Request for CalHEERS Development and Operations Services

Draft RFP Comments

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1	Y				We recommend asking vendors to also bid a distributed rules engine approach. MAGI rules can be readily built into the SAWS systems at a low cost and low risk, facilitating integrated eligibility determination for all health and human services.	N	CWDA
2	Y				The RFP does not clearly delineate how the SAWS systems will interact with CalHEERS nor how the county eligibility staff will access the centralized MAGI rules engine. If a single rules engine is built, we recommend that the SAWS systems interface with CalHEERS in a manner that is invisible to the county eligibility staff, which will facilitate integrated eligibility determination and promote efficiency.	N	CWDA
3	Y				The proposed RFP does not clearly state how CalHEERS will interact with SAWS and MRMIB to effectively manage cases where family members are covered under more than one of the programs (e.g., MAGI Medi-Cal and APTC).	N	CWDA

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4	Y				Although the solicitation mentions linkages with other human service programs, it does not give the vendor community sufficient detail to adequately understand the functionality that is required. We would be please to assist in developing these requirements.	N	CWDA
5	Y				The proposed RFP does not clearly stated if information obtained by any one system must be transmitted for use by another system (e.g., address change) and if so what functionality CalHEERS will need to have to handle that incoming information.	N	CWDA
6	Y				The RFP is clear that the proposed system must support English and Spanish and that other threshold languages will be added at the state's discretion. Baseline requirements should include functionality that captures the customer's language preference and supports mailing materials that match those preferences.	N	CWDA
7	Y				We applaud your decision to include MEDS modernization or replacement as a part of this solicitation. We believe that upgrading the MEDS system is essential to the success of this project.	N	CWDA

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8	Y				The distributed case management alternative does not appear to be described in enough detail for bidders to develop proposals.	N	CWDA
9	Y				We were not able to find any requirements that address the need to automatically convert clients that will be categorically eligible on 1/1/2014 (e.g., LIHP) or to facilitate outreach to and enrollment of groups that are very likely to be eligible (e.g., Healthy Family parents and emancipating Foster Youth).	N	CWDA
10	Y				The mail-in channel does not appear to be as thoroughly covered in the RFP as the other access channels. We suggest that requirements be added to ensure that vendors understand the need to support paper materials (e.g., coding, scanning, routing, storing, retention). We've noted a few examples in our	N	CWDA
11	Y				Service Level Agreements were not included in the draft solicitation. We are available to share our SAWS experience to assist you in crafting standards.	N	CWDA

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12	Y				Requirements for facilitating continued coverage for individuals loosing coverage are not clear. An example are individuals that are disenrolled from coverage under the SHOP program. We did not see any requirement for functionality that offers the opportunity to apply for other coverage and facilitates that transition. We've included specific examples below that we noted during our review.	N	CWDA
13	Y				In general the requirements are not as detailed as the narrative in describing what is expected for the vendor. In addition, in some instances there is an apparent discrepancy between the two. We have included examples in in our specific comments.	N	CWDA
14	Y				Search & Replace "Health Families" with "Healthy Families", "Callers System" with "CalHEERs"	Y	Consortium IV (C-IV)
15	Y				The terms user, end-user, authorized users, are used throughout the documents without definition.	N	Consortium IV (C-IV)

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16	Y				There is one requirement related to the Technical Refresh Assessment and Plan Deliverable (DR88) and a brief mention of the Deliverable in Section 5.5.2.6.2. Recommend adding Requirements that stress ensuring that the system equipment and software does not become obsolete and thereby unsupportable in any development, test or production environment. Also recommend a Requirement similar to the following: As the Equipment and Software components are assessed, the following impacts shall be considered at a minimum: 1. Cost of new Equipment and Software. 2. Impacts to the other components. 3. Application downtime required to apply changes. 4 . Training for new technology skills. 5. Upgrades to the facilities to accommodate new components. 6. Possible impacts on business operations.	N	Consortium IV (C-IV)

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17	Y				We did not see mention of a method of retaining a chronological Journal or Narrative of Case History. It is critical that case actions, interactions with Customers is maintained as part of the Case Record. Who, What, When, How Much $,Attempts to Contact, Attestations, etc. These are essential in Appeals.	N	Consortium IV (C-IV)
18	Y				Clarify, there doesn't appear to be any specification of ongoing maintenance hours; define the assumptions.	N	WCDS CalWIN
19	Y				Proposal appears to be silent on system defects; recommend SLA on defect cure requirements	N	WCDS CalWIN
20	Y				Scope of network not defined	N	Consortium IV (C-IV)
21	Y				Users (quantity, type, locations) not defined	N	Consortium IV (C-IV)
22	Y				There does not seem to be a comprehensive communication plan and define all the Stakeholders of the plan. Recommend, noting out that one will be developed.	N	WCDS CalWIN

