**Instructions to Respondents for the Completion of Exhibit A-4-b:**

The Agency is seeking information to determine the ability of Respondents to provide a Unified Operations Center (UOC) Solution as described in this ITN, to include development and ongoing operations and maintenance services.

All Respondents to this ITN shall utilize **Exhibit A-4-b**, Submission Requirements and Evaluation Criteria Components (Technical Response), for submission of its response and shall adhere to the instructions below for each Submission Requirement Component (SRC).

Respondents **shall not** include website links, embedded links and/or cross-references between SRCs unless otherwise instructed within a particular SRC.

Each SRC contains form fields. Population of the form fields with text will allow the form field to expand and cross pages. There is no character limit.

Attachments are acceptable for any SRC but must be referenced in the form field for the respective SRC and located behind each respective SRC response. Respondents shall name and label attachments to refer to respective SRCs by the SRC identifier number.

Agency evaluators will be instructed to evaluate the responses based on the narrative contained in the SRC form fields and the associated attachment(s), if applicable.

Each SRC response will be independently evaluated and awarded points based on the criteria and points scale using the Standard Evaluation Criteria Scale below unless otherwise identified in each SRC contained within **Exhibit A-4-b**.

|  |  |
| --- | --- |
| **STANDARD EVALUATION CRITERIA SCALE** | |
| **Point Score** | **Evaluation** |
| 0 | The component was not addressed anywhere in the response submission. |
| 1 | The response contained significant deficiencies and omissions and lacked meaningful detail. |
| 2 | The response is below average. It met some of the minimum requirements but did not address all elements requested. |
| 3 | The response is average and met the minimum requirements with minimum detail. |
| 4 | The response is above average. It exceeded the minimum requirements and provided good detail. |
| 5 | The response is excellent. It exceeded the minimum requirements and contained exceptional content and detail. |

The SRCs in **Exhibit A-4-b** may not be retyped and/or modified and must be submitted in the original format.

Failure to submit SRC responses via **Exhibit A-4-b**, may result in the rejection of the response.

**Exhibit A-4-b** is available for Respondents to download at:

[http://ahca.myflorida.com/procurements/index.shtml](http://ahca.myflorida.com/Procurements/index.shtml)

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**Respondent Name:**

**SRC #1 – TABLE OF CONTENTS**

The Respondent shall include a Table of Contents in its response. The Table of Contents shall contain section headings and subheadings along with corresponding page numbers. The Table of Contents page(s) shall be provided as the first page(s) of the Respondent’s Technical Response.

**Response**:

**Score: No points will be awarded for the Table of Contents.**

**SRC #2 – EXECUTIVE SUMMARY**

The Respondent shall include an Executive Summary, which demonstrates its overall understanding of the Scope of Services described in this ITN and describes the prominent features of its Technical Proposal.

**Response:**

**Score: No points will be awarded for the Executive Summary.**

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**Respondent Name:**

**SRC #3 – ORGANIZATIONAL STRUCTURE AND HISTORY**

The Respondent shall demonstrate its capability to provide the services described in this ITN by describing its organizational structure and history. For responses including use of proposed subcontractors, the same descriptions of organizational structure and history shall be provided for each subcontractor, including the organizational structure connecting the Respondent and each proposed subcontractor. At a minimum, the description shall include:

1. The Respondent's, and its proposed subcontractor, organizational structure, ownership, affiliations, and location(s);

2. A copy of the Respondent's, and its proposed subcontractor, corporate organizational chart and a depiction of where the UOC Solution services described in this ITN falls within the organizational structure; and

3. Background information on the Respondent’s corporation, and on its proposed subcontractor corporation(s), the size, and resources to include:

a. Name of Respondent and any subcontractor(s);

b. Date established;

c. Ownership (public company, partnership, subsidiary, etc.);

d. Corporation's Federal Employer Identification Number (FEIN) and Florida Corporate Charter Number;

e. Corporation's primary line of business; and

f. Total number of employees.

Attachments are limited to the following:

* Organizational chart of Respondent and subcontractor(s); and
* List of the Respondent’s and its proposed subcontractor physical locations.

**Response:**

**Score: No points will be awarded for Organizational Structure and History.**

**Respondent Name:**

**SRC #4 – RESPONDENT QUALIFICATIONS**

The Respondent shall demonstrate its capability to provide the services described in Attachment B-2, Scope of Services, by describing its relevant experience with large customer service delivery systems, qualifications and length of experience in providing services similar in nature to those described in this ITN. The description shall include how these experiences will be applied to move the Agency forward based on its current Strategic Plan. Details of corporate experience (including any subcontractor experience and capabilities) shall include a list of all contracts related to services similar in nature to those described in this ITN within the last five (5) years and shall include, at a minimum:

1. Relevant experience with designing, developing, implementing, hosting, and maintaining information technology and business solutions including mail operations, call center operations, and supporting business operations;

2. Relevant experience with developing and implementing technology services, business operations, and contact centers for large healthcare systems including project and program management, business requirements elicitation and development, system testing, and system implementation;

3. Capability to work in parallel on multiple projects, with multiple vendors, and maintain timelines while effectively working as a single, distributed team to meet Agency and federal requirements;

4. How the Respondent’s and any subcontractor qualifications and experience prepares the Respondent to move the Agency forward based on the goals, objectives, and guiding principles as described within the Agency’s Strategic Plan;

5. Relevant experience with designing, developing, and implementing Customer centric solutions including notable industry certifications, accreditations, and/or awards (URAC, ICMI, NCQA, JD Power); and

6. Any relevant experience the Respondent has with obtaining CMS certification for overall operations.

**Response:**

**SRC #4 Evaluation Criteria:**

1. The adequacy of the Respondent’s capability and approach to meet the requirements described in this ITN, based on the relative experience in the performance of current or previous contracts for which it is/was the lead vendor on any projects similar in size, scope, and complexity to the UOC Project in the past five (5) years.

2. The adequacy of the Respondent's relevant experience with large healthcare systems.

3. The adequacy of the Respondent’s experience and demonstrated capability to work in parallel to perform project and program management, business requirements elicitation and development, systems testing, and systems implementation.

4. The adequacy of the Respondent’s and any subcontractor qualifications and experience to move the Agency forward based on the goals, objectives, and guiding principles as described within the Agency’s Strategic Plan and to limit the potential for vendor lock-in and conflict of interest for future Agency acquisitions.

5. The adequacy of the Respondent's experience designing and implementing Customer centric solutions including notable industry certifications, accreditations, and/or awards.

