mention other available options.
- P - Electronic Data Interchange (EDI): tailor EDI transactions based on system limitations of each carrier
- P - develop subject area-specific tracks; both policy and technical SMEs will be assigned.
- I – no visual depiction in EDI section.
- I - FDSH solution seems to consider only 1 FDSH connection between MaineCare or the SBM, not for the solution to be an either/or and assumes it will utilize already existing ATC's.
- Plan Preview: provided detailed description
- Consumer Messaging: proposes to SFTP transport correspondences to the Marketplace's printing and mailing partner's SFTP staging location.
- P – utilizes USPS National Change of Address (NCOA) by sending a file of addresses prior to any bulk mailing for a returned error file.
- P – Consumer Portal: three base configuration options: Stand Alone, Single Sign On and Token Based.
- N – found the Consumer Portal section redundant with other sections.
- P - Portal access for non-consumer parties: Their system attaches permissions and roles at the individual account for both the individual customers, the admin staff operating within the system. They explained this with an example on pgs. 15 and 16 and elaborated on Pg.69.
- I - CRM: We read this RFP as requiring the Project 1 vendor to deliver the CRM and the Project 2 vendor to deliver the IVR. They offer comprehensive call center and CRM technology solution through SugarCRM.
- Chat solution integrates with SugarCRM

- **All the below are related to A.2:** Configure the platform
- I – approach is to first load 2021 plan data

- **All the below are related to A.3:** Provide additional functionality
- I – will utilize MAGI-in-the-cloud engine to assess and verify eligibility for financial assistance, and look to Maine for guidance on source authority.

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- N – doesn't speak towards assessing and verifying MaineCare eligibility via OFI resources and integrations.
- N – indicates they will use an API to leverage the State's ACES business rules, but doesn't indicate they will develop the API.
- I – indicates they would re-route applications to ACES for completeness.
- I - indicates they are able to pull the data from the Medicaid system to make an APTC/CSR determination, but doesn't describe how.
- Document Management System utilizes Dublin Core Metadata Initiative (DCMI) core elements, encoding syntaxes and usage guidelines for document metadata. The DCMI Core Element set is an ISO standard: ISO 15836-1:2017
- I - capable of designating the OFI system as a trusted system, bypassing Remote Identity Proofing (RIDP) and Verify for Lawful Presence (VLP) from the FDSH.

- **All the below are related to A.4:**

- Agreement on all of these

- **All the below are related to A.5:**

- P – solution is already compliant.
- P – configuration screen example in pg.103
- P – experience in delivering a solution with minimal disruption to the Medicaid system and without requiring any customizations.

- **All the below are related to A.6:**

- Recommends a staggered data migration process
- Proposes to work with the Maine Marketplace and CMS to identify the amount of time that CMS will take to produce ticket data.
- Proposes an approval required by the Maine Marketplace

- **All the below are related to A.7:**

- Recommends out of box functionality and will work to deliver Maine-specific requirements.
- Offering the "A" Team that built the DCHBX and Massachusetts Health Connector for Business SBM solutions.

C. Coordination and Collaboration between Project 1 and Project 2

- P – Success in collaboration
- N – did not state how they would collaborate for this project specifically.

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EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none"> • I – offered to use current call center for MaineCare population. • Q – unsure if the above references OFI or OMS call centers.
D. Technical and Security Requirements
<ul style="list-style-type: none"> • P - Will comply, and already meets some requirements. • P - Will utilize AWS Web Application Firewall (WAF) service in the Load Balancer to enable geo-blocking. • P – Pg. 124 standard practice to update documentation as new features and enhancements are introduced into the system
E. Document Repository Requirements
<ul style="list-style-type: none"> • Utilizes Amazon’s Simple Storage Service (S3) as a backing store combined with S3 Glacier • N – OID instead of OIT on top of pg.129
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Will develop a System Support Plan with the Department. • P - utilize zero-downtime deployments to migrate code to ensure maximum uptime • P - utilize redundant application and database servers, allows patches/upgrades, routine maintenance performed, and configuration changes without bringing down the system.
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • N - Visuals do not meet the RFP requirements. • P – narrative describes what components plan to be utilized, and what tools are utilized, what the benefits of using them are.
3. Staffing
<ul style="list-style-type: none"> • Met all requirements.
4. Implementation- Work Plan
<ul style="list-style-type: none"> • Q – Gantt chart on DDI Phase 1 till November 2021 • Q – ACES Integration complete by end of April. • N – visual on Pg. 182 and 183 unclear.

**STATE OF MAINE
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RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: IdeaCrew

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • Strong SBM implementation experience (MA, DC HBE, SBE modernization for CO, premium billing conceptual design for VT, OR use of checkbooks plan comparison tool, HRA calculator 2019 for State SBM use) • Reflects experience with short duration implementations • Organization clear commitment and focus on SBM market/model
2. Subcontractors
<ul style="list-style-type: none"> • Consumers Checkbook proposed for decision support services/tools – a plus for the SBM overall model
3. Organizational Chart
<ul style="list-style-type: none"> • Solid, sensible high-level organizational view with roles and responsibilities noted
4. Litigation
<ul style="list-style-type: none"> • None in past 5 years
5. Financial Viability
<ul style="list-style-type: none"> • No financial concerns
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met requirement

**STATE OF MAINE
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RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: IdeaCrew

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • Platform stands on strong architecture and meets core functional/feature needs • Like that the anonymous pre-screener of eligibility transitions to “next steps” • Strong renewal ‘dry run’ model outlined to reduce errors • Strong platform integration with Checkbook decision support tools • SHOP functionality – can turn on “full robust” model or slimmed down version for the State • Proven EDI experience with carriers and FDSH • Solid security compliance posture • Appreciate proactive identification of unique OEP 2021 play year considerations • Committed to OEP 2021 & 2022 enhancements
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Ready to support data migration with P2 vendor (e.g. - worked with Maximus in DC) • Broad experience collaborating with multiple parties on initiatives
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Strong commitment to comply with State OIT policies though somewhat light on details as to approach and existing practices to do so
E. Document Repository Requirements
<ul style="list-style-type: none"> • Met requirement
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Solid monitoring protocols including alerts • Good model for limiting system downtime through redundant apps and DB services to support patching, upgrades, maintenance and configuration changes • Utilize multiple, isolated AWS data centers to support high availability and resilience of the platform

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EVALUATOR DEPARTMENT: DHHS

2. Architecture Diagram and Narrative
<ul style="list-style-type: none">• Solid, clear diagram and narrative
3. Staffing
<ul style="list-style-type: none">• Good outline of key roles and description of accountabilities• Liked that SBM specific experience required for all roles• Strong proposed team for Maine project with lots of SBM prior project experience
4. Implementation- Work Plan
<ul style="list-style-type: none">• Solid project view presented including noting party(s) accountable for key project tasks

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: New Fields Tech

DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• N: Just two states: MD, CT• N: Created in 2017-18. Relatively young. High DDI risk• P: CIO 100 Awards in 2019, 2020
2. Subcontractors
<ul style="list-style-type: none">• N: Two small subcontractors
3. Organizational Chart
<ul style="list-style-type: none">• N: No apparent logic in the distribution of labor between the principal and the subcontractors
4. Litigation
<ul style="list-style-type: none">• P: None
5. Financial Viability
<ul style="list-style-type: none">• N: Small company
6. Certificate of Insurance
<ul style="list-style-type: none">• P: Meets

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DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • P: Pure SaaS (Single Point-of-Accountability), back-ended on AWS-Gov • P: Explicitly vouches compliance w/ MARS-E 2.0, IRS 1075, HIPAA, HITECH • P: Mobile-first Design. 70% mobile adoption. Enables push notifications. • P: Configurable look-and-feel, functionality • N: Covers all use cases, but no actual screen shots • P: Anonymous Pre-screener, plus Authenticated Screener • P: Strong EDI Portfolio • P: Demonstrates understanding of the complexity of the ACES-SBM interfacing
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • P: Willing to work w/ any P2-provider. Provides basic viability architecture, including the “Consumer Portal” • P: Allows external CRM integration • P: Built-in CRM (“Worker Portal”) appears to be adequate. However, not a full-fledged CRM.
D. Technical and Security Requirements
<ul style="list-style-type: none"> • N: No mention of the specified OIT policies • P: Industry-standard Architecture • N: Not clear if Single Tenant. • N: Incomplete Security model. Even though addresses specified audits, as well as Identity and Access Management, is, nonetheless, silent on, say, Vulnerability Management. • N: Did not respond to RPO, RTO, Disaster Recovery • N: Did not respond to the SOC 2 Type 2 requirement
E. Document Repository Requirements
<ul style="list-style-type: none"> • P: Stored in the NoSQL DB
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • N: No Operations & Maintenance Plan
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • P: Credible Architecture Diagram • N: Architecture narrative diffused throughout the doc. Ultimately, it is all there. But, the RFP strictly asks for an Architecture Narrative section, and that is missing.

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EVALUATOR DEPARTMENT: MaineIT

3. Staffing
• P: Credible Bench
4. Implementation- Work Plan
• P: Credible Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: New Fields Technologies LLC

DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • Provides end-to-end architecture, design, and development of complicated software systems, management of complex projects, creation of technical documents (p4) • Focused on state governments and health insurance exchanges (p5) • Included description of project within the past 5 years with Maryland and Connecticut (p8)
2. Subcontractors
<ul style="list-style-type: none"> • Relies on 2 listed subcontractors: Global Alliant and SM Tech Solutions (p12)
3. Organizational Chart
<ul style="list-style-type: none"> • Provided the required org chart (p14)
4. Litigation
<ul style="list-style-type: none"> • Indicated none past or current (p18)
5. Financial Viability
<ul style="list-style-type: none"> • Complete financial statements provided for 2016 and 2017 (p23) • Income statement provided for 2018 (p29) • Balance sheet for year ended December 31, 2011 was also provided (p30) • Unable to comment on fundamentals for 2019 since financials for that period were not provided • Demonstrates profitability for the years 2016, 2017, and 2018 • Did not include the required Dun & Bradstreet report
6. Certificate of Insurance
<ul style="list-style-type: none"> • Included required certificate (p32)

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INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: New Fields Technologies LLC

DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • Proposing an independent cloud hosted solution (p2) • Modular and flexible platform (p3) • Includes identity and access management system (p8) • Includes anonymous pre-screening (p9) • Cites eligibility engines in use in Connecticut and Maryland (p10) • Includes consumer portal and other role-based portals for stakeholders (p18) • Includes electronic reporting to IRS and CMS (p22) • Platform features a mobile app (p24) •
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Limited discussion of coordination and collaboration between project 1 and project 2
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Missing discussion around compliance with the State’s OIT policies, standards, and procedures
E. Document Repository Requirements
<ul style="list-style-type: none"> • Included in system support services (p58)
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Missing discussion of the specific operations and maintenance requirements detailed in the RFP
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Provided architecture diagram and narrative (p54)
3. Staffing
<ul style="list-style-type: none"> • Included staff job descriptions and resumes (p65)
4. Implementation- Work Plan
<ul style="list-style-type: none"> • Provided work plan with project timeline (p123)

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RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: New Fields Technologies

DATE: 11/21/2020

EVALUATOR NAME: Megan Garratt-Reed

EVALUATOR DEPARTMENT: Commissioner’s Office, DHHS

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • Q: is this a full SBM solution? Or modernization? • Q: what does “only truly digital HIX platform” mean? (p. 2) • N: second MHBE example doesn’t seem like it is really independent of the first? Especially since we are not requesting a mobile app.
2. Subcontractors
<ul style="list-style-type: none"> • Q: no address or phone for SM Tech Solutions?
3. Organizational Chart
<ul style="list-style-type: none"> • Q: bringing on MHBE Advisers? Does that mean core planned team don’t have SBE experience? (flagged by JH) • N: confused about relationship between subcontractors and organization chart. One subcontractor is PMO and QA for MHBE, but is Business Lead here. • N: Special Adviser has no SBM experience or even health services experience described.
4. Litigation
<ul style="list-style-type: none"> • P: none.
5. Financial Viability
<ul style="list-style-type: none"> • Q: financial statements from 2016, 2017, 2018 and 2011?
6. Certificate of Insurance
<ul style="list-style-type: none"> •