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23	Y				CalHEERS should include provisions to ensure eligibility data integrity for mutual clients known to MEDS where eligibility and benefits may be effected. Caution must be exercised when entering the demographic information during the clearance process and program info for the eligibility determination process.	N	WCDS CalWIN
24	Y				The plan includes a backup data center however there is no mention of a backup service center. Recommend adding a requirement for a backup service center given California's vulnerability to earthquakes, blackouts and other natural disasters.	N	Consortium IV (C-IV)
25	N	1.1	1-15		Availability - Section indicates the equipment, services, facility, and/or software proposed to meet the requirements of the Solicitation must be installed, tested, and fully operation on or before July 1, 2013, as specified in Section 4 - Vendor Scope of Work. This appears to be extremely broad in scope. Implies the completed product must be fully available earlier than subsequent deadlines discussed in other sections.	N	Consortium IV (C-IV)

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26	N	1.4.1	1-7		Under the Design, develop, test, and deliver Bullet, there is mention that the web portal must be "Presented in English and Spanish, with the ability to be translated into the threshold languages." OMR #138 - is the only mention of threshold languages and it is about the IVR functionality only. OMR # 131 - only	N	Consortium IV (C-IV)
27	N	1.4.1	1-8	UR 1 UR6	Under the Design, develop, test, and deliver , there is mention that the web portal must "enable access for persons with disabilities and provide a mechanism to obtain feedback regarding ease of accessibility." UR 1 and UR 6 address accessibility by the Disabled, however, there is no corresponding requirement for obtaining feedback from the Customers.	N	Consortium IV (C-IV)
28	N	1.4.1	1-8		Under Design, develop, test and deliver, sub-bullet on "Utilize the "no wrong door" service system…", recommend to add a new bullet to state "Allow individuals to upload / submit documents electronically"	N	Los Angeles Department of Public Social Services LEADER

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29	N	1.5	1-11	Regarding the note at the end of this section - it may also be necessary to add requirements as the federal rules are clarified. Although we recognize that it is a difficult caveat to include in a solicitation, there needs to be a mechanism to add items not yet known.	N	CWDA
30	N	3.1	3-27	Vendor qualifications 4 & 5 refer to experience establishing and operating call centers. Since this RFP is for the technology support rather than call center operations, the qualifications should refer to the technology.	N	CWDA
31	N	4.1 & 4.3.8	4-29 , 4-34 & 4-15	Sections 4.1 & 4.3.8 indicate that integration of MEDS is part of the baseline system, where as the chart on page 4-34 indicates it is optional. Recommend that integration with MEDS be consistently shown as a key element of the baseline system.	N	CWDA
32	N	4.3 Table 10	4-32	We recommend making basic interaction with the other human services part of the Core Functionality rather than a Mandatory Optional Functionality Service.	N	CWDA
33	N	4.3 5th bullet "Basic Health	4-31	The "in enacted" should be changed to "if enacted"	Y	WCDS CalWIN

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34	Y	4.3.1 Application Submission and Update	4-1	Mentions interfaces; need to ensure extra time for coordinating/testing efforts plus funding for interface partners (i.e. SAWS, IEVS, MEDS, etc.)	N	WCDS CalWIN
35	N	4.3.1	p. 4-1	Re "Verifying in real-time whether an individual is already eligible ... via MEDS interface" : Add requirements to address the "real-time clearance" process to identify the Client Index Number.	N	Los Angeles Department of Public Social Services LEADER
36	N	4.3.1	p. 4-1	Include means of notifying client's whose changed circumstances changes program eligibility, providing choices, and facilitating seamless transition to other coverage.	N	CWDA
37	N	4.3.1	4-1	Under Application Submission and Update, bullet "Enabling the customers or designated assisters...(e.g. email, web portal, and phone)", recommend to add "mail" to the list of e.g.	N	Los Angeles Department of Public Social Services LEADER
38	N	4.3.1	4-1	Add "Denial" "rescission" functionality	N	Los Angeles Department of Public Social Services LEADER
39	N	4.3.1	4-1	A mail in option should be added to the list of methods applicants and clients can use. (Second to last bullet.)	N	CWDA