6. The adequacy of the Respondent's relevant experience with obtaining CMS certification.

**Score:** **This section is worth a maximum of 30 raw points with each of the above criteria being worth a maximum of 5 points each.**

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**Respondent Name:**

**SRC #5 – CUSTOMER EXPERIENCE STRATEGY AND METHODOLOGY**

The Respondent shall demonstrate its capability to continuously improve the experience of UOC Customers including Recipients, Providers, and Stakeholders. The Respondent shall provide an overview of its Customer experience design thinking methodology and tools to continuously improve the Customer experience. The Respondent shall provide eight (8) journey maps (reference Attachment B-2, Scope of Services, Section 9.1 – Customer Experience Strategy and Methodology) demonstrating its Customer experience capability and understanding of the future vision of the UOC Customer journey.

As part of the overall methodology, a journey map is a valuable tool for designing compelling Customer experiences. In order to demonstrate Customer experience expertise along with the Respondent’s experience and understanding of the Agency Customer segments, as defined in **Attachment B-1, Definitions**, the Respondent shall provide a high-level journey map for each of the below eight (8) processes leveraging the respective Agency personas (Please refer to **FX UOC Persona Descriptions and FX UOC Journey Map Format** in the **UOC Proposal Library**). The Respondent shall use the FX UOC Journey Map Format document to structure how the information will be presented back to the Agency as part of its Response to SRC #5. It is expected that the Respondent will add information (i.e., stages, touchpoints), as necessary.

High-level processes:

1. Recipient – Managed Care Enrollment Referral
   * Suzanne received a letter informing her that open enrollment for her children will begin the first of the following month. Open enrollment lasts for two months. Any changes made during the period will not take effect until the first day of the month following the end of the period. The UOC Vendor shall create a journey map on how the solution will meet Suzanne’s needs.
2. Recipient – Complaint
   * Suzanne wishes to file a complaint against the current health plan for her children. She wants to make sure she is able to upload documents securely to support her concerns. She also wants to be notified of her complaint status as it progresses, while maintaining the ability to check the status for herself. Because of her work, she often is able to communicate more easily electronically, but expects prompt responses. The UOC Vendor shall create a journey map on how the solution will meet Suzanne’s needs.
3. Provider – Initial Enrollment
   * Dr. Press has recently filed an application to become a Medicaid provider who hopes to contract with the SMMC plans in her area. She has recently been informed that her application may be rejected due to unresponsiveness to requests for additional information. She alleges that she never received the request, and the Provider Services Management Vendor indicates they called her multiple times. Considering the FX vision of module integration, the UOC Vendor shall create a journey map on how the solution will meet Dr. Press’ needs.
4. Provider – Claims Status Inquiry
   * Dr. Press currently bills Medicaid Fee-For-Service and some managed care plans. She is often pressed for time and dislikes the need to log in to multiple portals to check the status of claims. She also struggles to keep track of all the different login requirements and passwords. Considering the FX vision of module integration, the UOC Vendor shall create a journey map on how the solution will meet Dr. Press’ needs.
5. Provider [Facility] – Survey Inquiry
   * Lifecare Health Center received a recent facility survey related to a patient complaint about the care they received. Preliminary findings were shared with the Chief Operating Officer (COO) on the day of the survey, but the COO has not heard any further information. The COO is anxious to receive the final findings so that she can work with the Director of Nursing and the compliance team to correct any deficiencies. The UOC Vendor shall create a journey map on how the solution will meet the needs of the Agency and the COO.
6. Provider [Facility] – Medicaid Managed Care Contracting
   * The COO of Lifecare Health Center has been working for weeks to secure a contract with several of the Medicaid Managed Care plans to no avail. The COO is frustrated with the process and does not know what to do next. The UOC Vendor shall create a journey map on how the solution will meet the needs of the Agency and the COO.
7. Stakeholder – Complaint
   * John has been contacted by several Medicaid recipients regarding receiving services from their managed care plans, after providers were denied payment for services. The reason provided by the plan is that the service is covered by Fee-For-Service (FFS) Medicaid and not the plan, but the providers are not FFS providers. When John contacts the plans they will not speak to him. The UOC Vendor shall create a journey map on how the solution will meet John’s need to advocate on behalf of recipients.
8. Stakeholder – Training
   * John has established himself as a point of contact for recipients and providers. His goal is to help educate them about Medicaid and navigating health care service delivery issues. He would like to receive training or access training information of the same nature as the recipients and providers. The UOC Vendor shall create a journey map on how the solution will meet John’s need to learn about the various programs.

Each journey map should consider the following guideposts when being developed:

* The need to build empathy and better understand the UOC Customers’ experiences;
* The need to communicate information and insights regarding the UOC Customers’ experiences to a broad internal audience;
* The desire to resolve current UOC Customer experience pain points; and
* The desire to identify moments that matter in order to design signature experiences that drive Customer loyalty and value.

**Response:**

**SRC #5 Evaluation Criteria:**

**Score: No points will be awarded for the Customer Experience Strategy and Methodology.**

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**Respondent Name:**

**SRC #6 – SANCTIONS**

The Respondent shall list and describe any sanctions levied against the Respondent, the Respondent’s affiliates, its subsidiaries, its parent company, the affiliates and subsidiaries of its parent company, its affiliate’s subsidiaries and subcontractors (handling subcontracts related to consultant services when the subcontracts are for $250,000.00 or more annually), within the five (5) years preceding the date of its response to this ITN. Sanctions shall include those imposed by a state or federal entity in relation to a contract under which the Respondent provided health care system implementation and operations services or government service contracts in excess of one million dollars ($1,000,000). Sanctions shall include financial consequences, damages, liquidated damages, or other amounts paid by the Respondent in a settlement of a contract dispute.

Information requested for each sanction shall be provided by the Respondent for administrative and non-administrative sanctions. An administrative sanction means the issue pertains to timeliness or the use of an incorrect format (i.e., report, deliverable, or another required item submitted late or submitted in the wrong format). A non-administrative sanction means the issue pertains to performance in accordance with the contract scope of services (i.e., incomplete or inaccurate deliverable or services).

**Response:**

**SRC #6 Evaluation Criteria:**

1. The extent to which sanctions were due to issues with performance (non-administrative) in accordance with the contract scope of services, versus administrative issues.
2. The severity of the sanction(s) from **minor** (dollar amounts less than $10,000.00 or resolution time less than 90 calendar days) to **significant** (dollar amounts above $10,000.00 or resolution time longer than 90 calendar days or numerous sanctions (more than one (1) sanction among two (2) or more contracts)).

