

**Request for Proposal
HBE 18-004
for**

Washington Health Benefit Exchange Call Center



Release Date: 8/17/18

Proposals Due: 10/16/18

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1 INTRODUCTION

1.1 Introduction and Background

The Washington Health Benefit Exchange, hereafter referred to as WAHBE, is seeking Proposals from qualified Vendors to operate an inbound customer service Call Center. The Call Center will support WAHBE by helping customers navigate the [Washington Healthplanfinder™](#) (HPF), answering questions about eligibility and enrollment, and providing other customer service functions as described throughout this Request for Proposal (RFP). Current Call Center services for WAHBE are being provided by a Vendor out of Spokane, Washington; with overflow sites in Kansas and Florida.

WAHBE was created by state statute in 2011 as a public-private partnership. WAHBE operates the HPF – an easily accessible, online marketplace for individuals and families to compare and enroll in health insurance including Qualified Health Plans (QHP), Qualified Dental Plans (QDP) and Washington Apple Health (Medicaid).

Washington Healthplanfinder offers Washington state residents:

- Side-by-side comparisons of QHPs and QDPs; and
- Access to tax credits or financial help to pay for co-pays and premiums; and
- Expert customer support offered through the Call Center; as well as one online, by phone, or in person through Navigators and insurance Brokers.

As the single point of entry for Washington Apple Health, QHP and QDP, WAHBE serves more than 1.7 million residents annually. As of March 2018, more than 209,000 Washington residents were enrolled in QHPs and more than 1.4 million were enrolled in Washington Apple Health.

WAHBE seeks to continuously improve how Washingtonians secure health insurance through innovative and practical solutions and an easy-to-use customer experience. These are reflected in our values of integrity, respect, equity, and transparency as they relate to those we work with and those we serve. For further information on WAHBE, please visit the WAHBE website at: <https://www.wahbexchange.org/about-the-exchange/what-is-the-exchange/>.

A glossary of terms used throughout this document is attached as EXHIBIT A.

1.2 Acquisition Authority

WAHBE issues this RFP acting under the authority pursuant to [Ch. 43.71 RCW](#); the statute that established the WAHBE Board and WAHBE.

WAHBE intends to award one (1) Contract as a result of this RFP. WAHBE reserves the right to issue a Contract with or without the Chat functionality described herein.

1.3 Vendor Eligibility

This procurement is open to those Vendor organizations which can fulfill all requirements stated within this RFP and, including without limitation, the following requirements:

1.3.1 Minimum Mandatory Qualifications

- Vendor is currently licensed to operate a business in the United States; and

- Vendor is currently licensed, or agrees to become licensed, to operate a business in Washington State per the requirements of [Section 1.3.2](#); and
- Vendor's proposed main (year-round) call center facility is in Washington State; and
- Vendor's proposed overflow and/or backup call center facility(ies) is (are) located within the continental United States; and
- Vendor has at least 5 years' experience operating a call center; preferably for health care or insurance.

1.3.2 Vendor Licensed to do Business in Washington State

Vendor must be licensed to conduct business in Washington State within thirty (30) calendar days of being identified as the Apparently Successful Vendor (ASV), including registering with the Washington State Department of Revenue, Department of Labor and Industries (Worker's Compensation), and the Employment Security Department (Unemployment Insurance), as applicable. Vendor shall collect and report all applicable taxes, including those assessed for operations in a state other than Washington State.

1.3.3 Use of Subcontractors

WAHBE will accept Proposals that include third party involvement only if the Vendor submitting the Proposal agrees to take complete responsibility for all actions of such Subcontractors. Vendors shall state whether Subcontractors are/are not being used and, if they are being used, Vendor must provide detailed information for each Subcontractor in their response to this RFP (see [Section 5.4](#)). Any Subcontractors engaged after award of the Contract shall be pre-approved, in writing (email acceptable), by WAHBE. Subcontractors shall comply with Contractor mandatory requirements to include location of staff within the Continental United States.

Per WAHBE policy, a former WAHBE Board Member or employee may not accept employment or compensation under a contract with WAHBE, directly or as an employee of another entity, within one year of termination of employment.

Vendor shall not sub-contract more than 49% of the total operating budget of the Vendor's Call Center solution. All Subcontractors shall be held to the same performance standards as the Vendor, and the Vendor shall be held exclusively accountable for Subcontractor performance.

Vendor shall act as the single point of contact for WAHBE with the Vendor's Subcontractors, product manufacturers, and other relevant third-parties for the Services described in the RFP and the Vendor's Proposal.

1.3.4 Insurance

Contractor shall, during the term of this Contract, maintain in full force and effect, the insurance coverage provided in EXHIBIT C, Sample Contract.

1.4 Period of Performance

The initial period of performance of any Contract resulting from this RFP will begin on or around April 1, 2019 and will end on June 30, 2022. Upon notice to the Contractor WAHBE, in its sole discretion, may extend the period of performance through June 30, 2027 in whatever time increments WAHBE deems appropriate.

1.5 Purpose and Project Overview

The purpose of this RFP is to select a Vendor to operate a full-service Call Center for WAHBE. In general, the successful Call Center Vendor will perform the following functions:

- Provide a toll-free phone number for HPF customer questions and inquiries; and
- Help consumers create HPF accounts and handle account needs such as email changes; and
- Receive inquiries and answer questions about health insurance eligibility, application and enrollment, and the availability of tax-credits and cost sharing reductions; and
- Provide email response service for consumers; and
- Assist customers with changes to the application, including those that may qualify the consumer for a special enrollment period or new eligibility determination; and
- Facilitate the customer application and enrollment process to include, but is not limited to, assistance with web-based and paper-based application processing; and
- Help customers navigate through complex program requirements (e.g. the Medicaid Expansion program (based on Modified Adjusted Gross Income parameters, or MAGI), eligibility for Advanced Premium Tax Credit (APTC), and facilitate enrollment in insurance plans); and
- Refer customers for in-person help (e.g. Navigator assistance programs, Enrollment Centers, or Brokers).
- Assess calls concerning eligibility for other health benefit programs available to Washington State consumers, and for more complex questions, route accordingly.

The WAHBE Call Center will be the first point of contact for many customers with questions about applying for and enrolling in health insurance through WAHBE. Expected user groups and call types are listed below:

Expected User Groups and Call Types

Category	Description	Category	Description
Users	<ul style="list-style-type: none"> • Individuals seeking to enroll in health insurance through HPF • Advanced Premium Tax Credit recipients • MAGI Medicaid Enrollees • CHIP Enrollees • Navigators and Brokers • Health Insurance Carriers • American Indian/Alaskan Native Enrollees 	Typical Calls	<ul style="list-style-type: none"> • APTC eligibility questions • Enrollment assistance • Premium amount questions • Health plan questions • Account updates • Special enrollment eligibility • Responses to notices for document requests • Complaints • System Access

1.6 Key Partnerships

The following Washington State agencies work with WAHBE to deliver health insurance in Washington state:

- Department of Social and Health Services (DSHS) – DSHS is a comprehensive social service agency. DSHS provides child and adult protection, food and cash assistance, mental health hospitals, services to the developmentally disabled, and enrollment and eligibility determination for services including Classic Medicaid, and Supplemental Security Income (SSI). DSHS operates the state’s Eligibility System.
- Health Care Authority (HCA) –As the state’s Medicaid agency, HCA is responsible for administering the Medicaid program. HCA operates the state’s MMIS system (ProviderOne) and contracts with Medicaid Managed Care Organizations (MCO) to enroll Medicaid clients in Medicaid MCOs. HCA also administers the state’s CHIP program and coordinates the purchasing of state and school employees’ medical benefit program.
- Office of the Insurance Commissioner (OIC) – OIC oversees Washington's insurance industry. OIC’s mission is to protect the consumers, the public interest and the state’s economy through fair and efficient regulations of the insurance industry. Examples of OIC services include assisting consumers with choices and problems involving private health insurance, as well as many government programs including Medicare.

1.7 Objectives

The objective of WAHBE’s Call Center is to facilitate the process of acquiring health and dental insurance, whether it is subsidized, unsubsidized, or MAGI Medicaid. Overall, the **primary goal** of the Call Center organization is to assist individuals in obtaining health insurance coverage and be able to provide information concerning the following:

- a. The types of insurance, including QHPs and QDPs offered on the HPF; and
- b. The premiums, benefits, cost sharing and quality ratings associated with the insurance plans offered; and
- c. The categories of assistance available, including premium tax credits and cost-sharing reductions, as well as assistance available through Medicaid/CHIP programs; and
- d. The application process for enrollment in health coverage available through WAHBE or other programs including Medicaid/CHIP.

A summary of the **core service areas** where the Call Center shall support consumers include:

- a. Eligibility – Provide assistance with applications including data entry and verifying proof of identity; and
- b. Enrollment – Respond to requests to enroll in or renew an existing insurance plan, and calls to confirm enrollment start date; and
- c. Financial Management – Receive calls from clients questioning their premium amounts, tax credits or cost sharing reductions, or IRS 1095-A forms; and
- d. Health/Dental Plans – Answer questions about available health and dental plan offerings; and
- e. Application Updates – Assist with reporting income changes, address changes, and qualifying events; and

- f. Customer Inquiry – Facilitate solutions to a variety of consumer questions, ranging from navigating the web portal, addressing system problems, or forwarding clients to the appropriate destination for additional assistance; and
- g. Paper Applications and document management – Provide data entry service for new and renewal paper applications. Also provide document uploading to HPF. Paper applications and documents are imaged by an external service provider and made available to the Call Center via imaging software.

The Call Center currently engages customers by email, phone, and fax. Chat functionality is not currently available but may be implemented and used by the Vendor in conjunction with the RFP. References to Chat services and performance requirements apply only if WAHBE elects to include this functionality in the Contract resulting from this RFP.

Major responsibilities for the Call Center include, but are not limited to, the following:

- a. Provide a Customer Relationship Management (CRM) solution and use it to track all customer encounters and
- b. Record all contacts and web-portal interactions, including chat, in an exportable format for review or transfer to replacement systems; and
- c. Utilize and maintain a Voice over Internet Protocol (VoIP) and Interactive Voice Response (IVR) system to facilitate automatic selection of the core Call Center services. Systems must meet NIST 800-58 standards including, but not limited to, encryption of VoIP traffic patching and Integrity threat mitigations (<https://nvlpubs.nist.gov/nistpubs/Legacy/SP/nistspecialpublication800-58.pdf>); and
- d. Provide assistance navigating the web portal through the eligibility process including Washington Apple Health and QHP/QDPs; and
- e. Provide technical support (includes, but is not limited to, patching, versioning, system performance, security, access, and monitoring) for the Call Center applications, systems and technology stack.
- f. Assist with APTC eligibility; and
- g. Assist individuals with applying for health coverage; and
- h. Provide information about QHP/QDP offerings; and
- i. Respond to inquiries related to eligibility status, enrollment status, and change in circumstances; and
- j. Respond to inquiries related to IRS 1095-A tax forms; and
- k. Research and resolve client issues and account discrepancies, including ticketing and escalations; and
- l. Educate clients on appeal, complaint, and certificate of exemption processes; and
- m. Provide language translation services through Call Center representatives or through a language translation service; and
- n. Refer or transfer callers to Washington state agencies, insurance carriers, Navigators, Enrollment Centers, or brokers as needed; and
- o. Conduct project work to align with service demand business needs.

In summary, based upon the primary goals, core service areas, and major responsibilities, the Call Center shall be accountable for a wide variety of customer service functions to Washington’s health coverage seeking consumers.

2 PROCUREMENT SCHEDULE

This RFP is being issued under the following Schedule. The Proposal deadlines are mandatory and non-negotiable. All times are **Pacific Time**. Failure to meet any of the required deadlines (dates and times) will result in disqualification from participation.

#	Activity	Dates & Deadlines
1	Issue RFP HBE 18-004	8/17/18
2	Optional Vendor Conference (Skype for Business)	8/29/18
3	Vendor Questions Due by 3:00 p.m. PT	9/07/18
4	WAHBE Posts Responses to Vendor Questions	9/21/18
5	Mandatory Vendor Letter of Intent Due	9/28/18
6	Vendor Proposals Due by 3:00 p.m. PT	10/16/18
7	Review and Evaluation Period	10/17/18 – 11/16/18
8	WAHBE Schedules Oral Presentations/Site Visits	11/19/18 – 11/21/18
9	Vendor Oral Presentations/Site Visits	11/26/18 – 11/30/18
10	WAHBE Conducts Reference Checks	12/03/18 – 12/12/18
11	Announce Apparently Successful Vendor	12/17/18
12	Request for Optional Debrief Deadline	12/21/18
13	Conduct Optional Debriefs	By 1/04/19
14	Contract Negotiations	1/07/19 – 1/31/19
15	Center for Medicaid Services Contract Review/Approval	2/01/19 – 3/30/19
16	Contract Execution	4/01/19
17	Transition Period (if applicable)	4/01/19 – 6/30/19
18	Call Center Go-Live	7/01/19

WAHBE reserves the right to revise this schedule at any time. Items 1-6 may be revised at any time by written addendum. Dates listed for items 7-18 are approximate and may be changed at any time without notice.

3 ADMINISTRATIVE REQUIREMENTS

3.1 Communication Through RFP Coordinator

Upon release of this RFP, all Vendor communications concerning this solicitation shall be directed to the RFP Coordinator listed below. Unauthorized contact regarding this solicitation with other WAHBE staff or Board Members or State employees involved with the solicitation may result in disqualification. Proposals should be based on the material contained in the RFP, and any related amendment(s). Questions and written answers shall be directed through the RFP Coordinator.

All oral communications shall be considered unofficial and non-binding on WAHBE. Vendors should rely only on written statements issued by the RFP Coordinator.

For Submission of Vendor Questions and Letters of intent ONLY:

Erin Hamilton, RFP Coordinator
Washington Health Benefit Exchange
Email: contracts@wahbexchange.org
(please include RFP #HBE 18-004 in subject line)

For Delivery of Proposals ONLY:

Hand-Delivered/Courier Address:

Washington Health Benefit Exchange
Attn: Erin Hamilton
810 Jefferson St SE
Olympia, WA 98501

U.S. Mail:

Washington Health Benefit Exchange
Attn: Erin Hamilton
810 Jefferson St SE
Olympia, WA 98501

3.2 Procurement Web Site and Vendor Reference Library

The contents of this RFP and related documents, any addenda and written answers to questions, and any other formal communications will be provided exclusively via the WAHBE web site: <https://www.wahbexchange.org/about-the-exchange/what-is-the-exchange/Vendor-procurements/> and Washington's Electronic Business Solution (WEBS) website: <https://fortress.wa.gov/ga/webscust/>.

The document(s) will be available in Adobe Acrobat, Microsoft Excel, or Microsoft Word formats.

3.3 Letter of Intent – Mandatory Submission (M)

A letter indicating the Vendor's intent to respond to this RFP must be received by the RFP Coordinator specified in [Section 3.1](#), no later than the date and time listed in [Section 2](#). The Vendor shall submit the Letter of Intent by email to contracts@WAHBExchange.org. Failure to submit a Letter of Intent by the deadline specified in [Section 2](#) will result in Vendor disqualification and the rejection of any subsequent Proposal.

Each Vendor shall include the following information in the Letter of Intent:

- Name of Prime Vendor Organization; and
- Name of Prime Vendor Representative to serve as contact for RFP communications; and
- Prime Vendor Representative Title; and
- Prime Vendor Representative Address; and
- Prime Vendor Representative Telephone Number; and
- Prime Vendor Representative Email Address; and
- Statement of Intent to respond to RFP HBE 18-004; and
- Statement of Vendor's good faith belief in Vendor's ability to meet the requirements listed in this RFP document; and
- Statement of capacity and qualifications to perform Call Center services of scope and duration defined in the RFP.

If a Vendor submits a Letter of Intent, it is not bound to provide a Proposal on the project; however, WAHBE would appreciate a notice from the Vendor if it chooses to withdraw its Letter of Intent prior to Proposal submission.

3.4 Optional Vendor Conference

WAHBE will conduct an optional Vendor conference via “Skype for Business”. The Vendor conference is for entities interested in submitting a Proposal. Individuals may submit written questions to the RFP Coordinator following the Vendor conference until the cut-off date for questions noted in [Section 2](#). Individuals may also ask questions during the Vendor conference, but responses provided by WAHBE during the conference are considered unofficial and non-binding.

Vendor Conference Call-In Information:

Date: August 29, 2018
 Time: 1:00 p.m. PT
 Link: <https://meet.lync.com/wahbexchange/hamile/PGRF6B6F>
 Phone #: 1-719-457-3306
 Passcode: 680549

3.5 Vendor Questions

Vendor questions regarding this RFP will be accepted until the dates and times specified in RFP [Section 2](#). Early submission of questions is encouraged. Vendor questions shall be submitted in writing via email to the RFP Coordinator at contracts@WAHBExchange.org. Only written responses posted to the WAHBE’s Procurement web site and WEBS will be considered official and binding.

Vendors MUST use the following format when submitting their written questions. Failure to provide questions in this format may result in either 1) rejection of the Vendor’s questions or 2) disqualification from the RFP process and the rejection of any subsequent Proposal.

Question #	Document Name	Section # and Title	Page or Paragraph #	Question

Written responses to Vendor questions will be posted as a numbered addendum on WEBS and on the WAHBE procurement webpage on or before the date specified in [Section 2](#). The Vendor that submitted the question(s) will not be identified.

3.6 Proposal Contents and Organization

Each of the RFP requirements are numbered and titled. Each requirement is either designated with an (M) or (MS); indicating how the Proposal will be evaluated:

- For **Mandatory Requirements (M)**, the Proposal shall indicate explicitly whether the Vendor’s proposed services meet the requirement. A statement, “(Vendor Name) has read, understands, and fully complies with these requirements” is acceptable, along with any additional information requested.
- For **Mandatory Scored requirements (MS)**, the Proposal shall indicate explicitly whether the Vendor’s proposed services meet the requirement and describe how the proposed Vendor’s

services accomplish each requirement as it relates to the service(s) proposed. These are scored elements of the Proposal.

- **For Mandatory Scored, Optional Award requirements (MSO)**, the Proposal shall indicate explicitly whether the Vendor's proposed services meet the requirement and describe how the proposed Vendor's services accomplish each requirement as it relates to the service(s) proposed. These are scored elements of the Proposal, but may not be awarded in a resulting Contract.

