

Washington Health Benefit Exchange Annual Financial Report

Submitted, December 31, 2020



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STATUTORY REQUIREMENT

Per chapter 43.71 RCW, the Washington Health Benefit Exchange (the Exchange) is required to submit an annual report to the Legislature, the Governor, and the Exchange Board on the annual cost of operating the Exchange. This report must identify spending in the following areas: call center, information technology and staffing.

The Exchange has been submitting financial reports since 2015, which are available online.¹

BACKGROUND

Since 2015, the Exchange Board has submitted a Strategic Plan to the Legislature which focused on four core outcomes:

- Define and deliver operational excellence;
- Increase the number of insured and access to affordable coverage;
- Advance consumer choice and decision-making; and
- Promote equity across the system.

Since 2015, one of the primary tactics for defining and delivering operational excellence was to improve and maintain the sustainability of the Exchange. With the support of the Governor and the Legislature, the Exchange was able to better align its resources with its revenues and has continued to implement strategies to maintain sustainability. The Strategic Plan, which is updated annually, continues to guide how the Exchange allocates its appropriation.

While federal challenges to long-term stability of state health benefit exchanges under the current provisions of Affordable Care Act remain, Washington has a history of proactive success in maintaining the stability of the Exchange and our state's individual insurance market and access to Washington Apple Health Medicaid enrollment services. While benefitting from relative stability in access to the market, premium affordability and out-of-pocket costs for our consumers remain as challenges to continue to work on in the coming years. The average cost of premiums increased by 36.4 percent in calendar year 2018 and 13.8 percent in calendar year 2019, followed by average premium decreases of 3.25 percent for calendar year 2020 and 3.2 percent for calendar year 2021. Consumers remain price-sensitive, with a significant number of customers moving from silver to bronze-level plans while others are dropping coverage all together.

¹ All previous reports are available online at: <https://www.wahbexchange.org/about-the-exchange/reports-data/presentations-reports/>.

COVID-19 and its associated economic disruption have resulted in increased numbers of uninsured individuals and families, due mainly to loss of employer-based coverage. As consumers are attempting to hold onto coverage, despite cost concerns, overall enrollment levels in Exchange plans have increased slightly during open enrollment for 2021.

FUNDING

The Exchange receives about \$5.2 million per year in General-Fund State which provides a portion of the state match required to support Medicaid activities, such as navigators, printing, and call center activities. The remainder of the state Medicaid match is funded by the 2 percent premium tax received by the Exchange for qualified health plan (QHP) enrollees.

General Fund-State (GF-S) funding in the Exchange budget has remained constant since the 2015-17 biennium. However, in the 2019-21 biennium additional one-time GF-S was provided to the Exchange to implement the Cascade Care legislation, a study of potential state premium subsidies, and for an actuarial report on the impacts of a state health insurance mandate.

The budget information in Table 1 reflects the enacted 2019-21 biennial budget.