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40	N	4.3.1	4-1		Add an item to "Application Information Verification" stating that the applicant can view the progress/status of eligibility determination (in addition to being notified).	N	CWDA
41	N	4.3.1	4-1		Application Submission and Update: Bullet 7 speaks to verifying if already eligible/receiving subsidized care via MEDS. MEDS currently interacts with the SAWS systems using a batch process. This will also need to be real-time to avoid information gaps and potential for duplicate benefits.	N	WCDS CalWIN
42	N	4.3.1	4-2		Add new bullet under Application Submission and Update to state "Collecting mandatory data for eligibility determination, such as but not limited to income". Income information is essential for MAGI calculation so believe it should be called out specifically.	N	Los Angeles Department of Public Social Services LEADER
43	N	4.3.1	4-2		Under Application Information Verification, "verification of specified fields (i.e. citizenship, tribal affiliation…)…", please consider adding IEVS for income verification.	N	Los Angeles Department of Public Social Services LEADER

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44	Y	4.3.1	4-2		Application Information Verification: States applicant is notified of application status during the app process. We suggest adding a requirement that the client have the ability to print the list of verification items that are outstanding.	N	WCDS CalWIN
45	Y	4.3.1	4-2		Plan Selection: There did not appear to be a requirement for vendor to periodically update the provider directories. Changes are inevitable and regular updates are essential to ensure accurate information for customers/users.	N	WCDS CalWIN
46	Y	Plan Selection "providing provider directories for each plan selected…"	4.3.1 p. 4-2		Need to specify who pays for/prints provider directories. Can be a large expense per Health Care Options experience	N	WCDS CalWIN
47	N	4.3.1	4-3		We didn't see where "Exchange Health Services Programs" are defined.	N	CWDA
48	N	4.3.1	4-3		Under Appeals, bullet 1 -> "Processing an individual appeal request….(status, assignments and relevant case notes)…", please consider to reword / include "…status, assignments, relevant case notes and documentation"…"	N	Los Angeles Department of Public Social Services LEADER

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49	N	4.3.1	4-3		Under Appeals, please consider adding a new bullet that states "Sending notification to the appropriate parties, such as the client, regarding the result of the appeal".	N	Los Angeles Department of Public Social Services LEADER
50	N	4.3.1	4-3		Under Case Management, bullet 4 regarding retention of the case information for a period of 36 months, QUESTIONS: 1. What happens to the case information after 36 months, archived, purged? 2. Is it only for "inactive" cases/individuals or this applies to both active/inactive cases/individuals? Recommendation: Request to this 36 months retention only applies to "Inactive" cases and these cases are to be "archived" not purged. This is needed during reviews, especially during appeals.	N	Los Angeles Department of Public Social Services LEADER
51	N	4.3.1	4-3		Under Case Management, please consider to add a new bullet that states "Ability for authorized users to view any documentation that may be uploaded by the clients and/or notices that were produced".	N	Los Angeles Department of Public Social Services LEADER

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52	N	4.3.1	4-3		Under "Renewal" -- add requirement to also post information online.	N	CWDA
53	N	4.3.1	4-3		Case Management: Bullet 5 speaks providing ability to associate individuals with one or more cases. It is unclear if this association is within CalHEERS or includes other systems, such as the SAWS. Please clarify that the association must be across systems serving the same family.	N	WCDS CalWIN
54	N	4.3.1	4-4		Fourth sub point under third bullet -- The phrase "..whole in the member account features" is not clear.	N	CWDA
55	N	4.3.1	4-4		Under Other Health Services Programs, 3rd bullet and sub-bullet 2 -> "Send and receive application and case data to/from SAWS". Request to change verbiage to "Send and receive application, case data and other documentations to/from SAWS".	N	Los Angeles Department of Public Social Services LEADER
56	N	4.3.1	4-4		We recommend that the second bullet be expanded as follows: "Collecting and sending the basic application data to the system of record for that program to continue the application process and track the result of that process."	N	CWDA

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57	N	4.3.1	4-4	Under Other Non-Health Services Programs, 2nd bullet " Collecting and sending the basic application data to the system…" -> please consider to rephrase statement to "Collecting and sending the basic application data, along with any documents provided by the applicant, to the system of record...".	N	Los Angeles Department of Public Social Services LEADER
58	N	4.3.2	4-4	Under Financial Management, 2nd bullet on Premium Processing -> Depending on SAWS, may need to discuss to add "Send electronic file to SAWS systems on premium collection data".	N	Los Angeles Department of Public Social Services LEADER
59	N	4.3.2	4-4	Add requirements to Address interface functionality related to the 250% Working Disabled program (non-MAGI Medi-Cal, determined by Counties) and premium processing by CalHEERS.	N	Los Angeles Department of Public Social Services LEADER
60	N	4.3.4	4-6	Re "Reporting": Add requirements to Address processing of "data discrepancies" (e.g. MEDS Alerts/Recon)	N	Los Angeles Department of Public Social Services LEADER
61	Y	4.3.4	4-6	References SHOP reports but section seems to apply to non-SHOP functions. Suggest deleting SHOP notation in "Reports" paragraph.	N	CWDA

