



Washington Health Benefit Exchange
RFI 17-007 Addendum 2
July 14, 2017

TO: Potential Respondents to RFI 17-007 and Other Interested Parties
FROM: Erin Hamilton, RFI Coordinator
SUBJECT: Addendum 2 to RFI 17-007 for "Document Scanning and Imaging Services"
PURPOSE: To provide responses to questions submitted by the July 12 deadline.

1. HBE's responses to Vendor questions submitted by the February 12 deadline are provided as an attachment to this Addendum.
2. Please contact the RFI Coordinator at contracts@WAHBExchange.org if there are any questions concerning this Addendum.

Respectfully,

A handwritten signature in blue ink that reads "Erin Hamilton".

Erin Hamilton
RFI Coordinator
contracts@wahbexchange.org

Vendor Questions and HBE Reponses for RFI 17-007: Document Scanning and Imaging Services

| # | Vendor Question | HBE Response |
|---|--|---|
| 1 | Is this work required to be scanned and indexed onsite at the HBE? Or can the services be performed anywhere? | Regarding our RFI, the work required does not have to be onsite at HBE. Our current services are not onsite. We are most interested in obtaining services that are based within Washington State, but are open to others as well. |
| 2 | Whether companies from outside USA can apply for this? | The majority of the services desired must be performed within the US |
| 3 | Whether we need to come over there for meetings? | Yes, occasional onsite meetings would likely be required. |
| 4 | Can we perform the tasks (related to RFP) outside the USA? | Some tasks may be performed outside the US. In your response, please denoted services proposed for outside the US for consideration. |
| 5 | Can we submit the proposals via email? | Yes. Responses to this RFI are required to be submitted via email. |
| 6 | Is the state HBE currently working with any vendors to provide scanning and imaging services? | Current imaging and scanning activities are not handled in-house at HBE, but rather by The Washington State Health Care Authority; a partner government agency. |
| 7 | Do you need scanning services for legacy data and or/day forward? Any idea of back scanning volume? | This has not yet been determined |
| 8 | Do you need vendor provide document destruction services on images that you scan? | No |
| 9 | Are you seeking vendors with an established internal software program or platform already in place to meet the requirements of this RFI? Or is this RFI also open to vendors, who complete the scope of work by using an already existing internal software program or platform? | We are looking for a vendor to supply an established and customizable program and platform. |

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| # | Vendor Question | HBE Response |
|----|---|--|
| 10 | Should we assume the application number is before a client ID is approved? | No, either Person ID or Application ID can be created first |
| 11 | What chroma is the Health Care Authority (HCA) scanning the files at? a. Color b. Gray c. Black and White | Color – Seldom used due to storage issues Gray – Sometimes used depending on the type of documents Black and White – used for most paper documents. Email attachments are imported in as color or black and white based on how they are received. |
| 12 | What is the DPI of the current scanned images? | Usually 200 DPI, sometimes up to 300 DPI as needed. |
| 13 | How many pages per “record” a. Are 3,000 records per week equal to lesser than the actual amount of images per week? b. Are the multi-page records 8.5x11 inch standard pages? c. Are there legal size documents? d. Are there multi-part pages and forms? e. Describe the paper: carbon copy, multi-part, etc. f. Are the documents stapled, paper clipped, or taped? g. Are the records still in envelopes? h. Are electronic records such as emails ever processed through the scanning and indexing software? | a. 3000 records per week is an estimated average. b. Generally, but there could be exceptions. c. Yes, the documents could be any size d. Yes, the documents could be any number of pages and forms e. Generally we receive copies of documents, but it could be anything. f. Yes, sometimes the documents are attached. Receiving and pre-indexing the documents is done by HBE personnel. g. Yes, sometimes the documents are attached. Receiving and pre-indexing the documents is done by HBE personnel. h. Yes, e-mails are printed as PDF’s and imported into the scanning software. E-mail attachments are imported into the scanning software as PDF, TIFF or JPEG files. |
| 14 | How many index fields are currently being hand keyed off of the forms? | Three fields in most cases - App ID, first name, last name |
| 15 | How many index fields are being auto captured based off of OCR, zone recognition, pattern matching, or classification? | None at this time |
| 16 | How many index fields are being produced based on auto lookups into a database table? a. Examples: hand key index the name, then auto lookup the social security number, address, DOB, etc. | Six fields can be auto lookup - Application ID, first name, last name, person ID, program, renewal date |