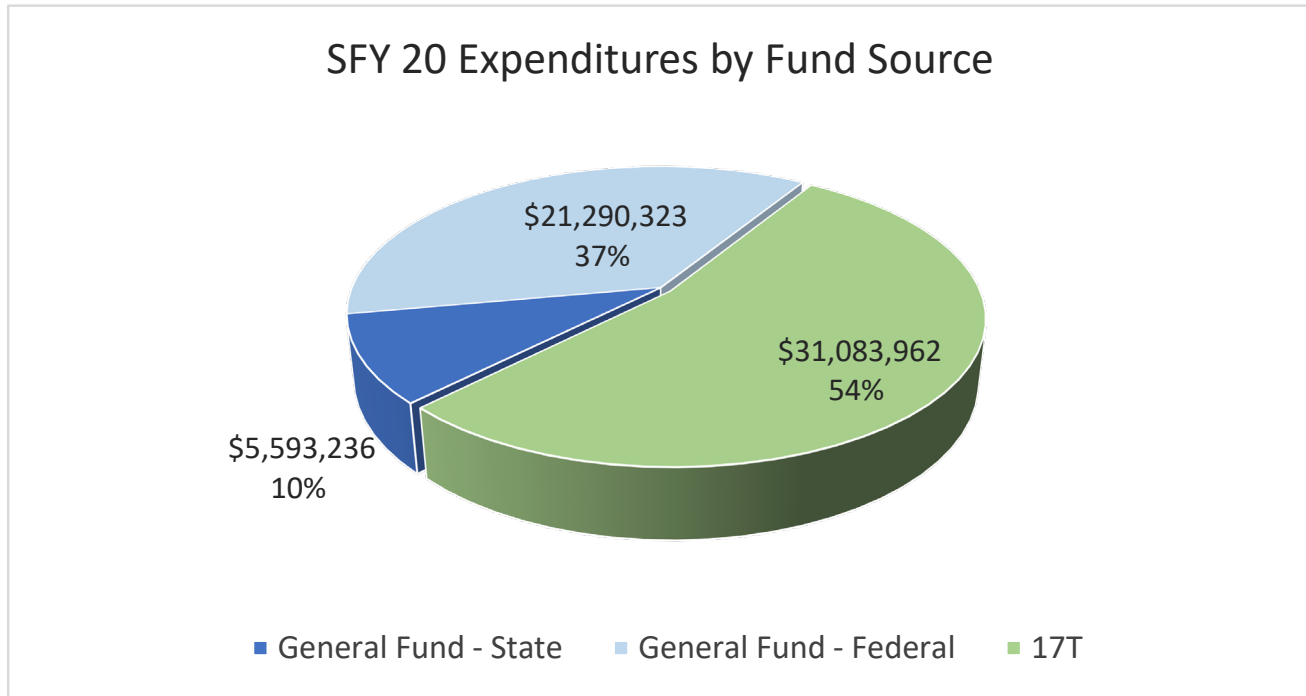
Table 1: Enacted 2019-21 Budget by Fund Source

Enacted Appropriation			
	SFY20	SFY21	Total
GF-State	6,407,000	5,334,000	11,741,000
17T	30,936,000	29,181,000	60,117,000
GF-Federal	24,590,000	25,465,000	50,055,000
Total	61,933,000	59,980,000	121,913,000

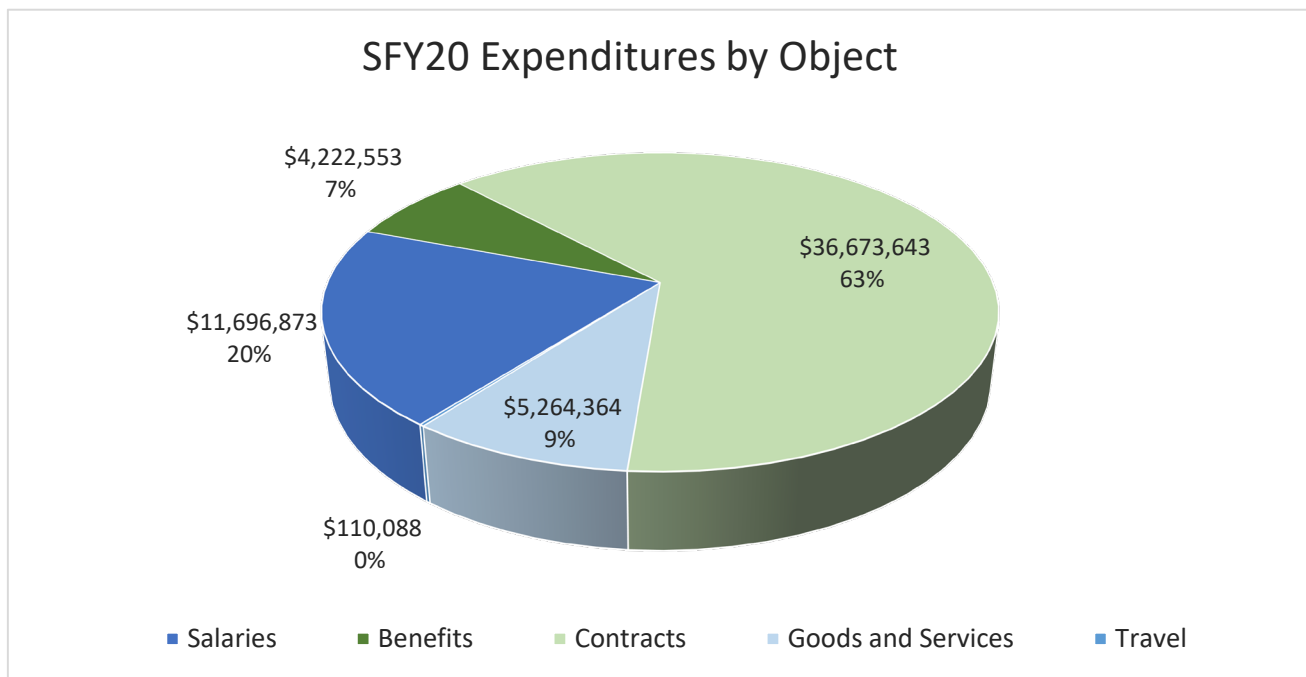
The 2019-21 biennial budget includes one-time funding for the system integrator transition, establishing the system requirements for the COFA dental program (per SB 5274) and launching Cascade Care (SB 5526). Additionally, the budget includes ongoing costs to support additional system costs for meeting Cloud software requirements.