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62	N	4.3.4	4-6		Reporting - add requirement to track client movement between programs and over time.	N	CWDA
63	N	4.3.4	4-7		Under the Notices bullet -- Recommend keeping copies of rejected NOA also. It often necessary to look back to them to see why it was rejected.	N	Consortium IV (C-IV)
64	N	4.3.4	4-7		Re "Notices" - Add requirements to notify individual of eligibility regarding approval/ denial/change/discontinuance .	N	Los Angeles Department of Public Social Services LEADER
65	N	4.3.4	4-7		Reports -- Add fiscal reports.	N	WCDS CalWIN
66	Y	4.3.4, 4.3.7, 4.4.3.7, 4.8.6.2			Although they are mentioned in several sections, noticing/correspondence requirements are unclear.	N	WCDS CalWIN
67	Y	4.3.5 Plan and Benefit Assistance	4-8		Specifies generation of correspondence; clarify if payment for printing and postage costs are responsibility of vendor; this is a highly variable cost component - variable pricing might be preferred here	N	WCDS CalWIN
68	Y	4.3.5 Web Portal	p. 4-8		Language requirements are specified in "Eligibility Administrator" section, but not in "Web Portal Online Help" section; recommend specify language requirements for Web Portal	N	WCDS CalWIN

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69	N	4.3.7	4-11	Disenrollment -- add language regarding facilitating continuation of coverage for employees disenrolled such as noticing employee of options to apply for subsidized coverage.	N	CWDA
70	Y	4.3.7	4-12	SHOP Notices: This section does not appear to address notification to employees should an employer become decertified, fail to renew or when health plans are changed. It would seem if an employer become decertified that an employee should to notified in order to apply for insurance as an individual or through other programs.	N	WCDS CalWIN
71	Y	4.3.7	12-Apr	Statement "Send an electronic, real-time transmission of information necessary for the qualified health plan issuer to provide a welcome package and identification card to the employer." appears to be an interface or electronic communication, yet is captured under Notices section.	N	WCDS CalWIN
72	N	4.3.8	4-15	Paragraph 2, Line 9: the wording "part of the" is repeated twice and should be removed for clarification.	Y	WCDS CalWIN
73	N	4.3.8	4-15	Paragraph 3, Line 4: Lists "Food Stamps/TANF". Seems that the term Food Stamps should be modified to CalFresh to meet the California name change.	Y	WCDS CalWIN

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74	N	4.3.8.1	4-16		Bullet 5: Appears to be a word missing in the sentence which leads an unclear meaning - "…to each individual know to MEDS each newly…"	N	WCDS CalWIN
75	N	4.3.9	4-9		Usability (Under the Format bullet list) Bullet 4-- calls for displaying information in a culturally sensitive manner. A search of the entire Requirements Matrix, returns no results for "culturally sensitive"	N	Consortium IV (C-IV)
76	N	4.3.9	4-18		Usability - mentions the CalHEERs must be accessible from smart mobile devices. A search of the entire Requirements Matrix, returns no reference to smart mobile devises, chat, Web-videos, Self-Help, "links to other"	N	Consortium IV (C-IV)
77	N	4.3.9	4-18		Add "counties" to the list of entities to be supported.	N	CWDA

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78	N	4.3.9	4-19		Usability, Under the Ease of Use bullet list, bullet 5 - calls "click no more than three times to get the information or functionality." A search of the Requirements Matrix returns no reference to "Click". It is unclear as to 1) What is being clicked? 2) What information or functionality is being returned? 3) Is it acceptable to click a Submit button up to three times to have the information actually saved to the System?	N	Consortium IV (C-IV)
79	N	4.3.9	4-19		Format -- Require the vendor to support all versions of Internet Explorer commonly in use. (This is a current problem in the CMIPS II project.)	N	CWDA
80	N	4.3.9	4-19		Content - Web Portal: Bullet 10 mentions links to other health benefit programs. It seems that it would benefit those visiting the site to also have the links to the various welfare programs or a way for them to also request cash or other aid.	N	WCDS CalWIN
81	N	4.3.9	4-19		Ease of Use: Bullet 4 allows the customer to print each screen. Suggest adding a requirement that the customer also be able to download forms from the site and notices.	N	WCDS CalWIN

