



Solicitation HBEX4 – Request for CalHEERS Development and Operations Services

Addendum #2

February 10, 2012

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The following changes have been made to Solicitation HBEX4 – Request for CalHEERS Development and Operations Services:

1. **Section 1.2 - Scope of the Solicitation** – Added clarification about the decision timing of State Option to Buy services.
2. **Section 2** updates include:
 - A. **2.1 - Solicitation Single Point of Contact** – Corrected the Single Point of Contact email address.
 - B. **2.2.1 - Solicitation Schedule**, Table 5 - Key Action Dates – Proposal Submission Deadline has been changed to 2/29/2012.
3. **Section 4 - Vendor Scope of Work** updates include:
 - A. **Section 4.3 - Business/Functional Scope** – Added clarification about the decision timing of State Option to Buy services.
 - B. **Section 4.3.3.4.2 - MEDS Statistics** – Updated first bullet under monthly transaction volumes to reflect that MEDS transactions in direct Support of County/MCED/HF eligibility determination and Operations Support are in excess of 50 million instead of 28 million.
 - C. **Section 4.4.4 - Capacity** – Added a new assumption regarding small employer market and employees.
 - D. **Section 4.5.2 - Communication Management** – Removed text regarding Balanced Scorecard.
 - E. **Section 4.5.8 - Project Status Reporting** – Added text regarding Balanced Scorecard.
 - F. **Section 4.6.1.3.1 - Conversion** – Added text to clarify scope and intent of Eligibility Transfer.
 - G. **Section 4.6.3 Implementation Scope - Organizational Change Management** – Added Clarification about the decision timing of State Option to Buy services.
 - H. **Section 4.7.6 - Service Center** – Added text to clarify role of Service Center Manager.
 - I. **Section 4.7.6.2 Mail and Print Processing** – Correction made to Table 21 - CalHEERS Mail and Print Processing – Outgoing Correspondence Types. Corrected the fifth column heading from Email to Text.
 - J. **Section 4.8.2 - Deliverable and Implementation Deliverables** – In Table 22:
 1. Moved “Service Center Build and Implementation Plan” and “Initial Service Center Management Plan” deliverables to Pre-Operational Readiness Review (PORR).
 2. Added missing “Initial IVR O&M Plan” deliverable to Pre-Operational Readiness Review (PORR).
 3. Corrected title for “Transition Out Management Plan.”
4. **Section 5 - Proposal Preparation Instructions** – Updates include:
 - A. **Section 5.4.1 – Proposal Structure** – Increased the maximum page count from 20 to 25 for Corporate Experience and Qualifications.

- B. **Section 5.5.2.3 - Corporate Experience and Qualifications** – Removed instructions for completing Proposal Attachments and 6 and updated Section 5.5.4 with appropriate instructions.
 - C. **Section 5.4.3 - Cost Proposal** – Added clarifying text regarding the inclusion of costs based on the Model Contract and the capped amount for Integration of MEDS Functionality.
 - D. **Section 5.5.4 - Proposal Attachments** – Clarified Attachment submission instructions for Prime Vendor, Major Subcontractors, and all Subcontractors.
 - E. **Section 5.6 - Proposal Submission Instructions** – Increased the number of:
 - 1. Hard copy proposal submissions from one Master to one Master plus five hard copies.
 - 2. Electronic copy proposal submission from 25 to 30.
5. **Appendix A – Glossary** – Updated several terms.
6. **Attachment 2 - Requirements** – Updated and/or added the following requirements (changes identified with Red text):
- A. UR30
 - B. PM10 and PM50
 - C. DIR4
 - D. OMR100, OMR135, OMR141, OMR142, and OMR169
 - E. PR1, PR4, PR84, PR86-PR99, and PR101.
 - F. DR58, DR78-DR100 (renumbering and changes)
7. **Attachment 8 - Cost Schedules** – The following updates were made to the cost schedules:
- A. Added Vendor Note to the Cost Summary tab to “10 - Integration of MEDS Functionality (State Option to Buy)” on row 17 that states, “Do not enter any costs in this line.”
 - B. Updated summary formulas for tabs A2 and A3.
 - C. Changed name of tab A2 to “A2 - Baseline (Alt) System Sum”.
 - D. Removed deliverable #31 - Contingency / Recovery Plan from tabs C1a, C2a, and C3a and renumbered subsequent deliverables accordingly.
 - E. Updated the Individual Premium Aggregation totals in the following tabs and rows:
 - 1. C1c – Rows 61-65
 - 2. C1d – Rows 60-63
 - 3. D1b – Rows 61-65
 - 4. D1c – Rows 60-63
 - 5. C2c – Rows 61-65
 - 6. C2d – Rows 60-63
 - 7. D2b – Rows 61-65
 - 8. D2c – Rows 60-63
 - F. Updated the Other Health Services Program totals in the following tabs and rows:
 - 1. C3c – Rows 50-54
 - 2. C3d – Rows 48-52

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3. D3b – Rows 50-54
 4. D3c – Rows 48-52
 - G. For tabs D1a and D2a, grayed out cells in columns B – D pertaining to SFY 2011/12 and SFY 2012/13 and added Vendor Note, “Do not enter hours, months, rates, or costs for SFY 2011/12 or SFY 2012/13.”
 - H. For tabs D1a, D2a, and D3a, updated “Information Requested” instructions in cells E27 and E78 to reference the correct rows.
 - I. For tabs D1a, D2a, D3a, and D4a, changed the number of months for all O&M services in SFY 2019/20 from 12 to 10.
 - J. Changed name of tab D3c to “D3c - Expanded O&M HWSW Main”.
8. **Attachment 9 - Contract Exception Matrix** – Added note stating: “All Model Contract exceptions must be included in the Vendor Proposal at time of its submission. No additional exceptions may be presented during Contract Negotiations.”