The Proposal shall contain information responding to all Mandatory Requirements in the RFP document and RFP Exhibits, and shall include the signature of an authorized Vendor representative on all documents required in the Exhibits.

Vendor's Proposals shall respond to all questions in both the main body of this RFP document and all Exhibits.

All electronic copies of the Proposals, which are submitted on a thumb drive, shall be submitted using unrestricted Microsoft Word, Microsoft Excel, Microsoft Project, Microsoft Visio, or Adobe Acrobat, except that exceptions and requested changes to the Sample Contract and assumptions (as described below) must be submitted in unrestricted Microsoft Word format. Failure to provide any requested information in the prescribed format may result in disqualification of the Vendor.

The Proposal shall be submitted in 2 volumes organized and containing the information listed below. This separation of documentation protects the integrity of WAHBE's evaluation process. No mention of the Financial Proposal may be made in Volume 1.

Volume 1:

Required Contents:

- Response to [Section 5.2](#): Vendor's signed and completed Response Checklist (EXHIBIT D); and
- Response to [Section 5.3](#): Vendor's Profile/Letter of Submittal; and
- Response to [Section 5.4](#): Executive Summary; and
- Response to [Section 5.8](#): Vendor Experience Summary; and
- Response to [Section 5.9](#): Service Proposal; and
- Response to [Section 5.10](#): Facilities Proposal; and
- Response to [Section 5.11](#): Operations Proposal; and
- Response to [Section 5.12](#): Performance Proposal; and
- Response to [Section 5.13](#): Security Proposal; and
- Response to [Section 5.14](#): Reporting Proposal; and
- Response to [Section 5.15](#): Technology Proposal; and

Submission Requirements:

- One (1) copy of all materials on thumb drive; and
- One (1) true and correct printed original; and
- Six (6) complete printed copies.

Volume 2:

Required Contents:

- Response to [Section 5.1](#): Vendor's signed and completed Certifications and Assurances (EXHIBIT B) with assumptions and any requested changes to Contract terms and conditions, in the format specified in [Section 3.16](#), attached; and
- Response to [Section 5.5](#): References; and
- Response to [Section 5.6](#): Prior Contract Performance; and
- Response to [Section 5.7](#): Financial Rating; and
- Response to [Section 5.16](#): Price Proposal (EXHIBIT F, Sections 1 -4); and
- Response to [Section 5.17](#): Price Proposal for Chat (EXHIBIT F, Section 5).

Submission Requirements:

- One (1) copy of all materials on thumb drive; and
- One (1) true and correct printed original.

3.7 Proposal Presentation and Format Requirements

The following requirements are Mandatory in responding to this RFP. Failure to follow these requirements may result in Vendor disqualification:

- a. The signature block in EXHIBITS (where required) must be signed by a representative authorized to bind the company to the offer; and
- b. Vendor shall respond to each requirement within page limitations provided. Failure to meet page number limitations, where requested, may result in the Proposal being disqualified. Alternatively, WAHBE, at its sole discretion, may review or consider only the information or material that is provided within the page limits permitted; and
- c. Failure to submit any of the required documents may result in the Proposal being disqualified; and
- d. Proposals shall be prepared on standard 8.5 x 11-inch loose-leaf paper and placed in three-ring binders with tabs separating the major sections of the Proposal. Foldouts containing charts, spreadsheets, and oversize exhibits are permissible; and
- e. Pages must be numbered consecutively within each section of the Proposal showing Proposal section number and page number. Responses to numbered requirements shall include the requirement number. Font size shall be 11 or larger; and
- f. Include Vendor name and the name, address, email, and telephone number of the Vendor's authorized representative at the beginning of each volume of the Proposal; and
- g. Figures and tables shall be numbered and referenced in the text of the Proposal by that number; and
- h. The Proposal, as well as any reference materials presented by Vendor, shall be written in English and Vendor shall provide all rates in United States dollars; and
- i. Files submitted shall be in MS Word, MS Excel, MS Visio, MS Project or Adobe PDF format. Files shall not be locked or protected.

3.8 Delivery of Proposals

It is Mandatory that Vendors submit all copies of their Proposals by the date and time in [Section 2](#), to the RFP Coordinator at the address specified in [Section 3.1](#).

Proposals must be received at WAHBE by the date and time specified. Proposals arriving after the deadline will be returned unopened to their senders. A postmark by that time is not acceptable. Proposals sent by facsimile or email will not be accepted. Vendors assume all responsibility for the method of delivery and for any delay in the delivery of their Proposal.

Proposal envelopes must be marked as follows: **SEALED PROPOSAL FOR RFP HBE 18-004 CALL CENTER SERVICES.**

Mailed proposals must be received and stamped by WAHBE mailroom personnel prior to the proposal deadline to be considered responsive. U.S. mail is not considered received until stamped by WAHBE mailroom personnel.

Hand delivered or Courier-Delivered (FedEx/UPS) proposals must be received and stamped at front reception area by proposal deadline to be considered responsive.

3.9 Cost of Proposal Preparation

WAHBE will not reimburse Vendors for any costs associated with preparing or presenting a Proposal to this RFP.

3.10 Proposal Property of WAHBE

All materials submitted in response to this solicitation become the property of WAHBE, unless received after the deadline in which case the Proposal is returned to the sender. WAHBE has the right to use any of the ideas presented in any material offered. Selection or rejection of a Proposal does not affect this right.

3.11 Proprietary or Confidential Information

WAHBE is subject to Washington State's Public Records Act (Chapter 42.56 RCW). Vendor's Proposal can be disclosed through the process set forth in this section. Portions of a Vendor's Proposal may be protected from disclosure through the process set forth in this section.

A Vendor cannot restrict its entire Proposal or entire sections of the Proposal from disclosure. A Vendor also cannot restrict its pricing from disclosure. Attempts to restrict disclosure using footers on every page to restrict disclosure will not be honored and may require the Vendor to resubmit the Proposal or subject the Vendor to disqualification.

If the Vendor wants to protect any Proprietary Information that is included in its Proposal from disclosure, the information shall be clearly designated by the Vendor as Proprietary Information. "Proprietary Information" is defined as information owned by Vendor to which Vendor claims a protectable interest under law. Proprietary Information may include, but is not limited to, information protected by copyright, patent, trademark, or trade secret laws.

To the extent consistent with Chapter 42.56 RCW, the Public Records Act, WAHBE shall maintain the confidentiality of Vendor's information marked Proprietary Information. If a public disclosure request is

made to view Vendor's Proprietary Information, WAHBE shall notify Vendor of the request and of the date that the Proprietary Information shall be released to the requester unless Vendor obtains a court order enjoining that disclosure. If Vendor fails to obtain a court order enjoining disclosure, WAHBE will release the Proprietary Information on the specified date.

WAHBE's sole responsibility shall be limited to maintaining the Vendor's identified Proprietary Information in a secure area and to notify Vendor of any request(s) for disclosure for so long as WAHBE retains Vendor's information in WAHBE records. Failure to label materials as Proprietary Information or failure to timely respond after notice of a public disclosure request has been given shall be deemed a waiver by Vendor of any claim that such materials are exempt from disclosure.

3.12 Waiver of Minor Irregularities

Vendors must read all instructions carefully. If Vendor does not comply with any part of this RFP, WAHBE may, at its sole option, reject Vendor's Proposal as non-responsive. WAHBE reserves the right to waive minor irregularities contained in any Proposal. Additionally, WAHBE reserves the right, at its sole option, to make corrections to Vendors' Proposals when an obvious arithmetical error has been made in the price quotation.

In those cases where it is unclear to what extent a requirement or price has been addressed, the evaluation team(s) may, at their discretion and acting through the RFP Coordinator, contact a Vendor to clarify specific points in the submitted Proposal.

3.13 Errors in Proposal

Vendors are liable for all errors or omissions contained in their Proposals. Under no circumstances will the responding Vendor be allowed to make changes to the proposed items after the deadline stated for receipt of Proposals, except as permitted in a Best and Final Offer (BAFO).

3.14 Amendments/Addenda

WAHBE reserves the right to amend portions of this RFP at any time. WAHBE may correct errors in the solicitation document identified by WAHBE or a Vendor. Any changes or corrections will be by one or more written amendment(s), dated, and attached to or incorporated in and made a part of this solicitation document. All changes shall be authorized and issued in writing by the RFP Coordinator. If there is any conflict between amendments, or between an amendment and the RFP, whichever document was issued last in time shall be controlling. In the event that it is necessary to revise or correct any portion of the RFP, a notice will be posted to WEBS at: <https://fortress.wa.gov/ga/webs/> and the WAHBE website at <https://www.wahbexchange.org/about-the-exchange/what-is-the-exchange/Vendor-procurements/>.

3.15 Right to Cancel

With respect to all or part of this RFP, WAHBE reserves the right to cancel or reissue at any time without obligation or liability.

3.16 Contract Requirements

WAHBE's Sample Contract has been included as EXHIBIT C.

To be responsive, Vendors shall indicate a willingness to enter into a Contract substantially similar to WAHBE's Sample Contract, by signing the Certifications and Assurances located in EXHIBIT B.

In no event is a Vendor to submit its own standard Contract terms and conditions in a response to this RFP. Any Vendor exceptions to the Contract terms and conditions in EXHIBIT C shall be submitted with the Proposal, attached to EXHIBIT B.

The Vendor may submit with its Proposal any exceptions and exact Contract deviations that its firm wishes to negotiate; however, many clauses are required by Washington state law and cannot be negotiated. Negotiations may begin with the announcement of the ASV. The ASV will not be allowed to submit new exceptions during negotiations.

Changes, if any, to the Contract which are accepted by WAHBE during Contract negotiations may result in a reduction in costs charged to WAHBE under the Contract. All other terms will be considered accepted by the ASV and WAHBE will enter into future negotiations at its sole discretion.

The Vendor is instructed to base its Proposal, including without limitation its Cost Proposal, on the Sample Contract, not alternate terms as proposed by the Vendor. Failure to do so may result in disqualification.

Vendor exceptions shall be provided in the table format shown below, together with the section of the Contract affected by the exceptions, the issue, the reason for the proposed change, and the proposed alternative language.

Vendor Exceptions not submitted in the table format shown below shall not be considered and shall be returned without review.

Sample Contract Section Number	Issue	Exact Proposed Alternative or Additional Language to Insert into Contract (Use Track Changes on Text in EXHIBIT C)	Reasons for Proposed Change

Any specific areas of dispute with the attached terms and conditions shall be identified in the Proposal and may, at the sole discretion of WAHBE, be grounds for disqualification from further consideration in the award of a Contract.

Vendor must identify all scope, schedule and cost assumptions related to the Vendor’s Proposal in the table format shown below. **Vendor assumptions not submitted in the table format shown below shall not be considered and may result in disqualification.**

Assumption	Contract Section Affected	Reason(s) for Assumption	Exact Proposed Alternative Language to Insert into Contract (Use Track Changes on text in RFP and/or Sample Contract)

The ASV is expected to execute the Contract within ten (10) Business Days of its receipt of the final Contract based upon CMS Contract approval. If the selected Vendor fails to sign the Contract within the allotted time frame, WAHBE may elect to cancel the award to the ASV and award the Contract to the

next ranked Vendor or, cancel or reissue this solicitation ([Section 3.15](#)). Vendor's submission of a Proposal to this solicitation constitutes acceptance of these Contract requirements.

3.17 Incorporation of Documents into Contract

This solicitation document, any addenda, and the winning Proposal shall be incorporated into any resulting Contract, as described in the Sample Contract.

3.18 Best and Final Offer

When in the best interest of WAHBE, the RFP Coordinator may request a BAFO(s) from Vendors being considered for award. Vendors may revise their initial Proposals and submit, in writing, their BAFO in response to the specifics contained in the request.

3.19 No Costs or Charges

No costs or charges shall be incurred by WAHBE before the Contract is fully executed.

3.20 No Obligation to Contract/Buy

WAHBE reserves the right to refrain from contracting with all Vendors. The release of this solicitation document does not obligate WAHBE to make any purchase.

3.21 Non-Endorsement and Publicity

In selecting a Vendor to supply services, WAHBE is neither endorsing Vendor's products or services, nor suggesting that it is the best or only solution to WAHBE's needs. By submitting a Proposal, Vendor agrees to make no reference to WAHBE in any literature, promotional material, brochures, sales presentation or the like, regardless of method of distribution, without the prior review and express written consent of WAHBE.

3.22 Withdrawal of Proposal

Vendors may withdraw a Proposal that has been submitted at any time up to the Proposal due date and time (identified in [Section 2](#)). To accomplish Proposal withdrawal, a written request (email acceptable) signed by an authorized representative of Vendor shall be submitted to the RFP Coordinator. After withdrawing a previously submitted Proposal, Vendor may submit another Proposal at any time up to the Proposal submission due date and time.

3.23 Optional Vendor Debriefing

Only a Vendor that submits a Proposal may request an optional debriefing conference to discuss the evaluation of its Proposal. The debriefing conference shall be held remotely, via conference call or Skype for Business and may last up to one hour. A Vendor's request for a debrief will be honored if received in writing (email acceptable) by the RFP Coordinator within five (5) Business Days of formal announcement of the selection of an ASV.

The optional debriefing will not include any comparison between Vendor's Proposal and any other Proposals submitted. However, WAHBE will discuss the factors considered in the evaluation of the requesting Vendor's Proposal and address questions and concerns about Vendor's performance with regard to the solicitation requirements.

3.24 Selection of Apparently Successful Vendor (ASV)

One finalist will be selected as the ASV. The ASV will be the Vendor that: (1) meets all the requirements of this RFP; and (2) receives the highest ranking as described throughout [Section 6](#).

All Vendors responding to this RFP shall be notified by email and/or WEBS when WAHBE has determined the finalist.

4 CALL CENTER REQUIREMENTS

This section defines the Scope of Work for Call Center services and outlines WAHBE's technical and operational requirements. Proposing Vendors shall develop their own detailed approaches to each section and sub-section that demonstrates an understanding of how to meet the objectives and requirements for the Call Center.

4.1 SERVICE REQUIREMENTS

4.1.1 Operational Go-Live Date

The Vendor shall ensure the WAHBE Call Center is fully Operational and prepared to service the public with Call Center services no later than July 1, 2019. Failure to meet this critical milestone shall result in liquidated damages and may result in termination for breach of Contract.

4.1.2 Hours of Operation

During Open Enrollment, additional hours of operation are required to meet customer demand. The Open Enrollment period is currently November 1 through December 15. The Open Enrollment hours shall begin a minimum of 2 weeks prior to and 4 weeks following Open Enrollment. The hours of operations shall be a minimum Monday – Friday 7:30 a.m. to 8:00 p.m. Pacific Time. In addition, extended hours on specified days during this period shall be required, as well as some or all weekends during this period.

Outside of Open Enrollment, hours of operations shall be Monday – Friday 7:30 a.m. to 5:30 p.m. Pacific Time. The Call Center may be required to be open some weekends.

The Call Center shall be closed on the following holidays*:

- New Year's Day; and
- Martin Luther King Jr. Day; and
- President's Day; and
- Memorial Day; and
- Independence Day; and
- Labor Day; and
- Thanksgiving Day; and
- Christmas Day.

* Under RCW 1.16.050 when a State legal holiday falls on a Saturday the holiday is observed on the preceding Friday; when a State legal holiday falls on a Sunday the holiday is observed on the following Monday. WAHBE reserves the right to request coverage of holiday, other days or hours of operations with 10 days' notice to Vendor.

4.1.3 Customer Service Delivery Methods

The Vendor shall provide dedicated resources to assist customers through the following inbound channels and back office services. These methods have been approved by WAHBE for service provisioning:

- Voice; and
- Live Chat (if implemented); and
- Email; and
- Off-phone Data Entry/Processing, including outbound customer contact; and
- Fax; and
- Others as mutually agreed.

4.1.4 Core Functions

While the primary goals, core service areas, and major responsibilities of the Call Center were provided in [Section 1.7](#), the following table reflects core functions which shall be performed by the Vendor’s Call Center operations.

Core Function Descriptions

Core Function	Description
General Inquiries	Call Center staff shall process fundamental inquiries related to MAGI-Medicaid programs, such as tax filing status and income limit questions. Basic navigational and data entry questions shall be fielded, and more complicated MAGI eligibility questions shall be warm or direct dial transferred to DSHS and HCA. General inquiries related to APTC and unsubsidized populations shall be fully processed by Call Center staff.
Technical application errors	Call Center shall assist consumers and customer support network (e.g. brokers and navigators) with resolving technical errors using mutually agreed-to WAHBE-approved workarounds and processes.
Account management	Call Center shall assist consumers and select Account worker user groups with password resets, answering security questions, email changes and other WAHBE-approved processes.
Application Processing	Call-in or paper applications for all types of health coverage programs shall include data entry by the WAHBE Call Center staff. Application information once submitted shall result in eligibility determined by software rules engines. “Application Results Notifications” shall also be processed by the software rules engine.
Eligibility Questions	DSHS and HCA will process Medicaid eligibility questions. WAHBE Call Center shall process eligibility questions for APTC and unsubsidized populations.
Health Plan Enrollment	Call Center shall assist QHP customers and Washington Apple Health enrollees with plan selection.
Account Updates	Call Center shall perform data entry changes reported to the Call Center for APTC, unsubsidized and MAGI-Medicaid enrollee populations. The rules engine shall affect the changes and send notifications. MAGI eligibility questions shall be transferred to HCA. “Classic” Medicaid changes shall be referred to DSHS.