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DATE: 11/21/2020

EVALUATOR NAME: Megan Garratt-Reed

EVALUATOR DEPARTMENT: Commissioner’s Office, DHHS

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • I: integrated marketing portal (p. 4) • P: FDSH simulator (p. 15) • N: not clear that prior experience with direct FDSH connections exists – possibly only with proxy services to state Medicaid agencies? • N: Says FDSH connection will be via the “Department of Welfare and Social Services” even though we specifically include an independent FDSH connection as an element of our model. (p. 45) •
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Missing?
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Missing?
E. Document Repository Requirements
<ul style="list-style-type: none"> • Missing?
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Missing?
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> •
3. Staffing
<ul style="list-style-type: none"> • Special Advisor has no SBM experience noted. (p. 67)
4. Implementation- Work Plan
<ul style="list-style-type: none"> •

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: New Fields Technologies LLC

DATE: 11/20/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • P – Implemented the Individual HIX platform for Maryland Health Benefit Exchange (MHBE) This platform has been recognized by the CIO 100 award in 2019 and 2020. • I - Leading the Universal Health Information Network (UNHIN) initiative, which is implementing a global patient centric internet for health information • I - Modernized and re-implemented the MHBE platform on open source technologies and Cloud infrastructure, and introduced a Mobile App. • P – current support provider for MHBE, and has had 5 successful open enrollments. • P - Architected and designed Mobile Enrollment for AHCT (Connecticut's official Health Insurance Marketplace), the first national mobile integrated eligibility enrollment service for health insurance • P - Provided AHCT with 1095A, CMS/IRS reporting and policy-based payment support since 2016 • P – Several awards for MHBE and AHCT
2. Subcontractors
<ul style="list-style-type: none"> • Proposes Global Alliant Inc. who currently support the MHBE production systems. • Proposes SM Tech Solutions LLC – provides project management and quality assurance.
3. Organizational Chart
<ul style="list-style-type: none"> • Met and clear and easily understood. • Additional note indication they will bring in senior advisors from MHBE and AHCT.
4. Litigation
<ul style="list-style-type: none"> • None

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: New Fields Technologies LLC

DATE: 11/20/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

5. Financial Viability
<ul style="list-style-type: none"> Q – did they meet this criteria? Seems like only portions were provided of the D&B, and only provided balance sheets?
6. Certificate of Insurance
<ul style="list-style-type: none"> Provided, dated 11/18/2020

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> All the below are related to A.1: Proposing the MHBE platform as an independent cloud hosted solution I - AHCT technology platform was migrated to MHBE in 2014 P – The platform, between AHCT and MHBE has supported 12 successful open enrollments and unique in that it supports Medicaid customers along with health insurance customers I - no licensing fees; developed and maintained with federal funding so the software is available without any licensing fees P - includes a comprehensive mobile application platform available in the App Store and Play Store I - Millennials and the Medicaid churn population are highly reliant on their phones, and Maryland sees a 70% usage rate for the mobile app. User Authentication/Authorization - utilizes a state-of-the-art identity and access management (IAM) system. All users are authenticated by the IAM system, access based on the role-based access control (RBAC). Prescreening is available. Plan comparison is available. Marketplace eligibility determination – Has its own rules engine currently, meeting all federal requirements and is configurable. N – noted they could integrate with the DHHS/OFI provided API, instead of committing to build it. Support Tools: Provided a list of 7 main support tools. Individual Qualified Health Plan (QHP) - implements the “Single Streamlined Application” (SSA) for consumers to apply for and enroll

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: DHHS/OFI

- SHOP: developed a full-featured State Based SHOP platform, integrated with the MHBE Individual platform: low cost to manage and provides consistent branding and services to consumers.
- Q – indicated the SHOP platform is going live in December 2019
- Simulated Transactions: periodic testing of transaction times in a controlled environment via performance testing, and for releases.
- I - provides real time reporting on transaction times opposed to relying on periodic testing.
- Verification of Special Enrollment Period - handles permutations and combinations related to reporting changes and special enrollment period applications
- Data Persistence: utilizes open source relational database system
- I – no visual depiction of data persistence or flow
- Applications: Can support all versions
- P - Document management: includes an integrated document-based workflow processing engine and utilizes a highly scalable NoSQL data storage engine to scale to hundreds of terabytes of content storage with no slowdown or performance impact
- P - Electronic Data Interchange (EDI): provides best-in-class, flexible integration capabilities with a Digital HIX API, indicate it's the only platform nationally to implement such an API.
- I – noted not in this section but on Pg 51 (browser view - BV) Authorization to Connect to the Federal Hub will not be required for the ME SBM since it requires re-use of the existing connectivity
- P - capable of addressing any customized needs of EDI the State of Maine needs.
- I - The Exchange also needs a team that understands integrated eligibility and Medicaid/CHIP eligibility and processing.
- N – repetition on pg. 20, and throughout some prior areas.
- I - their solution includes a FDSH simulator
- Plan Preview: provides a full-featured Plan Management Portal (PMP)
- Consumer Messaging: generated notices are saved to the NoSQL content management system in PDF format
- I - Notices to a specific consumer are collated and transported to a secure file transfer site for the printing/scanning vendor chosen by the exchange.
- Consumer Portal: meets and provided a summarized list of functions.
- Portal access for non-consumer parties - meets

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

- Appeals: meets and Worker Portal allows workers with appropriate level of access to review and override eligibility results as required to handle appeals
- I - CRM: supports services-based integration with specialized CRM platforms such as Salesforce (in Maryland) and Oracle CRM (Connecticut)
- I - Carrier Reconciliation – focused on data discrepancies
- P – best in class reporting the IRS
- Meets all MARS-E 2.0 security requirements already.
- Chat is supported – “Ask Flora” as branded in Maryland.

- General note – the proposal doesn’t follow RFP format well after this section and gets increasingly repetitive.

- **All the below are related to A.2: Configure the platform**
- Partner closely with ME SBM
- Pg.53 (BV) provides a list of configurations it will support.

- **All the below are related to A.3: Provide additional functionality**
- Agrees to provide
- I – indicates they would transmit applications to State MMIS for completeness.
- Plans to mirror the current integration model between DHHS and the federal platform to integrate our platform with DHHS via the account transfer service
- Utilizes MongoDB for Content Mgmt.

- **All the below are related to A.4:**
- Agreed to provide
- P – graphic on pg. 54 (BV)

- **All the below are related to A.5:**
- Agreed to fully comply
- Solution is fully compliant with these regulations

- **All the below are related to A.6:**
- Plans to utilize secure RESTful API
- Addressed on pg.129 (BV)
- Commits to develop a detailed Project Plan for Technology Platform Phases One and Two

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none"> • All the below are related to A.7: • Discussed on page 52 of the browser view, and then more details on 131 • Out of box functionality with only minor policy-based updates. • I – indicates the ME SBM team’s to conduct training and demonstrations, as well as carrier walkthroughs. • I - ME SBM team to conduct User Acceptance Testing using real-time connectivity with the Federal Data Services Hub for verification
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • N - Could not find where this was addressed
D. Technical and Security Requirements
<ul style="list-style-type: none"> • N - Could not find where data would remain the continental U.S.
E. Document Repository Requirements
<ul style="list-style-type: none"> • Found on Pg. 64 (BV) and not specific to all RFP requirements.
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Found on Pg.131 (BV) the following: ME SBE Team and the consumer assistance center vendor, to develop a detailed Technology Platform Annual Work Cycle Plan for ongoing maintenance and operations.
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Found on Pg.54 an diagram • Rest of this information is throughout the proposal.
3. Staffing
<ul style="list-style-type: none"> • Pg. 71 (BV) • N - Resume format was not ideal.
4. Implementation- Work Plan
<ul style="list-style-type: none"> • Pg.130 (BV)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: New Fields Technologies

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • Solid experience working with States on healthcare/HIX needs though no front-to-back SBM implementations other than the rearchitecting and relaunching the MD HBE • Some targeted projects for the CT Access Health solution • Heavy emphasis on mobile application solution
2. Subcontractors
<ul style="list-style-type: none"> • Global Alliant – technology services • SM Tech Solutions – PMO & QA services
3. Organizational Chart
<ul style="list-style-type: none"> • Met requirement
4. Litigation
<ul style="list-style-type: none"> • None
5. Financial Viability
<ul style="list-style-type: none"> • Financial details for 2016, 2017 and some of 2018 – did not provide more recent financials • No D&B report provided as requested
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met requirement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: New Fields Technologies

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
• SaaS solution positive; overall platform architecturally seems sound
• Mobile push notification feature a plus
• Provides CRM and worker portal functionality
• Did not reference Clear Choice Design for Small business decision-support in response
• Good outline regarding how platform aligns to MITA-compliance requirements
C. Coordination and Collaboration between Project 1 and Project 2
• Missed in response
D. Technical and Security Requirements
• Missed in response
E. Document Repository Requirements
• Missed in response
F. Operations and Maintenance Requirements
• Missed in response
2. Architecture Diagram and Narrative
• Good presentation with details
3. Staffing
• Missed providing job descriptions with minimum qualifications
• Missed providing capacity projection
• Specific proposed staff strong on MD SBM project experience
4. Implementation- Work Plan
• Response lacked detail

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Optum

DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • P: Builder of FDSH • P: “Takeover”: MA, VT, MD • P: AK-SHOP, NM-SHOP • P: Reference: Colorado • P: Lot of experience. Stable product. Low DDI risk.
2. Subcontractors
<ul style="list-style-type: none"> • N: One subcontractor. Critical for success.
3. Organizational Chart
<ul style="list-style-type: none"> • P: Credible
4. Litigation
<ul style="list-style-type: none"> • P: None directly related, but, lots of legal disclaimer
5. Financial Viability
<ul style="list-style-type: none"> • N: Behemoth company
6. Certificate of Insurance
<ul style="list-style-type: none"> • P: Meets

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Optum

DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • P: Pure SaaS (Single Point-of-Accountability) • P: Explicitly vouches compliance w/ MARS-E 2.0, IRS 1075, HIPAA, HITECH • P: Industry-Standard Identity & Access Management • P: Anonymous Pre-screener, plus Authenticated Screener • P: Strong EDI Portfolio. Extensive Web Services bench. • P: Strong, multi-channel consumer messaging • P: Covers all use cases, w/ actual screen-shots • N: Responsive Web, as opposed to Native Mobile App • P: Demonstrates understanding of the complexity of the ACES-SBM interfacing
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • P: Leverages Salesforce CRM • P: Willing to work w/ a different P2-provider
D. Technical and Security Requirements
<ul style="list-style-type: none"> • P: Individual, mature responses to the listed OIT policies • P: Industry-standard Architecture • P: Single Tenant • P: Mature Security Model • P: Mature DR Model • P: Mature understanding of SOC 2 Type 2
E. Document Repository Requirements
<ul style="list-style-type: none"> • P: Microsoft SharePoint. Mature model.
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • P: Mature model
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • P: Superb Architecture Diagram • P: Superb Architecture Narrative
3. Staffing
<ul style="list-style-type: none"> • P: Robust Bench
4. Implementation- Work Plan
<ul style="list-style-type: none"> • P: Robust Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: OptumInsight, Inc. dba Optum

DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • P – incorporated in 1993 (p5) • Has served various state governments for 10+ years (p6) • P -Oversaw the stabilization and implementation of HealthCare.gov for CMS (p6) • P - Assumed the role of general contractor to fix the troubled roll-out of the federal portal and system (p6) • P – Assisted various other states with similar trouble roll-outs of state-based marketplaces (p6) • P – currently supports 36 state exchanges (p6) • Optum is part of UnitedHealth Group (parent corporation) (p8) • Provided description of project within the past 5 years demonstrating similar work and experience with 3 other states (p12)
2. Subcontractors
<ul style="list-style-type: none"> • NFP Health has been in benefits administration for 50 years (p19) • NFP Health has run an online multi-carrier, multi-product benefits marketplace (HSAInsurance.com) since 1998 (p19)
3. Organizational Chart
<ul style="list-style-type: none"> • Org chart provided
4. Litigation
<ul style="list-style-type: none"> • None within 5 years resulting in settlement or court decree involving the payment of monies that relate to the products or services in the proposal (p22)
5. Financial Viability
<ul style="list-style-type: none"> • Provided 3 years of financial statements and Dun and Bradstreet report • Financial statements demonstrate the company’s ability to meet short-term and long-term obligations