**Score: This section is worth a maximum of 10 raw points with each of the above criteria being worth a maximum of 5 points each.**

**For item 1:**

1. 5 points if no sanctions;
2. 4 points if sanction(s) were related only to **administrative issues**;
3. 3 points if **non-administrative** sanction(s) were all **minor** and there were fewer than four (4) incidents;
4. 2 points if **non-administrative** sanctions were all **minor** but four (4) or more incidents;
5. 1 point if any **significant** **administrative** sanction; or
6. 0 points if any **significant non-administrative** sanction.

**For item 2:**

1. 5 points if no sanctions;
2. 4 points if sanction(s) were **minor** and there were fewer than four (4) incidents;
3. 3 points if sanctions were all **minor** but four (4) or more incidents;
4. 2 points if up to two (2) **significant** sanction(s); or more than two (2) contracts with multiple sanctions;
5. 1 point if more than two (2) **significant** sanctions but fewer than five (5); or more than two (2) but fewer than five (5) contracts with multiple sanctions; or
6. 0 points if performance falls below the above limits.

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**Respondent Name:**

**SRC #7: SECURITY RISK RATING SCORE SCAN**

In accordance with **Attachment B-2, Scope of Services, Section E., Special Provisions, subsection 7, Information Technology, Item 7.1, Development Requirements, sub-item 31.**, the Agency will conduct an initial IT security risk rating score scan on the Respondent through an IT security risk rating service, at the Agency's expense, to enable the Agency to effectively measure and mitigate the successful Respondent’s security risks. The Respondent shall work with the Agency’s security risk rating service provider to define the relevant Respondent assets providing Agency services.

**Response:**

**SRC #7** **Evaluation Criteria:**

The adequacy of the Respondent’s IT security risk rating score by determining whether the Respondent has received:

* 1. A score in the top 90-100% of the scan recommendations;
  2. A score in the top 80-89% of the scan recommendations;
  3. A score in the top 70-79% of the scan recommendations;
  4. A score in the top 60-69% of the scan recommendations;
  5. A score in the top 50-59% of the scan recommendations; or
  6. A score in the lower 0-49% of the scan recommendations.

**Score: This Section is worth a maximum of 5 raw points as outlined below:**

1. 5 points for a score in the top 90-100% of the scan recommendations;
2. 4 points for a score in the top 80-89% of the scan recommendations;
3. 3 points for a score in the top 70-79% of the scan recommendations;
4. 2 points for a score in the top 60-69% of the scan recommendations;
5. 1 point for a score in the top 50-59% of the scan recommendations; or
6. 0 points for a score in the lower 0-49% of the scan recommendations.

**Respondent Name:**

**SRC #8 – PROJECT MANAGEMENT AND SERVICE DELIVERY APPROACH**

The Respondent shall present its project management and service delivery approach and explain how it reflects industry best practices in service delivery excellence. The Respondent shall demonstrate its capabilities in working with third-party organizational standards by developing an approach that complies with the Agency's FX Project Management Standards included in the **UOC Proposal Library**.

The Respondent shall describe its proposed approach to PD-1: Project Management Plan (includes the UOC Vendor Resource Management Plan) and provide a draft PD-2: Project Schedule, as described in Attachment B-2, Scope of Services, Exhibit B-1-a, Deliverables and Performance Standards.

The proposed project schedule must show a thorough understanding of the scope of work and the capability to successfully complete each deliverable. The draft schedule shall include a high-level project timeline for successful management and completion of the project, as well as identify major project phases with consideration to Attachment B-2, Scope of Services, Section B.7.1. High-Level Implementation Plan. The schedule timeline must include timeframes and durations for key milestones and deliverables.

The Respondent shall demonstrate the following:

1. Approach to following project management best practices to ensure adherence to the **P-2: FX Project Management Standards**, including, but not limited to:

1. Communications management;
2. Risk and Issue management;
3. Change management;
4. Scope management;
5. Schedule management;
6. Quality management; and
7. Status reporting.

2. Experience following third party standards (such as the FX Program standards included in the **UOC Proposal Library**).

3. Experience implementing the System Development Life Cycle (SDLC) for multi-component configurable and customizable technology platforms.

1. Experience in and approach to successful delivery of services and solutions in a multi-vendor and multi-agency environment.
2. Ability to effectively manage multiple contact center teams that include the UOC Vendor, subcontractor, and Agency UOC staff.
3. Ability to implement and provide services and solutions to be adapted to accomplish the UOC Objectives and FX Guiding Principles outlined in Attachment B-2, Scope of Services, Section A.3.2. Overview of the FX Transformation.

**Response:**

**SRC #8 Evaluation Criteria:**

1. The adequacy of the Respondent’s proposed approach to project management and service delivery, and its alignment with FX Project Management Standards, including demonstrated understanding and approach to the System Development Life Cycle (SDLC) for a multi-component configurable and customizable technology platform.

2. The adequacy of the Respondent’s draft Project Schedule to demonstrate a high-level project timeline for successful management and capability to successfully complete each deliverable.

3. The adequacy of the Respondent's experience following third party standards (such as the FX Program standards included in the **UOC Proposal Library**).

4. The adequacy of the Respondent’s experience and demonstrated ability to successfully deliver in a multi-vendor and multi-agency environment.

5. The demonstrated ability of the Respondent to effectively manage multiple contact center teams including UOC Vendor, subcontractor and Agency staff.

**Score:** **This Section is worth a maximum of 25 raw points with each of the above criteria being worth a maximum of 5 points each.**

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**Respondent Name:**

**SRC #9 – DISASTER RECOVERY AND BUSINESS CONTINUITY**

The Respondent shall demonstrate its capability and approach to meeting the disaster recovery and business continuity requirements described in:

1. Attachment B-2, Scope of Services, Section B.8.3 – Disaster Recovery and Business Continuity
2. Attachment B-2, Scope of Services, Section B.10.1 – Operations and Maintenance Phase Requirements
3. Attachment B-2, Scope of Services, Section B.14 – Facilities and Service Location(s)
4. Attachment B-2, Scope of Services, Exhibit B-1-a, Deliverables and Performance Measures

**Response:**

**SRC #9 Evaluation Criteria:**

For both technology and services, the adequacy of the Respondent’s ability to:

1. Maintain and annually test a Contingency Plan (for Disaster Recovery and Business continuity) for the UOC Solution with the FX Technical Management Strategy;
2. Support the Agency’s Enterprise Contingency Plan, and coordination of related activities;
3. Provide backup procedures, hot sites, redundancy, and support to prevent and accommodate the disruption of systems and communications;
4. Minimize downtime and disruption of services;
5. Provide timely failover; and
6. Create effective policies and procedures to implement a recovery, as well as business continuation services.