The Exchange continues to strive for operational efficiencies, an improved customer experience and enhanced system performance and responsiveness. The enacted budget represents a 1.8 percent reduction from the 2017-19 biennium.

Graph 1: State Fiscal Year 2020 Expenditures by Fund Source



Graph 2: State Fiscal Year 2020 Expenditures by Object



CALCULATION OF PER MEMBER PER MONTH (PMPM) VALUES

This report uses the enacted 2019-21 Exchange biennial budget for current PMPM values. The 2022, 2023 and 2024 projected PMPM expenditures are based on the enacted 2019-21 biennial budget. Enrollment numbers for qualified health plan enrollees are from the November 2020 Wakely enrollment forecast and the November 2020 Caseload Forecast Council (CFC) forecast for Medicaid projections.

The PMPM cost is calculated by dividing budgeted expenditures by the total number of enrollees per population served. One-time budget enhancements in SFY 2020 resulted in a combined increase in PMPM values for the year. Lower appropriations for SFY 2021 and SFY 2022, together with relatively stable enrollment projections result in projected decreases in combined PMPM values for each fiscal year of the current biennium.

Table 2: Calculation of Per Member Per Month for Total Budget

	SFY 2020	SFY 2021	SFY 2022	SFY 2023	SFY 2024
Total Budget	\$61,933,000	\$59,980,000	\$58,360,000	\$58,246,000	\$58,360,000
QHP Budget	\$24,380,000	\$26,667,230	\$24,252,391	\$23,862,427	\$24,208,096
Average Monthly QHP Enrollment	186,557	193,898	198,586	202,534	205,886
Average Monthly Medicaid Enrollment	1,507,003	1,656,127	1,511,844	1,483,232	1,490,819
QHP PMPM	\$10.89	\$11.46	\$10.18	\$9.82	\$9.80
WAH PMPM	\$2.08	\$1.68	\$1.88	\$1.93	\$1.91
Combined PMPM	\$3.05	\$2.70	\$2.84	\$2.88	\$2.87

Table 3: Per Member Per Month Projection by Cost Category

Projected Wakely Actuarial and CFC Forecast					
Enrollment	SFY 2020	SFY 2021	SFY 2022	SFY 2023	SFY 2024
QHP Enrollment	186,557	193,898	198,586	202,534	205,886
Medicaid Enrollment	1,507,003	1,656,127	1,511,844	1,483,232	1,490,819
Total Enrollment	1,693,560	1,850,025	1,710,430	1,685,766	1,696,705

	SFY 2020 Budget	SFY 2021 Budget	SFY 2022 Budget	SFY 2023 Budget	SFY 2024 Budget
Total Cost	\$ 61,933,000	\$ 59,556,000	\$ 58,360,000	\$ 58,246,000	\$ 58,360,000
Annual	\$ 36.57	\$ 32.19	\$ 34.12	\$ 34.55	\$ 34.40
Monthly	\$ 3.05	\$ 2.68	\$ 2.84	\$ 2.88	\$ 2.87
Staff Costs	\$ 15,919,000	\$ 16,813,952	\$ 17,150,231	\$ 17,493,236	\$ 17,843,100
Annual	\$ 9.40	\$ 9.09	\$ 10.03	\$ 10.38	\$ 10.52
Monthly	\$ 0.78	\$ 0.76	\$ 0.84	\$ 0.86	\$ 0.88
IT	\$ 22,172,000	\$ 23,760,000	\$ 21,100,000	\$ 21,526,000	\$ 21,956,520
Annual	\$ 13.09	\$ 12.84	\$ 12.34	\$ 12.77	\$ 12.94
Monthly	\$ 1.09	\$ 1.07	\$ 1.03	\$ 1.06	\$ 1.08
Call Center	\$ 9,406,494	\$ 9,458,265	\$ 9,282,836	\$ 9,108,083	\$ 8,925,921
Annual	\$ 5.55	\$ 5.11	\$ 5.43	\$ 5.40	\$ 5.26
Monthly	\$ 0.46	\$ 0.43	\$ 0.45	\$ 0.45	\$ 0.44