Core Function	Description
Native American/ Alaska Native Applicants and Assisters	Call Center shall have a dedicated unit to assist tribal members with application enrollment and eligibility.
Email Response	Call Center shall have a dedicated unit to respond to email.
Web-based Chat (if implemented)	Call Center shall provide live chat features included in Vendor solution. Call Center may have a dedicated unit to respond to chat interactions or may cross-train CSRs to respond to chats (provided CSRs do not respond to both calls and chats simultaneously).
Complaint Processing	100% of WAHBE Call Center complaints shall be maintained in the Vendor's Customer Relationship Management (CRM) system. Complaints shall be managed using WAHBE's ticketing system. Complaints that can't be resolved at the Call Center shall be escalated to WAHBE for resolution.
Call Recording and Screen Capture	Call Center shall record 100% of all calls and capture all screens in HPF or any systems accessed during the call by CSRs. Recordings shall include all service channels.
Appeals	Call Center shall describe the appeals process and provide instructions for filing an appeal.
Document Management	Call Center shall be responsible for accessing imaged documents via imaging software and uploading the documents to customer dashboards in HPF.
Customer Surveys	Vendor shall conduct customer surveys to capture satisfaction levels with the call center interaction and respond with continuous improvement. The Vendor and WAHBE shall work cooperatively to determine the content, frequency and format prior to commencing such survey.
HPF System Testing	Call Center shall provide staff to assist with testing for HPF and CSA releases (currently 4-5 times per year. However, the frequency may increase depending on the number of scheduled system releases). Call Center shall provide ad-hoc testing upon request by WAHBE; to expedite issue resolution of unplanned errors and/or outages. Testing is often conducted outside of normal operating hours and limited to specialized services staff and supervisor(s). Call Center shall report HPF and CSA issues using a Production Control procedure as determined by WAHBE.
Language Translation service	Call Center shall provide language services to meet WAHBE Language Access Plan requirements reflected in EXHIBIT E.

4.1.5 Service Delivery Plan

The Vendor shall develop and maintain a WAHBE-approved Service Delivery plan, in accordance with the requirements listed in [Section 5.9](#).

4.2 FACILITIES REQUIREMENTS

The Vendor's operations shall include one or more facilities (physical structures) which shall provide Call Center services. The term "facility" refers to these structures.

4.2.1 Facilities

The Vendor shall provide a fully operational Call Center facility and be completely responsible for all insurance, operations and maintenance-related aspects associated with facility operation. All costs, including but not limited to operations, overhead, and profit, must be included in Vendor's proposed pricing.

Facilities shall meet State and Federal security and Privacy requirements, such as those related to MARS-E 2.0, PII, US Privacy Act, Americans with Disabilities Act, and IRS publication 1075.

All necessary hardware and software for the Call Center shall be provided by the Vendor and must include all the necessary cyber-security requirements to ensure the security and confidentiality of PII and PHI; including but not limited to:

- a. Baseline Minimum Standards, including:
 - i. Least User Privileges; and
 - ii. Least Rights; and
 - iii. Least Functionality; and
 - iv. Antivirus Protection; and
 - v. Patch Management; and
- b. Network Security; and
- c. Incident Response and Reporting; and
- d. Secure Coding Best Practices; and
- e. Physical and Environmental Security; and
- f. Data Security; and
- g. Reporting and compliance documentation, including:
 - i. SOC Reports; and
 - ii. Network Penetration Test; and
 - iii. Vulnerability Assessment Reports; and
 - iv. Intrusion Detection and Incident Response Plans; and
 - v. Business Continuity and Disaster Recovery Procedures; and
 - vi. Independent Assessments testing requirements and ability to meet sufficient recovery objectives.

The Vendor's Call Center facility shall:

- a. Be equipped with appropriate CSR workstations, training rooms, break rooms, rest rooms, managerial and meeting space; and
- b. Ensure adequate training space for heavy training and ramp up periods including open enrollment; and
- c. Provide technology enabled training rooms at proposed facility location, and ensure adequate training space during initial ramp-up; and
- d. Provide a year-round, on-site workspace and connectivity for at least three WAHBE employees.

4.2.2 Facilities Location

The Vendor shall locate the main (year-round) Call Center facility within the State of Washington. Overflow and backup facilities shall be located within the Continental United States.

4.2.3 Facilities Core Staffing

All Vendor management, supervisory, Customer Service Representative (CSR) and core business support staff shall be located at the Call Center facility(ies). Home-based CSR solutions or other virtual or indirectly supervised facility locales do not meet mandatory requirements.

4.2.4 Facilities Support Staffing

In-house or potentially sub-contracted support services such as IT support, cybersecurity, mailroom, photocopying, back room, etc. do not need to be located specifically within the Call Center facility, however, on-site location of support staffing is preferred. Off-site use of such staff shall be identified in both the Vendor's Staffing Plan and Data Security Plan.

4.3 OPERATIONS REQUIREMENTS

The organization of Vendor staff and the appropriate assignment and differentiation of tasks are extremely important to WAHBE to ensure the overall success of the WAHBE Call Center. The staffing, managerial, and organizational structure for the Call Center are in many instances left to the Vendor's discretion. However, many operational processes require a high level of communication and collaboration between WAHBE and the Vendor to maximize efficiencies and ensure success.

Call Center staffing levels and organization shall be driven by the number of people using HPF, the availability and use of self-service modalities, the different kinds of customers to be served and the degree of specialized knowledge required in the Call Center for different kinds of customers and programs.

4.3.1 Key Staff

Vendors shall provide their best-qualified, full-time staff to fulfill key positions dedicated to the WAHBE program.

All key staff are subject to approval by WAHBE prior to acceptance or changes to staffing. Prior approval shall include resume and position description for the key roles and successful completion of a background check.

Key Staff shall be present in the Olympia, Washington area during the development and Implementation Stages of the Call Center Project at specific times and occasions as defined in the Work Plan and as requested by WAHBE. In addition, Key Staff may be required to attend trainings, meetings, and other activities physically onsite at WAHBE in Olympia, WA. All travel shall be at the Vendor's expense. Vendor can expect a minimum of three, but no more than six required in-person visits to be required yearly.

Key Staff includes, but is not limited to, personnel that perform the following types of functions:

- a. Site Director; and
- b. Workforce Manager; and
- c. Training Manager; and
- d. Quality Assurance Manager; and
- e. IT Manager; and

- f. Human Resources Manager; and
- g. Information Security Manager.

WAHBE may require replacement of any Key Staff member, at any time, in accordance with Section 11.d of the Sample Contract.

In addition to the requirements listed in Section 11 of the Sample Contract, the broad duties and responsibilities associated with Key Staff include, but are not limited to:

- a. Manage all operational functions within the Call Center; and
- b. Identify any potential problem areas, recommend solutions, and work closely and cooperatively with WAHBE to resolve issues quickly and fairly; and
- c. Assist with security issue and hardware and software vulnerability management, risk management, and participate in mitigation and contingency actions to address the risks; and
- d. Ensure Call Center staff comply with all policies and procedures; and
- e. Aid in the development and implementation of processes that improve efficiency and quality; and
- f. Manage all CSR Supervisors within their work units; and
- g. Provide direction to team members and resolve problems in a timely and professional manner; and
- h. Ensure all productivity standards are met in a timely manner through measuring and monitoring; and
- i. Analyze daily, weekly and monthly reports for performance measurement and efficiencies and provide this data electronically; and
- j. Ensure accuracy and quality of Call Center performance data; and
- k. Develop curriculum used to train new hires on all Vendor provided equipment, telephony systems, software programs and customer service standards necessary for success in their position; and
- l. Coordinate with WAHBE Training Manager to utilize WAHBE created courses and materials for all employees concerning new software functionality or policies; and
- m. Oversee the Vendor training program, including responsibility to hire, coach, train and evaluate trainers; and
- n. Listen to pre-recorded phone calls and web video to identify quality assurance points that may need review with all or some of the staff; and
- o. Assess QA processes and develop and implement a formal QA performance evaluation program; and
- p. Develop a quality control performance evaluation program; and
- q. Conduct standing calibration sessions with Call Center leadership and WAHBE to review performance and consistency of scoring; and
- r. Evaluate results with Call Center/WAHBE staff representatives and develop action plans to identify and address deficiencies; and
- s. Work cooperatively with WAHBE and Vendor's management team to address deficiencies; and

- t. Review performance at the individual CSR level with supervisor/manager level to ensure each CSR has the knowledge and skills required to effectively deliver on the established service commitments; and
- u. Implement, manage, assess and monitor Information Technology (IT) business applications, systems, network, telecommunications and desktop infrastructure and support; and
- v. Provide technical expertise and knowledge to the execution of day to day operations and telephony and IT solutions, including implementation of new services and products. Serve as key technical consultant to quantify, qualify, and respond to various support and technical challenges; and
- w. Interface regularly with Chief Operations Officer and Call Center management team; and
- x. Ensure that all IT Service level management processes are adhered to according to established performance standards and regulatory requirements; and
- y. Appoint a designated Security Manager with the responsibility and resources to coordinate, develop, implement and maintain a WAHBE-specific information security program.

4.3.2 Organizational Structure and Staff

Within the confines of Key Staff requirements, the Vendor has flexibility with respect to development of their internal organizational structure, divisions, and work units. Below are the various functions to be performed by Vendor's personnel during the term of this contract, grouped by current work units/job classes. Vendors shall propose their own organizational structure and methodology for the following categories of personnel.

4.3.2.1 Customer Service Representatives (CSRs)

The Vendor shall develop and retain highly skilled and informed CSRs in accordance with the agreed upon service level outlined in the Contract. CSRs shall provide account management, eligibility and enrollment assistance for consumers via phone, email, and chat (if implemented), and to provide administrative support services including, but not limited to, the following activities:

- a. Document all consumer interactions and work processes in the Customer Relationship Management (CRM) solution including the classification of interaction type:
 - i. BOTH WAH & QHP/QDP – Enrollment/Renewal/Update; and
 - ii. BOTH WAH & QHP/QDP – General Questions/Education; and
 - iii. QHP/QDP – APTC; and
 - iv. WAH/Medicaid – Enrollment/Renewal/Update; and
 - v. WAH/Medicaid – General Question/Education; and
 - vi. Family Dental; and
 - vii. Pediatric Dental; and
- b. Provide assistance navigating the web portal, assisting with enrollment and financial assistance eligibility and comparing health and dental plans; and
- c. Collect and enter the necessary information into an online application to assist individuals with applying for or renewing health coverage; and
- d. Assist consumers with the definitions of health insurance terminology used on the web portal; and
- e. Provide information about QHP, QDP, and Medicaid/ Managed Care Organization (MCOs) offerings; and

- f. Provide information about Advance Premium Tax Credit (APTC) and cost-sharing reductions; and
- g. Inform consumers on the process for making premium payments to carriers; and
- h. Assist consumers with changes during the plan year including income changes, address changes, and qualifying special enrollment period (SEP) events; and
- i. Assist Medicaid eligible consumers in selection of an MCO and in choosing a Primary Care Provider (PCP); and
- j. Use WAHBE customer service support ticketing system following WAHBE ticketing system procedures; and
- k. Submit incident tickets on behalf of consumers and the customer support network per WAHBE Process Guides, including the Troubleshooting Desk Aid; and
- l. Respond to inquiries related to eligibility status, enrollment status, coverage dates and change in circumstances; and
- m. Research and resolve consumer issues and account discrepancies; and
- n. Educate consumers on appeal and complaint processes; and
- o. Answer questions and assist with problems related to IRS 1095A tax forms; and
- p. Provide assistance with password resets.

Irrespective of most internal deployment strategies chosen by the Vendor, WAHBE has determined the following deployment structure shall be mandatory to facilitate customer service:

- a. Dedicated Management staff–Dedicated Management staff shall not work for other Vendor clientele during their contracted time, unless approved by WAHBE; and
- b. Dedicated Assignment CSRs – All CSRs performing functions for WAHBE shall be 100% dedicated to WAHBE duties and responsibilities and deployed accordingly. Dedicated Assignment CSRs shall not work for other Vendor clientele during their contracted time, unless approved by WAHBE; and
- c. Overflow Assignment CSRs – Overflow Assignment CSRs may perform duties and responsibilities beyond WAHBE for other Vendor clientele; however, such Overflow Assignments must be minimized to ensure consistently high customer service levels to WAHBE customers and shall be communicated to WAHBE.

4.3.2.2 Support Personnel

In addition to Key Staff and core business personnel such as CSRs, the Vendor is responsible for providing support or ancillary services to productively operate the WAHBE Call Center. This includes, but is not limited to, personnel that perform the following types of functions:

- a. Information Services (IT, telecommunications, etc.); and
- b. Cybersecurity (Policy, audit, incident response, etc.); and
- c. Financial Services (payroll, purchasing, etc.); and
- d. Administrative Services (mailroom, photocopying); and
- e. Records Management (audio/video recording, electronic and physical document management, records retention and destruction).

Each facility that maintains, processes, or collects protected information such as PII shall designate onsite cybersecurity staff with the appropriate training and certifications.

These services can be provided in-house or sub-contracted within RFP-defined parameters. All Subcontractors shall be held to the same performance standards and regulatory compliance requirements as the prime, and the Vendor shall be held exclusively accountable for Subcontractor performance.

4.3.2.3 Escalation Services

The Vendor shall provide a team of dedicated resources to review incident tickets and research and resolve consumer escalated issues such as, account access, eligibility, enrollment, and cancellation. These staff provide outreach to consumers using several contact methods, such as email and outbound calls. Vendor must provide a sufficient number of staff to handle all incident tickets received (approximately 50,000 tickets in 2017).

The Escalation Services staff are required to be subject matter experts (SMEs), through Vendor provided training and experience, who have responsibility for review and resolution of escalated casework and processes. They serve as SMEs for internal escalation within the Call Center and will often be asked to utilize special data sources and tools provided by WAHBE to complete assigned tasks and projects. The Escalation Services Team Supervisor shall work closely with WAHBE for policy, procedures, and system functionality to ensure the right access and materials are available to the team. The Escalation Services staff and all materials, including standard consumer communication, must be approved by WAHBE.

4.3.2.4 Quality Assurance (QA)

The Vendor shall manage all processes related to quality monitoring and controls. The Vendor shall provide Quality Assurance resources to monitor Call Center staff's interaction with consumers and to provide feedback to the training team to identify additional training needs. The Vendor shall leverage quality assurance systems to present process improvement ideas to WAHBE.

WAHBE and/or WAHBE-designated staff may also provide independent quality assessment reviews as they deem necessary. Vendor shall provide WAHBE full access to the call, email, chat (if implemented), and screen recording system(s) and all other delivery channels or services.

4.3.2.5 Document Management Services

The Vendor shall provide staff for document management services which includes accessing scanned documents via an imaging system and downloading the documents to the HPF according to the WAHBE Document Processing Guide.

4.3.2.6 Email Response Services

To maintain high customer service, the Vendor shall assign CSRs to Email response and follow WAHBE's Email Processing Guide.

4.3.2.7 Chat (if implemented)

The Vendor shall provide the proper staff skilled to receive and respond professionally to text chat sessions and determine optimal staffing levels to ensure that service levels for chat are consistent with its phone service performance levels. The Vendor, along with WAHBE, shall establish processes and training for the chat channel services.

4.3.3 Multi-Lingual Support

The Call Center shall employ, at a minimum, English and Spanish speaking personnel. Vendor may use a third-party translation service for other languages, if desired. The language translation services must meet requirements provided in the WAHBE Language Resources plan located at <https://www.wahbexchange.org/new-customers/application-quick-tips/language-resources/>.

At the end of the transition in period, at least ten (10%) percent of the Call Center staff shall be bilingual in Spanish/English languages. This number will be evaluated annually by WAHBE and adjusted based upon the percentage of Spanish speaking enrollees.

To the extent that any additional other limited English proficient population exceeds 10% of the population of total calls, the Vendor may be required to provide Call Center staff bilingual in the appropriate language in a percentage to be determined by WAHBE.

4.3.4 Training

Training is a critical component of effective operations and requires close collaboration with WAHBE. The Vendor is responsible for administering a comprehensive WAHBE-specific customer service training program delivered through a variety of tools, adult learning methodologies, and maintaining a knowledge management system.

WAHBE will provide “Train-the-Trainer” training to Vendor’s training staff regarding WAHBE-specific procedures and use of the HFP system. These trainings will be delivered in Olympia, WA for select HFP system releases. Vendor is responsible for all travel and other expenses associated with Vendor’s staff attending training. Vendor is responsible to ensure training is distributed to all employees. Vendor is also responsible for providing training to staff regarding any Vendor-specific systems and procedures including, but not limited to telephony, CRM, and timekeeping.

The Vendor is responsible for providing a sufficient number of qualified staff to provide new hire training, refresher training, new procedural training, security and awareness training, and software release training. Vendor is to provide adequate training staff to effectively train new hires until fully staffed at initial ramp up and during the seasonal ramp up periods. Training staff must be full-time employees.

Training staff, along with Quality Assurance staff, are expected to continue the learning cycle by listening to calls and documenting any gaps in training. Materials should be continuously updated with new WAHBE- provided information and job aids, and gap training should be delivered as needed.

The Vendor shall create all training content and materials relative to customer service protocols, scripts, work instructions and CRM utilization using training content provided by WAHBE. WAHBE will conduct “Train the Trainer” sessions which the Vendor shall be required to attend. Training content for CSRs shall be developed by the Vendor using the Train the Trainer materials.

The Vendor shall submit a training plan and all training materials for approval by WAHBE annually or as materially modified for new hires and tenured staff.

The Vendor should identify how it will create an environment where CSRs are rewarded for advanced knowledge.

4.3.5 Organizational Cross-Training

Vendor may cross-train staff in a manner which maximizes the flexibility of Call Center operations. To that end, staff capable of easily transitioning between defined Work Units and Deployment approaches is desirable.

4.3.6 Workforce Management

Vendor shall ensure the Call Center is effectively staffed to ensure successful delivery of services to meet the requirements defined in this RFP and any resulting Contract.

The Vendor shall develop and execute a Workforce Management plan to include recruitment, hiring, training, and ongoing performance management in support of the Call Center for the duration of the

Contract. The Vendor shall provide staff sufficient to support forecasted Call Center volumes and maintain Key Performance Indicators (KPIs) as described in EXHIBIT E. In addition, the Vendor shall propose its strategy for employee retention including a plan for how to mitigate expected and unexpected vacancies and retention practices. The Workforce Management plan should also include ratios for supervisors/leads and CSRs to ensure the appropriate supervisory structure is in place as call volumes adjust throughout the Contract.

A draft staffing plan shall be submitted with the Vendor's Proposal and updated monthly whenever there is a change in Vendor resources or upon the introduction of new content, approaches, methodologies, or other substantive changes to the Call Center services.

Each year, the Vendor shall provide a detailed plan for staffing and production readiness for the Open Enrollment period.