**Score:** **This Section is worth a maximum of 30 raw points with each of the above criteria being worth a maximum of 5 points each.**

**Respondent Name:**

**SRC #10 – TECHNICAL SOLUTION COMPONENTS – PLATFORM REQUIREMENTS**

The Respondent shall demonstrate its capability and approach to meeting the requirements described in Attachment B-2, Scope of Services, Section B.8.0 - UOC Platform Solution (Technology), including but not limited to its proposed approach to ensuring its UOC Solution provides all of the required technology components and specified options, and all components are integrated into one common solution. In addition, the Respondent shall complete **Exhibit B-3,** **Technology Matrix** for the components of their solution.

**Response:**

**SRC #10 Evaluation Criteria:**

The adequacy of the Respondent's demonstrated ability to:

1. Provide hosting services to meet the Agency’s requirements and support optimal performance of the UOC Solution;

2. Provide a UOC solution that includes best in class Interactive Voice Response capabilities;

3. Provide a UOC solution that includes adequate automatic call distribution;

4. Provide a UOC solution that includes adequate cloud-hosted VOIP-enabled PBX;

5. Provide a cloud-hosted UOC solution that includes an adequate Customer Relationship Management (CRM);

6. Provide a UOC solution that includes adequate Workforce Management capabilities;

7. Provide a UOC solution that includes adequate quality management capabilities;

8. Provide a UOC solution that includes adequate call recording capabilities;

9. Provide a UOC solution that includes adequate knowledge management capabilities;

10. Provide a UOC solution that includes adequate service/ticket management capabilities; and

11. Provide a UOC solution with relevant business operations technologies.

**Score:** **This Section is worth a maximum of 55 raw points with each of the above criteria being worth a maximum of 5 points each.**

**Respondent Name:**

**Respondent Name:**

**SRC #11 – BUSINESS SOLUTION COMPONENTS – CUSTOMER SERVICE**

The Respondent shall demonstrate its proposed approach to the Customer Service and Business Operations Solution requirements, addressing all requirements in Attachment B-2, Scope of Services, Section 9.2 – Enterprise Customer Service Support. This shall include, at a minimum, the following:

1. Respondent's experience and proposed approach to providing an enterprise UOC Solution with an initial focus on Medicaid Customers (Medicaid Recipients, Medicaid Providers, Agency partners and other groups referenced in the *Customer* definition in Attachment B-2, Scope of Services, Section A.1, Definitions and Acronyms. This includes Customer access to the following services:

a. Agent assistance via phone and/or email during Business Hours;

b. Assistance via self-serve technology twenty-four (24) hours per day, seven (7) days per week, three hundred and sixty-five (365) days per year (24\*7\*365); and

c. Proactive communications including required correspondence and opt-in alerts for account updates.

2. Respondent's experience and proposed approach to providing the following enterprise Customer service support services:

a. Hire, train, and onboard sufficient, qualified staff for tiered and General Support staff functions (as described in Attachment B-2, Scope of Services, Section B.9.2.3.1, Staffing, Table: B.9.2.3.1 – UOC Customer Service Support Tier Structure);

b. Provide a Customer service support infrastructure with a comprehensive CRM solution that can be used within the UOC and across the Agency for escalated and/or referred items; This CRM shall include Customer inquiry management, Customer issue management, a Customer support infrastructure, and contact tracking and reporting;

c. Provide sufficient, qualified staff for correspondence activities to be performed by the UOC, as agreed to by the Agency;

d. Provide an Agency-approved Training and Knowledge Management function within the UOC Solution that has been proven in a large-scale Customer service environment; and

e. Design, develop, and operate the UOC technical support services as defined in Attachment B-2, Scope of Services, Section B.9.2.4 – Technical Support Services.

3. Respondent's experience and proposed approach to providing an Agency-approved correspondence process with Agency-approved messaging that includes but may not be limited to:

a. Developing correspondence (system generated and manual);

b. Developing and managing up-to-date correspondence templates;

c. Sending all direct mailings and electronic correspondence timely, as agreed to by the Agency;

d. Automated tracking of correspondence;

e. Making correspondence accessible for users to view and download; and

f. Integrating with other FX Module Vendors so that notifications generated from a FX Module Vendor’s system is routed and tracked through the UOC CRM.

4. Respondent's experience and proposed approach to partnering with a firm that specializes in Customer Service training and can support potential site certification for the UOC.

**Response:**

**SRC #11 Evaluation Criteria:**

1. The adequacy of the Respondent’s relevant experience with and proposed approach to designing, developing, implementing, hosting, and maintaining an enterprise Customer contact center operation that meets the Customer access criteria described.

2. The adequacy of the Respondent’s relevant experience with and proposed approach to providing the described enterprise Customer service support and business operations services.

3. The adequacy of the Respondent’s relevant experience with and approach to developing and executing a large-scale correspondence process, including coordination with an Agency and/or organization for messaging, reviews, and approvals.

4. The adequacy of the Respondent’s relevant experience with and approach to partnering with a firm that specializes in Customer Service and Business Operations training.

**Score:** **This Section is worth a maximum of 20 raw points with each of the above criteria being worth a maximum of 5 points each.**

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**Respondent Name:**

**SRC #12 – BUSINESS SOLUTION COMPONENTS – PROVIDER BUSINESS SERVICES**

The Respondent shall demonstrate its proposed approach to the Provider Management Business Services Solution requirements, addressing all requirements in Attachment B-2, Scope of Services, Section B.9.3 – Business Services – Provider Management. At a minimum, this includes the following:

1. Respondent's approach to providing and supporting the enrollment, re-enrollment, and file maintenance activities of new and existing providers. This includes the following services:
   1. Providing general Tier 1 customer support and self-service options for provider inquiries via multiple communication channels;
   2. Developing and delivering provider communications;
   3. Receiving and processing inbound and outbound provider mail operations (including returned mail processing) and communications fulfillment;
   4. Supporting the business services associated with Background Screening and Provider Credentialing; and
   5. Coordinating with the FX Provider Services Module (PSM) Vendor and partners to efficiently deliver end-to-end provider management services.
2. Respondent's approach to providing support services for Facility Licensure and Intake.
   1. Providing general Tier 1 customer support for facility inquiries via multiple communication channels;
   2. Developing and delivering communications and notices;
   3. Receiving and processing inbound and outbound Facility mail operations (including returned mail processing) and communications fulfillment;
   4. Controls to account for the receipt of funds related to fees or sanctions to be securely tracked and routed; and
   5. Coordinating with the Agency's Health Facility Regulation Bureau to efficiently delivery end-to-end Facility Licensure services.
3. Respondent's approach to providing Training, Outreach, and Site Support to Providers that includes but may not be limited to:
   1. Developing training and outreach materials;
   2. Methodology and techniques for conducting training and outreach activities;
   3. Process for recruiting and maintaining qualified specialist to develop and conduct training or site support activities;
   4. Supporting the design, development, and distribution of provider communications including, but not limited to, bulletins, forms, public content forums, provider policy updates, website content, provider letters and surface mail, provider emails, policy alerts, provider texts, mass messaging and system alerts, user guides, technical documents, and education and training opportunities.
4. Respondent's approach to supporting the Provider Complaint process. This includes the following services:
   1. Receiving, acknowledging, and tracking the receipt of a provider complaint;
   2. Routing of complaints to the appropriate Agency staff or partner (e.g., health or dental plan);
   3. Responding to complaints through approved communications channels.