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82	N	4.4	4-20	Second bullet -- for clarity, add counties to the parenthetical list of "system users".	N	CWDA
83	Y	4.4 and Technical Requirements		The narrative in section 4.4 does not appear to complement the requirements listing. They appear to be two totally separate documents. Example in section 4.4 page 4-20 there is a bullet at the bottom of the page entitles "CalHEERS External System Interface", this bullet mentions APIs that allow A2A integration with CalHEERs yet there are no requirements that mention "A2A". In addition there are no API requirements.	N	Consortium IV (C-IV)
84	Y	4.4 and Technical Requirements		Title correction -- We assume that CASES, CalHEERS and "Callers" are all the same and should be CalHEERS.	Y	Consortium IV (C-IV)
85	Y	4.4.2 Facilities	p. 4-24	Specifies Exchange Project Staff at vendor site; recommend more specifics on staff count, offices, square feet, etc. required	N	WCDS CalWIN
86	Y	4.4.3.7	4-33	Technical Correspondence section does not include the requirements to store and reprint, which is requested in section 4.3.4 Reports.	N	WCDS CalWIN

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87	Y	4.4.3.7	4-33		Statement "the Correspondence must be able to be generated dynamically" is vague and can be interpreted in a variety of ways. Does dynamic refer to the manner of generation, the ability to generate automatically based off of case circumstance, or does it mean it includes case specific data?	N	WCDS CalWIN
88	Y	4.4.3.7 Correspond ence			Can't find language requirements - Attachment 3 as referenced	N	WCDS CalWIN
89	Y	4.4.4 Table 11 - Volume Capacity	p. 4-36		Need table data filled in	N	WCDS CalWIN
90	Y	4.4.7	4-37		We recommend adding SAVE (Systematic Alien Verification for Entitlement) interface.	N	Los Angeles Department of Public Social Services LEADER
91	Y	4.4.7	4-38		SAWS - section requires the ability to exchange standardized application and case information. Since an applicant may be associated with more than one case, we recommend including information at the individual level.	N	WCDS CalWIN

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92	Y	4.4.7	P. 4-38	A one way interface implies the CalHEERS only send information to these interface partners and not expecting a return response to some degree most interface will be two way the extent to the degree will need to be defined.	N	WCDS CalWIN
93	Y	4.4.7	P. 4-38	Each interface will need to be defined; what will be sent to and received from.	N	WCDS CalWIN
94	Y	4.4.7	P. 4-38	Need to clarify what the interface cost expectations are; including assumption on which party will cover the cost(s).	N	WCDS CalWIN
95	Y	4.4.7 Interfaces	p. 4-37	Recommend including interface with Child Support.	N	WCDS CalWIN
96	Y	4.5.1	p.4-46	Clarify Project Sponsor and Program Sponsors and who they are.	N	WCDS CalWIN
97		4.5.13	4-51	Operational SAS -70 Audits are obsolete and have been replace by the annual SSAE 16 Operational Audits.	N	Consortium IV (C-IV)
98	N	4.5.2	4-47	Paragraph 3: A potential exists for numerous change orders. It would seem to be more efficient to provide a change order mechanism within the contract to allow for changes without constantly amending a contract.	N	WCDS CalWIN

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99	N	4.6.1.3			Discusses UAT; however, it does not go into detail as to who the audience will be. Will UAT be county staff, state staff, CBOS, application assistors, or the vendor? Interface testing with the current systems is briefly mentioned, but it seems to me it's a large piece and how can you develop/propose a plan on something if you don't know who the audience is?	N	Consortium IV (C-IV)
100	N	4.6.1.3.1	4-56		This section does not appear to directly address the issue of "pre-enrollment," despite the fact that the "Eligibility Transfer" row in Table 10 (p. 4-34) indicates that pre-enrollment will be described in Section 4.6.1.3.1. We recommend that this section include a description of pre-enrollment, including both what it means and how it is intended to work.		CWDA
101	N	4.6.1.3.1 Conversion	p. 4-56		Recommend due date for conversion activities; "vendor is required to make every effort to provide a successful conversion" is vague and doesn't hold vendor accountable for successful result.	N	WCDS CalWIN
102	Y	4.6.4.3	4-60		For Training; clarify will there be a training system for training. We have found that Computer Based Training and hard copy materials are not effective be themselves.	N	WCDS CalWIN

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103	Y	4.7.1 Rejection of unsatisfactory deliverables	p. 4-60		Recommend a specific cure period for rejected deliverables (i.e. "within 10 business days"); open-ended cure risks schedule slippage.	N	WCDS CalWIN
104	Y	4.8.1 Operations Management	p. 4-68		System Availability, Performance Management, and Change Management standards too vague; recommend specific SLAs to ensure desired performance.	N	WCDS CalWIN
105	Y	4.8.6.2	4-73		Incoming Mail and Fax does not specify if reprinting/copying option will be needed for stored files. Suggest adding a requirement for reprinting.	N	WCDS CalWIN
106	N	4.8.6.2 Incoming Mail and Fax	p. 4-73		Last bullet not complete thought: "Undelivered/returned mail." ???	N	WCDS CalWIN
107	Y	4.8.7 toll-free telephone number	p. 4-74		Ensure SLAs around availability, uptime, capacity	N	WCDS CalWIN