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|----|---|--|
| 17 | How are files collected at HBE? | Applications to be scanned are delivered to HBE by USPS. |
| 18 | How are files delivered to the current vendor for scanning? | Applications or other documents are delivered to the imaging vendor in person by HBE personnel. |
| 19 | What is the current timeline from delivery of files to the current vendor to receipt of images and data at the HBE health plan finder? | Current SLA is 24 hours from receipt to document upload. |
| 20 | Are their workflows configured within the HPF application based on indexing from the forms? a. what are the index fields that trigger workflows and routing of records within the HPF? | The index fields do not trigger automatic workflows. The program field is used primarily to group the documents. |
| 21 | Do the records arrive directly to the HCA or to WAHB? a. Do they arrive in bulk or gradually via USPS? b. Are the records compiled into 3,000 count stacks and delivered to HCA for processing? | The records arrive at HBE by USPS and are delivered to HCA by HBE personnel. The documents are sorted before processing by HCA personnel. |
| 22 | What is the normal routine for current delivery of files to HCA and required return or upload into the HPF? | The records arrive at HBE by USPS and are delivered to HCA by HBE personnel each business day. Current SLA for imaging is 24 hours. |
| 23 | What is the current timeline for how records are being processed? | Current Service Level Agreement is 24 hours. |
| 24 | How long are the physical records kept at the HCA before they are delivered to HBE or destroyed? | Paper copies are kept for 30 days |
| 25 | What is the retention period for the electronic files? | Electronic records are archived up to 10 years unless otherwise specified. |
| 26 | What is the projected timeline to change from processing records with the HCA to a qualified vendor? | This is yet to be determined. |
| 27 | What is the current expense to process records with the HCA? a. Weekly? b. Monthly? c. Annual? | We currently pay HCA \$499,324 per year for imaging services, regardless of the number of records imaged. However, cost is only one consideration. We are seeking solutions that are competitive in terms of cost, efficiency, and other considerations. |

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| 28 | Are you looking for someone to provide a total solution (scanning services, indexing, and repository for searching)? Or just the scanning/indexing services and you'll provide the search repository? | We are interested in a comprehensive imaging solution, but this scenario would be considered. |
| 29 | Are we able to submit a response to the RFI that doesn't include the scanning services (and only include the search capability)? | We are interested in a comprehensive imaging solution. |
| 30 | Are you looking for a turnkey product or service? | This would be considered, depending on the capability and level of customization possible. |
| 31 | Do you want the vendor to host the Exchange or simply provide the data for use by the Exchange? | This is yet to be determined. |
| 32 | Does the work include only scanned hard copy? | No, we also receive emails. Currently these are turned into hard copy, then scanned. |
| 33 | Does the 3,000 documents/week include any electronically received documents? If so, in what format are those documents received by the HBExchange? | Yes, documents received as email attachments are included in this number. Documents can be mailed, e-mailed, or faxed to us. We expect the amount of documents received as email attachments to increase. |
| 34 | Who does the sorting and pre-indexing? | Currently this is done by vendor personnel. |
| 35 | Who determines the Doc types? | HBE personnel would be determining the Doc type. |
| 36 | What is the extent of the archival capabilities you want? For hard copy? Electronic? For how long? | Electronic records are archived up to 10 years unless otherwise specified. Hard copies are archived and available to HBE for 30 days before being disposed of. |