**Response:**

**SRC #12 Evaluation Criteria:**

1. The adequacy of the Respondents relevant experience with and approach to providing Customer support through multiple communications channel that would meet the provider enrollment criteria described.

2. The adequacy of the Respondents relevant experience with and approach to providing the described mail and communications fulfillment operations.

3. The adequacy of the Respondents relevant experience with and approach to the receipt of funds and the controls associated with the relevant accounting principles.

4. The adequacy of the Respondents relevant experience with and approach to the development and delivery of training, outreach, and website content and materials.

5. The adequacy of the Respondents relevant experience with and approach to the design, development, and distribution of communications utilizing various medium.

6. The adequacy of the Respondents relevant experience with and approach to complaint administration processes.

7. The adequacy Respondents relevant experience with and approach to providing support services for the provider community.

**Score: This Section is worth a maximum of 35 raw points with each of the above criteria being worth a maximum of 5 points each.**

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**Respondent Name:**

**SRC #13 – BUSINESS SOLUTION COMPONENTS – RECIPIENT BUSINESS SERVICES**

The Respondent shall demonstrate its proposed approach to the Recipient Service Business Solution requirements, addressing all requirements in Attachment B-2, Scope of Services, Section B.9.4 – Business Services – Recipient Management. At a minimum, this includes the following:

1. Respondent's experience and proposed approach to providing and supporting the eligibility and enrollment activities of recipients, including:

a. Providing general Tier 1 Customer support and self-service options for recipient inquiries via multiple communication channels;

b. Supporting seamless transfer of recipients to appropriate partner agencies and other FX Module Vendors;

c. Providing secure production, delivery, and tracking of recipient Medicaid Cards;

d. Providing deactivation, destruction, and tracking of returned Medicaid Cards;

e. Receiving, processing and supporting inbound and outbound recipient mail operations (including returned mail processing) and communications fulfillment; and

f. Providing a self-service platform in coordination with other FX Module Vendors for recipients to inquire about their health plan options and enable plan selection by the recipient.

2. Respondent's experience and proposed approach to providing support services for Recipient File Maintenance Activities, including:

a. Providing general Tier 1 Customer support for recipient inquiries via multiple communication channels;

b. Routing and escalation of file maintenance activities to the appropriate Agency business unit or partner agency; and

c. Receiving inbound mail operations, storing, tracking, and forwarding to partner agencies as appropriate.

3. Respondent's experience and proposed approach to providing Outreach and Communications services for Recipients, including:

a. Developing Training and Communications materials;

b. Methodology and Techniques for conducting training and outreach activities;

c. Process for recruiting and maintaining qualified specialist to develop and conduct training; and

d. Supporting the design, development, and distribution of recipient communications including but not limited to, bulletins targeted to the general recipient population, forms, Florida Medicaid or FX website content, recipient letters and surface mail, secure messaging, and appropriate social media engagement, news articles, mass messaging and system alerts, program brochures, user guides, and educational information.

. Respondent's experience and proposed approach to supporting the Recipient Complaint, Grievance, Appeals, and Fair Hearing process, including:

a. Approach for the development and implementation of a single-entry point solution for receiving, acknowledging, and tracking recipient complaints, grievances, appeals, or fair hearings in accordance with applicable federal and state regulations;

b. Providing general Tier 1 Customer support for the complaint process;

c. Routing of complaints to the appropriate Agency business unit or health plan for triage and assignment; and

d. Responding to complaints through approved communications channels.

**Response:**

**SRC #13 Evaluation Criteria:**

1. The adequacy of the Respondent’s relevant experience with and proposed approach to providing Customer support through multiple communication channels that would meet the recipient eligibility and enrollment support criteria described.

2. The adequacy of the Respondent’s relevant experience with and proposed approach to developing self-service options that support the required business processes and outcomes.

3. The adequacy of the Respondent’s relevant experience with and proposed approach to producing, distributing, destroying, and tracking items that contain PII or PHI.

4. The adequacy of the Respondent’s relevant experience with and proposed approach to providing the described mail and communications fulfillment operations.

5. The adequacy of the Respondent’s proposed approach to escalate activities to the appropriate Agency business unit or partner agency.

6. The adequacy of the Respondent’s relevant experience with and proposed approach to the development and delivery of training and outreach materials.

7. The adequacy of the Respondent’s relevant experience with and proposed approach to the design, development, and distribution of communications utilizing various medium.

8. The adequacy of the Respondent’s relevant experience with and proposed approach to complaint administration processes.

9. The adequacy of the Respondent’s relevant experience with and proposed approach to coordinating and transferring data or information to external entities in a seamless manner.

10. The adequacy of the Respondent’s relevant experience with and proposed approach to providing services that support the targeted Medicaid recipient population.

**Score:** **This Section is worth a maximum of 50 raw points with each of the above criteria being worth a maximum of 5 points each.**

**Respondent Name:**

**SRC #14 – BUSINESS SOLUTION COMPONENTS – ENTERPRISE OPERATIONS SERVICES (COMMUNICATIONS MANAGEMENT, MAIL AND FULFILLMENT)**

The Respondent shall demonstrate its proposed approach to the Enterprise Operations Business Solution requirements, addressing all requirements in Attachment B-2, Scope of Services, Section B.9.5 – Enterprise Operations Management. At a minimum, this includes the following:

1. Respondent's experience and proposed approach to providing and supporting the Provider and Recipient Claims Processing and Payment Support activities, including:

a. Providing general Tier 1 Customer support and self-service options for provider and recipient inquiries via multiple communication channels;

b. Methodologies and processes for escalating and routing complex issues to the appropriate Agency staff or FX Module Vendor; and

c. Receiving and processing inbound and outbound mail operations and communications fulfillment.

