

# Memorandum

**To:** Pat Powers, Interim Administrative Officer  
**From:** Bill Obernesser, Consultant  
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**Date:** August 18, 2011  
**Subject:** Eligibility and Enrollment Project Update

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On July 15, 2011, The California Health Benefit Exchange began a two-pronged effort to gather information specific to the eligibility and enrollment functions for the Exchange: first soliciting input from stakeholders and second, conducting market research with vendors offering services similar to those that will be required by the Exchange.

For this initial stakeholder engagement phase, two workgroups were established with one focused on the individual market and the second exploring issues related to the small business market. Participants in these workgroups discuss eligibility and enrollment business processes to identify best practices that will inform the development of options presented to the Exchange Board in September.

The two workgroups each convened on July 29<sup>th</sup> and August 9<sup>th</sup> via webinar. Due to the short time line between the development of the workgroups and the September deliverable, staff requested targeted feedback that would be helpful in designing the business processes for the Exchange, initially focusing on online and mail business processes. In response to suggestions from the stakeholder community, an in-person all day meeting will be held on September 15 which will allow for a broader discussion and for both workgroups to interact and discuss overlapping issues. In-person and phone processes will be on the agenda as well.

The second component in the process to obtain information included the execution of a market research process targeted at vendors. On July 19, 2011, the Exchange issued a seven page Market Research Questionnaire, the stated purpose of which was to seek:

*“...information on third-party administrative and information technology (IT) resources, systems and services to support the future operations of the Exchange, beginning in 2013.”*

Anticipating that the information obtained from the responses would:

*“... provide an important source of input to the development of the business operational architecture of the Exchange and may also inform the future acquisition of services to support Exchange operations, if the Exchange elects to acquire such services.”*

The process did not represent a formal procurement or any stage of a formal procurement.

The intent of Exchange staff was to invite presentations from a sample of vendors (6-8 vendors) during the week of August 8, and if necessary, the week of August 15, to obtain information from vendors. A team of representatives from the Exchange, DHCS, MRMIB and OSI was formed to attend vendor presentations.

By July 29, the deadline for submission of written responses, nineteen responses had been received. The Questionnaire responses were reviewed on July 30 through August 4, and invitations were issued to seven vendors that either seemed to offer comprehensive and detailed solutions to CA Exchange requirements, or seemed to offer highly relevant input on analogous commercial operations in place today, or both. Because of the number of responses received, all respondents offering relevant input could not be invited for in-person presentations in the time period available.

Between August 8 and August 17, 2011 the team received seven in-person presentations from vendors, or teams of vendors. A team debriefing is scheduled for August 18, 2011.

The questionnaire responses remain an active resource for ongoing market research by the Exchange, and additional invitations to present or requests for information could be issued to any of the respondents at any time.

Attachment: List of vendors that responded to the Exchange Market Research Questionnaire