4.3.7 Work Plan

The selected Vendor shall submit an updated Work Plan, that is accepted by WAHBE, within fourteen (14) days of Contract Execution. The Work Plan shall comply with Section 21 of the Sample Contract and be based off the initial work plan submitted by the Vendor in response to [Section 5.11](#) of this RFP. The work plan must identify, at minimum:

- a. Vendor's approach to starting services or transitioning services from the current Vendor, if applicable; and
- b. Resource requirements, dependencies, and critical paths of all implementation tasks and activities necessary to ensure a smooth transition and startup of the Contract. Vendor must provide end to end performance testing prior to Go-Live. All start-up activities and other operations-related tasks should be based on an April 1, 2019 transition start-date and July 1, 2019 Go-Live date; and
- c. All tasks, dependencies, resources, timeframes for completion, and milestones for the deliverable acceptance, in accordance with applicable specifications and responsibilities identified; and
- d. All tasks, timelines and dependencies for activities for which WAHBE staff are responsible.

The selected Vendor shall ensure that the work plan is updated and shared with WAHBE on a weekly basis. All such updates are subject to WAHBE's acceptance as a deliverable.

4.3.8 Employment Practices

Beyond best practice employment protocols for employees in the health care industry, the Vendor shall ensure compliance with the following stipulations:

- a. Compliance with Regulations – The Vendor shall comply with all relevant Federal and State laws, regulations, and policies and comply with best practices surrounding information transfer and patient confidentiality; and
- b. Pre-employment Processing – The Vendor shall comply with a pre-employment process which entails minimum high school diploma or GED equivalent; criminal background check; and initial drug screening test for all CSR, supervisory and management staff; and
- c. Continuous Employment Processing – The Vendor shall comply with annual random alcohol and drug screening tests for a minimum of 5% of the CSR, supervisory, and management personnel.

4.3.9 Transition-Out Plan

In the event the Contract is transferred to a new vendor at any time, Vendor shall provide a detailed transition-out plan describing the transfer of data, services and operations from the Vendor's organization to a potential new vendor at the end of the contract. In addition, the Vendor shall provide technical support to ensure a smooth, reliable transition.

4.4 PERFORMANCE REQUIREMENTS

Vendor shall establish a performance management program that includes, but is not limited to: Performance Standards/Key Performance Indicators, a Quality Assurance Plan and Program, and a Problem Escalation Procedure, as described below:

4.4.1 Performance Standards/Key Performance Indicators

The Vendor shall meet or exceed the Performance Standards/KPIs as listed in EXHIBIT E.

4.4.2 Liquidated Damages for Non-Performance

Liquidated damages shall be levied to the selected Vendor for non-performance to include, but not be limited to: failure to meet Performance Standards/KPI performance metrics, failure to maintain mandatory requirements, etc. Liquidated damages for failure to meet the Performance Standards/KPIs are listed in EXHIBIT E.

4.4.3 Quality Assurance (QA) Plan and Program

The selected Vendor shall have a comprehensive QA plan and program for the WAHBE Call Center and shall provide such to WAHBE for approval as noted in the selected Vendor's Work Plan. The Vendor shall provide on-going coordination and approvals for changes to the QA program.

4.4.4 Quality Assurance Committee

Vendor and WAHBE shall establish a Quality Assurance Committee that meets on a quarterly basis. WAHBE will determine committee membership based on input from the leadership of both organizations. WAHBE and Vendor shall collaboratively develop a formal charter that will identify specific process and technology improvements to be implemented.

4.4.5 Problem Escalation Procedure (PEP)

The Vendor shall provide and maintain a WAHBE-approved Problem Escalation Procedure (PEP) for both routine and emergency situations. The PEP must state how the Vendor shall address problems as they occur during the performance of the Contract, including an escalation path for problems not resolved to WAHBE's satisfaction or within acceptable timeframes.

The PEP, including any revisions thereto, must be provided to and accepted by WAHBE within ten (10) Business Days after the start of each Contract term and within ten (10) Business Days after any change to the PEP.

The PEP shall detail how issues shall be escalated to ensure timely resolution including, but not limited to:

- a. The process for establishing the existence of a problem; and
- b. Names, titles, and contact information for progressively higher levels of personnel in the Vendor's organization who would become involved in problem resolution; and

- c. For everyone listed in the Vendor's PEP, the maximum amount of time a problem will remain unresolved with that individual before the problem escalates to the next contact person listed in the Vendor's PEP; and
- d. Expedited escalation procedures and identification of events that would trigger procedures; and
- e. The method of providing feedback on resolution progress, including the frequency of feedback to be provided to WAHBE; and
- f. Contact information for persons responsible for resolving issues after normal WAHBE Business Hours (e.g., evenings, weekends, holidays, etc.) and on an emergency basis; and
- g. A process for updating and notifying WAHBE of any changes to the PEP; and
- h. Nothing in this section shall be construed to limit any rights of WAHBE which may be allowed by the Contract or applicable law.

As part of the PEP, if the Vendor fails to meet the same KPI two or more times during a month, the Vendor shall conduct analysis and provide potential solutions to meet the KPIs in the future. Proposed solutions can include both Vendor and WAHBE operational changes that should be made. Such analysis shall be provided upon request of WAHBE.

4.5 SECURITY REQUIREMENTS

4.5.1 Employee Identification

Vendor shall ensure that each employee or agent of the Vendor or Subcontractor displays his or her company ID badge at all times while on WAHBE premises. Upon request of authorized WAHBE personnel, each such employee or agent shall provide additional photo identification. Also, employees co-located with other programs must display WAHBE identification at all times while performing duties for the WAHBE program.

At all times at any facility, the Vendor's personnel shall comply with WAHBE site requirements including, but not limited to: escorting visitors at all times; providing information for badge issuance; and wearing a badge in a visible location at all times.

4.5.2 Background and Reference Checks

The Vendor shall comply with the background and reference check requirements found in Section 14 of the Sample Contract (EXHIBIT C).

4.5.3 Data Security

The Vendor shall be required to submit, as an attachment to the Proposal, an illustrative Data Security Plan designed for Call Center operations. These should be from an existing client. The Data Security Plan should cover important PII, US Privacy Act, Washington State Public Release Act, and PCI requirements.

The Data Security Plan must meet federal standards and shall include, but not be limited to:

- a. Storage and accessibility protocols for hardcopy sensitive information (SI); and
- b. Connectivity through internet or between systems containing protected information shall maintain FIPS-140-2 compliant encryption; and
- c. Storage and accessibility protocols for SI stored on computer networks or other electronic media; and
- d. Other records management protocols, including destruction, for SI; and
- e. Physical access controls; and
- f. Vulnerability and risk management plan; and

- g. Patch management plan; and
- h. 3rd party Vendor management; and
- i. Data classification plan; and
- j. Data Use Agreement protocols to ensure SI is not violated in the hands of and outside of the Call Center organization; and
- k. Safeguard policies, procedures and mechanisms regarding protection of SI from various types of threats; and
- l. Security training provided to all staff performing on-site responsibility for WAHBE program; and
- m. Data retention plans and policies.

In addition to Vendor's Data Security Plan, Vendor must comply with all WAHBE Data Security and Reporting Requirements (Sample Contract, Schedule 7);

The Vendor shall maintain documentation and records for an incident response plan that is reviewed at least annually and focused on the confidentiality, integrity and availability of systems, data or use. The incident response plan shall include annual testing in coordination with WAHBE and reporting timelines.

4.5.4 Data Retention

To comply with federal regulations, the Vendor shall maintain documents and records (whether paper, electronic, or other media) for a period of 10 years, in accordance with the requirements of Sample Contract – Section 19. The Vendor must make all records available to WAHBE, or their designees, upon request.

4.5.5 Disaster Recovery & Business Continuity

Ensuring business continuity in a disaster is significantly magnified when it comes to Call Centers. A comprehensive Disaster Recovery and Business Continuity Plan ensures the availability of mission-critical Call Center operations in the aftermath of a natural disaster, regional pandemic or human-error-related outage or any other unforeseen event that would compromise operations. These translate into such events as electrical/equipment failures, union strikes, weather events, and many others. The Disaster Recovery Plan should also include details regarding the plans for the Call Center IT systems and implementation of security controls that are required to run the Call Center. The Vendor shall be required to submit with their Proposal, as an attachment, an illustrative Disaster Recovery Plan for Call Center operations. This should be from an existing client. The selected Vendor shall provide an applicable Disaster Recovery Plan to WAHBE for approval within 30 days of the Effective Date.

4.6 REPORTING REQUIREMENTS AND DELIVERABLES

4.6.1 Submission and Acceptance Process

For each report or deliverable described below, the Vendor shall submit the report or deliverable to the WAHBE Associate Director of Operations in accordance with Section 24 of the Sample Contract; and in the format, content, and timing specified by WAHBE. To be considered timely, the report must be received by the date and time noted unless otherwise agreed to in advance by WAHBE. Reports shall also be available on a live online portal for WAHBE staff to view.

Upon receipt, the WAHBE Associate Director of Operations will review the report for completeness and quality in meeting the report requirements. Upon completion of the review, the WAHBE Associate Director of Operations will issue to the Vendor notice of acceptance or rejection of the report or deliverable. In the event of rejection, the Vendor shall correct the identified deficiencies or non-conformities and resubmit the report to WAHBE for acceptance within ten (10) business days.

Within the scope of this RFP, the Vendor may suggest other reports to improve the quality of reporting and data collection.

4.6.2 One-Time and Infrequent Reports/Deliverables

Deliverable	Description	Frequency/ Due Date
Problem Escalation Procedure (PEP)	Refer to RFP Section 4.4.5	10 calendar days after Contract effective date and within 10 calendar days of any changes to the plan
Work Plan	Refer to RFP Section 4.3.7	14 calendar days after Contract effective date
Transition-Out Plan	Refer to RFP Section 4.3.9	120 calendar days before expiration of the final Contract term or within 14 days of contract termination, whichever comes first
Data Security Plan	Refer to RFP Section 4.5.3	30 calendar days after Contract effective date. Updated annually and delivered by March 31
Disaster Recovery & Business Continuity Plan	Refer to RFP Section 4.5.5	30 calendar days after Contract effective date. Updated annually and delivered by March 31
Service Delivery Plan	Refer to RFP Sections 4.1.5	30 calendar days after Contract effective date
Workforce Management Plan	Refer to RFP Sections 4.3.6	30 calendar days after Contract effective date
Technology Services and Support Plan	Refer to RFP Sections 4.7.5	30 calendar days after Contract effective date. Updated annually and delivered by March 31
Training Plan	Refer to RFP Section 4.3.4	30 calendar days after Contract effective date. Updated annually by August 1st or within 5 business days of modification
Quality Assurance Plan	Refer to RFP Sections 4.3.2.4 and 4.4.3	30 calendar days after Contract effective date. Updated annually by August 1st or within 5 business days of modification
Open Enrollment Readiness Plan	Refer to RFP Section 4.1.2	Annually by June 1 st . Plan must include timelines and details for recruiting, hiring, and training staff to meet projected call volumes.

4.6.3 Routine Reports/Deliverables

Deliverable	Description	Frequency/ Due Date
Work Plan Updates	The Work Plan Updates report provides updates to work plan provided to WAHBE, for review and acceptance.	Weekly during transition/start-up period
Daily/Weekly/Monthly To-Date Operations Report	<p>A combination report providing daily, weekly and month-end statistics on Call Center operational metrics, call categories and dispositions. This report shall contain, at minimum, the following:</p> <ul style="list-style-type: none"> • Headcount of all Customer Service Representatives (CSR); and • New Hire Training CSR Headcount; and • CSR FTE Equivalent Report; and • Maximum Number of Staff Available for Call Center support; and • Shrinkage due to Absence (% of phone staff not available); and • Daily and weekly Average staff schedule adherence %; and • Contacts Offered by channel type (email, chat, phone); and • Contacts Handled by channel type (email, chat, phone); and • Calls Abandoned and Abandoned Rate; and • Chats Abandoned and Abandoned Rate; and • Average Handle Time (phone, chat); and • Service Level (phone, chat, email); and • Availability (phone, chat); and • Occupancy (phone, chat); and • Maximum Wait Time (phone, chat); and • Average Speed of Answer (ASA) (phone, chat); and • Chat Speed of Customer Response (Idle Time) Average; and • Average Length of Post-Call Work (phone, chat); and • Number of calls transferred detailed by agency; and • Accuracy Rate – Forecasted number of calls vs. actual. 	Daily by 10:00 a.m. PT unless otherwise approved in writing by WAHBE

Deliverable	Description	Frequency/ Due Date
Daily Queue Performance Report	<p>The Daily Queue Performance Report details call statistics. This report shall contain, at minimum, the following:</p> <ul style="list-style-type: none"> • Average Speed of Answer; and • Average Talk Time; and • Average Hold Time; and • Average After Call Work; and • Average Handle Time; and • Number of Calls on Hold; and • Total Number of Calls Offered; and • Total Number of Calls Abandoned; and • Total Number of Chats Abandoned (if implemented). 	Daily by 10:00 a.m. PT unless otherwise approved by WAHBE
Monthly Call Types and Durations	<p>The Monthly Call Types and Durations Report details call by type. This report shall contain, at minimum, the following:</p> <ul style="list-style-type: none"> • Calls Handled by Interaction Type: <ul style="list-style-type: none"> ○ BOTH WAH & QHP – Enrollment/Renewal/Update; and ○ BOTH WAH & QHP – General Questions/Education; and ○ QHP – APTC; and ○ WAH/Medicaid – Enrollment/Renewal/Update; and ○ WAH/Medicaid – General Question/Education; and ○ Pediatric Dental; and ○ Family Dental; and • Chats Handled by Interaction Type: <ul style="list-style-type: none"> ○ BOTH WAH & QHP – Enrollment/Renewal/Update; and ○ BOTH WAH & QHP – General Questions/Education; and ○ QHP – HIPTC; and ○ WAH/Medicaid – Enrollment/Renewal/Update; and ○ WAH/Medicaid – General Question/Education; and ○ Pediatric Dental; and ○ Family Dental. 	Monthly – to be included with invoice

Deliverable	Description	Frequency/ Due Date
Quality Assurance (QA) Report	<p>The Quality Assurance report shall contain, at minimum, the following:</p> <ul style="list-style-type: none"> • Number of consumer contacts evaluated per CSR per month; and • Average overall score for sum of evaluations per location; and • Average overall score for sum of evaluations all locations; and • Average score for key components of QA checklist/scorecard. 	Monthly – to be included in Service Review and with invoice
Operations	<p>The Operations report shall contain, at minimum, the following:</p> <ul style="list-style-type: none"> • An annual System and Organization Controls Compliance Report; and • An annual Network Penetration Test; and • A monthly Vulnerability Assessment Reports; and • An Intrusion Detection and Incident Response Plan – to be provided annually or sooner, upon update; and • A Business Continuity and Disaster Recovery Procedure – to be provided annually or sooner, upon update; and • An annual Independent Assessments testing requirements and ability to meet sufficient recovery objectives. 	Varies – Dates for initial submission and annual updates to be determined by mutual agreement
Technology	<p>The Technology report shall contain, at minimum, the following:</p> <ul style="list-style-type: none"> • Daily Call Center Infrastructure Health Check Report; and • Quarterly Inventory list for all hardware and software implemented, including versions at each site, update/patching plans and any known vulnerabilities. 	Varies
Monthly Performance Standards / KPI and Customer Satisfaction Report	<p>The Monthly Performance Standards / KPI Report shall detail compliance with all Performance Standards/KPIs and report current Customer Satisfaction Survey results – in format to be approved by WAHBE.</p>	Monthly – to be included in Service Review and with invoice

Deliverable	Description	Frequency/ Due Date
Other	Ad Hoc Analysis and Reporting which may include, but is not limited to: <ul style="list-style-type: none"> • Maximum Number of Staff Available for Call Center support; and • Availability (phone, chat); and • Occupancy (phone, chat); and • Average Length of Post-Call Work (phone, chat); and • Accuracy Rate – Forecasted number of calls vs. actual. 	Upon Request

4.6.4 System Reports

All reports shall be made available to WAHBE, via WAHBE and Vendor-provided systems, on a real-time basis.

The Vendor shall report and track systems-related occurrences that impact the Call Center to include:

- a. Date, time, triage steps, Performance Standard/KPI Impact, steps recommended steps for resolution, steps taken to resolve outage or system delay events and outcomes; and
- b. Prepare Post-event root-cause report/analysis and provide feedback to WAHBE for incorporation into process improvement of processes and controls.

Vendor shall provide WAHBE with real-time access, via web portal, to operational data within all its WAHBE Call Center operational support systems. WAHBE will utilize this data to analyze, verify and validate performance of the Call Center.

4.7 TECHNOLOGY REQUIREMENTS

4.7.1 Telephony System

4.7.1.1 ACD & IVR System Monitoring & Operational Requirements

The Vendor shall:

- a. Integrate IVR, ACD and CRM systems; and
- b. Integrate IVR with HPF portal and CSA (WAHBE developed systems); and
- c. Maintain Call Center systems integration to a level of efficiency consistent with, or better than, industry standards; and
- d. Monitor the ACD and IVR for uptime and accuracy; and
- e. Provide IVR configuration screen which could be operated/set up by WAHBE staff; and
- f. Enable IVR callback technology to include scheduling capabilities; and
- g. Develop IVR menu options for caller self-service; and
- h. Maintain and improve the IVR call trees based upon consumer contact types, call volumes, IVR failure rates, etc. Examples include testing new scripting and providing results and analysis to WAHBE; and
- i. Integrate IVR with HPF and/or CSA to support use cases including, but not limited to:
 - Recognizing call as a request for IRS form 1095-A reprints, identifying customers requesting reprints and scheduling reprints with HPF; and
 - Recognizing call as an enrollment status check, identifying the customer and providing them with the enrollment status update; and

- Recognizing customer as Medicaid customer who does not need to immediately renew and recommending the caller come back in X number of days; and
 - Recognizing customer as one associated with a navigator and/or broker, and asking whether they have already contacted their navigator and/or broker; and
 - Request for FAQ info; and
 - Recognizing a call as an account unlock or a password reset and performing the function end to end; and
- j. Provide the ability to make ad hoc changes and updates to IVR messaging and call routing menus swiftly to manage caller demand; and
 - k. Program WAHBE approved Customer Satisfaction Survey (CSAT) into IVR menu; and
 - l. Proactively identify call routing and message changes within the IVR to improve consumer experience and containment rate; and
 - m. Initiate an internal resolution process for any outages or abnormal ACD or IVR behavior; and
 - n. Integrate data from reports generated from the ACD and IVR into weekly and monthly reports be provided to WAHBE; and
 - o. Patch management process to ensure software is up to date, using a WAHBE-approved patch management process.

