



# **Solicitation HBEX4 – Request for CalHEERS Development and Operations Services**

## **Addendum #3**

February 17, 2012

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

1. **Section 2 – Solicitation Process and Schedule**
  - A. **Section 2.2.1 - Solicitation Schedule** – Table 5 Key Action Dates includes a minor correction to two dates.
  - B. **Section 2.22 - Protest Process** – Text updated with revised protest process.
2. **Section 4 - Vendor Scope of Work** – Updates include:
  - A. **Section 4.4.2 - Facilities** – Provides clarification around facilities requirements.
  - B. **Section 4.6.3.1 - CalHEERS Users** – New assumptions added to Table 15 - CalHEERS Users.
  - C. **Section 4.7.6 - Service Center** – The following two updates were made:
    1. First paragraph – Provided clarification pertaining to the Vendor's responsibility for housing Service Center staff.
    2. Table 17 - CalHEERS Customer Service Metrics – A new assumption was added to the Key Assumptions on Application Processing Requirements.
  - D. **Section 4.8 - Deliverables** – Table 22 - D&I Deliverables has been updated to indicate if the deliverable is Preliminary, Interim, or Final, and appropriate deliverables have been updated to indicate State Option to Buy.
3. **Section 5 - Proposal Preparation Instructions** updates include:
  - A. **Section 5.5.4 - Proposal Attachments** – Provided clarification pertaining to CA Form 700 applicability and submission requirements.
  - B. **Section 5.6 - Proposal Submission Instructions** – Updates include revised Proposal submission instructions.
4. **Section 6.4 - Proposal Scoring Methodology** – Clarified text pertaining to proposal ranking.
5. **Appendix C - Solicitation Library Index** – Updates include:
  - A. Removing categories of documents that will not be provided as part of the Solicitation Library.
  - B. Adding two new UX 2014 documents.
6. **Appendix D - Model Contract** – The following Model Contract Sections have been updated for clarification:
  - A. Recitals
  - B. Section 1.14, 1.18, 1.25, 2.5, 3.3, 4.4.2, 9.3.2, 9.3.3, 9.4, 11.1, 12.11, 15.1, 15.2, 15.4.3, 15.8, 17.3, 21.2, 22.37.2
  - C. Exhibit A – Balanced Scorecard information added.

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- D. Exhibit C – Service Level Agreements updated.
  - E. Exhibit G – Updated Letter of Credit information.
  - F. Exhibit I – Removed Section 3.3.2 and 3.4.
7. **Attachment 2 - Requirements** – Updates include:
- A. Clarifying, updating, and/or adding the following requirements (changes identified with Red text):
    - a. BR 51 and BR352
    - b. DIR77
    - c. DR has been reordered and renumbered. Also note changes to: DR3, DR7, DR8, DR51 - DR53, DR56-DR66, DR81- DR92, DR103-DR106
    - d. PMR3, PMR4, PMR19, PMR29, PMR51, and PMR52
    - e. PR30 and PR96
    - f. SH293
    - g. TR18, TR39, TR68, TR69, TR103, TR109, TR139, TR182, TR192, TR193, TR194, TR195, TR196, TR197, TR198, and TR199
8. **Attachment 3 - Certification Checklist** – Item 9 has been revised.
9. **Attachment 4 - Corporate Information and Experience Matrix**, Item 8 has been revised to clarify background check requirements.
10. **Attachment 7 - Resume Form** – Updates include deleting background check information.
11. **Attachment 8 - Cost Schedules** – Updates include:
- A. Tabs C1a, C2a, C3a, and C4a – Added new column B to indicate Key Deliverables. If cell in column is blank, then the decision regarding the Key Deliverable is to be determined after contract award.
  - B. Tab C4a – Added “Final Service Center Management Plan” deliverable.
  - C. Tab D4a – Added “Central Printing” section to capture the print services costs to be provided as part of the Service Center during the O&M period.
12. **Attachment 13 – Economic Interest Forms** – Cover page updated with the following note, “Form 700 will be completed by the staff of the successful Vendor. Proposing Vendors are not to submit Attachment 13 with its proposal.”