Notes:

IT expenditure category represents total Information Technology spending less salaries and benefits

QHP enrollment projections based on November 2020 Wakely Forecast

Medicaid Enrollment projections based on November 2020 Caseload Forecast Council forecast

PROGRESS ON STRATEGIES TO REDUCE COSTS

The Exchange's 2020 Annual Report to the Legislature included a description of the progress that was made in calendar year 2019. This report reflects the additional progress made in 2020 to reduce costs and improve customer service.

Annually, the Exchange utilizes a modified zero-based budget methodology to ensure that resources continue to be used for the most strategic purposes. Since nearly 65% of the Exchange budget is contracted, considerable effort has been given to ensuring that contracted resources provide competitive costs and high performance.

1. *Reprocure contracts to sustain critical functions, secure stable costs over multiple biennia and enable more dynamic system response capability to changing market conditions.*

The Exchange completed reprocurement of its System Integrator (SI) contract in 2020, following the earlier reprocurement of our contracted call center. The new SI contract meets federal procurement requirements, increases cost transparency, improves approaches to system development and long-term flexibility, and system responsiveness. The new contract reflects the Exchange's move to agile software development and more frequent deployments of system enhancements and customer service improvements. The reprocurement reflects a one-time cost increase (the first in five years) and again ensures flat contracted costs over the next five years.

2. *Enhance automation and new capabilities to reduce dependencies on call center staff for routine transactions.*

The Exchange has taken steps to improve call center efficiency. This includes modifying our approach to managing passwords, which has resulted in fewer customer calls to the call center in each of the last two open enrollment periods. The Exchange also directed Faneuil, the call center vendor, to implement new tools which further streamlined the work for customer service representatives. Additional software and data analytics capability resulting from the call center reprocurement is also improving customer support and reducing length of call center calls.

The Exchange and Faneuil piloted chat functionality in English and Spanish for call center services for the first time during open enrollment in 2019. Customer surveys indicate chat was well-received and is more convenient for many customers. For 2020, the Exchange implemented new customer service benchmarks for chat services. Preliminary data for 2021 open enrollment indicates the contractor is meeting benchmarks as customers continue to increase utilization of chat services. Early indications are that chat services may be reducing call volumes. However, other factors (included COVID-related service demands, regulatory changes and market dynamics) necessitate continued review of demand on call center services and future contract negotiations and procurement. Finally, to secure customer service capability during the COVID-19 pandemic, the Exchange worked with Faneuil to convert customer service representatives to remote work. This included successful IT deployments and training for call center employees.

3. *Reconfigure Healthplanfinder, Exchange website and mobile customer tools to allow consumers greater ability to process applications without assistance from the call center.*

Changes were made to improve the clarity and consistency of *Washington Healthplanfinder* enrollment screens to facilitate enrollment. The Exchange website and mobile applications are now aligned with the same look and feel for a more consistent customer experience. The use of the mobile application is increasing, with 226,000 downloads of the app and 73,000 documents uploaded since it was implemented. In 2019, Medicaid clients were able to access their plan insurance information and apply for coverage on the mobile app. QHP customers are also able to apply for coverage on the mobile app.

4. *Explore how partnerships with the state's Department of Enterprise Services and other state agencies could enhance the ability to leverage contracts and reduce costs.*

The Exchange continues to use services from the Department of Enterprise Services (DES) to procure the best price and service of software vendors. The Exchange also continues to use master contracts from DES to purchase as-needed technical staff and other services.