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

<ul style="list-style-type: none"> • Financial statements demonstrate company’s consistent and stable profitability • Dun and Bradstreet indicates low risk of delinquency and financial stress
6. Certificate of Insurance
<ul style="list-style-type: none"> • Included required certificate of insurance (p342)

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
<p>A. Project 1 – Marketplace Technology Platform</p> <ul style="list-style-type: none"> • Includes user authentication (p1) • Include anonymous pre-screening of eligibility (p1) • Includes plan comparison (p4) • System includes eligibility determination (p6) • Includes auto reenrollment (p6) • Data is persisted (p17) • Supports electronic, telephonic, and paper applications (p17) • Built-in capability to interact with Federal Data Services Hub (p19) • Includes online complaint filing (p30) • Includes different portals for various stakeholders (p35) • Uses Salesforce CRM (p36) • Accounting is handled by the NFP Health Platform (p37) • Provides small business decision support tool (p49) • WebInsure system is an ecosystem of interacting independent services with clear demarcation of boundaries and dependencies (p56) • Provided discussion on three phased approach for the construction of the platform (p58) •
<p>C. Coordination and Collaboration between Project 1 and Project 2</p> <ul style="list-style-type: none"> •
<p>D. Technical and Security Requirements</p> <ul style="list-style-type: none"> • Outlined plan to comply with State’s OIT policies, standards, and procedures (p75) • Provides backup, recovery, and disaster recovery services (p90)

**STATE OF MAINE
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DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

E. Document Repository Requirements
• Optum will establish a SharePoint document repository (p94)
F. Operations and Maintenance Requirements
• Provides dedicated staff for Operations and Maintenance requirements (p97)
2. Architecture Diagram and Narrative
• Provided the required architecture diagram and narrative (p111)
3. Staffing
• Included required job descriptions (p127)
• Included required staff resumes (p135)
• Describes the role of sub-contractor (NFP Health) in the organization (p152)
4. Implementation- Work Plan
• Provided work plan with project timeline (p156)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Optum

DATE: 11/21/2020

EVALUATOR NAME: Megan Garratt-Reed

EVALUATOR DEPARTMENT: Commissioner’s Office, DHHS

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • I: previous FFM data migration limited to SHOP. (p. 7) • P: significant experience with complex SBM-Medicaid integration project in MA (p. 9-10) • I: CO project sounds like it might be closest to full end-to-end product. Otherwise, not a lot of evidence of a proven solution to offer.
2. Subcontractors
<ul style="list-style-type: none"> • Not totally clear to me the role that subcontractor plays. EDI with carriers only?
3. Organizational Chart
<ul style="list-style-type: none"> • Q: surprised project manager isn’t key staff? (p. 3 of App E)
4. Litigation
<ul style="list-style-type: none"> • Q: Answer sufficient?
5. Financial Viability
<ul style="list-style-type: none"> •
6. Certificate of Insurance
<ul style="list-style-type: none"> •

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Optum

DATE: 11/21/2020

EVALUATOR NAME: Megan Garratt-Reed

EVALUATOR DEPARTMENT: Commissioner’s Office, DHHS

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • Q: Confused about third party vendor’s role in formulary lookup and OOP calculator? Is this included? Don’t believe a relevant subcontractor was named. (p. 11) • N/Q: Believe SHOP subsidy eligibility calculation is also required, but isn’t mentioned here? (p.16) • P: configurability of data verification requirements for SEP (p. 16) • P: appreciate specificity of carrier interaction plan (p. 18) • P: previous experience with direct FDSH connection (p. 20) • P: continuous reconciliation (p.39) • Q/N: seems to focus primarily on cosmetic differences. Unclear if “custom development” is included in the scope or not. • P: existing Medicaid determination capability • N: don’t feel that the Clear Choice (standardized plan) Design display was fully understood/addressed. (p. 48) • N: doesn’t seem to include full range of functionality – seems like a tool for modeling group coverage financial contributions, but not comparing those to ICHRA/QSHERA or Medicaid options?
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • I: utilizing a subcontractor-like agreement with the Project 2 vendor – helps address responsibility but assumes Project 2 vendor will be amendable? • P: appreciate clearly expressed plan for interaction
D. Technical and Security Requirements
•
E. Document Repository Requirements
•
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • N: concerned about language re: negotiating SLAs, especially desire for a grace period for OE go-live.
2. Architecture Diagram and Narrative
•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Megan Garratt-Reed

EVALUATOR DEPARTMENT: Commissioner’s Office, DHHS

3. Staffing <ul style="list-style-type: none">• N: concerned that for several senior roles, required experience is HHS or SBM – would like senior team members to have prior SBM experience.• P: appreciate that implementation manager has experience with two SBMs. (p. 139)• Q: Implementation Manager is currently pursuing an MBA? (p. 139)
4. Implementation- Work Plan <ul style="list-style-type: none">•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Optum Insight

DATE: 11/21/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
<ul style="list-style-type: none">• Overview of the Organization• Did not provide a brief description of qualifications.• I - They were responsible for overseeing and stabilizing the implementation of HealthCare.gov for CMS (Centers for Medicare & Medicaid Services).• I – They developed and implemented the FDSH (Federal Data Services Hub)• I – Helped 5 states with their exchange, and eligibility and enrollment.• P – 3 states (Mass, Vermont and Maryland) they conducted a take-over of the SBM in less than 2 months.• P – replaced the Massachusetts Commonwealth's failed SBM in a six-month period.• P – recognized for pioneering use of intelligent automation: IT as a Service (ITaaS), and Business Process as a Service (BPaaS) platforms and tools• WebInsure Health Insurance Exchange is a flagship product provided by Optum's subsidiary, hCentive• P - nation's leader in exchanges, currently supporting 36 states• WebInsure Data Exchange Manager technology; a middleware to send and receive electronic data interchange (EDI) transactions to and from an exchange and the carriers' systems.• P - 26 years of combined ACA, E&E, exchange, and HHS experience.• 2015: selected as vendor for Arkansas SHOP Exchange• Currently provides DDI and M&O to Massachusetts Health Connector health insurance exchange (HIE).• Provides M&O and hosting to Vermont Health Connect HIE.• Utilizes the WebInsure solution for the Connect for Health Colorado HIE, implemented in 2013 and still in use. This model uses a "no wrong door" and has a two-way, real-time connection with the E&E system.

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DATE: 11/21/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none"> • Subcontractors
<ul style="list-style-type: none"> • NFP Health Services Administrators – benefits administration, and runs HSAInsurance.com, and a call center
<ul style="list-style-type: none"> • Organizational Chart
<ul style="list-style-type: none"> • Provided 2 organizational charts, one for DDI and one for M&O. • Project is in the page header.
<ul style="list-style-type: none"> • Litigation
<ul style="list-style-type: none"> • None currently
<ul style="list-style-type: none"> • Financial Viability
<ul style="list-style-type: none"> • Audited financials start on pg. 24 (browser view = BV) • Dun and Bradstreet – pg. 328 (BV)
<ul style="list-style-type: none"> • Certificate of Insurance
<ul style="list-style-type: none"> • Provided – dates 11/5/2020

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • All the below are related to A.1: • Refer to Service Level agreement at Part II.F (O&M Requirements) • Propose to use WebInsure.cloud-based portions of the solution, Optum aligns with Amazon Web Services (AWS) and Salesforce Government Cloud to host solution components based within the continental United States. • Authentication: WebInsure can integrate with any tool or service for Authentication and is required for specific portions of the tool, they include OptumID. • Prescreening: requests only a limited set of questions to determine results, and the provided figures are helpful visuals. • Plan Comparison: Has a wide array of comparison tools, adjustable to state-specific requirements, or exchange preferences. Also does anonymous. • Includes out of pocket cost calculator and provided a visual. • Marketplace eligibility determination: can calculate APTC by leveraging their internal APTC calculator instead of FDSH services if desired.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Optum Insight

DATE: 11/21/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

- WebInsure includes fully passive annual eligibility redeterminations for QHP's, Medicaid and CHIP.
- Provided a detailed list for the redetermination process.
- WebInsure already utilizes multiple trusted data sources from the SSA, IRS, FDSH.
- P – provided income as an example to reduce churn in the population.
- Provider Directory: WebInsure includes a Decision Support Tool for anonymous and logged in use.
- Integrates with a third-party vendor to get provider and facilities data, example provided.
- Coordinated and integrated (RFP A.1.e): shares information on a real-time basis, reducing burden on consumers. Detailed list of system rules.
- Configurable interfaces
- I – QHP section: consumers often want to enroll in an SADP without enrolling in the QHP plans, they can make this configurable based on the Exchanges's policy.
- SHOP: Meets mins and will re-direct to carrier's.
- Periodic Testing: includes load testing via Jmeter. Otherwise uses APM tool monitoring. Agrees to meet SLA requirements.
- Verification of Special Enrollment Period: provided a list for the general process
- Data Persistence: all data, via all portals is persisted back to a relational DB. Outbound files, notices and reports persists in network storage.
- Applications: can process all types
- Document Mgmt: has this capability and can be integrated. Their repository includes all essential documents necessary for FDSH connectivity if needed.
- P - EDI: Very descriptive in this section. Noted they have upgraded their capabilities to meet nuanced requirements of a dozen different solutions, including the FFM.
- EDI module includes a transaction queue: lines up required deliveries during the day and a batch process extracts XML from the db and delivers it to the EDI translator for final delivery.
- FDSH: built in capability. Verifies application data real-time, and issues document requests for those elements that could not be verified. Provided a list FDSH integrations.
- Consumer Messaging: supports all versions requested. Provided a description of notification groupings.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

- P - The service also looks for any special accommodations, such as large text size or to indicate to the print vendor that the notice must be printed in braille.
- SBM Consumer Portal: allows various document types to be uploaded.
- P - Includes a “What I need to do” section for the client.
- Portal Access: solution supports 5 different portals; Individual, Back-Office, Assistor, Broker and Plan Management.
- CRM: Customer Relations Management system is on Salesforce and includes live chat.
- Accounting: proposes NFP’s Health Platform. Includes “Continuous reconciliation” including daily, weekly and monthly reconciliations.
- P – NFP was able to cut reconciliation discrepancies by more than 80% in six months.
- P - 1095’s – after generations, they go through an internal quality control process.
- P – knowledgeable in ATC processes and POA&M (plan of action and milestones) processes.