2. Respondent's experience and proposed approach to providing Centralized Mail and Communications, including:

a. Providing a mail service center to act as a central hub for all inbound and outbound mail;

b. Processing inbound mail from traditional mail, email, web portal communications;

c. Providing a solution that uses automation to create a digital mail room that will standardize the processing and distribution of paper and electronic mail;

d. Providing Document Capture technology to scan all incoming traditional paper mail documents while importing electronic files to process them together through the same platform;

e. Include Intelligent Data Capture capability to automatically extract data from semi-structured documents and automatically extract key information that can be used to index the document and/or route the document to the right Agency business unit or FX Module Vendor; and

f. Process for the destruction of documents per state and Agency record retention policies, and its certification.

3. Respondent's experience and proposed approach to providing support services for Pharmacy Benefit Management Activities, including:

a. Providing Tier 1 general support to callers regarding pharmacy benefits (e.g., who should they call, covered drugs, complaint intake, etc.);

b. Routing fee-for-service recipients to the PBM Ombudsman for pharmacy related issues and to the health plan for SMMC recipients; and

c. Process for communicating to the provider or recipient the result of the review through various communication channels (mail, email, text, web-portal, etc.).

**Response:**

**SRC #14 Evaluation Criteria:**

1. The adequacy of the Respondent’s relevant experience with and approach to providing Customer support through multiple communication channels that would meet the Enterprise Operations criteria described.

2. The adequacy of the Respondent’s relevant experience with and approach to developing self-service options that support the required business processes and outcomes.

3. The adequacy of the Respondent’s relevant experience with and approach to collaborating with other entities to develop and agree upon escalation and routing processes to transfer complex issues.

4. The adequacy of the Respondent’s relevant experience with and approach to providing the described mail and communications fulfillment operations.

5. The adequacy of the Respondent’s relevant experience with and approach to providing electronic mail processing to include email and web portal communications.

6. The adequacy of the Respondent’s relevant experience with and approach to providing document capture and intelligent data capture technologies.

7. The adequacy of the Respondent’s relevant experience with and approach to providing secure destruction of sensitive documents.

**Score:** **This Section is worth a maximum of 35 raw points with each of the above criteria being worth a maximum of 5 points each.**

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**Respondent Name:**

**SRC #15 – PERFORMANCE STANDARDS AND REPORTING**

The Respondent shall demonstrate its experience, understanding and ability to provide an automated method or system/operations tools to provide reports of the quality measurements and performance monitoring dashboards for the post-implementation UOC Solution services as defined in Attachment B-2, Scope of Services, Section B.11 – Reporting and, Attachment B-2, Scope of Services, Exhibit B-2, Operations and Maintenance Service Level Agreement. At a minimum, the Respondent shall demonstrate the following:

1. The Respondent’s experience and proposed approach to providing a UOC performance reporting dashboard system and resulting generated reports to the Agency’s Contract Manager;

2. The Respondent’s experience and proposed approach to providing real-time performance reporting dashboards for contracted performance standards and Service Level Metrics described in Attachment B-2, Scope of Services, Exhibit B-2-b, Operations and Maintenance Service Level Metrics in this ITN;

3. The Respondent’s experience and proposed approach to storing and reporting relevant data for ongoing and ad hoc reporting, including methods for conducting quality control; and

4. The Respondent’s experience and proposed approach to adhering to and reporting on Service Level Metrics provided in Exhibit B-2-b - Operations and Maintenance Service Level Metrics.

The Respondent shall provide samples of the following types of dashboard report exports:

* + 1. Staffing Report
    2. Executive Level Dashboard Report
    3. Contact Center Activity Report
    4. Contract Compliance / Service Level Metrics Dashboard

**Response:**

**SRC #15 Evaluation Criteria:**

1. The adequacy of the Respondent’s relevant experience with and proposed approach to providing web-based reporting dashboard solutions and tools for performance reporting.

2. The adequacy of the Respondent's proposed approach and demonstrated ability to meet the Service Level Metrics.

3. The adequacy of the Respondent’s relevant experience and proposed approach to developing standard report dashboard extracts and ad hoc queries for the UOC Solution.

4. The adequacy of the Respondent’s sample dashboard reports to demonstrate a successful performance and status reporting approach for the UOC Solution.

**Score:** **This Section is worth a maximum of 20 raw points with each of the above criteria being worth a maximum of 5 points each.**

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**Respondent Name:**

**SRC #16 – SECURITY**

The Respondent shall demonstrate its experience, capability, approach and proposed solution for the Security Life Cycle to include activities defined in certification and accreditation, risk assessment, and system security plan phases and to address all requirements in Attachment B-2, Scope of Services, Section B.8.7 – Security to:

1. Coordinate with stakeholders to develop and execute a Systems Security Plan, security controls, security assessments, and risk assessments, in compliance with all Florida and federal enterprise information security policies, standards, security initiatives, and regulations;

2. Develop and execute a Security Controls Test Plan that includes objectives, scope, misuse cases, testing type, entrance and exit criteria, schedule, testers, software tools, and test results;

3. Develop and execute a Security Test Plan for all shared infrastructure, connectivity and communications between the EDW Solution, the Integration Platform and the modules; and

4. Conduct periodic Security Control Assessments to monitor ongoing effectiveness of implemented security controls and remediate those issues as determined by the Agency.

The Respondent shall describe its proposed plan and approach to resolving security breaches in relation to the UOC Solution. The Respondent shall also describe any security breaches that have occurred within the last five years and the remedies used for those breaches, if applicable.

**Response:**

**SRC #16 Evaluation Criteria:**

1. The adequacy of the Respondent’s proposed approach and demonstrated ability to meet all federal, state, and Agency security requirements.

2. The adequacy of the Respondent’s proposed solution in terms of including all security/vulnerability testing as outline in T8 - Data Security, in the **UOC Proposal Library**.

3. The demonstrated ability of the Respondent to provide a hosting environment that is FEDRAMP compliant.

4. The demonstrated capability of the Respondent to resolve security breach incidents.

**Score:** **This Section is worth a maximum of 20 raw points with each of the above criteria being worth a maximum of 5 points each.**

**Respondent Name:**

**SRC #17 – DELIVERABLE APPROACH**

The Respondent shall describe its relevant experience, proposed approach and representative content, relative to the UOC deliverables described in Attachment B-2, Scope of Services, Exhibit B-1-a, Deliverables and Performance Standards. Where proposed approaches and content for a deliverable are addressed by the Respondent in another SRC, the Respondent shall refer to the other SRC(s) within its response to SRC #17.