5. *As the Exchange continues to stabilize, examine staffing levels in all areas.*

The Exchange has stabilized its staffing needs and grew slightly to improve services and meet federal audit requirements. For example, the Exchange added four full time positions to conduct specific system maintenance and operations activities previously performed by a contracted vendor. Additional staff were added for system security to increase the ability to monitor and respond to cyber security threats. Security improvements continue to be a high priority across Exchange activities. Positions were also added to support organizational priorities including Cascade Care implementation, and to support diversity, equity and inclusion efforts. The Exchange went to fully remote operations in March 2020 for safety, continuity and expansion of services during the pandemic. This proved to be very successful, and allowed staff to safely and effectively expand eligibility, enrollment and customer outreach during the pandemic and the resulting economic recession.

Table 4: State Fiscal Year 2020 Employees and Contractors by Month

	FTEs											
	July	August	September	October	November	December	January	February	March	April	May	June
Communications	17.5	16.5	17.5	18.5	18.5	17.5	17.5	17.5	17.5	19.5	19.5	18.5
Executive	5.5	5.0	5.5	6.5	5.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5
Finance	18.5	18.5	18.5	18.5	18.5	18.5	17.5	17.5	17.5	17.5	17.5	17.5
IT	34.5	35.5	34.5	36.5	36.5	36.5	38.0	38.0	38.0	38.0	38.0	38.0
Office of Strategy and Policy	9.5	9.5	9.5	9.5	9.5	9.5	10.0	10.0	9.0	9.0	9.0	10.0
Operations	43.0	45.0	44.0	43.0	43.0	44.0	45.0	45.0	45.0	45.0	45.0	44.0
Total	128.5	130.0	129.5	132.5	131.5	132.5	134.5	134.5	133.5	135.5	135.5	134.5

	Contractors											
	July	August	September	October	November	December	January	February	March	April	May	June
Communications	0	0	0	0	0	0	0	0	0	0	0	0
Executive	2	2	3	1	2	3	1	1	1	1	0	0
Finance	0	0	0	0	0	0	0	0	0	0	0	0
IT	11	9	10	11	10	11	12	18	18	16	16	16
Office of Strategy and Policy	0	0	0	0	0	0	0	0	0	0	0	0
Operations	1	1	1	1	1	1	1	2	2	2	1	1
Total	14	12	14	13	13	15	14	21	21	19	17	17

Total	142.5	142	143.5	145.5	144.5	147.5	148.5	155.5	154.5	154.5	152.5	151.5
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6. *Expand inter-agency work teams and staff cross training to improve efficiency and effectiveness*

The Exchange actively participates with Washington State Health and Human Services agencies to develop an enterprise technology roadmap. The Enterprise Governance structure facilitates improved communications, problem resolution, and interagency cooperation to ensure that public resources are maximized, and services are improved. During the COVID-19 pandemic enhanced agency relationships facilitated faster and more effect response to regulatory and system needs and problem-solving in public health and eligibility and enrollment operations and systems.

7. *Continue to examine business processes to prevent duplication and increase efficiency.*

Beginning in 2019, the Exchange implemented an Agile initiative to streamline how IT system projects are prioritized, built, and implemented. Agile is expediting technology improvements while reducing risks and improving the *Washington Healthplanfinder* user experience.

The Exchange also completed an initiative to upgrade aging hardware and convert to the Microsoft Azure cloud--a full software and framework upgrade to reduce asset vulnerabilities, reduce redundant software and introduce new security measures to maximize data integrity and information privacy. This overhaul will reduce hardware refresh costs, modernize our IT platform to better accommodate operational changes, and has the potential to reduce maintenance and operating costs as the Exchange works to reduce IT storage cost.

The Exchange continued our Lean initiative to improve business processes and drive better financial and programmatic outcomes. For example, improvements were identified to the tools and processes the Exchange uses to update and maintain all our communications platforms. This led to the procurement of Adobe Experience Manager, which will streamline communications to one technology, strengthen our digital platforms, mainstream processes, and reduce redundancy in many workstreams to allow for capacity of other workstreams. The Exchange continues to increase skills and train additional staff in Lean facilitation and leadership.