4.7.1.2 Telephony System – Customer Satisfaction Survey Reporting & Functionality

The Vendor shall provide a Customer Satisfaction Survey through the IVR menu. The Customer Satisfaction Survey shall prompt the caller for participation prior to connecting with the CSR and present the survey after the CSR completes call. The Survey shall accept DTMF (Dual Tone Multi-Frequencies) responses. All survey activity shall be captured for later reporting. Survey questions shall be defined by WAHBE. The survey functionality shall allow for adding or changing survey questions as desired by WAHBE.

4.7.1.3 Telephony System – Reporting & Records Maintenance

The Vendor shall record 100% of all inbound and outbound customer contacts (voice, email, chat) and provide WAHBE the ability to retrieve the contact information for up to 10 years from the date of contact. Call logs should be easily searchable and include a proven mechanism for accessibility.

The Vendor’s telephony applications shall be integrated with the Vendor’s CRM database.

The Vendor shall notify WAHBE of any disruption to service and provide continued updates to WAHBE when resolution cannot be achieved within the agreed upon Performance Standard.

4.7.2 Hardware and Software

The Vendor shall provide computing systems workstations for all staff at the Call Center. Vendor shall meet or exceed the following minimum requirements throughout the life of the Contract, including upgrades to software and equipment:

- a. Processor - 6 core I5 equivalent or higher based on Call Center software and systems requirements; and
- b. Memory - 8 GB minimum or higher based on Call Center software and systems requirements; and
- c. Disk Space - Minimum 256GB HD or larger (SSD preferred); and

- d. Enterprise level Full disk encryption (Bitlocker, Endpoint, etc.); and
- e. Monitors (2) – recommend 24-inch monitors or larger; and
- f. Provide WAHBE with a refresh and upgrade schedule for all workstations, software and other technical equipment at the Call Center.

4.7.3 Technology Support

- a. Vendor shall have technical support and maintenance agreements for all provided applications, systems, desktops, telephony (including remote telephony) and network connectivity. This includes patching and maintaining current versions of software (all software under support); and
- b. Vendor shall provide a technical lead to manage, support and coordinate all aspects of all Call Center operations technology, including but not limited to voice, data, desktops and cloud-based systems and shall act as the technical representative and facilitator with WAHBE for any cross-organization issues; and
- c. Vendor shall provide fiber connectivity within the Call Center facility; and
- d. Vendor shall work with the WAHBE Information Technology department to arrange for connectivity to the account worker applications via means of direct connection from WAHBE to Vendor premises and/or site to site VPN tunnel or equivalent; and
- e. Vendor shall work with the WAHBE technology and security teams to develop and implement security controls compliant with state and federal regulations; and
- f. Vendor shall comply with industry best practices including OWASP.org and NIST; and
- g. Vendor must provide internet services at each call center. Internet Services must meet the demand of Call Center throughput with no more than 80% utilization of sustained load during peak business hours, a minimum of a consistent 100Mbps connection or faster, and MPLS connection; and
- h. Vendor must provide phones, headsets, computers, monitors, printers, scanners, keyboards, mice and other peripheral equipment necessary for CSRs to perform Call Center activities; and
- i. The Vendor must supply all network routers and switches, firewalls, services, software, servers, data center racks, and wiring sufficient to meet network and operational needs; and
- j. Vendor must secure all telephony and switch locations to meet NIST as well as WAHBE Data Security and Reporting Requirements (Sample Contract, Schedule 7); and
- k. Vendor shall assume billing and cost management responsibilities for establishing and maintaining network connectivity (IPSec tunnels, MPLS and Internet); and
- l. Vendor shall provide, utilize and manage redundant DHCP and DNS network services; and
- m. Vendor is required to provide battery backup for all routers, switches and servers to allow systems to be shutdown safely or moved over to another backup power source without loss of functionality or operations; and
- n. Vendor must provide enough bandwidth to record 100% of all voice and data traffic without affecting daily operations; and
- o. Vendor shall keep all systems and hardware up to date including software, patches and firmware in compliance with WAHBE policy and regulatory compliance for all Call Center tools including, but not limited to, CSR desktops and browsers; and

- p. Vendor shall provide the capability to record 100% of all calls and screens viewed, including chat. The recordings must be exportable in an industry-standard format that can be viewed and heard; and
- q. Vendor shall provide the capability to view, search and extract any data required for WAHBE needs related to Call Center operations during the full retention period of the data. If the Vendor is no longer under Contract it must transfer the software, services and subscriptions to WAHBE IT or it must provide the data in a way that can be searched with in the capability of the current functionality and managed; and
- r. Vendor shall provide a help desk resource for internal technology-related escalations; and
- s. Vendor shall assess and plan upgrades within six (6) months of new upgrade or version for all systems and technologies used by or at the Call Center(s) managed by the Vendor. The Vendor shall follow-up with the WAHBE technical and security teams for deployments or requests for implementation delays; and
- t. Vendor shall provide details regarding the systems used to manage the Call Center operations. Examples of the information expected are the make of the CRM, methods of data storage, details on any incident management systems utilized, etc.; and
- u. Vendor shall define plans to share data (CRM, Calls, Chats, etc.) with WAHBE and define how application to application integration shall be enabled. The Vendor shall provide details on how PII data within the Call Center shall be protected, including from over the shoulder browsing, screen capture, printing, etc. The Vendor shall detail plans to connect with external entities/organizations including requirements to ensure secure connectivity from network to network; and
- v. Vendor shall provide chat software, maintenance agreements, and CSRs to support chat (if implemented); and
- w. Vendor shall suggest innovations and provide opportunities to improve the customer experience and increase efficiencies in accordance with the requirements of Section 32 of the Sample Contract.

4.7.4 Americans with Disabilities Act and Telecommunications for the Deaf and Hard of Hearing

Vendor shall comply with all Washington State and federal disabilities laws and regulations (Americans with Disabilities Act of 1990, 42 U.S.C. 12101 et seq). Vendor shall promptly respond to and resolve any complaint regarding accessibility to Call Center services. Failure to comply with these requirements shall constitute a material breach.

The Vendor shall provide a TTY/TDD or equivalent system at the WAHBE Call Center that provides full telephone accessibility to people who are deaf, hearing, hard-of-hearing, deaf-blind, late-deafened, or have a speech disability. Vendor shall provide training to Call Center personnel on the effective use of such system.

4.7.5 Technology Services and Support Plan

The Vendor shall provide a Technology Services and Support Plan that details an operations plan that ensures all WAHBE requested technology services are provisioned and supported in accordance with the requirements of the Contract. The plan shall describe all operations, and activities specified in this RFP. The Vendor shall work with WAHBE and the Incumbent Vendor to identify and plan for the continuation and completion of all outstanding tasks. The plan shall include identification of all tasks, assumptions, clear delineation of responsibilities, level of effort to complete each task, timelines for task completion, and the labor categories required to perform the work during the transition-in phase as well as ongoing operations. The Technology Services and Support Plan must be updated and submitted to WAHBE annually.

4.7.6 Data Maintenance and Migration

- a. The Vendor is responsible for maintaining, in an easily accessible format, call recording data, including screen shots, from the current Vendor's NICE platform to Vendor's proposed platform; and
- b. The Vendor will be responsible for migrating call data from Incumbent Vendor's CRM system to its proposed CRM system; and
- c. The Vendor will be responsible for the maintenance of the data currently hosted in Incumbent Vendor's Calabrio Call and Screen Recording software (data must be accessible to WAHBE at all time); and
- d. The Vendor shall develop a data migration project plan to be approved by WAHBE; and
- e. The Vendor shall propose metrics to meet the performance standards; and
- f. The Vendor shall cleanse all data prior to migration; and
- g. The Vendor shall perform all extraction, transformation and loading (ETL); and
- h. The Vendor shall test and validate all data with WAHBE support prior to migration; and
- i. The Vendor shall perform all data migration; and
- j. The Vendor shall provide reports or environment access to WAHBE for the data being migrated; and
- k. The Vendor shall retain WAHBE data for a period of 10 years and make available, in an easily readable format, in case of inquiries or audits.

4.7.7 Chat Functionality (if implemented)

Vendor shall provide a proposed chat solution to implement within the Healthplanfinder that allows users to initiate a chat session. The Healthplanfinder shall only be used to initiate chat call and the chat session details shall be stored only within the Call Center Vendor chat solution with no details being stored in the Healthplanfinder database. The chat solution features and capabilities shall include simultaneous chats, auto greetings, templates, transcripts, skills-based routing, transfer to voice agent, support for surveys and reporting.

Technical discussions shall occur between WAHBE, WAHBE's HPF system integrator and other Vendors. Vendor shall provide a Chat solution implementation plan, to be reviewed and approved by WAHBE Security.

5 VENDOR PROPOSAL – REQUIRED SUBMITTALS

Respond to each of the following requirements, per the instructions in [Section 3.6](#).

5.1 Certifications and Assurances (M)

Vendor shall complete and submit a signed copy of EXHIBIT B, signed by a person authorized to bind the Vendor to a Contract.

5.2 Confirmation of Requirements/Proposal Checklist (M)

The Vendor shall complete and provide a signed copy of EXHIBIT D, confirming submission of various Proposal deliverables as well as an understanding of various requirements. The requirements checklist includes all requirements within the RFP.

5.3 Vendor Profile/Letter of Submittal (M)

Vendor shall provide a Letter of Submittal written on the Vendor's official business letterhead stationery which includes:

- a. The legal business name; and
- b. Type of business entity, (e.g., corporation, sole proprietorship, limited liability company); and
- c. If Vendor is an affiliate of a larger organization, the name and type of business entity of the ultimate parent organization; and
- d. The year the entity was organized to do business as the entity now substantially exists; and
- e. Vendor's Federal Employer Tax Identification Number; and
- f. Washington State Uniform Business Identification (UBI) number, if registered (see [Section 1.3.2](#)); and
- g. Proposal Primary Contact address, email address, and telephone numbers; and
- h. A web site URL (if any); and
- i. An organizational chart of Vendor's principal officers, including names and titles; and
- j. A statement that the proposed solution meets all the minimum qualifications and all the mandatory requirements set forth in the RFP and its amendments, if any; and
- k. A statement that agrees that all electronic and paper documents, custom software (e.g., E-learning), and other deliverables that are developed as a part the services shall become the property of WAHBE under the Contract; and
- l. A statement that acknowledges and agrees to all the rights of WAHBE including the RFP rules and procedures and the terms and conditions of this RFP, including any amendments; and
- m. A reference to all RFP amendments received by the Vendor (identified by amendment issue date) to represent that the Vendor is aware of all such amendments (if no RFP amendments have been received, the Vendor should so state); and
- n. Any other representations promise and warranties as the Vendor deems appropriate and wishes to convey to WAHBE.

The Letter of Submittal shall be signed and dated by an individual with full authority to legally bind the entity submitting the Proposal to this RFP.

5.4 Executive Summary (M)

In five (5) pages or less, summarize the Vendor's service approach and overall services, giving evaluators a strong general overview of the Technical and Operational capabilities of the Vendor.

The Vendor's Executive Summary must include the following information:

- a. State the Vendor's ability and willingness to work cooperatively with WAHBE and designees; and
- b. State that the Vendor agrees to comply with the procurement process described in the RFP; and
- c. State that the Vendor understands the scope and objectives of the services and agrees to meet the requirements specified in the RFP; and
- d. State that the Vendor will perform the services described in the RFP; and
- e. State that the Vendor's proposed solution will meet all requirements; and
- f. Identify any key operational issues; and
- g. Explain how the Proposal represents to WAHBE the best option for the WAHBE Call Center, and why WAHBE should select the proposed service approach; and
- h. Describe any Call Center experience in the health care industry which can include, but not be limited to: public sector insurance, private health insurance, medical center/hospital, medical research, emergency or other medical hotlines; and
- i. Provide a brief description of its entity (including business locations, size, areas of specialization and expertise, client base and any other pertinent information that would aid an evaluator in formulating a determination about the stability and strength of the entity), including the Vendor organization's experience and history developing Call Center operations of similar size and scope to the WAHBE Call Center project; and
- j. Provide business information for any Subcontractors the Vendor proposes for this project. Describe the functions that will be Subcontracted and the Vendor's strategy for managing the Subcontractors; and
- k. Provide information that distinguishes you from your competitors.

5.5 References (M)

- a. Vendor shall provide **at least three (3) and no more than six (6)** client references from customers for whom the Vendor has implemented Call Centers in similar size and scope. References from insurance or health care-related Call Center customers are preferred. At least one reference must be from a customer whose Call Center contract exceeds \$10 Million per annum.

The most relevant references are considered those that the Vendor has provided services similar in type and scope to those requested within this RFP.

- b. Vendor shall provide the following information for each customer reference:
 - Organization Name; and
 - Type of Business; and
 - Contact name and title; and
 - Telephone and Email address; and
 - A brief description of the work done for the referenced client; and
 - Start and end dates; and dollar amount of project.

- c. References shall not be from a person, company or organization with any special interest, financial or otherwise, in the Vendor.
- d. Vendor References will be contacted and scored for the top-ranking response(s) only and may be used as a scoring criterion during the Oral Presentation/Site Visits phase.
- e. By submission of the references, Vendor grants permission to WAHBE to contact the references and others who may have pertinent information. Do not include current WAHBE staff as references. WAHBE may evaluate additional references at WAHBE's discretion.
- f. WAHBE reserves the right to eliminate from Contract award consideration any Vendor who receives an unfavorable report from a Vendor identified customer reference. WAHBE also reserves the right to contact other Vendor customers and other third parties for additional references.

5.6 Prior Contract Performance (M)

The Vendor's Proposal shall respond to the following:

- a. Vendor shall submit full details of all contracts it has executed or been involved (e.g., as a Subcontractor to another Vendor) with the State of Washington within the last four (4) years, including the other party's name, address, email address and telephone number; and
- b. Vendor shall submit full details of all contracts that have been terminated for either default, such that payment proceedings and/or execution on a letter of credit, payment, performance or bid bond have been undertaken, or convenience within the last four (4) years. Vendor must include the other party's name, address, email address and telephone number, and brief description of the termination; and
- c. Vendor shall submit a brief description of any significant pending legal and administrative proceedings in any jurisdiction in which Vendor, its officers, directors, employees or principals or any of its affiliates or parent(s), their officers, directors, employees or principals is a party or of which any of their property is subject. Include the name of the court or agency in which the proceedings are pending, the date instituted, and the principal parties thereto, and a description of the factual basis alleged to underlie the proceedings. Notwithstanding the foregoing, Vendor shall submit information concerning any claim or allegation which brings into question Vendor's performance or failure to perform; and
- d. Vendor shall submit a brief description of any occasion in which Vendor, any officer or principal of Vendor with a proprietary interest therein, has ever been disqualified, removed or otherwise prevented from bidding on, participating in, or completing a federal, state or local governmental project because of a violation of law or a safety regulation; and
- e. Vendor shall submit a list of all material threatened and/or pending claims, litigation, judgments or settlements and government enforcement actions; and
- f. Vendor shall identify whether the Vendor or any of its officers refused to testify or waive immunity before any state or the federal grand jury relating to any public project within the last ten years. If so, provide details.

If multiple organizations are participating (e.g., affiliates, parent companies, and/or subcontractors), the information requested herein shall be provided regarding each of the respective organizations.

WAHBE will evaluate the information and may, at its sole discretion, reject the Proposal if the information indicates that completion of a Contract resulting from this RFP may be jeopardized by selection of the Vendor.

5.7 Financial Rating (M)

Vendor shall provide a copy of a Dun and Bradstreet business/credit report of the Vendor's financial status and include the same for any Subcontractors used. The report shall bear a date not more than sixty (60) days prior to the submittal date of the Proposal. Vendor shall have a "good" or better financial strength rating.

5.8 Vendor Experience Summary (MS)

In three (3) pages or less, describe Vendor's Experience providing Call Center Services for a healthcare or insurance industry Customer, state-based Marketplace and/or Medicaid program.

5.9 Service Proposal (MS)

In ten (10) pages or less, provide a detailed Service Delivery Plan addressing the requirements outlined in [Sections 4.1.1 – 4.1.7](#). The plan shall provide a detailed description of the Vendor's service capabilities – demonstrating the Vendor's approach in implementing and handling multi-channels including phone, email, and chat. The Service Delivery Plan shall fully explain how the Vendor shall provide consistent, quality services. The plan shall demonstrate the ability to take ownership of each contact, manage each contact accurately, hand-off efficiently per procedure and communicate to ensure customer satisfaction. Please provide your definition of customer satisfaction, how it is measured, and the data sources used to measure it. The plan should also address an approach for handling variable factors (known and unknown) that may cause spikes in demand and periods quieter than planned. Some known factors are a ramp-up and ramp-down of resources for the Open Enrollment period, consumer reactions to marketing and media, Healthplanfinder system unplanned outages, and tax season.

5.10 Facilities Proposal (MS)

In three (3) pages or less, describe how your proposed Call Center facility(ies) meets the requirements listed in [Sections 4.2.1 – 4.2.4](#). Include a discussion of how staff are deployed in various facilities (one or more), the location of these facilities, your intention on using existing facilities or new buildings, and other relevant aspects of your facilities that you think are favorable (e.g. LEED-compliant). Explain how your approach distinguishes you from your competitors.

5.11 Operations Proposal (MS)

In twenty (20) pages or less (not including the Work Plan), describe your approach to meeting the requirements listed in [Sections 4.3.1 – 4.3.8](#), and how they distinguish you from your competitors. Include a discussion of your ability and flexibility to meet Core Functions described in [Section 4.1.4](#); your potential use of sub-contracted services; your approach to comply with various operational protocols; your recruitment, selection criteria, employment screenings including references and background checks, hiring and retention philosophy and practices; and your philosophy and methodologies for training Call Center staff to help ensure a satisfactory implementation of the Call Center operation by critical dates. Provide, as part of your Proposal, a sample illustrative Training Plan.

Describe your methodology for accomplishing the various tasks/roles and how this structure distinguishes you from your competitors. Include a discussion of the expected staffing and minimum job qualifications for Key Staff, the level of commitment for Key Staff to WAHBE, how Support Personnel and related services shall be provided and deployed, organizational unit structuring, and CSR staff deployment philosophies to include such areas as managing peak call coverage. Provide a proposed organizational chart.