- **All the below are related to A.2:** Configure the platform
- Ability to add State-specific banners, includes state branding.
- Can integrate with Decision Support Systems.
- I - for November 1, 2021, applicable federal and State laws need to be released and provided to Optum no later than April 1, 2021

- **All the below are related to A.3:** Provide additional functionality
- I - custom development is required for SBM and in OFI for the enhanced integration to work end-to-end. OFI’s commitment and continued support for this project will be vital to the success of the enhanced functionality implementation.
- I - When a change in MaineCare eligibility, OFI will communicate that decision to the Marketplace through APIs
- I - The system will use Account Transfer APIs to integrate with the OFI and leverage ACES business rules
- I - OFI will need to point existing Account Transfer endpoint to the new solution.
 - Q - real-time updates/reconciliation of benefits

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• P - commitment will be to have parity with FFM for Account Transfer so that no changes are required in the OFI system other than the Account Transfer toolkit changes noted by CMS when a state transition.• P - OFI will need to send the eligibility data to WebInsure instead of FFM with no changes in format.• Employer “What if” modeling. • All the below are related to A.4:• I - will require custom development in partnership with OFI for integrated end-to-end functionality, and very critical for OFI to remain fully committed in this project for the success of the enhanced functionality implementation.• I – recognize that State’s departments have additional data capturing needs for determination. Product comes with a framework to add specific questions dynamically.• I – anticipate 2 additional secondary interfaces: income and prison. • All the below are related to A.5:• Will comply if not already complied. • All the below are related to A.6:• Has a built-in migration tool-kit. • All the below are related to A.7:• PM will work with DHHS and OIT to align the project schedule with our recommended approach, and will create a comprehensive Project Management Plan• Expects contract to be completed Dec 7th and DDI Stage to begin Jan 4th.• Comprehensive overall answer to the phases required.• Approach to M&O is to apply specific team, that will meet SLA requirements<ul style="list-style-type: none">○ This also applies to Section F.
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none">• P – Success in collaboration• Approach - clear and efficient communications and with a similar agreement as to how they approach Subcontractors (same way as Optum personnel), provided a flow diagram.
D. Technical and Security Requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

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DATE: 11/21/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none"> • Solution designed to comply with the current version of applicable State and federal laws, rules, and regulations. • I - Additional State or Department policies, standards, guidelines, and procedures will be implemented where possible • Performs Section 508 compliance reviews on externally facing portal interfaces • Public cloud: managed and implemented through a strictly controlled, automated build and deployment process. Cloud providers will flow-down their service levels, and these will be provided to Maine upon request • Commits that resources not located within the Continental US will not have access to the Department’s confidential data (where confidential data is defined as any personally identifiable information including Federal Tax Information and Personal Health Information) at any point during the project. • All environments are within data centers in the continental United States • Benefit to hosting WebInsure on a cloud IaaS is ensured backup, failover and disaster recovery.
E. Document Repository Requirements
<ul style="list-style-type: none"> • Will establish a SharePoint document repository to store and manage deliverables and work products • Work with for mutual agreement on formatting/structure.
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • I - Service Level Agreements (SLAs), we’d like to discuss as part of negotiations, the ability to earn back credits when we successfully meet SLA metrics for a continuous period of time, the concept of excused performance, and a grace period after open enrollment go-live. • Will produce and deliver an Operations and Maintenance Plan • I - Oracle Database 19c
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Provided 2 diagrams: 1st was “solution summary” and the 2nd was WebInsure cloud hosted environments. • Written in Java, and based on SOA principles. • Ecosystem of interacting services that are maintained independently from one other. • No major shortcomings. • Discusses Optum ID
3. Staffing
<ul style="list-style-type: none"> • Resumes of 4 individuals. • DDI staffing plan of approximately 27 distinct roles at differing percentages.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• 13 different roles and differing percentages for M&O
4. Implementation- Work Plan
<ul style="list-style-type: none">• Provided and noted: To successfully meet the project schedule, a mutually agreed to contract must be executed by the parties 15 business days prior to project start date, team must have a project start date no later than January 4th, 2021.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Optum

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • Strong overall healthcare solution experience (ACA, HIX) • Oversaw stabilization of CMS Healthcare.Gov and development of FDSH • SBM experience in some capacity (e.g. -MA, VT, MD) • Some targeted projects for the CT Access Health solution
2. Subcontractors
<ul style="list-style-type: none"> • NFP Health Services – EDI expertise
3. Organizational Chart
<ul style="list-style-type: none"> • Met requirement – appreciated both the DDI and M&O org views
4. Litigation
<ul style="list-style-type: none"> • Met requirement – no concerns
5. Financial Viability
<ul style="list-style-type: none"> • Strong financial organization
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met requirement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Optum

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • Solution appears to have good overall user flow • Overall platform architecture is current and sound • Plan comparison views positive with filtering and advanced search features • Strong EDI experience exemplified by working with 2 dozen carriers and 2 decades of experience in collaboration with sub-contractor • Existing connects to trusted data sources (FDSH, RRV-SSA) • Not detailed in response re: decision support tools • Noted accounting is the “most crucial factor in a successful project of this magnitude” – while important, not sure it’s the most crucial factor • Caveated response to OEP 2021 & 2022 enhancement requirements with clear limits and parameters that must be met
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Response reflected commitment to coordination and collaboration and reflected vast prior experience doing so across multiple entities in various projects
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Strong outline of organization’s technical and security practices (e.g. – 508 Accessibility) • Did not detail alignment of those practices State OIT policy by policy and caveated response by saying “will act in accordance with additional State policies where possible”)
E. Document Repository Requirements
<ul style="list-style-type: none"> • Sharepoint proposed which is positive in that it is a tool the State is familiar with
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Strong O&M framework depicted • Good detail on Incident priority levels, definition and approach to managing; additionally, good outline of change management and control board approach • Solid monitoring protocols

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: DHHS

2. Architecture Diagram and Narrative
<ul style="list-style-type: none">• Solid diagram and presentation with details
3. Staffing
<ul style="list-style-type: none">• Would have liked more SBM-specific experience reflected in minimum qualifications in job descriptions• 3 years of PM experience seems light for minimum qualification for lead PM• Appreciated Optum outlined both DDI and M&O roles• Odd that they did not list the PM role as “key”• Light on SBM-specific initiative experience with proposed key staff (other than Implementation Manager)
4. Implementation- Work Plan
<ul style="list-style-type: none">• Appears to be a number of items Optum wishes to discuss relative to eventual contract negotiations• Very precise that contract must be in place 15d in advance of 1/4/21 project start date to meet 11/1/21 OEP date

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: GetInsured

DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • P: NJ, PA, CA, NV, MN, ID, WA • P: Stable tech. Live since 2014. Low DDI risk • P: Claims 70% nationwide SBM customer
2. Subcontractors
<ul style="list-style-type: none"> • P: None. Single point-of-accountability.
3. Organizational Chart
<ul style="list-style-type: none"> • P: Credible
4. Litigation
<ul style="list-style-type: none"> • P: No substantial litigation in the last five years • N: But one isolated contractor lawsuit
5. Financial Viability
<ul style="list-style-type: none"> • P: Medium-sized Company
6. Certificate of Insurance
<ul style="list-style-type: none"> • P: Meets

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: GetInsured

DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • P: Pure SaaS (Single Point-of-Accountability), back-ended on AWS-Gov • P: Explicitly vouches compliance w/ MARS-E 2.0, IRS 1075, HIPAA, HITECH • P: Near 100% renewal across five states • P: Industry-Standard Identity & Access Management • P: Anonymous Pre-screener, plus Authenticated Screener • P: Strong EDI Portfolio • P: Strong, multi-channel consumer messaging • P: Covers all use cases, w/ actual screen-shots • P: Demonstrates understanding of the complexity of the ACES-SBM interfacing
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • P: If GenInsured is chosen for both P1 & P2, then integrated product across P1 & P2. Therefore, coordination & collaboration are built-in. However, willing to work w/ a different P2-provider. Provides basic viability architecture of working w/ a different P2-provider. • P: Built-in CRM
D. Technical and Security Requirements
<ul style="list-style-type: none"> • P: Actually read through the specified OIT policies, and provided responses. Great responses! • P: Industry-standard Architecture • P: Single Tenant • P: Strong Security Model • N: No elaboration on DR • N: Inadequate understanding of SOC 2 Type 2. No mention of recruiting an accounting firm certified by AICPA.
E. Document Repository Requirements
<ul style="list-style-type: none"> • P: AWS-S3. Mature Model.
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • P: Credible Plan
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • P: Strong Architecture Diagram • P: Strong Architecture Narrative
3. Staffing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

<ul style="list-style-type: none">• P: Solid Bench
4. Implementation- Work Plan
<ul style="list-style-type: none">• P: Credible Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Vimo, Inc. dba GetInsured

DATE: 11/19/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • Since 2010, primary market focus has been State-Based Marketplaces, with roster of 7 states – California, Idaho, Washington, Minnesota, Pennsylvania, New Jersey, and Nevada • SaaS platform supports enrollment of 2.6M consumers annually, accounting for 70% of all SBM enrollments • Projects within past 5 years: (1) Nevada transition from FFM to SBM in 2019, (2) MNsure in 2019, (3) New Jersey transition from FFM to SBM in 2020
2. Subcontractors
<ul style="list-style-type: none"> • Indicated as N/A
3. Organizational Chart
<ul style="list-style-type: none"> • Org chart provided, identifying implementation team
4. Litigation
<ul style="list-style-type: none"> • Identified litigation settled in January 2016
5. Financial Viability
<ul style="list-style-type: none"> • 2018 Financial Report is missing the opinion section of the independent auditor’s report • 2018 Financial Report is also missing the balance sheet, income statement, statement of shareholder’s equity, and statement of cash flows, limiting analysis to only 2018 and 2019 financial statements provided in the 2019 report • The company is liquid and solvent in 2018 and 2019 • The company as diversified revenue streams, however state contracts account for a significant portion of their revenue (p84)
6. Certificate of Insurance

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 11/19/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

- | |
|--|
| <ul style="list-style-type: none">Valid certificates provided for general liability, professional liability, and cyber liability |
|--|

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none">Supports user authentication/authorization administered from a remote systemEligibility Pre-Screener is completely anonymousAllows anonymous plan comparisonIncludes marketplace eligibility determination, including determination and verification of (1) Advance Premium Tax Credit eligibility, (2) calculation of cost-sharing reduction subsidies, and renewal (with auto reenrollment)Includes comparison tools – provider directory, formulary lookup, and out-of-pocket cost estimatorHas provided Small Business Health Options Program functionality in Mississippi and New Mexico (p75)Provides data persistence with nightly backup of the database, and real-time stream to the disaster-recovery instance (p81)Handles electronic, telephonic, and paper applications(p82)Processing EDI files since 2005 with well over 25M EDI transactions, and follows the TR3 industry standards for 834 interfacing with carriers (p84)Includes an independent data verification services subsystem to facilitate integration with FDSH (p91)Issuer portal provides preview to issuer representatives of their own plans before they are made available to consumers (p98)Consumer messaging may be delivered via U.S. mail, E-mail, or SMS based on the preference of the user (p101)Consumers are able to establish a password protected account in the Member Portal with the ability to reset the password via self-service and with multi factor authentication (p111)Consumers are able to save an unfinished application to edit at a later time (p115)

**STATE OF MAINE
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DATE: 11/19/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

- Platform includes ability for consumers to upload documents to the portal, triggering a ticket to be created and routed to consumer assistance for verification (p120)
- Provides appeals forms that can be downloaded and submitted through the member portal (p122)
- Filing complaints is currently routed through the consumer assistance call center (p123)
- Provides portal access for various stakeholders – brokers, navigators, assisters, carriers, and Department administrative staff (p144)
- Includes customer relations management and integration with interactive voice response and application status lookup (p155)
- Provides carrier and individual payment calculation reconciliation via a proprietary Reconciliation Workbench (p159)
- Platform generates 1095-As (p165)
- Electronic reporting to the IRS includes a monthly IRS report and 1095-A (p167)
- GetInsured has undergone annual MARS-E audits since 2015, including multiple successful audits in 2020 with no “Highs” or “Criticals” (p169)
- Platform uses responsive web design so that the shopping experience is device agnostic (p173)
- Changes to the platform to achieve compliance with state laws may require drawing on the “included hours” or using another change order mechanism (p184)
- Experience in other states integrating existing eligibility processes (p185)
- To re-use the State’s ACES rules, GetInsured eligibility rules would likely be replaced with a call to ACES to complete assessment for MAGI Medicaid and CHIP (p185)
- Platform will receive transferred applications from OFI when individuals apply for MaineCare and are deemed ineligible – application data will be used to populate the application data in the Marketplace (p195)
- Platform can support bi-directional transfer of images between the SBM and OFI document systems to provide a better consumer experience – implementation may require use of “included hours” (p198-199)
- Bidder points to experience with Covered California demonstrating the ability to map existing consumers from current plans to Clear Choice plans (p201)
- Platform is designed to be reusable and highly configurable, and it is modular as evidenced in Washington and California (p216)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

<ul style="list-style-type: none"> • GetInsured has leveraged integrated eligibility systems in California, Minnesota, and Idaho (p219) • GetInsured has also leveraged state authentication resources for single sign on in Idaho and California (p219) • The platform is documented to the extent that it can be operated by a variety of vendors – this has occurred in California (p221)
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • GetInsured has experience working with a wide range of stakeholders including state agencies, vendors, carriers, CMS, and the IRS
D. Technical and Security Requirements
<ul style="list-style-type: none"> • GetInsured has provided discussion on how they meet the requirements of the State’s OIT policies, standards, and procedures (p254)
E. Document Repository Requirements
<ul style="list-style-type: none"> • GetInsured prefers to manage all documents within the OIT maintained instance of Microsoft SharePoint (p267)
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • GetInsured support models is based on the ITIL Service Delivery Model, clearly defining the standard definition of support processes and the types and level of support provided to assist business processes (p272)
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Diagram (p7) and narrative (p12) provided
3. Staffing
<ul style="list-style-type: none"> • Job descriptions and resumes provided • GetInsured is not proposing any sub-contractors for the project (p97)
4. Implementation- Work Plan
<ul style="list-style-type: none"> • Work plan provided with project timeline, go live dates, and responsible position (p105)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Vimo dba GetInsured