8. *Expand customer assistance and outreach conducted by navigators and brokers.*

This year the Exchange continued to provide valuable community-based resources by activating eleven full-service enrollment centers offering in-person assistance to customers signing up for health and dental coverage through Washington Healthplanfinder during open enrollment. These venues also played a pivotal role in the Exchange's 'More to Live Well' effort - a statewide campaign to encourage all Washingtonians to shop, compare plans, and sign up for health and dental plans during open enrollment. The campaign featured virtual meetings, virtual events, and scheduled phone appointments statewide and the enrollment centers provided extended work hours to help customers with the enrollment process.

Additionally, the Exchange incorporated outreach-related metrics into the contracts for the nine organizations providing statewide navigator services. By directing each contracted organization to submit reports detailing planned and completed outreach activities and events, the Exchange aimed to ensure outreach resulted in Washingtonians accessing assistance throughout the enrollment process. The Exchange has learned of the creative ways in which navigators continue to assist enrollment at flu shot clinics and this year at drive-through COVID testing facilities.

9. *Enhance member communication channels with carriers to leverage customer touch points for key messages to maintain enrollment.*

The Exchange has continued to grow its direct email outreach to new and existing clients throughout the year. During the most recent enrollment period, the Exchange sent over a half million specialized emails to customers who had engaged with the Exchange for purposes of enrollment. The Exchange saw a 44 percent open rate on these communications, which exceeds the standard health/medical related email open rate of 17 percent.

This year the Exchange leveraged some new media channels to connect with new and renewing customers. This included the use of paid content channels, television PSAs, digital PSAs (e.g. Netflix, etc.) to reach a growing population whose entertainment viewing habits are tied to such outlets. The Exchange also used music channels, securing time on Pandora and Spotify, whose audiences align well with consumer demographics.

In addition to the digital communication channels, the Exchange promoted a special open enrollment for individuals impacted by COVID closures and restrictions, and open enrollment through traditional advertisements. This included inside of transit, strategically placed advertisements in essential businesses including grocery stores, pharmacies, and specialty food markets to reach audiences that might not be engaged online.

10. Continue strong financial management practices and stewardship of resources

The Exchange engaged an independent certified public accounting firm to perform its annual financial audit. The Exchange had no audit findings or reportable weaknesses for its audit for the fiscal year ended June 30, 2020. The Exchange also continues to strengthen financial policies to ensure transparency and stewardship over organizational assets and effective management of resources.

ADDENDUM A

Washington Health Benefit Exchange Statement of Net Position

ASSETS

Current assets	
Cash and cash equivalents	\$ 2,573,066
Medicaid program cost reimbursement receivable	3,562,425
Accounts receivable	3,901,540
Prepaid expenses	<u>3,109,713</u>
Total current assets	<u>13,146,744</u>
Capital assets	
Leased building	2,793,937
Software	58,931,823
Furniture and equipment	1,777,476
Leasehold improvements	1,854,084
Work in process	<u>2,601,422</u>
	67,958,742
Less accumulated depreciation and amortization	<u>(48,419,311)</u>
Capital assets, net	<u>19,539,431</u>
Other assets	
Prepaid expense	<u>361,323</u>
Total assets	<u>33,047,498</u>

DEFERRED OUTFLOWS OF RESOURCES

Deferred outflows of resources	<u>1,858,486</u>
Total assets and deferred outflows of resources	<u>\$ 34,905,984</u>

LIABILITIES

Current liabilities	
Accounts payable and accrued liabilities	\$ 11,919,879
Current portion of financing leases	562,463
Payroll liabilities	<u>1,224,373</u>
Total current liabilities	<u>13,706,715</u>
Financing leases, excluding current portion	1,179,476
Net pension liability	3,768,556
Net other postemployment benefits (OPEB) liability	1,428,134
Long-term unearned revenue	<u>361,323</u>
Total liabilities	<u>20,444,204</u>

DEFERRED INFLOWS OF RESOURCES

Deferred inflows of resources	<u>2,668,532</u>
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NET POSITION

Net position	
Net invested in capital assets	19,539,431
Unrestricted net position	<u>(7,746,183)</u>
Total net position	<u>11,793,248</u>
Total liabilities, deferred inflows of resources and net position	<u>\$ 34,905,984</u>