Per the requirements addressed in [Section 4.3.6](#), provide a proposed Workforce Management and staffing plan to include recruitment, hiring, training, and ongoing performance management in support of the Call Center for the duration of the Contract.

Per the requirements addressed in [Section 4.3.7](#), provide a proposed Work Plan in anticipation of a July 1, 2019 Go-Live date. The work plan shall identify all tasks, dependencies, resources and duration times, and shall include milestones for the delivery, review, correction of deficiencies in, and acceptance of each deliverable and responsibility identified. The work plan shall also include tasks, timelines and dependencies for activities for which WAHBE staff are responsible.

5.12 Performance Proposal (MS)

In ten (10) pages or less, describe your approach to meeting the requirements listed in [Sections 4.4.1 – 4.4.5](#), including the Performance Standards/KPIs provided in EXHIBIT E, and how this distinguishes you from your competitors. Include a discussion of:

- your performance management approach; and
- performance reporting approach; and
- the elements of your Quality Assurance/Quality Control Program; and
- your suggested Quality Assurance Committee structure; and
- additional proposed Performance Standards/KPIs and metrics that you would establish, including any above minimums, for each Performance Standard/KPI; and
- proposed liquidated damage amounts for failure to meet the additional Performance Standards/KPIs proposed.

Provide example metrics and customer facing reports currently used by your firm showing compliance with performance standards and KPIs comparable to those in EXHIBIT E; as well as any other data used to help monitor and drive performance for WAHBE.

Describe any value-added services or support you will offer if awarded a Contract including, but not limited to: quarterly business reviews; analysis of current business and recommendations for cost-saving initiatives; and suggested strategies for increasing service efficiencies.

5.13 Security Proposal (MS)

In eight (8) pages or less, describe how the Vendor meets the requirements listed in [Sections 4.5.1 – 4.5.5](#) and how this distinguishes you from your competitors. Per [Sections 4.5.3 and 4.5.5](#), Vendor must submit a sample Data Security Plan and a sample Disaster Recovery Plan from an existing client.

5.14 Reporting Proposal (MS)

In three (3) pages or less, describe how the Vendor meets the requirements listed in [Section 4.6](#) and how this distinguishes you from your competitors. Vendor must submit samples of all reports listed in

Sections 4.6.2 – 4.6.4. Vendor may also submit additional reports suggested to improve the quality of the reporting and data collection.

5.15 Technology Proposal (MS)

In twenty (20) pages or less, describe your proposed approach to [Sections 4.7.1 – 4.7.7](#). List the technology and software solutions proposed for the operating environment and why you have selected them for this Contract. Describe how the proposed operational environment would meet requirements listed and distinguishes you from your competitors. Include a discussion of potential issues (and proposed resolutions) associated with all elements as described in this section of the RFP. Call Center technologies are evolving rapidly. Describe your proposal for upgrading and ensuring the use of “best in class” solutions.

Where possible, Vendors should include examples of active implementations in their portfolio of current Call Center services. Reference to examples based in other state exchanges will assist evaluators in comparing and understanding Proposals.

Per [Section 4.7.5](#), Vendor must submit a proposed Technology Services and Support plan.

5.16 Price Proposal (MS)

Vendors shall submit their Price Proposal using the Price Proposal template provided as EXHIBIT F. Vendors must complete the Price Proposal template in strict accordance with the instructions provided.

Vendors shall utilize the WAHBE Call Center Volume Data provided in EXHIBIT G to calculate its Price Proposal. Call volumes are for illustrative and evaluation purposes only; and are based on historical and forecasted call levels. WAHBE does not guarantee a minimum or maximum number of calls in the performance of this Contract.

Prices identified on the Price Proposal are to be fully loaded prices that include all costs associated with the provision of services as required by the RFP. When calculating prices, Vendors must include all costs necessary to successfully perform the entire scope of work described in [Section 4](#), as well as all costs necessary to meet the Performance Standards/KPIs described in EXHIBIT E. Prices shall be inclusive of all costs to be charged to WAHBE and not be contingent on any other factors or conditions. No other amounts will be paid to the Vendor. Financial Proposals for Contract years 2 and 3 should reflect projected efficiencies.

Any transition costs must be detailed in the Transition Price section of the template. Vendor shall propose a transition period that ensures Go-Live by July 1, 2019. The template should reflect costs only for those months of transition identified by the Vendor.

Vendor must provide a narrative for each section: explaining the detailed components of the proposed prices and all assumptions made in formulating the prices. Vendors are encouraged to be as specific and detailed in their narrative as possible. The ASV shall be required to provide WAHBE an itemized/detailed breakdown of all costs associated with the Contract upon award.

All prices shall be entered in US dollars and cents. Every blank in the Price Proposal Template shall be filled in. A dollar amount is required for all line items listed, even if the value is \$0.00. Any line item that is left blank or not addressed will be considered a \$0.00 proposal for the item(s) and will be incorporated into any resulting Contract as such.

In the event of a mathematical inconsistency between a line item price and an extended price based on quantities, the line item price will prevail.

In the event a Vendor proposes a dollar amount range for any line item, the high end of the range will be used for evaluation purposes.

The Price Proposal must be signed and dated by an individual authorized to bind the Vendor to the Proposal. Failure to complete the Price Proposal template as instructed or failure to sign the Price Proposal are grounds for rejection.

5.17 Price Proposal for Chat (MSO)

A price proposal for the implementation and use chat functionality is mandatory. However, WAHBE reserves the right to award a Contract with or without this functionality, as determined in the best interest of WAHBE. All costs associated with chat, including fulfillment of services and adherence to KPIs should be included in Section 5 of the Price Proposal template.

6 EVALUATION PROCESS

This section describes the evaluation of Proposals. The schedule of these events can be found in [Section 2](#).

6.1 Selection Criteria

This RFP and the evaluation of Proposals are made in conformance with applicable WAHBE procurement policies, Federal Uniform Guidance requirements and Washington State law.

The decision will be based on consideration of the total best value. Best value includes, but is not limited to, the responsiveness of the Proposal to the requirements as set forth in the RFP, the competence and responsibility of the Vendor, quality of service, breadth and depth of offering, the strength and form of contractual commitments made by Vendor to WAHBE and total cost. In making an award WAHBE will consider:

- a. The relative ability, capacity, and skill of the Vendor to perform the Contract and provide the services required, including: (a) Vendor financial capacity and stability; and (b) quality of professional personnel; and
- b. Whether the Vendor can complete the implementation/transition of services within the time specified; and
- c. The character, integrity, reputation, judgment, experience, and efficiency of the Vendor; and
- d. The quality of performance of previous Contracts or services including previous and existing compliance by the Vendor with laws relating to the Contract or services, and Vendor expertise with engagements of similar scope and complexity; and
- e. The extent to which the Proposal satisfies the needs and requirements of WAHBE as specified in these RFP documents, including: (a) the relative quality of the product or service proposed by the Vendor; (b) quality and effectiveness of the proposed business solution and approach; and (c) innovative use of current technologies; and

- f. The cost of the Proposal to WAHBE, including: (a) the Life-cycle Cost of the services to be provided including cost of selection, acquisition, operation, support, maintenance, and disposal from the date of acquisition to the projected date of replacement; (b) projected internal cost to WAHBE including ongoing support; and (c) the extent to which the Proposal provides competitive pricing, economies, and efficiencies; and
- g. The strength and form of contractual commitments made by the Vendor to WAHBE, including warranties, guarantees, and other contractual commitments and the willingness to conform to the contractual terms as proposed in the RFP.

The evaluation approach described below is intended to identify the Proposal that offers the greatest benefit, which may not necessarily be the Proposal with the initial highest score or the lowest cost.

6.2 Evaluation Approach

The Vendor evaluation process includes steps identified in the following stages. The Evaluation process is intended to identify the Proposal that is in WAHBE’s best interest and offers WAHBE the best value, which may not necessarily be the Proposal with the highest score or the lowest cost.

The evaluation process for this RFP evaluates Vendor Proposals in a structured, four stage approach. The evaluation and scoring for each stage will determine participation in future stages. For each stage, WAHBE will select which Vendor(s) may proceed to the next stage based on the evaluation approach. The four stages are outlined in the chart below:

Stage	Description
Stage 1: Administrative Screening, Contract Issue List Review, Minimum Qualifications	Step 1: Proposals will be reviewed by WAHBE to determine, on a pass/fail basis, compliance with administrative requirements. Step 2: WAHBE will evaluate the Exceptions to Sample Contract to determine if Proposals are responsive and adhere to the RFP requirements in Section 3.16 . Step 3: WAHBE will consider the completeness of, and potential gaps in, the Minimum Qualifications and Requirements. These steps will determine, on a pass/fail basis, which Vendors advance to Stage 2 of the evaluation process.
Stage 2: Management Proposal, Business Proposal, Technical Proposal, and Cost Proposal	Step 4: WAHBE will evaluate and score Vendor’s Proposal. Step 5: WAHBE will review Exceptions to Sample Contract. WAHBE reserves the right to discuss Exceptions to Sample Contract, with the Vendors starting in Stage 2 and any time thereafter, and to have the Vendors clarify, revise and resubmit a revised Exceptions to Sample Contract. WAHBE will take into consideration the overall evaluation and Exceptions to Sample Contract when selecting the participants for Stage 3. WAHBE will select up to three (3) Vendors to participate in Stage 3.

Stage	Description
Stage 3: Oral Presentation, Product Demonstrations, Reference Check	Step 6: Vendors will provide an Oral Presentation and/or site visit to WAHBE. Vendors will present product demonstrations at a location specified by WAHBE. Step 7: WAHBE will perform reference checks for top Vendors Step 8: WAHBE may request a BAFO WAHBE will identify one Vendor to participate in Stage 4.
Stage 4: Selection of Apparent Successful Vendor and Contract Negotiations	Step 9: Announcement of the Apparently Successful Vendor (ASV). Step 10: Contract negotiations with the Vendor.

6.3 Stage One – Administrative Screening

6.3.1 Step 1: Meeting Administrative Requirements

WAHBE will:

- Review each Proposal to ensure that they are constructed correctly; and
- All assurances and elements are provided; and
- The Proposal is received on time; and
- All mandatory elements are addressed in the Proposal.

Purpose:

- Receive Vendor Proposals; and
- Screen Vendor Proposals to ensure they meet minimum administrative requirements.

If a Proposal is deficient in any way, WAHBE may decide based upon the seriousness of the deficiency to:

- Reject the Proposal; or
- Waive the requirements as an administrative irregularity.

WAHBE reserves the right to contact Vendor for clarification of the response. If WAHBE decides to reject a Proposal, a letter will be composed to the Vendor rejecting the Proposal and specifying the reasons for the rejection.

6.3.2 Step 2: Exceptions to Sample Contract Evaluation

The Exceptions to Sample Contract will be reviewed by WAHBE to determine the responsiveness of the Proposal and adherence to the RFP requirements described above in [Section 3.16](#). If a Proposal is considered non-responsive and doesn't adhere to the RFP requirements described above in [Section 3.16](#), WAHBE will reject the Proposal.

WAHBE reserves the right to contact Vendor for clarification of the response. If WAHBE decides to reject a Proposal, an email will be composed to the Vendor rejecting the Proposal and specifying the reasons for the rejection.

6.3.3 Step 3: Meeting Minimum Mandatory Qualifications

WAHBE will consider the completeness of, and potential gaps in, the Minimum Mandatory Qualifications. This step involves identifying Vendors who comply with the list of qualifications that all Vendors must meet. WAHBE does not review a Vendor's Proposal if it does not meet these qualifications. Vendors should not submit a Proposal to this RFP if they do not meet these qualifications.

This evaluation (of Steps 1, 2 &3) will determine, on a pass/fail basis, which Vendors advance to Stage 2 of the evaluation process. Mandatory Requirements (M) and Mandatory Scored Requirements (MS) will be screened for completeness. Proposals that fail to meet any Mandatory Requirements will be eliminated from further consideration.

6.4 Stage Two – Proposal Evaluations

6.4.1 Scoring the Proposals

Mandatory Scored Requirements are worth a total of 1,000 points. Evaluators will assign points to each Mandatory Scored requirement based on the effectiveness and completeness of the proposed solution to each requirement.

To determine Vendor’s score in Stage 2, WAHBE scores will be weighted by category as follows:

Evaluation Category	Score
Administrative Requirements (Sections 5.1 – 5.7)	Pass/Fail
Vendor Experience (Section 5.8)	50
Service Proposal (Section 5.9)	100
Facilities Proposal (Section 5.10)	50
Operations Proposal (Section 5.11)	200
Performance Proposal (Section 5.12)	100
Security Proposal (Section 5.13)	50
Reporting Proposal (Section 5.14)	50
Technology Proposal (Section 5.15)	150
Price Proposal (Section 5.16 /EXHIBIT F) – Sections 1 - 3 (Operating costs)	250
Price Proposal (Section 5.16 /EXHIBIT F) – Section 4 (Transition-in costs)	50
Price Proposal (Section 5.17 /EXHIBIT F) – Section 5 (Chat implementation costs)	50
Total Score	1,100

6.4.2 Step 4: Proposal Evaluation and Scoring

WAHBE will use the criteria above to score the Vendor Proposal to determine which Proposals are in the best interest of WAHBE. This will be accomplished by identifying the Proposals which most closely match the requirements and services needed and which Cost Proposals provide the best value to WAHBE.

WAHBE will evaluate each Scored Requirement separately by assigning a raw score to each requirement. The final score will be the average of all points awarded by individual evaluators, up to the maximum points possible per section.

6.4.3 Step 5: Cost Proposal Evaluation and Scoring

WAHBE will review the proposed costs for each Vendor Proposal and will construct a financial model identifying the one-time and recurring costs over a 3-year period.

WAHBE will calculate:

- Total Transition Costs (one-time costs); and
- Total Three Year Operational Fixed Costs (one-time and recurring costs); and
- Total Three Year Direct Costs (including the per-call rate).

The Financial Evaluation Team will score the Vendor's price where:

- The Vendor submitting the lowest Total Proposal Price (Fixed and Direct costs, including per-call rate) will receive 250 points. Other Vendors will receive a score based on the following formula: Vendor Score = (Lowest Vendor Price ÷ Vendor Price) X 250 points.
- The Vendor submitting the lowest Total transition price will receive 50 points. Other Vendors will receive a score based on the following formula: Vendor Score = (Lowest Vendor Price ÷ Vendor Price) X 50 points.

6.4.4 Step 6: Review Exceptions to Sample Contract

WAHBE will review Exceptions to Sample Contract, along with Vendors scores from Stage 2 when selecting the participants for Stage 3.

6.4.5 Determining Vendors for Stage Three

Those Vendors whose Proposals are the top three after Stage 2 will be invited to participate in Stage 3. Because of the time, cost and expense of conducting the interviews, demonstrations and reference checks in Stage 3, the number of Vendors moving to Stage 3 will be limited to a maximum of 3.

The RFP Coordinator will send invitations to the Vendors moving to Stage 3 and arrange the presentations and demonstrations. Those Vendors not invited to Stage 3 will be notified.

6.5 Stage Three – Oral Presentations, Site Visits and Reference Checks

The purpose of Stage Three is to:

- Interact with the proposed Key Staff in person; and
- Receive a tour or presentation of the proposed Call Center and observe its operation; and
- Clarify any ambiguities and ask additional questions regarding the Vendor's Proposal and/or services; and
- Perform Reference Checks on the Vendors.

Scoring will be reset to zero at the beginning of Stage 3.

6.5.1 Step 7: Oral Presentation and Interview Scoring

Up to three (3) of the highest-ranking candidates from Stage Two will be invited to give an oral presentation at WAHBE and/or provide the WAHBE evaluation team with a demonstration and site visit of their proposed Call Center facility. The RFP Coordinator will notify participants of the date, time, and location of the presentation and/or site visits. WAHBE reserves the right to require additional presentations, site visits and interviews.

Vendors who include Third-Party Solution Providers and other Subcontractors in their Proposal will be permitted to have the Third-Party Solution Providers and other Subcontractors participate in Stage 3. The RFP Coordinator will notify Vendors of the date, time, and location of the demonstration. The dates in [Section 2](#), are an estimate and are subject to change at the discretion of WAHBE.

The Key Staff proposed to be involved in the performance of the Contract must participate in the demonstration and/or site visit.

6.5.2 Step 8: Reference Checking

Reference checks of Vendors will be conducted, at WAHBE's discretion, prior to or during the Oral Presentation phase. In addition to Vendor's Company references, WAHBE will check the references of

proposed Key Staff. Whether included as a Key Staff reference or not, WAHBE reserves the right to use its own or other organization's experience using Key Staff on other projects as a factor in evaluating the probability of success for Key Staff proposed by the Vendor.

6.5.3 Step 9: Best and Final Offer (BAFO)

Once a Proposal has been submitted, Vendors are not allowed to make changes to those Proposals unless they receive a request for a BAFO from WAHBE. WAHBE reserves the right, that at any point after completing Stage 3, to notify all remaining Responsive and Responsible Vendors that WAHBE will require them to submit BAFO(s).

The notice will be in writing (email acceptable) and will set a specific time and date by which the BAFO must be submitted to WAHBE. The BAFO notice may set additional conditions and requirements for the submission of the BAFO. The notice will advise Vendors that the BAFO shall be in writing (email acceptable) and that upon the closing date for submission, WAHBE intends to select a Lowest Responsive and Responsible Vendor. The BAFO Notice will be posted on WEBS and the Washington Health Benefit Exchange Website.

For purposes of the BAFO, Vendors may revise their initial Proposals and submit, in writing (email acceptable), their BAFO(s) in response to the specifics contained in the request. Changes to the original bid must be clearly identified in the re-submitted Proposal using the Track Changes function in Microsoft Word.

Evaluation of BAFO(s) and selection of an ASV will be based upon WAHBE-established evaluation criteria. Terms proposed as part of a BAFO must be in accordance with the terms requested in this RFP and may not alter the requirements of the RFP.

6.6 Stage Four – Announcement of Apparently Successful Vendor and Contract Negotiations

6.6.1 Step 10: Announcement of the Apparently Successful Vendor (ASV)

The RFP Coordinator will make announcement of the ASV via WEBS and/or email.