1. PD-1 Project Management Plan (Includes Vendor Resource Management Plan)
2. PD-2 Project Schedule
3. PD-3 High-Level Technical Design
4. PD-4 System Security Plan
5. PD-5 Requirements Management Plan
6. PD-6 Bill of Materials (Architecture, Hardware/Software Specification)
7. PD-7 Completed Requirements Traceability Matrix
8. PD-8 System Design Document
9. PD-9 Implementation Plan/Software Release Plan
10. PD-10 Contingency Plan (for Disaster Recovery and Business Continuity)
11. PD-11 Test Plan
12. PD-12 Customer Experience Blueprint
13. PD-13 Organizational Change Management Plan (Includes Training Plan)
14. PD-14 Operations and Maintenance Manual
15. PD-15 Production Readiness Review
16. PD-16 Post Implementation Report
17. PD-17 Warranty Completion Report
18. PD-18 Annual Operational Analysis (AOA)
19. PD-19 Vendor Turnover Plan

**Response:**

**SRC #17 Evaluation Criteria:**

**Score:** **No points will be awarded for Deliverable Approach.**

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**Respondent Name:**

**SRC #18:** **Optional Additional Innovation Opportunities (not evaluated)**

1. **General Opportunities –** The Respondent may include any additional innovations offered to the Agency that are not included in Attachment B-2, Scope of Services. The requirements described in Attachment B-2, Scope of Services are not intended to limit innovations, cost effective solutions, or creativity in preparing a response, which provides the Agency the best solution. Innovative ideas, product offerings, and new concepts other than those presented in this ITN can be considered by the Respondent. Responses to this SRC will not be scored and may, at the Agency’s discretion, be included in the Negotiations Phase.

The market for operations and business services is constantly changing, offering new or modified service delivery methods and technologies. The Agency is seeking a UOC Vendor that will utilize Agency-approved innovative methods and technologies to meet UOC objectives and demonstrate tangible benefits.

Following are examples of areas where potential innovations may be of benefit:

1. Self service capabilities;
2. 100% paperless service delivery;
3. Medicaid card production and distribution;
4. Leveraging process automation and Artificial Intelligence (AI);
5. Real-time decision-making tools and predictive analytics;
6. Scalable staffing models;
7. Virtual service delivery;
8. Employee engagement; and
9. Knowledge management.
10. **Implementation Acceleration Opportunities –** In addition to the above areas,the Agency is particularly receptive to considering innovative approaches from Respondents that would accelerate the implementation timeline of business services from current operations to the UOC Vendor prior to scheduled rollouts, as detailed in Attachment B-2, Scope of Services, Section B.7.1 – High-Level Implementation Plan. Respondents may propose strategies to incorporate business functions (e.g., contact center operations, mail room, print publications, and training) and/or other future FX Module functionality into the UOC prior to the scheduled **FX Strategic Roadmap** module transition dates. Business functions related to claims processing and financial operations will not be considered for early implementation.

Respondents interested in proposing an accelerated implementation must articulate the approach to their proposed strategy, scope of business functions impacted, an implementation timeline, associated cost impact(s), tangible benefits achieved, and risk mitigation tactics to alleviate disruption in services to providers, recipients, and other Agency stakeholders. Respondents shall provide sufficient detail in their response that will allow the Agency to determine the viability of the Respondent’s proposed innovation.

**Response**:

**Score: No points will be awarded for any proposed Additional Innovation Opportunities.**

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**Respondent Name:**

**SRC #19 – VENDOR STAFFING**

1. The Respondent shall describe its proposed baseline staffing solution as described in Attachment B-2, Scope of Services, Section B.12- Staffing. The Respondent shall identify its proposed team, including Key Staff, and describe how its team will implement and support operations during the Contract term. The Respondent shall also provide job descriptions for each proposed team member and resumes for each of its identified Key Staff.

#### Proposed Baseline Staffing Solution

The Respondent’s proposed baseline staffing solution should include, but may not be limited to the following:

1. UOC Vendor staff organizational chart that identifies the number of Key Staff and other staff dedicated to UOC support, including FTE hours, roles, and hierarchies for all identified staff;
2. Qualifications and experience of the UOC Vendor’s Key Staff including resumes and draft job descriptions for all staff;
3. Workforce management tool(s) used to assist with operational efficiency of UOC Vendor staffing and scheduling;
4. Staff ratio for all functional areas of the UOC and how this ratio will be defined and modified based on changes occurring during the course of the Contract due to additional FX modules going live; and
5. Plan to mitigate the risk of staff turnover (and potential effect on quality of service and continuity of operations) during the Contract Term. The UOC Vendor should provide specific examples from past or current experience to describe how it has managed similar challenges.

In addition to the proposed Baseline Staffing Solution, the Respondent shall describe its proposed approach for scaling up of resources to support peak volumes and scaling down of resources and costs when volumes are lower, in order to meet the requirements defined in Attachment B-2, Scope of Services Exhibit B-2, Operations and Maintenance Service Level Agreement and Attachment B, Exhibit B-2-b, Operations and Maintenance Service Level Metrics of this ITN.

The UOC Vendor shall also populate the Rate Card as defined in Attachment A, Exhibit A-5-A - Cost Proposal, as part of its Response with the roles that the Respondent believes are required to deliver the UOC scope of work. In addition to initial pricing, the Rate Card will also be used for situations where there are fluctuations in staffing due to peak periods of volume or if there is a need for additional skill sets of resources to support project needs. These situations and changes in staffing will be mutually agreed to between the Agency and the UOC Vendor.

**Response:**

**SRC #19 Evaluation Criteria:**

**Score: No points will be awarded for UOC Vendor Staffing.**

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**Respondent Name:**

**SRC #20 – FACILITIES AND SERVICE LOCATION(S)**

The Respondent shall identify its proposed service location(s) and describe its proposed approach/criteria used to identify and select its proposed facility location(s) in Florida for UOC Vendor staff providing services described in ITN Section B.14, including the facility location(s) for mail room, Customer contact center, and Key Staff. The Respondent shall include specific proposed locations (full address(es)), with special consideration of proximity to the Agency. The Respondent shall describe its approach to establishing locations that satisfy the requirements in Attachment B-2, Scope of Services, Section B.14 – Facilities and Service Location(s).

**Response:**

**SRC #20 Evaluation Criteria:**

1. The adequacy of the Respondent's selection criteria/approach for its proposed facility location selection(s).
2. The adequacy of the Respondent's proposed facility location in terms of its proximity to Tallahassee and other Agency headquarter cities in Florida, and the benefits of the proposed locations to the State of Florida.