DATE: 11/21/2020

EVALUATOR NAME: Megan Garratt-Reed

EVALUATOR DEPARTMENT: Commissioner’s Office, DHHS

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • P: previous experience in Marketplaces with plan standardization. (p. 7) • P: successful data migration from the FFM (p. 19) • P: recent CMS approval of platform’s ability to accurately process complex enrollments (p. 19) • P: ability to share cost of updates for national compliance with other clients (p. 22) • P: proven ability to execute FFM-SBM transition in less than one year (p. 23)
2. Subcontractors
<ul style="list-style-type: none"> • N/A
3. Organizational Chart
<ul style="list-style-type: none"> •
4. Litigation
<ul style="list-style-type: none"> • N: None
5. Financial Viability
<ul style="list-style-type: none"> • Q: financial stress score? (p. 109)
6. Certificate of Insurance
<ul style="list-style-type: none"> •

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 11/21/2020

EVALUATOR NAME: Megan Garratt-Reed

EVALUATOR DEPARTMENT: Commissioner’s Office, DHHS

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
• P: tile display of plan preview(p. 61)
• P: Good consumer decision support tools
• N: not completely clear whether the proposal includes the third party data vendor needed for some aspects of consumer decision support
• N: Disappointing answer re: Clear Choice display – just notes adding a logo?
• P: strong response re: employer decision support tools.
• N: somewhat limited answer re: employee ICHRA/QSHERA display
• P: “custom grouping” for households enrolling in different plans
• P: configurability of QLEs
• N: no CRM marketing tools
C. Coordination and Collaboration between Project 1 and Project 2
• Basic answer
D. Technical and Security Requirements
•
E. Document Repository Requirements
• P: existing project assets.
F. Operations and Maintenance Requirements
•
2. Architecture Diagram and Narrative
•
3. Staffing
• Team experienced with SBMs.
• Limited key personnel (discussed with Jordan Harris)
4. Implementation- Work Plan
•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Vimo

DATE: 11/21/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • Q – CoverMe to SBM • Their platform supports multiple states, most recent being Penn and NJ. • Platform supports 12 million consumers • I – user fees associated to operate under Healthcare.gov. This solution removes that dependency. • Solution is called “Exchange-in-a-box”, SaaS platform. • Reuse of from previous state implementations • SBM’s primary focus since 2010 • Total of 7 SBM client states, and migrated 4 of them from the FFM. • I – California was the first SBM in the nation. • P – Pg. 23 transitioned NJ and Penn to SB’s within a year from the RFP to launch.
2. Subcontractors
<ul style="list-style-type: none"> • NA
3. Organizational Chart
<ul style="list-style-type: none"> • Provided
4. Litigation
<ul style="list-style-type: none"> • No litigation within 5 years. • Had a settlement in Jan 2016: break of contract, and other related matters.
5. Financial Viability
<ul style="list-style-type: none"> • Starts on pg. 37 • Provided for 2017, 2018 and 2019 • D&B - Pg.104 – noted unreflective of the current state of their business.
6. Certificate of Insurance
<ul style="list-style-type: none"> • Pg.123 – dated 5/26/2020

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Vimo

DATE: 11/21/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • This entire section is the File3A for this proposal. • All the below are related to A.1: • Solution is “Exchange-in-a-box”, it’s as single shared SaaS platform used for all their SBM customers. • Allows for configurations • Multiple years of compliance wit MARS-E • Authentication: implemented a variety of models based on state requirements and recommends using their own platform capabilities for this project. • Provided a figured displaying the interaction between their platform, the identity server and the partner site. • I – If Single Sign On desired, will require the organizations to identify shared, unique user identifiers, and undertake a one-time mapping of user identities across the systems. • GetInsured platform incorporates Role Based Access Control (RBAC) to enforce the MARS-E (Minimum Acceptable Risk Standards for Exchanges) separation of duties controls. • Prescreener: allows for anonymity and quick estimates and plan comparison. Limits drop-offs with only 4 data points for the user. • FPLS updated yearly • Marketplace eligibility determination – modular architecture, and describes modules. • Provided a high-level eligibility flow that included DHHS. <ul style="list-style-type: none"> ○ Q – MAGI in the Cloud under DHS swim-lane. ○ NJ Hix Portal • Have their own built-in MAGI assessment feature to utilize. • Transferred via an account transfer to OFI. • N – page 31 levertage • Plans to leverage the states access to FDSH. • Document Upload: screen to show mismatches. • Can receive verification results from OFI to reduce redundant calls to FDSH.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Vimo

DATE: 11/21/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

- Redeterminations: fully supported, and promotes passive renewals.
- Approach to pre-load renewal plan year data.
- Work with carriers to finalize the plan crosswalk and upload it using the Plan Management module.
- Consumer Notifications: delivered consumers based on preferred method.
- Notices are queued until the end of the day, and sends a single notice.
- Determination notice includes a list of data elements the system was unable to verify, and how to resolve, and subsequent steps.
- Coordinated and integrated (RFP A.1.e): importance of tight integration with Medicaid system
- Looks to minimally incorporate noticing and uniform elig determinations.
- Proposes a single front door through IOS functionality, or minimally direct to SBM. Expects to align SBM prescreener and IOS's.
- LDAP functions for shared credentials across the systems or shared directory.
- I - Plan Comparison: consumers are generally unfamiliar with health insurance terminology, often overwhelmed by the complexity of benefits and limitations and often propels consumers to gravitate towards plans with the lowest premium.
- Allows consumers to make decision based on “total cost of ownership”
- Provider Directory: allows up to 5 providers to be entered by consumer.
- implementation of the provider search feature requires GetInsured to contract with a third-party vendor to obtain, cleanse, consolidate and manage regular feeds.
- formulary lookup uses a proprietary GetInsured drug list and requires the carriers on the exchange to provide a prescription drug template.
- Adopted tile-based approach to displaying information.
- QHP - capability for a household to group members into different enrollments: “Custom Grouping”
- SHOP: lots of available assets in this area.
- Periodic testing: runs synthetic transaction tests on periodic basis using Pingdom and Blazemeter (external monitoring) Prometheus and Grafana (internal).
- Verification of SEP/QLE – highly configurable using “gating”
- Data persistence: platform is architected with a single system of record for all application and enrollment information secured on PostgreSQL and Couchbase (NoSQL) databases.
- Streamed real-time to disaster recovery instance.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Vimo

DATE: 11/21/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

- Applications: Supports all versions
- Document management: Scanned and stored in AWS S3
- Allocating “included hours” for pricing to develop process and requirements.
- EDI: GetInsured 834s are capable of interfacing with carriers already using 834s
- Performs data validations such as overlapping enrollment
- FDSH: platform includes an independent Data Verification Services (DVS) subsystem to facilitate integration with FDSH
- Differing methodologies for State Medicaid integration.
- Consumer Messaging: all changes supported and provided a list of sample notices.
- Portal: walked thru a consumer account set up.
- Data matching issues (DMI) and tickets created by document uploads are queued and processed by a dedicated data verification team.
- CRM: platform has proprietary CRM features integrated
- Accounting: uses the reporting tool by Sisense, which provides an intuitive interface for business users to build reports on demand.
- Has a reconciliation workbench.
- 1095's: meets, methodology similar to Month IRS reports, and has 6 independent processes.
- MARS-E compliant
- Chat compliant

- **All the below are related to A.2:** Configure the platform
- Does not anticipate needing to make significant changes to platform to achieve compliance with state laws in Maine, if needed will draw on the included hours or change order mechanism.

- **All the below are related to A.3:**
- Platform has the capability to integrate with Medicaid system but does have its own internal tools for Medicaid/CHIP rules.
- Utilize account transfer capability with OFI.

- **All the below are related to A.4:**
- Provided a list of 3 main items needed to integrate with IOS and call center.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

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DATE: 11/21/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none"> • All the below are related to A.5: • Complies with all requirements for an SBE, documented in RTM's. • All the below are related to A.6: • Successful in prior data migrations and provided scenarios. • All the below are related to A.7: • Will create a Project Plan for Phases one and two for a thorough understanding of the Scope of Work and a detailed Technology Platform Annual Work Cycle Plan. • I - Please note a minor point of clarification: the definition of “fully functional” is dependent on the scenario you are trying to represent
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Ensuring a seamless connection between 1 and 2.
D. Technical and Security Requirements
<ul style="list-style-type: none"> • P - Reviewed the policies and provided a list of how its meets criteria. • All data centers hosting environments are entirely with the US. • Tech architecture diagram is always kept up to date.
E. Document Repository Requirements
<ul style="list-style-type: none"> • Preference is for the repository to reside within the State of Maine network.
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Support model is based on the ITIL Service Delivery Model, provides definition to support processes, and guidance. • Before going live, M&O lead works closely with the Marketplace operations lead to adjust support processes. • Security management controls to maintain the CIA triad. Confidentiality, Integrity and Availability.
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • File B begins here • Platform is hosted and delivered as a Software as a Service (SaaS) • First diagram displays the overview of the platform technical architecture and connectivity to external systems. • 2nd diagram is the functional architecture. • 3rd is the deployment architecture • 4th is the within a data center • Narrative meets, mostly already discussed in previous sections.
3. Staffing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: Vimo

DATE: 11/21/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• Plans to implement a DDI, a M&O and Product Teams.• Provided 22 resumes
4. Implementation- Work Plan
<ul style="list-style-type: none">• Kick off for 1/5/2021

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: GetInsured

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • Strong SBM implementation experience (7 States – NJ/PA in-flight, CA, NV replaced FFM model, MN, ID & WA) • Proven platform exists with scale of use (2.6m enrollments annually, 25m EDI tx) • Experience staff with SBM implementation experience • Clear investment in SBM business model for the organization • Experience with mixture of implementation approaches (stand-alone SBM or tighter connection with State Medicaid program)
2. Subcontractors
<ul style="list-style-type: none"> • None
3. Organizational Chart
<ul style="list-style-type: none"> • Met requirement – appreciated views for project, implementation and functional
4. Litigation
<ul style="list-style-type: none"> • None in past 5 years; 1 in Sept 2013 individual-contractor related and not reflective of concern for SBM services involved
5. Financial Viability
<ul style="list-style-type: none"> • No financial concerns
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met requirement; also have excess liability with Lloyds and cyber liability

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 1

BIDDER NAME: GetInsured

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
A. Project 1 – Marketplace Technology Platform
<ul style="list-style-type: none"> • Platform stands on strong architecture • Well outlined response re: how platform meets feature/functionality requirements with accompanying screen shots • User-friendly UI presentation w/tile display • Strong monitoring model and quick escalation when thresholds exceeded • EDI tx proven experience • Proven integrations – with FDSH and States • Committed to outlined OEP 2021 & 2022 enhancements • Strong requirements traceability to Federal regulations and statutes
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Proven ability to support data migration with P2 vendor • Broad experience collaborating with multiple parties on initiatives
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Strong outline of organization’s technical and security practices and alignment with State OIT policies
E. Document Repository Requirements
<ul style="list-style-type: none"> • Sharepoint proposed which is positive in that it is a tool the State is familiar with; willing to work with State on structure and format
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Use of JIRA for incident tracking positive in that it’s a tool the State is familiar with • Solid monitoring protocols including alerts
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Solid diagram and narrative with details
3. Staffing
<ul style="list-style-type: none"> • Good outline of key roles and description of accountabilities for both DDI and M&O phases

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

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BIDDER NAME: GetInsured

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

- | |
|---|
| <ul style="list-style-type: none">• Did not list minimum qualifications for job descriptions as requested• Did not note amount of time/capacity associated with assigned resources• Would have liked SBM-specific experience for all proposed resources |
|---|

4. Implementation- Work Plan

- | |
|---|
| <ul style="list-style-type: none">• Good MS project view presented including noting party responsible for project tasks |
|---|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Maximus

DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • P: SBM Call Center for NJ, MD, DC, NY, VT • P: Other related services to several other states • P: ISO 9001:2015 & ISO/IEC 27001 certs • P: ClearMark and other awards
2. Subcontractors
<ul style="list-style-type: none"> • P: Two (2) subcontractors. Appear integrated.
3. Organizational Chart
<ul style="list-style-type: none"> • P: Credible
4. Litigation
<ul style="list-style-type: none"> • N: Substantial Litigations
5. Financial Viability
<ul style="list-style-type: none"> • P: Big Company
6. Certificate of Insurance
<ul style="list-style-type: none"> • P: Meetsd

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Maximus

DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
• P: Meticulous response to all listed use cases
• P: Credible commitment to Quality
• P: Mature workflow
• P: Eleven Maximus call centers have been recognized as "Certified Centers of Excellence"
C. Coordination and Collaboration between Project 1 and Project 2
• P: Superb plan to coordination and collaboration between P1 & P2
D. Technical and Security Requirements
• P: Compliance w/ listed OIT Policies
• P: Compliance with all stated Security requirements
• P: Maximus & Genesys have partnered to create a Government Call Center app, back-ended in a FedRAMP-Moderate infrastructure
• P: Commitment to all stated Audits
E. Document Repository Requirements
• Q: Vague. However, does state willingness to create a solution.
F. Operations and Maintenance Requirements
• P: Strong O&M response
2. Architecture Diagram and Narrative
• P: Robust Architecture Diagram
• P: Robust Architecture Narrative
3. Staffing
• P: Robust bench
4. Implementation- Work Plan
• P: Robust plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Maximus US Services, Inc.

DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • Maximus has been supporting SBM since 2010 with five contracts currently (pD-1) • Serves 21 states as a Medicaid enrollment broker (pD-2) • Identified projects within past 5 years involving experience implementing client contact centers: (1) DC Health Benefit Exchange, (2) Maryland Health Benefit, (3) New York State of Health (pD-9) • Experience collaborating with wide range of stakeholder (p20)
2. Subcontractors
<ul style="list-style-type: none"> • CSG System, Inc – mail and print subcontractor (p26) • Guidant global – enterprise-wide staffing vendor (p27)
3. Organizational Chart
<ul style="list-style-type: none"> • Included the required org chart (p29)
4. Litigation
<ul style="list-style-type: none"> • Included a list of current litigation and litigation closed within the past 5 years (p32)
5. Financial Viability
<ul style="list-style-type: none"> • Provided 3 most recent years of financial statements (p34) • The company is liquid and solvent, with no expectation that the company would not be able to make-good on obligations, either short-term or long-term • The company has demonstrated profitability over the 3-year period from 2017 through 2019
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided required certificates (p155)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Maximus US Services, Inc.

DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none"> • Indicates the consumer assistance center solution is compliant with all federal requirement (p8) • Indicates ability to meet call center hours requirements (p9) • Will collaborate with project 1 vendor to address data matching issues (p17) • Intends to use project 1 vendor ticketing system (p19) • Cites experience implementing interactive voice response with other SBMs (p23) • Cites extensive experience participating in the appeals process (p27) • Incoming and outgoing mail would be handled by subcontractor CSG (p29) • Maintains a Security Operations Center to oversee Security Information and Event Management (p42) • Cites experience meeting federal requirements (p43) • Indicates intent to meet the required hours of operation, including surge times (p47)
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Cites experience working with other SBM Project 1 vendors (p57)
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Will implement project security plan to be in compliance with State OIT policies, standards and procedures (p58)
E. Document Repository Requirements
<ul style="list-style-type: none"> • Agrees to manage all project 2 documents within a designated repository (p60)
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Cites experience operating and maintaining 11 SBMs (p61)
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Provided the required architecture diagram and narrative (p75)
3. Staffing
<ul style="list-style-type: none"> • Included job descriptions and resumes (p120) • Subcontracts with guidant global for staffing (p146) • Subcontracts with CSG for mail and print (p147)
4. Implementation- Work Plan
<ul style="list-style-type: none"> • Provided the required project work plan with timelines (p155)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Maximus

DATE: 11/22/2020

EVALUATOR NAME: Meg Garratt-Reed

EVALUATOR DEPARTMENT: DHHS Commissioner’s Office

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. P: prior experience integrating with a separate SBM technology vendor
2. I: specific reference to Augusta office space
3. P: Experience transitioning NJ from FFM to SBM
4. P: Significant breadth of experience in SBMs
5. I: Not a lot of objective performance information provided
6.
• Extensive Marketplace experience
7. Subcontractors
• Q: subcontracting out of staffing? How does accountability work?
8. Organizational Chart
• P: sizeable DDI team.
9. Litigation
•
10. Financial Viability
•
11. Certificate of Insurance
•

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Maximus

DATE: 11/22/2020

EVALUATOR NAME: Meg Garratt-Reed

EVALUATOR DEPARTMENT: DHHS Commissioner’s Office

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none"> • P: Center for Health Literacy • Q: benefits of cloud-based platform III-7? • P: language access line in place • P: development of content for online chat • P: dedicated Health Plan Liaison • P: clear commitment to appeals processing • N: limited answer on integration • P: Will recruit in Maine
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Good comprehensive answer.
D. Technical and Security Requirements
<ul style="list-style-type: none"> •
E. Document Repository Requirements
<ul style="list-style-type: none"> •
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> •
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> •
3. Staffing
<ul style="list-style-type: none"> • P: Ok SBM experience. (They noted earlier that the implementation manager was coming directly from New Jersey Project, but that’s not stated here?)
4. Implementation- Work Plan
<ul style="list-style-type: none"> •

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

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BIDDER NAME: Maximus

DATE: 11/22/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • P – currently support 5 SBM contracts, all including a full-service consumer assistance center. • P – has a scalable telephony platform, with many technology assets (IVR, Webchat, etc.) • Strong New England Presence. • Largest Medicaid enrollment broker in the US, serving 21 states and 45.5 million individuals. • I - Currently provides Maine with Assessments for Long-Term Services and Supports and Independent and External Review/Dispute Resolution/Medical Review. • P – Can rapidly scale up or down in response to State’s needs, or changes in federal requirements. • I – Maximus Federal (practice in the Maximus portfolio) operates the FFM Contact Center Operations (CCO). • P – will bring continuity and lessons learned from previous projects and utilize their Standardized Operations and Analytics Project Management Office (SOA PMO) and their library of resources. • P – will create annual planning cycles, maintain appropriate staff levels through staffing plans accounting for numerous factors, consistently train. • P - Has rapidly stood up turnkey contact engagement centers with both on premise and remote based agents. • Earned multiple awards across call centers and solutions. • P – Project 1 they currently provide open enrollment and eligibility support and application processing.
2. Subcontractors
<ul style="list-style-type: none"> • CSG Systems Inc. for print and mailing services.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Maximus

DATE: 11/22/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none"> • Guidant Global serving as the staffing vendor.
3. Organizational Chart
<ul style="list-style-type: none"> • I – mentioned working directly with facilities lead to design Augusta Maine office space. • Clear and understandable organizational chart. Provided 2 charts one for implementation and one for operations. • I – no designated roles as key staff, will accomplish at contract award.
4. Litigation
<ul style="list-style-type: none"> • 2 currently and one closed within past 5 years. All employee related items.
5. Financial Viability
<ul style="list-style-type: none"> • I – Provided a comparable report to the Dun & Bradstreet Comprehensive Insight Plus report as indicated it is now discontinued. • Provided 2017, 2018 and 2019
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided dated 11/13/2020

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none"> • Will utilize the cloud-based Genesys telephony solution called Citizen Journey Platform (CJP) • Prioritizing to hiring Mainers to provide services remotely to support the call center. • Will establish Augusta based management and mailroom operations • Understands and encourages close coordination with Project 1, and knowing they will need to train staff on Project 1's technology. • Complete comprehensive training prior to engaging SBM Consumers, including cultural sensitivity and diversity, and annual refreshers, utilizing their Center for Health Literacy. • Will process paper and telephone applications, plan to scan all paper apps. • Resolution of data matching issues: their training includes a dedicated module with procedures.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Maximus

DATE: 11/22/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

- Account Maintenance Support: will adhere to call scripts and documented work instructions that are easily accessible through their knowledge management system (KMS) called Panviva.
- Will also provide technical assistance support to a degree, on site navigations, change reporting, etc.
- Ticketing: Will use Project 1's system to create tickets following SOP's developed jointly.
- Consumer Complaints: their process includes internal escalation process, in which the Department would be included if not resolved within the CAC.
- Call Center Solution: streamlined Consumer journey, call, skillset routing, consumer survey, live call monitoring and call recording.
- I – top 5 Maine languages are French, Spanish, Cushite, Chinese and Vietnamese.
- Partners with Lionbridge for translation services.
- Tools for Consumers with disabilities, include a separate Text
- Telephone/Telecommunications Device for the Deaf (TDD/TTY)
- Supervisors perform live call monitoring for quality control.
- IVR will include FAQ's
- Will look to develop scripts for the chatbot and has webchat.
- I – indicate users primarily enter from their mobile devices, and minimal channel hops helps with the experience.
- Carrier support includes a Health Plan Liason as point of contact.
- Customer Satisfaction Surveys: brief, easy to complete upon call completion will be routed to the IVR.
- Will subcontract with CSG for all outgoing mailing needs, and have mailroom staff for incoming mail.
- P Pg.34 – 98% monthly retention of key staff, provides a model including 4 major bullet points.
- Conducted detailed volume analysis based on population data provided.
- Utilizes performance-based training; applying policies and procedures to real-life scenarios, includes a training phase chart.
- CJP provides real-time data that feeds the dashboards for Supervisors and Managers to analyze volume and trends.
- Pg. 41 – list of reports
- Will develop a security plan for the CAC.
- Call Center Hours: Year-round M-F 8-5, excluding State holidays and admin closings, but can be tailored. During Open enrollment will be M-F 8-8 and

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INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: DHHS/OFI

<p>Saturday 9-5 and special considerations for the last 2 Sundays and last 3 days of OEP.</p> <ul style="list-style-type: none"> • Three-phased approach for implementation of the CAC: Implementation, Transition and Operations. Provided details on each of these and the associated phases requested, such as re-verifying migrated user accounts in Phase 2.
<p>C. Coordination and Collaboration between Project 1 and Project 2</p>
<ul style="list-style-type: none"> • P – pg.11 Understands and encourages close coordination with Project 1 and knowing they will need to train staff on Project 1’s technology. • P – pg. 12 chart indicating Project 1 and Project 2 responsibilities • Outlined a coordination effort approach.
<p>D. Technical and Security Requirements</p>
<ul style="list-style-type: none"> • Provided a chart indicating compliance minimally at a baseline level.
<p>E. Document Repository Requirements</p>
<ul style="list-style-type: none"> • Proposes mutually agreed upon process and coordination with Project 1 vendor.
<p>F. Operations and Maintenance Requirements</p>
<ul style="list-style-type: none"> • Work plan supports fully operational call center by 8/31/2021, the end of Phase 1. • Will deliver an O&M plan, and provided a list of components it would include, one component being change management plan and process. • Hosting: AWS with regions in the US for primary and secondary locations
<p>2. Architecture Diagram and Narrative</p>
<ul style="list-style-type: none"> • Provided multiple diagrams including a high-level solution diagram, a diagram showing system users and functionality, interconnection view diagram. • Limitations – proactively provided a list of potential risks, 4 provided with a mitigation strategy.
<p>3. Staffing</p>
<ul style="list-style-type: none"> • Priority to fill Consumer Service Representative role with Mainers, who will work from home. • Location in Augusta for back-office functions and leadership • Provided overview of each of the positions. • Methodology for staffing estimations • Provided staffing plan including durations, for each phase of implementation, transition and operations.
<p>4. Implementation- Work Plan</p>
<ul style="list-style-type: none"> • Provided - 3 days for contract negotiation, completed on 12/1/2020