6.6.2 Step 11: Negotiation with the ASV

To protect the best interest of WAHBE and ensure successful Contract negotiation, the Contract negotiation between WAHBE and the ASV is included in and a part of the entire Proposal evaluation process. The Proposal evaluation process is not complete until and unless the Contract negotiation is successfully completed, and the Contract terms are in their final form and mutually agreed to by both the ASV and WAHBE.

The ASV must deploy a senior negotiation team to support the Contract negotiations. The negotiation team must be empowered to make decisions on all parts of the Contract, Work Plan and other Project documents, including pricing and other key business and legal terms such as performance standards, liquidated damages, indemnities, liabilities, damages, etc. An ASV sending authorized representatives to a meeting who are not empowered to negotiate the Contract terms and conditions will not meet the requirements of this Section, and WAHBE reserves the right, at any time, to: (1) suspend negotiations until such ASV replaces such individuals and demonstrates to WAHBE's reasonable satisfaction that such replacement individuals have the requisite amount of corporate authority to negotiate on behalf of the ASV; or (2) disqualify the ASV.

The negotiation team must contain a senior lawyer representing the ASV. The senior lawyer must have reviewed the RFP and EXHIBITS plus the ASV's Proposal and must have been directly involved in the development of the exceptions to the Sample Contract and assumptions, if any.

Preliminary negotiations will take place at a location as specified by WAHBE. The goal is to negotiate the terms of the Contract based on WAHBE's responses to the ASV's proposed changes (documented as exceptions and assumptions) to the Sample Contract published in this RFP. After this first series of negotiation sessions, WAHBE may send to the ASV WAHBE's responses to the ASV's exceptions to the Sample Contract language and assumptions. Depending on the nature and outcome of the preliminary negotiations, if WAHBE sends such responses, WAHBE may require the ASV to address WAHBE's responses to the ASV's proposed language changes prior to further negotiations. At this time, WAHBE may also request additional negotiation sessions with the ASV.

If a satisfactory Contract cannot be negotiated within a reasonable time as determined by WAHBE, WAHBE may, at its sole discretion, suspend or terminate negotiations with the ASV and initiate negotiations with the next highest scoring ASV or, at WAHBE's option, the ASV that in WAHBE's judgment offers the next best value as determined by the evaluations.

Upon successful completion of Contract negotiations or WAHBE's receipt of a BAFO and acceptable final Contract offer and signature from an ASV, WAHBE will submit the executed Contract to CMS for approval.

6.6.3 Step 12: Contract Execution

Once WAHBE and the Vendor have resolved all project issues and reached mutual agreement on the Contract terms, the Vendor will sign and tender the Contract to WAHBE for acceptance and ratification by the designated WAHBE contracting authority.

The ASV is expected to execute the Contract within ten (10) Business Days of its receipt of the final Contract based upon CMS Contract approval. If the selected Vendor fails to sign the Contract within the allotted time frame, the WAHBE may elect to cancel the award, and award the Contract to the next ranked Vendor or, cancel or reissue this solicitation in accordance with [Section 3.15](#). Vendor's submission of a Proposal to this solicitation constitutes acceptance of these Contract requirements.

6.6.4 Optional Vendor Debriefing

Following the announcement of the ASV, a Vendor who has submitted a Proposal in response to the RFP may request a debriefing conference by submitting a request in writing to the RFP Coordinator by email by the date and time specified in the [Section 2](#).

The debriefing conference will be conducted via telephone and/or Skype for Business and is limited to a maximum of one hour in length.

Discussion at the debriefing conference will be limited to the following:

- Critique of Proposal based on evaluators' comments; and
- Review of final score in comparison with other Vendors' final scores without identifying the other Vendors.

WAHBE **will not** discuss other Vendor's Proposals or evaluations during debriefing.

6.6.5 Protest Procedures

To submit a Protest, a Vendor must have submitted a Proposal for this RFP and must have requested and participated in a debriefing conference.

The Protest process occurs after the Proposals are submitted and evaluated. This process allows unsuccessful Vendors to focus on the evaluation process to ensure its integrity and fairness. Protests can raise issues related to the evaluation process as set out in the RFP or how the process was executed. This allows WAHBE to correct evaluation process errors and problems before a Contract is executed.

An unsuccessful Vendor may submit a Protest in response to this RFP, if all the following conditions have been met:

- The protesting party has submitted a Proposal in response to this RFP; and
- An announcement of the ASV has been posted on WEBS; and
- The protesting Vendor has requested a debriefing conference within three (3) business days of the announcement of the ASV; and
- The protesting Vendor has participated in a debriefing conference with WAHBE; and
- The protesting Vendor has not been chosen as the ASV and failed to agree on the terms of a Contract with WAHBE.

The following is the process for filing a Protest:

6.6.5.1 Grounds for Protest

Protesting Vendors should include all issues they wish to raise when submitting a Protest, including:

- a. Bias, discrimination, or conflict of interest on the part of an evaluator; and/or
- b. Errors made in computing the scores; and/or
- c. WAHBE's non-compliance with procedures described in this RFP document.

Protesting Vendors are limited to one Protest in response to this RFP. Protesting Vendors may not raise issues which reasonably could have been addressed through Vendor Questions and Answers.

6.6.5.2 Protest form and content

A Protest must state all the facts and arguments upon which the Protest is based and the grounds for the Protest. It must be in writing (email acceptable) and signed by a person authorized to bind the Vendor to a contractual relationship. At a minimum, the Protest must include:

- a. The name of the protesting Vendor, mailing address and phone number, and the name of the individual responsible for submission of the Protest; and
- b. The RFP number and title; and
- c. A detailed and complete statement of the specific action(s) by WAHBE under Protest; and
- d. The grounds for the Protest; and
- e. Description of the relief or corrective action requested.

Vendors may attach to their Protest any documentation they have to offer in support.

6.6.5.3 Submitting a Protest

Protests must be in writing (email acceptable) and must be signed. WAHBE must receive the written Protest within five (5) business days after the debriefing conference.

6.6.5.4 Protest Bond

Any Vendor submitting a protest must post a bond or cashier's check for One Million, and No/100ths Dollars (\$1,000,000.00) simultaneously with the protest. The bond or cashier's check will be used by WAHBE to cover the costs associated with a protest (e.g., cost of processing the protest and any cost associated with the delay to the Project that would result from the protest). Any remaining funds will be returned to the protestor. If the protest is successful, the entire \$1,000,000.00 will be returned. Proposers are not entitled to any interest accrued on any protest bond or cashier's check they submit. The protest shall be dismissed with prejudice if the Proposer fails to timely post such bond or cashier's check.

6.6.5.5 Protest process

- a. The RFP Coordinator will forward the Protest to the WAHBE designated Protest Coordinator with copies of the following:
 - This RFP and any amendments; and
 - The protesting Vendor's Proposal; and
 - The evaluators' scoring sheets; and
 - Any other documents showing evaluation and scoring of the Proposal in question.

- b. WAHBE will follow these procedures in reviewing a Protest:
 - WAHBE will conduct an objective review of the Protest, based on the contents of the written Protest, the materials provided by the RFP Coordinator and any other relevant facts known to WAHBE.
 - If a Protest may affect the interest of any other Vendor, WAHBE reserves the right to provide such Vendor with a copy of the Protest and provide them with an opportunity to submit any relevant information regarding the Protest to WAHBE.
 - WAHBE will send the protestor a decision, via email, within ten (10) business days after WAHBE receives the Protest, unless more time is required to review the Protest and make a determination. The protesting Vendor will be notified by the RFP Coordinator if additional time is necessary.

- c. WAHBE will make a final determination of the Protest and will either:
 - Find that the Protest lacks merit and uphold WAHBE's actions; or
 - Find that any errors in the RFP process or in WAHBE's conduct did not influence the outcome of the RFP, and uphold WAHBE's actions; or
 - Find merit in the Protest and provide options for corrective action by WAHBE which may include:
 - That WAHBE correct any errors and re-evaluate all Proposals affected by its determination of the Protest; or
 - That WAHBE reissue the RFP document; or
 - That WAHBE make other findings and take such other action as may be appropriate.

The WAHBE Protest decision is final and no appeal process is allowed. If the protesting Vendor does not accept the WAHBE response to the Protest, the Vendor may seek relief from the Superior Court. This protest procedure constitutes the sole administrative remedy available to Vendors under this RFP. Chapter 34.05 RCW, Administrative Procedures Act (APA) does not apply to this procurement.

EXHIBIT A: GLOSSARY OF TERMS

“**ACA**” means the federal patient protection and affordable care act, P.L. 111-148, as amended by the federal health care and education reconciliation act of 2010, P.L. 111-152, or federal regulations or guidance issued under the affordable care act.

“**Apparently Successful Vendor**” (**ASV**) means the Vendor that (1) meets all the requirements of this RFP (2) is one of the top 3 scoring finalists selected into an unranked pool of finalists for an oral presentation, and (3) is selected as the highest ranked Vendor for these presentations.

“**APD**” means Advanced Planning Document.

“**APTC**” means Advanced Premium Tax Credit.

“**BAFO**” means Vendor’s best and final offer(s) in response to the RFP, if any.

“**Business Days**” means Monday through Friday, except for holidays observed by the State of Washington and as otherwise agreed in writing by WAHBE.

“**Business Hours**” means 7:30 a.m. to 8:00 p.m. Pacific Time during WAHBE’s Open Enrollment period, and 8:00 a.m. to 6:00 p.m. Pacific Time otherwise.

“**Broker**” means a person or business who can help enroll customers in a Qualified Health or Dental Plan through Washington Healthplanfinder. They can recommend which plan you should enroll in. They are also licensed and regulated by Washington state and typically get payments, or commissions, from health insurers for enrolling a consumer into a plan. Some brokers may only be able to sell plans from specific health insurers.

“**Call Center**” means a location place where WAHBE customer and other telephone calls are handled by the Contractor, with some amount of computer automation. The Call Center shall have the capacity, among other tasks described in the Contract, to handle the peak volume of WAHBE calls at the same time, to screen calls and/or to forward the calls to someone qualified to handle them, and to log calls and maintain statistics.

“**Calls Offered**” means the total number of calls that are available to be answered by the queue before IVR selection and recording.

“**CHIP**” means Child Health Care Insurance Plan, the program that facilitates health insurance for children of families without access to health care.

“**CMS**” means Centers for Medicare and Medicaid Services, the Federal Agency that administers and oversees programs related to Medicare, Medicaid, the Children’s Health Insurance Program (CHIP), and the Health Insurance Marketplace.

“**Contract**” means a binding agreement between two parties including all attachments, schedules and exhibits, and all amendments and Change Orders hereto.

“**CSA**” means the WAHBE Customer Service Application, the software used by account workers to assist with HPF customer support activities.

“Deliverables” means both a service or services performed by the Call Center Contractor, and any of the Contractor’s products that result from the Contractor’s activities and that are prepared for or performed for WAHBE (either independently or in concert with WAHBE or third parties) during the course of Contractor’s performance under this Contract, including without limitation Reports, Enhancements, Custom Software, and Deliverables that are described in Schedule 1 *Services/Deliverables Payments and Key Staff*, in the Work Plan, Proposal, Change Orders, as well as all designs, structures, and models developed in the course of rendering the Services and incorporated into such products.

“DHCP” means Dynamic Host Configuration Protocol, a protocol used to provide quick, automatic, and central management for the distribution of IP addresses within a network.

“Direct Costs” means business costs that are a direct result of performing the required services. Direct costs vary depending on fluctuations in business activity. Items subject to these costs may include but are not limited to: raw materials; labor & benefits; rent or lease on temporary equipment, 3rd party services such as translation, and profit.

“DNS” means Domain Name System, the Internet's system for converting alphabetic names into numeric IP addresses.

“DSHS” means the Washington State Department of Social and Health Services. DSHS is a comprehensive social service agency that provides child and adult protection, food assistance, cash assistance, mental health services, services to the developmentally disabled, and enrollment and eligibility determination for services including Classic Medicaid and Supplemental Security Income (SSI).

“Effective Date” means the first date this Contract is in full force and effect. It may be a specific date agreed to by the parties; or, if not so specified, the date of the last signature of the parties to this Contract.

“Enrollment Center” means a physical site where customers can obtain in-person insurance application and enrollment assistance from knowledgeable, trusted WAHBE representatives.

“ES” means Eligibility Service, the DSHS system that verifies enrollment eligibility for various State services.

“ETL” means Extract, Transfer and Load, three database functions that are combined into one tool to pull data out of one database and place it into another database.

“Exchange” typically means the organizations established as a result of the ACA.

“FY” means Fiscal Year, the period beginning July 1 and running through June 30 of each year.

“Fixed Costs” means business costs that are constant regardless of fluctuation in business activity. Items subject to these costs may include but are not limited to: Insurance; rent or leases; property taxes; basic utilities; salaried staff; software; and amortization or depreciation of assets.

“HCA” means the Washington State Health Care Authority. It is the agency responsible for administering Medicaid and coordinating all Medicaid programs.

“HFP” means Healthplanfinder™, WAHBE’s easily accessible, online marketplace for individuals and families to compare and enroll in health insurance including Qualified Health Plans (QHP), Qualified Dental Plans (QDP), and Washington Apple Health (Medicaid).

“Health Benefit Exchange” means the Washington Health Benefit Exchange (WAHBE), sometimes referred to as the “Exchange”, established in CH. 43.71 RCW.

“Information Technology (IT)” means all aspects of managing and processing information using computers including hardware, software, and network communications.

“IVR” means Interactive Voice Response, a technology that allows a computer to interact with humans using voice and tones input via keypad.

“LAP” means Language Access Plan.

“MAGI” means Modified Adjusted Gross Income. It is a way of calculating income to better reflect low income expenditures.

“Mandatory Requirement” or “(M)” means the Vendor shall comply with the requirement, and the Response will be evaluated on a pass/fail basis.

“Mandatory Scored Requirement” or “(MS)” means the Vendor shall comply with the requirement, and the Response will be scored.

“MMIS” means Medicaid Management Information Systems. It is a mechanized claims processing and information retrieval system for Medicaid that is required by the federal government.

“MPLS” means Multiprotocol Label Switching, a type of data-carrying technique for high-performance telecommunications networks.

“Navigator”, also referred to as “In Person Assister”, means an individual who is trained and able to help consumers look for health coverage options through Washington Healthplanfinder. They can help complete eligibility and enrollment forms. These individuals and organizations are required to be unbiased. Their services are free to consumers.

“PCI” means Payment Card Industry.

“PII” means Personal Identifiable Information.

“Project” means the planned undertaking and the activities of all parties related to the development, implementation and operations of the WAHBE Call Center.

“Proposal” means the proposal submitted by Contractor in response to the RFP, clarifications and information provided by Contractor at the demonstrations, amendments to the proposal, and any BAFO(s).

“Purchaser” means WAHBE.

“QDP” means Qualified Dental Plan.

“QHP” means Qualified Health Plan.

“RCW” means the Revised Code of Washington.

“Smart Planfinder™” means WAHBE’s online tool that helps customers identify insurance plans based on their needs and preferences.

“SOC” means Service Organization Controls.

“Subcontractor” means one not in the employment of Vendor, who is performing all or part of the WAHBE engagement under the resulting Contract under a separate Contract with Vendor. The term **“Subcontractor”** means Subcontractor(s) of any tier.

“Total Price” means the total of all fixed and direct costs.

“Transitional Cost” means the complete cost to successfully transition services from one fully-operational Vendor to another by a specified date.

“Triage” means to review, evaluate, route and identify root causes for issues; as well as to identify and propose solutions or fixes.

“Vendor” means a company, organization, or entity submitting a Proposal to this RFP.

“WAH” means Washington Apple Health. This term is used interchangeably with Medicaid.

“WAHBE” means the Washington Health Benefit Exchange, sometimes referred to as the “Exchange”, established in CH. 43.71 RCW.

EXHIBIT B: CERTIFICATIONS AND ASSURANCES (M)

Issued by the Washington Health Benefit Exchange

We make the following certifications and assurances as a required element of the Proposal, to which it is attached, affirming the truthfulness of the facts declared here and acknowledging that the continuing compliance with these statements and all requirements of the RFP are conditions precedent to the award or continuation of the resulting Contract.

The prices in this Proposal have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offer or competitor relating to (i) those prices, (ii) the intention to submit an offer, or (iii) the methods or factors used to calculate the prices offered. The prices in this Proposal have not been and will not be knowingly disclosed by the offer, directly or indirectly, to any other offer or competitor before Contract award unless otherwise required by law. No attempt has been made or will be made by the offer to induce any other concern to submit or not to submit an offer for the purpose of restricting competition. However, we may freely join with other persons or organizations for the purpose of presenting a single Proposal or bid.

The attached Proposal is a firm offer for a period of 120 days following the Proposal Due Date specified in the RFP, and it may be accepted by WAHBE without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 120-day period. In the case of protest, your Proposal will remain valid for 180 days or until the protest is resolved, whichever is later.

In preparing this Proposal, we have not been assisted by any current or former employee of WAHBE or the state of Washington whose duties relate (or did relate) to the WAHBE's solicitation, or prospective Contract, and who was assisting in other than his or her official, public capacity. Neither does such a person nor any member of his or her immediate family have any financial interest in the outcome of this Proposal. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)

We understand that WAHBE shall not reimburse us for any costs incurred in the preparation of this Proposal. All Proposals become the property of WAHBE, and we claim no proprietary right to the ideas, writings, items or samples unless so stated in the Proposal. Submission of the attached Proposal constitutes an acceptance of the evaluation criteria and an agreement to abide by the procedures and all other administrative requirements described in the solicitation document.

We understand that any Contract awarded, as a result of this Proposal shall incorporate all the solicitation requirements. Submission of a Proposal and execution of this Certifications and Assurances document certify our willingness to comply with the Contract terms and conditions appearing in Exhibit C, or substantially similar terms, if selected as a Contractor. It is further understood that our standard Contract will not be considered as a replacement for the terms and conditions appearing in Exhibit C of this solicitation.

We (circle one) **are** / **are not** submitting proposed Contract exceptions (see [Section 3.16](#)).

Vendor Signature

Vendor Company Name

Title

Date

EXHIBIT C: SAMPLE CONTRACT

The Sample Contract is posted as a separate document on the Washington's Electronic Business Solution (WEBS) website at <https://fortress.wa.gov/ga/webs/home.html> under RFP HBE 18-004 and on the WAHBE Website at <https://www.wahbexchange.org/about-the-exchange/what-is-the-exchange/vendor-procurements/>.