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108	Y	6.4	6-17		It appears that the scoring of the vendor proposals are on the total proposal, including the optional items. That strategy could result in a vendor award based upon optional items that may never be exercised/implemented. We believe it would be cleaner to base scoring on mandatory features and functionality and then go through a process to make sure the optional features are cost competitive. This could be done during negotiations.	N	Consortium IV (C-IV)
109	Y	Appendix A	G-6		Add definition for "CSR"	N	CWDA
110	Y	Appendix B, section 1.2	B-2		There is a Appendix A section in Appendix B, this is confusing.	N	WCDS CalWIN
111	Y	Appendix B, section 2.0	B-3		The governance section needs to detail more information on the oversight. The interface partners need to be included as part of the governance body to provide oversight and coordination of mutual system changes as required.	N	WCDS CalWIN
112	Y	Appendix B, section 2.0	B-3		Clarify the term 'governance bodies' and who they are.	N	WCDS CalWIN

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113	Y	Appendix B, section 2.0	B-5	Clarify what the intent of this statement is 'CMS is developing additional content to further explain and describe the states' use of the ALM environment and tools for implementing the ELC process. This content will include how to submit and access artifacts for stage gate reviews and which products and components will be available for sharing and reuse across multiple stakeholders. In addition, CMS will provide more details on Medicaid connectivity.'	N	WCDS CalWIN
114	Y	Appendix B, section 3.3	B-13	There is a general assumption that the exchange will have interface partners. The vendor should be required to engage those partners in development and testing.	N	WCDS CalWIN
115	Y	Appendix B, section 3.4.1	B-16	Reference "Stakeholders' through out the document however there does not seem to be a definition included.	N	WCDS CalWIN
116	Y	Appendix B, section 3.4.1	B-16	Clarify the term 'decision makers/approvers' and who they are.	N	WCDS CalWIN

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117	Y	Appendix H	H-4 of 23		Add a section to clarify to partners to call out additional bodies of work they are expected to know and train applicable staff to support. Such as: County Worker: They will also assist consumers in applying for non-subsidized health coverage when the consumer initiated the application at the county welfare department (CWD) office.	N	WCDS CalWIN
118	Y	Appendix H	H-4 of 23		Related to section 4.8.6 Service Center. Define in glossary Service Center, Service Center Staff, Call Center, Call Center Staff; or make a reference to section 4.8.6	N	WCDS CalWIN
119	N			UR 5 UR 6	"UR 5 appears to be repetitive of UR 4. UR 6 is repetitive of UR 1. Suggest clarify UR 5 to reflect obtaining feedback from Customers. And eliminating UR 6. "	N	Consortium IV (C-IV)
120	N	Usability Requirements		UR23	This requirement appears to limit access to the Exchange to the State standard browser only (i.e., current version of Internet Explorer), which conflicts with other requirements for supporting various smart phone or mobile devices. Many customers will need to access the Exchange from other user platforms (e.g., ions or Android devices).	N	Los Angeles Department of Public Social Services LEADER

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121	N			UR 23	Calls for the use of the "current version of Internet Explorer". We have found with C4Y that we need to take into account the other formats available. For example, Catholic Charities in the Modesto/Stockton is not allowed to use IE…they are required to use Google Chrome. The new 'tool' should be adaptable to all other web browsers.	N	Consortium IV (C-IV)
122	Y			BR General	Add functionality to issue "denial" notice if found not qualifying after application submission	N	Los Angeles Department of Public Social Services LEADER
123	Y			BR General	Many of the requirements appear to describe programmatic or business processes, but do not exactly define the system function or scope (e.g., SR 83).	N	Los Angeles Department of Public Social Services LEADER
124	Y			BR General	Several duplicative requirements appear throughout the requirements document. (e.g., SR 3 and SR 5)	N	Los Angeles Department of Public Social Services LEADER
125	Y			BR General	Add functionality to allow a "rescission" after disenrollment (e.g. erroneously) without going thru appeal process	N	Los Angeles Department of Public Social Services LEADER

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126	Y			BR General	Add functionality to provide search functionality for business rules/policies	N	Los Angeles Department of Public Social Services LEADER
127	Y			BR General	Add MEDS interface functionality such as updating death info, DRA citizenship and identity info	N	Los Angeles Department of Public Social Services LEADER
128	N			BR General	We recommend that the following requirement be inserted after the current BR46: "The CalHEERS shall provide the functionality to collect and send basic application data for other non-health services programs to the system of record in order to continue the application process and track the result of that process."		CWDA
129	N			BR 5	Suggest a time limit be incorporated on how long to keep an unfinished application.	N	Consortium IV (C-IV)
130	N			BR7	Add functionality to "store" the scanned material	N	Los Angeles Department of Public Social Services LEADER
131	N			BR8	Add functionality to notify the applicant the result of obtaining the Statewide Client Index (SCI) and step to take to resolve discrepancies, if any	N	Los Angeles Department of Public Social Services LEADER
132	N			BR 8	Should say **retrieve** or obtain as many already have a CIN	N	Consortium IV (C-IV)