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Maximus

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • Vast experience for services being sought – serving multiple States as their SBM CAC with high volume of call volumes and consumers served • Serve as SMB CAC in MD, NJ, NY, VT & DC • Top 10% rating for call centers in surveys – reflecting quality of service • Mailroom experience clear • Broker and Assister training program development and delivery experience • Specific 3 referenced projects direct experience for services sought
2. Subcontractors
<ul style="list-style-type: none"> • CSG Systems for mail and print services; Guidant Globe for staffing services
3. Organizational Chart
<ul style="list-style-type: none"> • Sound implementation and M&O structure outlined
4. Litigation
<ul style="list-style-type: none"> • 3 cases – none related to services sought
5. Financial Viability
<ul style="list-style-type: none"> • Sound financially – no concerns
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met requirement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Maximus

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none"> • Call Center Technology (CJP) ready for use and can integrate with SBM platform and IVR • Strong core training program for resources • Sound QA model outlined • Ability to scale resources up/down quickly based on call volumes and spikes • Covid experience reflects ability to pivot to virtual training model (DC) • Strong security/privacy protocols including staff training • Sound fundamental understanding of Federal regulation/compliance requirements • Strong service orientation reflected in proposed “warm transfer” with screen pop for calls exchanged between CAC and DHHS OFI call center • Sound outline of 3 phase implementation approach
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Commitment reflected with vast experience with collaborating with multiple parties including SBM Project 1 vendors – no concern
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Response reflected understanding of State OIT policies and how they will align and comply with no exceptions noted
E. Document Repository Requirements
<ul style="list-style-type: none"> • Basic response that they’ll work with State on tool selection versus proposing a specific tool
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • JIRA tool proposed for system issues/change requests positive in that it’s a tool the State has familiarity • Sound Operations & Maintenance model outlined
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Sounds, secure platform depicted • LMS online training system a plus • Good outline of risks and mitigation strategies
3. Staffing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 11/21/20

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EVALUATOR DEPARTMENT: DHHS

- | |
|--|
| <ul style="list-style-type: none">• Overall sound implementation and staffing high-level org views• Positive retention model outlined• Minimum qualifications for PM and Implementation Mgr seem light and not sufficient emphasis on vast project experience• Would have liked stronger emphasis on direct call center management experience (versus preferred) for Call Center Manager minimum qualifications• Odd that PM is at 88% capacity in Phase 1 versus 100% |
|--|

4. Implementation- Work Plan

- | |
|--|
| <ul style="list-style-type: none">• Existing PMO organization and practices should help• Sound overall MS project plan view defining tasks across all parties |
|--|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: SaviLinx

DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • P: Federal Employee Dental-Vision, Federal Military Health Insurance, MA Health Connector, ME Unemployment Insurance. The MA Health Connector is the closest to the ME SBM.
2. Subcontractors
<ul style="list-style-type: none"> • P: Two (2) subcontractors. Well integrated.
3. Organizational Chart
<ul style="list-style-type: none"> • P: Credible
4. Litigation
<ul style="list-style-type: none"> • P: None
5. Financial Viability
<ul style="list-style-type: none"> • P: Small company
6. Certificate of Insurance
<ul style="list-style-type: none"> • P: Meets

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
• N: No meticulous breakdown of all listed use cases
• P: Strong current KPIs
• P: Credible commitment to Quality
• P: Good forecast of call types: Eligibility, Shopping, Enrollment
• N: Internal drafting comments left in the submitted doc. Marker of carelessness!
C. Coordination and Collaboration between Project 1 and Project 2
• N: Nothing substantial, beyond a throwaway line
D. Technical and Security Requirements
• P: Compliance w/ listed OIT Policies
• P: Compliance with all stated Security requirements
• P: Leverages NICE inContact, industry leader UCaaS, back-ended in FedRAMP-Moderate infrastructure
• P: Commitment to all stated Audits
E. Document Repository Requirements
• N: Simply presumes that the P1 vendor will handle all Document Repository requirements
F. Operations and Maintenance Requirements
• N: Appears to have skipped this entire section. Yes, parts of it could be derived from other materials, but, nonetheless, this is a serious lapse.
2. Architecture Diagram and Narrative
• P: Architecture Diagram is Adequate
• N: Architecture Narrative is Subpar
3. Staffing
• Credible bench
4. Implementation- Work Plan
• Credible plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: SaviLinx, LLC

DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • SaviLinx is an omnichannel contact center (p1) • Cites experience serving a federal and state health insurance marketplace (p6) • Included descriptions of project within the past 5 years: (1) FedPoint, (2) State of Maine, Department of Labor, (3) Community Health Options (p12)
2. Subcontractors
<ul style="list-style-type: none"> • Subcontracts with MPX to develop and manage automated processes to generate and deliver correspondence via mail or digital channels (p17) • Subcontracts with Zelus LLC for training solutions (p19)
3. Organizational Chart
<ul style="list-style-type: none"> • Provided the required org chart (p21)
4. Litigation
<ul style="list-style-type: none"> • None identified (p22)
5. Financial Viability
<ul style="list-style-type: none"> • No financial statements provided (p22) • Provided Dun and Bradstreet Report (p23)
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided required certificate (p39)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: SaviLinx, LLC

DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none"> • Will deploy the Nice inContact CXOne customer experience contact center solution (p4) • Handles inbound calls, emails, and webchat (p6) • Uses IVR/ACD call routing (p6) • Agrees to meet requirement for hours of operation and surge times (p12)
C. Coordination and Collaboration between Project 1 and Project 2
•
D. Technical and Security Requirements
• Indicates compliance with State OIT policies, standards, and procedures (p17)
E. Document Repository Requirements
•
F. Operations and Maintenance Requirements
•
2. Architecture Diagram and Narrative
• Provided the required architecture diagram and narrative (p33)
3. Staffing
• Provided job descriptions and resumes (p36)
4. Implementation- Work Plan
• Provided the required work plan, however is missing critical elements required by the RFP (p59)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Savilinx

DATE: 11/22/2020

EVALUATOR NAME: Meg Garratt-Reed

EVALUATOR DEPARTMENT: DHHS Commissioner’s Office

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
<ul style="list-style-type: none"> • P: strong Maine presence • N: no marketplace experience at all, limited health program experience
1. Subcontractors
<ul style="list-style-type: none"> • P: appreciate that training subcontractor has SBM experience
2. Organizational Chart
<ul style="list-style-type: none"> • Project staffing chart?
3. Litigation
<ul style="list-style-type: none"> • No answer given.
4. Financial Viability
<ul style="list-style-type: none"> • Missing statements?
5. Certificate of Insurance
<ul style="list-style-type: none"> •

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Savilinx

DATE: 11/22/2020

EVALUATOR NAME: Meg Garratt-Reed

EVALUATOR DEPARTMENT: DHHS Commissioner’s Office

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none"> • Lacking detail specific to several requirements, e.g. broker/assister/carrier supports and appeals processing • Seems to rely on Department for volume forecasting
C. Coordination and Collaboration between Project 1 and Project 2
•
D. Technical and Security Requirements
•
E. Document Repository Requirements
•
F. Operations and Maintenance Requirements
•
2. Architecture Diagram and Narrative
•
3. Staffing
<ul style="list-style-type: none"> • Understaffed for implementation
4. Implementation- Work Plan
<ul style="list-style-type: none"> • Oversimplified work plan.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: SaviLinx

DATE: 11/22/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • I – Provide call center services for FEDVIP military health insurance exchange (BENEFEDS) • I – Provide call center Consumer Support Agent (CSA) training, craft SOP’s and consulting for the Massachusetts Health Connector. • Q - We State of Maine Department of Unemployment • Currently serve on the frontline of the COVID-19 pandemic response delivering unemployment insurance surge support services for the State of Maine. • Hired 100 agents within 10 days. • Maine native founded SaviLinx in 2013. • Early adopters of SaaS/PaaS technologies, fully scalable and requires a simple licensing adjustment to accommodate changes in staffing, volume, and channels. • Supports FedPoint since 2015. • Maine agents come back year after year. • For DOL – they integrated with the SOM IT to integrate with the Avaya system.
2. Subcontractors
<ul style="list-style-type: none"> • MPX – used for Mail services. Established in 1941 in Portland Maine. • Zelus – used for training
3. Organizational Chart
<ul style="list-style-type: none"> • Provided, clear and understandable
4. Litigation
<ul style="list-style-type: none"> • blank
5. Financial Viability
<ul style="list-style-type: none"> • D&B provided. • Did not see audited financial statements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 11/22/2020

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EVALUATOR DEPARTMENT: DHHS/OFI

6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided, dated 11/12/2020

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none"> • Services will be delivered from headquarters in Brunswick and supported by Caribou hub; “Made for Maine” Consumer Assistance Center. • Utilizes Nice inContact’s CXone contact center solution suite • Ratio of 12:1 specialist per supervisor. • Ramp up annually to support open enrollment. • Plans for transfer processes with OFI and requesting priority access for SBM related calls. • Will provide a language line and bill on a per minute when utilized. • Researched to determine staffing levels. • Q - With 85% of Mainers eligible for a subsidy, we assume that the typical Maine call will most likely be more? complex • M-F 8-5 year round and OEP 8-8 and S 9-5, including final 2 Sundays 9-5 and final 3 days 8-10. • Weekly check-ins with the Department on for staffing levels. • Configure all laptops with MS Windows Bitlocker • Remote work for staff. • Pg.23, 24, 25, 37, 59 – still had notes embedded. • Up to 20 Department Representatives may request a side-sit session with a SaviLinx Supervisor to listen to calls using a virtual or dual headset, subject to health and safety protocols. • Approach includes a establish stage, inception, pre-construction, construction, transition, operational hand-off.
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Agreed to collaborate.
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Will comply with all Federal requirements • Reviewed IT policies and agrees to comply with A-J

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EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• All data will be stored in the Continental U.S.• Designed to support Business Continuity.
E. Document Repository Requirements
<ul style="list-style-type: none">• Will use repository from Project 1.
F. Operations and Maintenance Requirements
<ul style="list-style-type: none">• Proposal did not follow RFP requested format and hard to tell if all specific items were addressed for this section.
2. Architecture Diagram and Narrative
<ul style="list-style-type: none">• Provided Pg.33
3. Staffing
<ul style="list-style-type: none">• Provided
4. Implementation- Work Plan
<ul style="list-style-type: none">• Provided.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: SaviLinx

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • No specific complete SBM CAC experience • Experience overall with Call Center Service (Maine DOL) including Health Insurance focus (FedPoint) • Maine-Based with commitment to operations and resourcing in Maine
2. Subcontractors
<ul style="list-style-type: none"> • Zelus LLP as training partner and MPX for document operations management
3. Organizational Chart
<ul style="list-style-type: none"> • Seems the chart view is more the Corporate Organization Chart versus a project organizational chart
4. Litigation
<ul style="list-style-type: none"> • No response noted
5. Financial Viability
<ul style="list-style-type: none"> • Missed providing financial statements
6. Certificate of Insurance
<ul style="list-style-type: none"> • Met requirement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

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DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none"> • Contact Center utilizes NIECE inContact solution which is positive • Proposed Maine-based call center operations (primary in Brunswick with Caribou hub support) • While responses to this section hit on some of the requirements (e.g. – service channels, DHHS OFI Call Center interaction, training and call recording), it missed and/or lacked details requirement by requirement in the RFP
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Commitment reflected to collaboration but not as detailed as desired on approach
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Response reflected commitment to State OIT policies and without exception
E. Document Repository Requirements
<ul style="list-style-type: none"> • No response provided
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Minimal response
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Effective Architectural diagram provided • Narrative not very detailed
3. Staffing
<ul style="list-style-type: none"> • Light on staffing detail and identification of key roles • No minimum requirements noted for job descriptions
4. Implementation- Work Plan
<ul style="list-style-type: none"> • Plan outlined without timeline view and identification of all responsible parties

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: GetInsured

DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • P: ID, WA, MN, PA, NJ • P: Used to operate MO-SHOP • P: Atlanta Call Center has been operational for a decade
2. Subcontractors
<ul style="list-style-type: none"> • P: None
3. Organizational Chart
<ul style="list-style-type: none"> • P: Credible
4. Litigation
<ul style="list-style-type: none"> • P: No substantial litigation in the last five years • N: But one isolated contractor lawsuit
5. Financial Viability
<ul style="list-style-type: none"> • P: Medium-sized Company
6. Certificate of Insurance
<ul style="list-style-type: none"> • P: Meets