3. The adequacy of the Respondent's demonstrated ability to meet the facility requirements specified in the ITN.

**Score:** **This Section is worth a maximum of 15 raw points with each of the above criteria being worth a maximum of 5 points each.**

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**Respondent Name:**

**SRC #21 – TURNOVER PLAN**

The Respondent shall demonstrate its capability to fulfill the turnover and project close out requirements described in Attachment B-2, Scope of Services, Section B.15 – Vendor Turnover. The Respondent shall submit a sample Turnover Plan specifying how the Respondent will provide assistance in turning over all artifacts in its possession, as it relates to the contract, in the event of contract expiration or termination for any reason. The Respondent shall include a detailed description of its proposed processes and approach to turnover planning including:

1. Providing the Turnover Plan deliverable to the Agency within the agreed-upon timeframe;
2. An overview of the support the Respondent will provide for the turnover activities described in the ITN;
3. Approach to identifying and submitting all records, files, methodologies, data, and any supplemental documentation that the Agency would require to continue services;
4. Resources and training that would be required by the Agency or another FX Vendor to take over operation of the project;
5. Coordinating tasks and activities with the incoming UOC Vendor, upon Agency request; and
6. Providing the Agency with a turnover results report documenting completion of all tasks at each step of the turnover plan.

**Response:**

**SRC #21 Evaluation Criteria:**

**Score:** **No points will be awarded for Turnover Plan.**

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**Respondent Name:**

**SRC #22 – OPERATIONS AND MAINTENANCE**

The Respondent shall demonstrate its proposed approach and capability to maintain the day-to-day functions of the implemented UOC Vendor’s Solution and support the UOC technical and business operations specified in Attachment B-2, Scope of Services, Section B.10 –Operations and Maintenance Requirements using best practices. At a minimum, the description shall include the Respondent’s proposed approach to providing ongoing UOC Vendor services and support of the UOC Vendor Solution per the requirements of this ITN. The description shall include, at a minimum:

1. The Respondent’s proposed UOC Vendor Solution maintenance, defect management correction, configuration updates, enhancements, best practices solutions, scheduled maintenance, testing, and release management processes and approaches;
2. The Respondent’s proposed approach to developing and implementing a training plan to successfully meet the requirements specified in this ITN;
3. The Respondent’s proposed approach to providing the UOC Vendor’s Solution warranty to successfully meet the requirements specified in this ITN;
4. The Respondent’s proposed incident management approach and process;
5. The Respondent’s proposed process and approach to disposition activities for any systems decommissioned during the term of the Contract; and
6. The Respondent shall provide a sample Operations and Maintenance Manual that demonstrates its proposed approach to developing this manual.

**Response:**

**SRC #22 Evaluation Criteria:**

1. The adequacy of the Respondent's UOC Operations and Maintenance approach in terms of meeting the requirements specified in Attachment B-2, Scope of Services, Section B.10 – Operations and Maintenance.
2. The adequacy of the Respondent’s approach to ongoing UOC Solution maintenance activities, including defect management, testing, solution configuration management, integration, and change process.
3. The adequacy of the Respondent’s training approach.
4. The adequacy of the Respondent’s proposed approach to providing warranty activities.
5. The adequacy of the Respondent’s proposed Operations and Maintenance Manual sample.
6. The adequacy of the Respondent’s Incident Management approach and process.
7. The adequacy of the Respondent’s proposed approach to staffing, managing and assisting with system disposition activities.

**Score:** **This Section is worth a maximum of 35 raw points with each of the above criteria being worth a maximum of 5 points each.**

**Respondent Name:**

**SRC #23 – IMPLEMENTATION AND TRANSITION APPROACH**

The Respondent shall demonstrate its experience successfully transitioning technology and business services solutions from an incumbent FX Vendor for services similar in nature to those described in Attachment B-2, Scope of Services, Section 7 – Transition / Design, Development, and Implementation, of this ITN. At a minimum, the Respondent shall demonstrate the following:

1. Experience implementing large, complex, multi-stage technology and services projects in a multi-vendor environment, using an innovative, best practices approach;
2. Approach to effective Organizational Change Management per the requirements in Attachment B-2, Scope of Services, Section B.7.2 – Organizational Change Management (OCM) of this ITN; and
3. Capability and approach to successful staff training and knowledge management.

**Response:**

**SRC #23 Evaluation Criteria:**

1. The adequacy of the Respondent's demonstrated experience with and articulation of successful business services and technology transition practices and outcomes.
2. The adequacy of the Respondent's best practices and experience implementing large, complex, multi-stage technology and services projects in a multi-vendor environment, using an innovative best practices approach.
3. The adequacy of the Respondent's proposed approach to Organizational Change Management and demonstrated ability to meet the requirements in Attachment B-2, Scope of Services, Section B.7.2 – Organizational Change Management (OCM) of this ITN.
4. The adequacy of the Respondent’s approach to staff training and knowledge management, including its ability to work with subcontractor vendors.

**Score: This Section is worth a maximum of 20 raw points with each of the above criteria being worth a maximum of 5 points each.**

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**Respondent Name:**

**SRC #24 – GENERAL UOC PRODUCT DEMO**

The Respondent shall provide a high-level preview of its proposed UOC solution that introduces the Agency to its base functionality. The Respondent shall submit with its Response one (1) thumb drive containing one (1) or more high-level, recorded product demos of its end-to-end, integrated solution that demonstrates functionality relevant to that required by the Agency for the UOC operations, as specified in Attachment B-2, Scope of Services. The demo(s) shall be limited to 20 minutes in length, and may include video demonstrations of workflows, screen shots, and other content as deemed appropriate to demonstrate the ability of the Respondent’s proposed solution to meet the Agency’s UOC business and technical requirements specified in Attachment B-2, Scope of Services, Section B.8.11, Platform Infrastructure Components.

NOTE: The Agency intends to request additional, detailed solution demonstrations as part of the negotiation process.

Examples of demo scenarios the Respondent may consider include, but are not limited to:

1. Functionality a call center representative might use to support a customer inquiry from request to resolution, such as logging into the CRM, accessing the Knowledge Management System to identify articles that are supportive in resolving the issue, communicating via chat sessions, issue escalation, resolution and providing follow-up communications;
2. Functionality used to assist a Recipient searching for health plan options;
3. Functionality used to escalate a Provider issue to the Provider Services Module Vendor;
4. CRM routing process(es); and
5. Help request intake, processing and resolution.

**Response:**

**SRC #24 Evaluation Criteria:**

1. The demonstrated adequacy of the solution’s functionality in terms of how well it relates to the Agency’s UOC business process needs, as described in Attachment B-2, Scope of Services.
2. The demonstrated adequacy of the solution’s functionality in terms of how well it meets the UOC technical requirements of the Agency, as described in Attachment B-2, Scope of Services.
3. The solution’s demonstrated ease of use, intuitiveness and navigation.

**Score: This Section is worth a maximum of 15 raw points with each of the above criteria being worth a maximum of 5 points each.**