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133	N			BR13	Add functionality to notify the applicant of the verification result in real-time if an existing account if found	N	Los Angeles Department of Public Social Services LEADER
134	N			BR19	Add functionality to notify the applicant of the verification result in real-time	N	Los Angeles Department of Public Social Services LEADER
135	N			BR32	Add functionality to track DRA-required identity	N	Los Angeles Department of Public Social Services LEADER
136	N			BR 43	Referral seems inappropriate, unless it contains the information the customer entered so it will not have to be re-entered into SAWS.	N	Consortium IV (C-IV)
137	N			BR43	Add functionality to screen Medicare Saving Program eligibility	N	Los Angeles Department of Public Social Services LEADER
138	N	Business Requirements		BR57	"The CalHEERS shall provide the functionality highlight any benefit gaps in a plan that might surprise the consumer for each plan selected for comparison." This requirement is unclear and can be interpreted in many ways, as the criteria for "surprise" is not strictly defined.	N	Los Angeles Department of Public Social Services LEADER

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139	N			BR 78	Appears to be a comment rather than a requirement.	N	Consortium IV (C-IV)
140	N	Business Requirements		BR123	This requirement indicates that the system will capture the individual's preferred language, but does not specify that the system will deliver written or spoken communication in such preferred language. Further, there does not appear to be a specific requirement for written communications in threshold languages as required by law.	N	Los Angeles Department of Public Social Services LEADER
141							
142							
143	N			TR General	There is no requirement for backup/recovery of Service Center functionality/facilities.	N	Consortium IV (C-IV)
144	Y			TR General	There's no mentioning of MEDS Alerts. Is it implied there's no MEDS Alerts will be generated during the reconciliation process and/or via the daily batch? Please evaluate if this should be added as a requirement.	N	Los Angeles Department of Public Social Services LEADER
145	N			TR General	Did not find any indication of development and maintenance of CalHEERS testing and training environment(s) to migrate new/modified system related changes. Please consider adding a new requirement	N	Los Angeles Department of Public Social Services LEADER

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146	Y	Technical Requirements		TR General	There appears to be many compound requirements that should be broken down into separate requirements (e.g., TR 6).	N	Los Angeles Department of Public Social Services LEADER
147	Y	Technical Requirements		TR General	We suggest having specific requirements for a back-up power generator. If the generator can't meet the specific requirements then it simply won't be doing anyone any good because it can put undue stress on the unit and even damage some of the devices connected to it. The requirements should include generator size, how much power/total power, capacity etc.	N	Consortium IV (C-IV)
148	Y	Technical Requirements		TR General	The technical requirements are very broadly written, therefore difficult if not impossible to test and hold the vendor accountable to. We suggest pulling some of the pertinent specific functionality out of the reference documents so that these requirements can be specifically tested and verified.	N	Consortium IV (C-IV)
149	N	Technical Requirements		TR6	This requirement does not explicitly restrict geographically unstable locations for the data center and other facilities.	N	Los Angeles Department of Public Social Services LEADER

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150	N	Technical Requirements		TR20	4 hours of back-up power is not adequate. We suggest a minimum of 24-48 hours of back-up power.	N	Consortium IV (C-IV)
151	N			TR25	Based on past experience, it's probably best to add a new required to state "H. One (1) Telephone Headset". This is to facilitate the need to participate a on teleconference call but no need to occupy an entire conference room.	N	Los Angeles Department of Public Social Services LEADER
152	N			TR27	Based on past experience, it's probably best to add a new required to state "One (1) Telephone Headset". This is to facilitate the need to participate a on teleconference call but no need to occupy an entire conference room.	N	Los Angeles Department of Public Social Services LEADER
153	N			TR28	Based on past experience, please specify "microwaves" as one of the "furnishings"	N	Los Angeles Department of Public Social Services LEADER