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: GetInsured

DATE: 11/20/2020

EVALUATOR NAME: B. Victor Chakravarty

EVALUATOR DEPARTMENT: MaineIT

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
• P: Meticulous response to all listed use cases
• P: Credible commitment to Quality
• P: Mature workflow
• N: No current KPIs
C. Coordination and Collaboration between Project 1 and Project 2
• P: To its credit, does NOT presume GetInsured winning P1. Credible plan.
D. Technical and Security Requirements
• P: Actually read through the specified OIT policies, and provided responses. Great responses!
• P: Compliance with all stated Security requirements
• P: Commitment to all stated Audits
E. Document Repository Requirements
• P: MS SharePoint. Robust option.
F. Operations and Maintenance Requirements
• P: Strong O&M response
2. Architecture Diagram and Narrative
• P: Robust Architecture Diagram
• P: Robust Architecture Narrative
3. Staffing
• P: Robust bench
4. Implementation- Work Plan
• P: Robust plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Vimo, Inc. dba GetInsured

DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • Since 2010, primary market focus has been State-Based Marketplaces, with roster of 7 states – California, Idaho, Washington, Minnesota, Pennsylvania, New Jersey, and Nevada • Has been operating consumer assistance center in Georgia for over 10 years (p15) • Described projects within past 5 years with reflective experience and expertise (1) Nevada Health Link, (2) Mississippi SHOP, (3) Pennsylvania SBE (p18)
2. Subcontractors
<ul style="list-style-type: none"> • Indicated N/A
3. Organizational Chart
<ul style="list-style-type: none"> • Provided the required org chart (p29)
4. Litigation
<ul style="list-style-type: none"> • Identified litigation settled in January 2016
5. Financial Viability
<ul style="list-style-type: none"> • 2018 Financial Report is missing the opinion section of the independent auditor’s report • 2018 Financial Report is also missing the balance sheet, income statement, statement of shareholder’s equity, and statement of cash flows, limiting analysis to only 2018 and 2019 financial statements provided in the 2019 report • The company is liquid and solvent in 2018 and 2019 • The company as diversified revenue streams, however state contracts account for a significant portion of their revenue (p84)
6. Certificate of Insurance
<ul style="list-style-type: none"> • Required certificates provided (p120)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 11/21/2020

EVALUATOR NAME: Philip Dubois

EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none"> • 15 years experience with health insurance call center operations (p5) • Staff experienced with MAGI and QLE/SEP eligibility verification (p20) • Includes team of agents to handle data matching issues (p24) • Account maintenance support provided by L1 personnel (p28) • Ticketing system and escalation (p33) • Includes real-time monitoring (p40) • Includes call recording, access to recordings, and long-term archival and storage (p42) • Includes interactive voice response (p42) • Processing of incoming and outgoing mail would be handled by vendors (p68) • Calls are monitored for quality assurance (p76) • Includes monitoring of benchmarks/performance indicators (p101) • Discusses coordination of interactions with OFI call center to avoid duplicative wait times (p115) • Indicates that the required hours of operations would be met (p118) • Uses a three phased approach for implementation (p118)
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Indicates they will ensure a seamless connection between Project 1 and Project 2 (p130)
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Addressed the State’s OIT policies, standards, and procedures (p132)
E. Document Repository Requirements
<ul style="list-style-type: none"> • GetInsured prefers a OIT maintained instance of SharePoint (p142)
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • A technical support manager will be assigned prior to Go Live (p151) • The consumer assistance center technology is cloud based and is redundant and scalable (p153)
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Provided the required architecture diagram and narrative (p6)
3. Staffing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 11/21/2020

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EVALUATOR DEPARTMENT: DHHS – Office of MaineCare Services

<ul style="list-style-type: none">• Provided job descriptions, minimum qualifications, and resumes for proposed staff (p32)
4. Implementation- Work Plan
<ul style="list-style-type: none">• Provided the required implementation work plan (p107)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Vimo dba Get Insured

DATE: 11/22/2020

EVALUATOR NAME: Meg Garratt-Reed

EVALUATOR DEPARTMENT: DHHS Commissioner’s Office

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • 92% satisfaction in NV is impressive (p. 8) • Appreciate the remote model that could allow for hiring of Maine personnel • Successful NV implementation and apparently successful system in PA are both highly relevant – FFM to SBM transition states. • Demonstrated experience with
2. Subcontractors
<ul style="list-style-type: none"> • N/A
3. Organizational Chart
<ul style="list-style-type: none"> • P: sizeable DDI team.
4. Litigation
<ul style="list-style-type: none"> •
5. Financial Viability
<ul style="list-style-type: none"> •
6. Certificate of Insurance
<ul style="list-style-type: none"> •

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Vimo dba Get Insured

DATE: 11/22/2020

EVALUATOR NAME: Meg Garratt-Reed

EVALUATOR DEPARTMENT: DHHS Commissioner’s Office

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none"> • N: overall very hard to tell here what’s part of the call center solution vs. what is technology – hard to assess any element independently • N: no commitment to informal appeal resolution • N: limited offering for carrier support
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Not clearly answered given concerns about independence from technology product
D. Technical and Security Requirements
<ul style="list-style-type: none"> •
E. Document Repository Requirements
<ul style="list-style-type: none"> •
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> •
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> •
3. Staffing
<ul style="list-style-type: none"> • Good experience represented
4. Implementation- Work Plan
<ul style="list-style-type: none"> •

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Vimo

DATE: 11/23/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none"> • Currently provides a consumer assistance center for Pennsylvania (Pennie) and Nevada Health Link. • Supported multiple open enrollments successfully. • SBM's have been their primary focus since 2010 • Their main CAC is located in Georgia and operational for more than 10 years. • Pennie's CAC was fully staffed by remote personnel due to the pandemic, which was part of the Disaster recovery plan.
2. Subcontractors
<ul style="list-style-type: none"> • NA
3. Organizational Chart
<ul style="list-style-type: none"> • Provided, included sections for both the SBM Product team and the CAC Implementation team.
4. Litigation
<ul style="list-style-type: none"> • None in past 5 years, settled a case approximately 5 years ago.
5. Financial Viability
<ul style="list-style-type: none"> • Provided Financial statements for 2017, 2018 and 2019 • DDI Cost Deferment • D&B provided on pg.99
6. Certificate of Insurance
<ul style="list-style-type: none"> • Provided and dated 5/26/2020

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: Vimo

DATE: 11/23/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none">• CAC utilizes their GetInsured technology platform (Evolve IP), and a cloud-based telephony solution. The Customer Administration Portal is specifically designed for the reps and the supervisors, specifically Levels 1-3.• CAC personnel go through rigorous training to support ACA related questions.• Pg. 10 Provided a list of resources the CAC will provide to consumers• Discussed mixed household churn, proposes integration of messaging and protocols for transfer.• Described the differing levels of resources and how it applies to the mixed population.• Can support all methods of applications, paper apps are digitized and updated for entry via a ticket to a level 2.• Provided the QLE verification process “gating”• Describes document verification and application edit feature.• Platform provides a Member Portal for consumer account information access.• Training on de-escalation• Telephony platform includes monitoring and whisper coaching, call recording and other requested items.• IVR call flows, and integration with the Marketplace allows usability of data captured in the IVR, such as phone number lookups.• Pg. 55 - Data transfer and reconciliation will be handed off to a dedicated team at the Marketplace. That team monitors the monthly reconciliation process.• Appeals are supported exclusively by Level 2 staff.• Post call and web-based customer satisfaction surveys.• Incorporated vendors for mail operations, proposing to use the same ones supporting Idaho, Nevada and Pennie. Master’s Touch will handle outbound and lbml will do inbound.• Utilizes Sisense and Erlang calculators do develop staffing plans.• Provided descriptions around the training program and processes.• Applies segregation of duties and developed InfoSec program, and provided description.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 11/23/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none"> • Expects warm transfer calls with OFI, including IVR integration. • Will meet requested hours of operation. • Will meet requested phased approach, and will create a project plan.
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Will utilize the Annual Work Cycle Plan • Indicates they will work with their internal technology team.
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Reviewed IT policies and provided a chart of each and how they plan to meet. • Solution already meets federal requirements. • All data will be in the US.
E. Document Repository Requirements
<ul style="list-style-type: none"> • Preference is for repository to be in the SOM network.
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • Controls used to maintain the CIA triad (Confidentiality, Integrity and Availability of systems and/or data • Will implemented standard practices
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • 2nd File starts here. • Provided many diagrams, and descriptive and comprehensive in the narrative.
3. Staffing
<ul style="list-style-type: none"> • Provided comprehensive job descriptions, resumes and allocations.
4. Implementation- Work Plan
<ul style="list-style-type: none"> • Provided and Kick-off begins 1/27/2021

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: GetInsured

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• Solid SBM CAC experience in PA and NV• Bring CRM/call center tools to the table• 92% call satisfaction rate in NV CAC Call Center reflecting quality of service• Specific 3 referenced projects reflect experience for services sought
2. Subcontractors
<ul style="list-style-type: none">• None proposed
3. Organizational Chart
<ul style="list-style-type: none">• Sound organizational charts outlined across project, operations and implementation teams
4. Litigation
<ul style="list-style-type: none">• None in past 5 years
5. Financial Viability
<ul style="list-style-type: none">• Sound financially – no concerns
6. Certificate of Insurance
<ul style="list-style-type: none">• Met requirement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services – Project 2

BIDDER NAME: GetInsured

DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II of the RFP)
B. Project 2 – Consumer Assistance Center
<ul style="list-style-type: none"> • Narrative with screen shots helpful though screen shots • WFM tool helpful for resource staffing forecasting and scheduling • Strong model for selection and training of staff – initial and ongoing • Strong privacy and security posture presented • Some question regarding ability to effectively partner with a different project 1 vendor’s platform • Strong core training program for resources • Like the proposed dedicated phone line to answer and assist with calls from DHHS OFI Call Center • Clear, comprehensive outline of 3 phased implementation approach
C. Coordination and Collaboration between Project 1 and Project 2
<ul style="list-style-type: none"> • Outlined vast experience with collaboration with multiple parties in project work
D. Technical and Security Requirements
<ul style="list-style-type: none"> • Response reflected understanding and commitment to State OIT policies and without exception
E. Document Repository Requirements
<ul style="list-style-type: none"> • Sharepoint proposed which is positive in that it is a tool the State is familiar with • Plan to pre-load repository with key project assets a positive to help with project acceleration
F. Operations and Maintenance Requirements
<ul style="list-style-type: none"> • JIRA tool proposed for system issues/change requests positive in that it’s a tool the State has familiarity • Sound Operations & Maintenance model outlined
2. Architecture Diagram and Narrative
<ul style="list-style-type: none"> • Sounds, secure platform depicted • Virtual desktops helpful with respect to data security posture
3. Staffing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 11/21/20

EVALUATOR NAME: David Simsarian

EVALUATOR DEPARTMENT: DHHS

<ul style="list-style-type: none">• Overall sound implementation and staffing high-level org views across implementation and operations teams• Strong specific team proposed with good project experience• Experience managing remote workforce
4. Implementation- Work Plan
<ul style="list-style-type: none">• Overall sound project plan view defining tasks across parties



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

I, B. Victor Chakravarty accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand that the evaluation process is to be conducted in an impartial manner. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the funding decision notices for public distribution.

DocuSigned by:

B. Victor Chakravarty

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11/19/2020

Signature

Date



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
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Commissioner

AGREEMENT AND DISCLOSURE STATEMENT

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

I, Philip Dubois accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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DocuSigned by:
Philip Dubois
A20E79F80692456...

11/19/2020

Signature

Date



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

I, Megan Garratt-Reed accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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DocuSigned by:
Megan Garratt-Reed
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11/19/2020

Signature

Date



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SERVICES

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D
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AGREEMENT AND DISCLOSURE STATEMENT

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

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DocuSigned by:
Jamie Pruett
1EB7EDED85424...
Signature

11/19/2020

Date



STATE OF MAINE
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SERVICES

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D
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AGREEMENT AND DISCLOSURE STATEMENT

RFP #: 202010151

RFP TITLE: Health Insurance Marketplace Technology Platform and Consumer Assistance Services

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DocuSigned by:
David Simsarian
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Signature

11/19/2020

Date