EXHIBIT D: PROPOSAL CHECKLIST (M)

To be considered responsive, Vendors shall include, at a minimum, the following components in their Proposal. Failure to include or properly document any of the following requirements may be grounds for disqualification.

RFP Section Reference	RFP Requirement/Required Submittal	Submit with Volume #	Vendor Will/Can Meet Requirement (Y/N)	Comment (Required if Vendor does not meet requirement(s) as stated)
5.1	Signed Certifications and Assurances Form (EXHIBIT B: Certifications and Assurances)	2		
5.2	Signed Proposal Checklist	1		
5.3	Completed and signed Vendor Profile/Letter of Submittal	1		
5.4	Complete Executive Summary	1		
5.5	List of References	2		
5.6	Prior Contract Performance	2		
5.7	Financial Rating/Credit report	2		
5.8	Vendor Experience Summary	1		
5.9	Service Requirements Proposal	1		
5.10	Facilities Requirements Proposal	1		
5.11	Operations Requirements Proposal, including: <ul style="list-style-type: none"> • Training Plan • Organizational Chart • Workforce Management and Staffing Plan • Work Plan 	1		
5.12	Performance Requirements Proposal, including KPIs	1		

EXHIBIT E: CALL CENTER KEY PERFORMANCE INDICATORS (KPIs) AND LIQUIDATED DAMAGES

1. Key Performance Indicators (KPIs)

If Contractor fails to meet any KPI listed in Section 1, Contractor shall be liable for liquidated damages in the amount of two percent (2%) of the monthly billing for Operations Services provided during the month in which the KPI was missed. These liquidated damages will apply for each KPI missed.

Metric	Description	KPI and Calculation	Reporting Standard
Response Time to all calls	Monitor the average response time to all calls	<p>80% of all calls offered for the month must be answered within:</p> <ul style="list-style-type: none"> • 180 seconds during Open Enrollment; • 300 seconds outside of Open Enrollment <p>Service level shall be measured for each 15-minute time interval and aggregated for the day.</p> <p>Calculation: Monthly calls answered in (180 or 300) seconds divided by (Total monthly calls answered + Total monthly calls abandoned)</p>	Provide on line access for the report or email report every month to WAHBE Call Center Manager
Response Time/Average speed to respond to emails	Monitor the response time to all emails	100% of emails received for the month must be acknowledged, assigned, and answered within 24 operating hours	Provide on line access for the report or email report every month to WAHBE Call Center Manager
Abandoned Calls	Monitor the percentage of monthly calls that are abandoned after getting connected to the Automatic Call Distributor and before reaching an agent or self-service option	<p>The percentage of calls abandoned each month is 5% or less</p> <p>Calculation: Total number of abandoned calls for the month divided by Total number of calls offered for the month times 100.</p>	Provide on line access for the report or email report every month to WAHBE Call Center Manager
Service Quality	Monitor the quality of customer service	95% of all customer satisfaction surveys received for the period must indicate a satisfaction rate of "Good" or higher as it relates to the quality of the call center and customer interaction	Customer satisfaction surveys will be created and agreed to by Contractor and WAHBE

Metric	Description	KPI and Calculation	Reporting Standard
Busy Out/Blocked Call Rate	Calls that cannot be connected because circuits are not available at the time the call arrives or the ACD is programmed to block calls from entering the queue	The percentage of monthly calls that are not allowed into the IVR must be 1% or less Provide the percent of “busies” from carrier network provider and disconnects from the Automated Call Distributor system (ACD)	Provide on line access for the report or email report every month to WAHBE Call Center Manager
Call Center Services Availability	Ensure all Call Center Services are Operational no less than 99% of monthly business hours (outside of planned Downtime)	Call Center must not experience any technical, functional, or other issues that make Call Center Services inaccessible to callers for more than 1% of the total operating hours for the month Calculation: Total monthly operating hours minus monthly hours offline divided by total monthly operating hours	Provide on line access for the report or email report every month to WAHBE Call Center Manager
Key Staff Replacement	To ensure vacated Key Staff positions are filled in accordance with Contract requirements within 90 days of vacancy	Positions must be filled within 90 days of Key Staff departure	Provide on line access for the report or email report every month to WAHBE Call Center Manager
Spanish-English Bilingual Staff Availability	At least ten (10%) percent of Call Center staff are bilingual in Spanish English languages	The percentage of Spanish-English bilingual staff at any given point must be at least 10% of the total Call Center staff	Provide on line access for the report or email report every month to WAHBE Call Center Manager
Reporting Deliverables	All required reports provided to WAHBE by specified due date	Reports must be accurate, complete and delivered on-time to WAHBE for review and acceptance	100% of reports due for any month are complete and on-time
Chat (if implemented)	To be determined by mutual agreement	To be determined by mutual agreement	To be determined by mutual agreement

2. Critical Events and Liquidated Damages

In the event the Call Center Critical Events listed below do not received Acceptance by the dates agreed upon in the Work Plan, Contractor’s liability for liquidated damages set forth below shall apply.

Categories of Critical Events	Critical Events	Call Center Deadline for WAHBE Acceptance	Liquidated Damages Amount	Application of Liquidated Damages
Facilities Ready	The following Facilities Readiness is received and accepted:	TBD	\$1,000	Per business day if facility readiness not complete
	● All Workstations are completed			
	● All Furniture has been delivered			
	● Offices and Conference Rooms completed			
	● Training facilities completed			
IT Systems	The following IT Systems Installed, Configured, Tested and Operational:	TBD	\$1,000	Per business day for any IT system not ready
	● Phone System			
	● CRM			
	● Email and Chat (if implemented)			
	● Personal Computers in CSR workstations and offices			
	● Servers, switches, Routers, and other data network equipment			
	● Phone Lines			
	● Data Lines			
Processes	The following Process & Plans developed by Vendor and approved by WAHBE:	TBD	\$1,000	Per business day late
	● All work processes and procedures have been developed			
	● All Operational and Implementation Plans			

Categories of Critical Events	Critical Events	Call Center Deadline for WAHBE Acceptance	Liquidated Damages Amount	Application of Liquidated Damages
Staffing	The following shall be completed:	TBD	\$1,000	Per business day not completed
	<ul style="list-style-type: none"> All key staff and CSRs have been hired. All CSRs have been trained. 			
Call Center Acceptance	The Call Center is ready to accept the following:	TBD	\$10,000	Per business day if Call Center is not Operational by the Deadline for WAHBE Acceptance
	<ul style="list-style-type: none"> Phone Calls 			
	<ul style="list-style-type: none"> Chat sessions (if implemented) 			
	<ul style="list-style-type: none"> Email 			
	<ul style="list-style-type: none"> Mail 			
Call Center Go-Live	The Call Center is fully operational, and all required services are provided.	July 1, 2019	\$10,000	Per business day if Call Center is not fully Operational or not all services are provided

SECTION 2 – FORECAST AND PRICE PROPOSAL FOR CALLS HANDLED (Mandatory Bid)

Using your experience, judgement, and existing methodologies provide the following information in the table below:

Column A

Provide the forecasted number of calls to be RECEIVED at the call center, by month. Forecasts should be based off the historical call volume data provided in APPENDIX G.

Column B

Provide the forecasted number of calls to be HANDLED by month, based on the forecasted number of calls entered by Vendor in Column A.

Column C

Provide the number of CSR staff needed to successfully respond to the projected number of calls handled in Column B. Proposed CSR levels for calls handled shall include all costs and staffing necessary to accomplish phone and email services and document processing functions, as reflected in [Section 4.1.4](#).

Column D

Provide a total monthly price to operate the call center and successfully handle the projected number of calls reflected in Column B. Prices shall include all costs to the Vendor including, but not limited to: staff salaries, benefits and overtime; facility lease\rent, IT equipment and licenses, indirect costs, overhead, and profit. **If selected as the ASV, Vendor must provide WAHBE with an itemized list of all cost elements that make up the total prices quoted in Column D.**

Vendors must include all costs necessary to successfully perform the entire scope of work described in [Section 4](#), as well all costs necessary to meet the KPIs and performance standards described in EXHIBIT E. Prices shall be inclusive of all costs to be charged to WAHBE and not be contingent on any other factors or conditions. No other amounts will be paid to the Vendor. Financial Proposals for contract years 2 and 3 should reflect projected efficiencies.

Month of Operation	A. Forecasted Calls Received	B. Forecasted Calls Handled	C. Number of CSRs Proposed to handle forecasted number of calls, emails, applications, and documents	D. Total Price for Call Center Services
July 2019				
August 2019				
September 2019				
October 2019				
November 2019				
December 2019				
January 2020				
February 2020				
March 2020				
April 2020				
May 2020				
June 2020				
FY 2020 Totals				

Month of Operation	A. Forecasted Calls Received	B. Forecasted Calls Handled	C. Number of CSRs Proposed to handle forecasted number of calls, emails, applications, and documents	D. Total Price for Call Center Services
July 2020				
August 2020				
September 2020				
October 2020				
November 2020				
December 2020				
January 2021				
February 2021				
March 2021				
April 2021				
May 2021				
June 2021				
FY 2021 Totals				
July 2021				
August 2021				
September 2021				
October 2021				
November 2021				
December 2021				
January 2022				
February 2022				
March 2022				
April 2022				
May 2022				
June 2022				
FY 2022 Totals				
Total Price for All Call Center Services (FY 2020 – FY 2022)				

Vendor Narrative/Explanation for Section 2 (add more lines or attach a separate document as needed):

SECTION 3 – PRICE PROPOSAL FOR CALLS HANDLED ABOVE OR BELOW FORECAST (Mandatory Bid)

A. To address fluctuations in call volumes above or below the projections provided in Section 2, provide a per-call price for each call handled OVER the monthly forecast.

Example 1 – Over Monthly Forecast

Forecasted calls handled this month = 1,600

Actual calls handled this month = 1,605

Proposed amount per call over forecast - \$5.00

Vendor would add \$25.00 (5 additional calls x \$5.00) to the “Price for Calls Handled” in Section 2 for the month

B. Vendor shall also provide a per-call credit amount for each call UNDER the monthly forecast.

Example 2 – Under Monthly Forecast

Forecasted calls handled this month = 1,600

Actual calls handled this month = 1,595

Proposed credit per call under forecast - \$5.00

Vendor would deduct \$25.00 (5 less calls x \$5.00) from the “Price for Calls Handled” in Section 2 for the month

Proposed Price Per Call	FY 2020 Price per Call	FY 2021 Price per Call	FY 2022 Price per Call
A. The amount WAHBE will pay in addition to the base contract amount for each call handled above the monthly forecast			
B. Amount Vendor shall credit WAHBE per call when calls handled in a month are less than the monthly forecast			

Prices shall include all costs to the Vendor including, but not limited to: staff salaries, benefits and overtime; facility lease\rent, IT equipment and licensing, indirect costs, overhead, and profit. **If selected as the ASV, Vendor must provide WAHBE with an itemized list of all cost elements that make up the total prices quoted above.**

Vendors must include all costs necessary to successfully perform the entire scope of work described in [Section 4](#), as well all costs necessary to meet the KPIs described in EXHIBIT E. Prices shall be inclusive of all costs to be charged to WAHBE and not be contingent on any other factors or conditions. No other amounts will be paid to the Vendor. Financial Proposals for contract years 2 and 3 should reflect projected efficiencies.

Vendor Narrative/Explanation Section 3 (add more lines or attach a separate document as needed):

SECTION 4 – CONTRACT MINIMUM AND MAXIMUM PRICE PROPOSAL (Mandatory Bid)

EXHIBIT G: CALL CENTER CALL VOLUME DATA

Month	Calendar Year	QHP Enrollment	Medicaid Enrollment	Avg Call Length (minutes)	Minimum Daily Call Volume	Maximum Daily Call Volume	Avg Daily Call Volume	Total Monthly Calls Received	Emails Processed	Paper Processing (Applications)	Document Processing (Uploads)
July	2015	152,596	1,532,530	11.8	3,255	5,754	4,270	93,936	3,911	4,853	13,223
August	2015	151,693	1,540,077	11.6	2,863	5,117	4,045	84,942	3,163	4,126	10,456
September	2015	151,187	1,546,005	10.8	2,040	6,232	4,491	94,308	4,019	2,591	8,644
October	2015	149,878	1,553,397	11.8	3,348	5,922	4,084	89,843	3,041	5,364	12,501
November	2015	150,039	1,563,870	12.6	4,344	9,095	5,892	106,048	3,028	5,447	7,693
December	2015	145,848	1,582,418	12.0	1,782	9,881	7,132	156,913	4,606	9,135	8,306
January	2016	152,753	1,586,096	12.2	3,029	9,553	6,871	137,418	2,881	7,434	11,992
February	2016	164,310	1,584,999	12.2	4,054	8,163	5,254	105,073	3,856	6,441	9,161
March	2016	171,817	1,584,244	11.6	3,531	5,624	4,358	100,241	3,888	5,048	12,063
April	2016	169,853	1,582,392	12.1	3,069	4,878	3,782	79,418	2,603	5,617	9,878
May	2016	168,231	1,581,593	14.2	2,192	3,329	2,835	59,533	2,451	3,299	10,913
June	2016	166,918	1,584,430	15.4	2,370	3,300	2,898	63,746	2,962	2,749	4,054
July	2016	165,367	1,584,552	16.5	2,574	3,519	2,942	58,838	2,954	3,570	4,475
August	2016	163,831	1,589,546	16.7	2,356	3,633	3,050	70,144	2,791	4,651	11,221
September	2016	161,794	1,593,704	15.2	2,733	3,755	3,202	67,243	1,949	3,333	4,536

Month	Calendar Year	QHP Enrollment	Medicaid Enrollment	Avg Call Length (minutes)	Minimum Daily Call Volume	Maximum Daily Call Volume	Avg Daily Call Volume	Total Monthly Calls Received	Emails Processed	Paper Processing (Applications)	Document Processing (Uploads)
October	2016	159,155	1,597,516	14.0	663	4,175	3,127	65,675	1,337	5,787	9,214
November	2016	153,226	1,606,227	15.0	3,913	6,886	5,083	96,574	1,676	4,328	7,805
December	2016	147,171	1,618,620	13.1	5,036	9,325	6,374	133,861	1,258	4,834	7,978
January	2017	171,713	1,602,817	12.4	4,609	11,793	6,218	124,366	1,628	4,836	5,660
February	2017	184,146	1,596,575	11.6	3,023	5,303	3,751	71,273	1,487	3,360	6,493
March	2017	190,496	1,593,743	12.3	2,916	4,911	3,459	79,560	1,573	3,485	9,830
April	2017	186,778	1,591,089	12.3	2,676	4,378	3,265	65,299	1,039	2,205	7,218
May	2017	182,263	1,588,570	13.0	2,199	3,670	2,957	65,046	712	3,130	9,651
June	2017	177,723	1,583,770	12.3	2,271	3,647	2,906	63,936	429	2,918	8,583
July	2017	173,364	1,568,965	12.2	2,381	3,814	3,005	60,092	383	2,831	7,019
August	2017	170,705	1,561,575	12.6	2,298	3,544	2,868	65,973	454	2,853	7,564
September	2017	169,987	1,549,163	12.5	2,535	3,758	3,032	60,649	401	2,024	5,699
October	2017	170,327	1,543,504	13.1	2,746	4,352	3,190	70,175	589	3,069	6,959
November	2017	170,310	1,547,011	13.0	4,317	7,889	5,964	119,283	890	3,226	6,475
December	2017	161,967	1,560,652	11.9	3,382	15,220	6,764	135,273	1,153	3,978	6,369
January	2018	199,438	1,566,971	11.3	3,669	7,974	5,060	111,314	902	3,319	6,956

Month	Calendar Year	QHP Enrollment	Medicaid Enrollment	Avg Call Length (minutes)	Minimum Daily Call Volume	Maximum Daily Call Volume	Avg Daily Call Volume	Total Monthly Calls Received	Emails Processed	Paper Processing (Applications)	Document Processing (Uploads)
February	2018	206,580	1,561,231	11.4	3,013	4,897	3,750	71,250	655	1,988	5,612
March	2018	205,142	1,556,273	12.1	2,880	4,093	3,344	73,571	698	2,821	7,987
April	2018	202,970	1,553,674	11.7	2,426	4,499	3,162	66,402	577	2,198	6,936
May	2018	199,557	1,553,775	11.6	2,120	3,498	2,743	60,351	545	2,057	6,917
June	2018	195,962	1,553,474	11.1	1,715	3,349	2,627	55,162	413	1,762	6,394
July	2018	192,389	1,553,137	11.6	2,137	3,408	2,636	55,355	379	2,603	6,801
August	2018	190,244	1,554,521	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
September	2018	189,977	1,555,559	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
October	2018	190,552	1,542,027	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
November	2018	190,595	1,551,381	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
December	2018	181,300	1,566,163	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
January	2019	211,970	1,568,114	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
February	2019	202,218	1,565,815	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
March	2019	196,178	1,564,272	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
April	2019	191,123	1,562,121	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
May	2019	186,165	1,560,825	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD

Month	Calendar Year	QHP Enrollment	Medicaid Enrollment	Avg Call Length (minutes)	Minimum Daily Call Volume	Maximum Daily Call Volume	Avg Daily Call Volume	Total Monthly Calls Received	Emails Processed	Paper Processing (Applications)	Document Processing (Uploads)
June	2019	181,168	1,558,634	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
July	2019	176,419	1,558,092	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
August	2019	173,428	1,558,373	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
September	2019	172,220	1,558,815	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
October	2019	172,349	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
November	2019	172,260	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
December	2019	163,877	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
January	2020	213,571	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
February	2020	203,745	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
March	2020	197,660	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
April	2020	192,567	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
May	2020	187,571	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
June	2020	182,537	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD

1. QHP Enrollment is based on actuals for July 2015-July 2018, Enrollment figures beginning August 2018 are based on the Wakely April 2018 Actuarial Forecast.
2. Medicaid enrollment is based on annual enrollment provided by the June 2018 Medicaid Forecast approved by the Washington State Caseload Forecast Council www.cfc.wa.gov.
3. The minimum, maximum, and average daily call volumes include only calls received/offered Monday through Friday.