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154	N	Technical Requirements		TR30	This requirement is difficult to test to determine if the ELC and ALM are "aligned to the Exchange Lifecycle Governance process". We suggest pulling the desired requirements from the CMS Exchange Reference Architecture: Foundation Guidance and Collaborative Environment and Life Cycle Governance – ERA Supplement, which should, at a minimum demonstrate alignment.	N	Consortium IV (C-IV)
155	y	Technical Requirements		TR44	TR44 is a good example of an important requirement that is written too broadly. As written this requirement cannot be tested and verified. We suggest that a list of minimum business performance matrices be specified. These business performance matrices need to at least track and monitor the SLAs.	N	Consortium IV (C-IV)
156	Y			TR49	What is "Callers"? Many TR reference this "callers" but it was not explained as to what / who they are	N	Los Angeles Department of Public Social Services LEADER
157	N	Technical Requirements		TR55	This requirement does not delineate the distribution of rules (MAGI vs. non-MAGI) among the Exchange and SAWS.	N	Los Angeles Department of Public Social Services LEADER

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158	y	Technical Requirements		TR73	This is an example of a broad requirement that cannot be tested "The Vendor shall provide a comprehensive network infrastructure which leverages automatic notifications". This does not answer the question, what type of notifications, when should they be triggered, who should they go to, what is the vendor to leverage. These requirements need more specifics and details so they can be tracked and tested to ensure the vendor is meeting the intent of the procurement.	N	Consortium IV (C-IV)
159	Y	Technical Requirements		TR76	This requirement should contain more detail - what does CalHEERS define as "optimal performance". This will drive what adequate bandwidth will be needed to meet those performance requirements during peak usage times.	N	Consortium IV (C-IV)
160	N			TR78 TR79	Batch requirements referencing 'users' should be changed to 'the Exchange'.	N	Consortium IV (C-IV)

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161	N			TR84	Is it implied that this is a daily batch file exchange between CalHEERS and MEDS? If yes, please consider rephrase the requirement to specify "….daily, monthly and quarter batch files with MEDS…" And, if not, please consider a new requirement to establish / mandate a daily batch file exchange between CalHEERS and MEDS. This is how the SAWS and MEDS communicate currently, daily (outgoing and incoming), monthly (MEDS Renewal), and quarterly (MEDS Recon)	N	Los Angeles Department of Public Social Services LEADER
162	N			TR86	Why is the interface with SCI via "batch file", not real time? Based on the DRAFT HBEx solicitation document, CalHEERS is to provide real-time information. Please consider to rephrase requirement to "The CalHEERS shall provide the capability to interface with the State Client Index (SCI) via batch files and ability to access real-time SCI data"	N	Los Angeles Department of Public Social Services LEADER
163	N			TR89	TR-89 Since modifications to the existing MEDS API's could also impact other systems using those API's, language should be added to indicate that any API changes would be made in coordination with MEDS or current API users.	N	Consortium IV (C-IV)

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164	Y	Technical Requirements		TR91	For the complex interaction that is envisioned with the SAWS there is only one interface requirement "CalHEERS shall interface with each of the existing SAWS". We assume that the interface should be on-line and real-time and available 24/7? the type of data and functionality that is required to be exchanged with SAWS should be articulated in line with the narrative section.	N	Consortium IV (C-IV)
165	N			TR 93 TR 94	Please clarify why CalHEERS needs to reconcile with MEDS and SCI separately? SCI individuals = MEDS individuals. Demographic information resides in MEDS, it may be sent by the SAWS but SAWS sends MEDS transactions to MEDS. With that said, please consider combined the two TR into one AND make a new requirement for quarterly reconciliation effort.	N	Los Angeles Department of Public Social Services LEADER
166	N			TR96	Please consider to interface with CMIPS. This may provide income information and individuals who are receiving IHSS.	N	Los Angeles Department of Public Social Services LEADER
167	N	Technical Requirements		TR99	This requirement does not fully define a clear path for horizontal eligibility between HEX and SAWS.	N	Los Angeles Department of Public Social Services LEADER

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168	N	Technical Requirements		TR160	Although this requirement lists "System Upgrade Administration," it does not specify any software and hardware upgrades to ensure current technology or to prevent technological obsolescence.	N	Los Angeles Department of Public Social Services LEADER
169	N			DIR 1 - 10	Very vague when discussing the "existing systems data". There is no discussion of working with the SAWS Systems (plural) or interface partners during the analysis of data files, conversion planning or testing. Any conversion or interface planning, testing and implementation is a workload impact on the Source Systems or Interface partners. Recommend that an Interface Agreement is required with each interface partner, which will include file layouts, transactions frequencies, security and file transfer protocols, test methodologies, thus setting level of effort expectations.	N	Consortium IV (C-IV)
170	Y			DIR1	Conversion does not define existing systems.	N	Consortium IV (C-IV)
171	N			DIR 11	Should include automated Regression Testing.	N	Consortium IV (C-IV)
172	N			OMR49 OMR50	Requirement should be combined	Y	Consortium IV (C-IV)
173	N			OMR133	Appears to be in conflict with OMR138	N	Consortium IV (C-IV)

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