ADDENDUM B

Exchange Contracts in Effect 2020

Contract #	Company	Start	End	Description	Additional Value	Total Contract Value	Changes	Change Made In
HBE-447	22nd Century Technologies	3/1/20	6/30/22	Information technology and professional services		\$864,000	New contract	February
HBE-446	4 Consulting	3/1/20	6/30/22	Information technology and professional services		\$432,000	New contract	February
DES-251	Ad Specialties and Promotions, Inc	8/14/19	10/15/21	Dispensers, kiosks and promotional items		\$0	New contract	August
HBE-401	Advisor Benefits Group	9/19/18	8/31/20	Full service enrollment center	\$15,000	\$43,000	Extend period of performance; add funding; change WAHBE contract manager; incorporate new marketing plan	August
SLA-116-17	Akamai	8/22/13	5/31/21	Solution to address evolving complexities of application acceleration in the cloud	\$171,288	\$1,093,203	Kona security solution licensing and support renewal	May
HBE-389	Ames Bros	6/25/18	6/30/20	Creative Services/Marketing/Design	\$150,000	\$450,000	Extend period of performance; add funding; add new statement of work; incorporate change order process	July
HBE-389	Ames Bros	6/25/18	6/30/21	Creative services/marketing/design	\$30,000	\$480,000	Extend period of performance, add funds, and add new statement of work	June
HBE-393	Applied Team Insurance	9/1/18	8/31/20	Full service enrollment center	\$15,000	\$30,000	Extend period of performance; add funding; change WAHBE contract manager; incorporate new marketing plan	August
MLA-363	Atlassian	8/1/17	8/23/20	JIRA software (cloud) + JIRA software (server) annual licensing	\$20,494	\$45,966	Table grid next generation cloud (200 users); Jira software (200 users); test management for Jira cloud (200 users)	August

ADDENDUM B

Exchange Contracts in Effect 2020

Contract #	Company	Start	End	Description	Additional Value	Total Contract Value	Changes	Change Made In
MLA-363	Atlassian	8/1/17	8/23/20	JIRA software (cloud) + JIRA software (server) annual licensing	\$11	\$45,977	Jira software (server) 10 users: starter license renewal	August
MLA-363	Atlassian	8/1/17	8/23/20	JIRA software (cloud) + JIRA software (server) annual licensing	\$4,286	\$50,263	Confluence (cloud) standard 200 users	March
HBE-220	BerryDunn	5/2/16	6/30/21	Audit services	\$84,000	\$537,500	Extend period of performance; add funding; revise statement of work for fiscal year 20 audit plan	April
HBE-427	Better Health Together	7/1/19	6/30/21	Lead navigator organization and enrollment center services	\$301,956	\$603,913	Extend period of performance, add funds, amend WAHBE contract manager, and revise key performance indicators	May
HBE-338	BetterDoctor	5/10/17	6/30/21	Provider directory	\$22,000	\$1,211,062	Add two new issuers for 2020 plan year	November
HBE-448	Bourntec Solutions	3/1/20	6/30/22	Information technology and professional services		\$1,512,000	New contract	February
HBE-445	Cairncross & Hempelmann	12/13/19	12/31/21	Legal assistance		\$162,000	New contract	December
HBE-438	Cascadia Strategies	8/8/19	4/30/20	Consultation services to assist in implementing cascade care		\$150,000	New contract	August
SLA-159	Century Link	10/29/13	10/28/23	Internet services	\$6,171	\$139,287	Upgrade existing internet bandwidth from 200MB service to 1G	March
HBE-428	CHOICE Regional Health Network	7/2/19	6/30/20	Lead navigator organization services		\$166,000	New contract	July

ADDENDUM B

Exchange Contracts in Effect 2020

Contract #	Company	Start	End	Description	Additional Value	Total Contract Value	Changes	Change Made In
HBE-428	CHOICE Regional Health Network	7/2/19	6/30/21	Lead navigator organization services	\$166,000	\$332,000	Extend period of performance, add funds, amend contract managers, and revise key performance indicators	May
HBE-170	Ciber	9/21/15	12/31/19	Optional use contract for technical staffing	\$0	\$4,000,000	Add IT business analyst - functional - expert work order	October
HBE-170	Ciber	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Extend period of performance	October
HBE-170	Ciber	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Extend IT Business Analyst - Funtional - Expert work order	November
HBE-170	Ciber	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Extend IT Business Analyst - Funtional - Expert work order	November
HBE-170	Ciber	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Extend Information Technology Business Analyst - Functional - Expert for COFA work order	May
HBE-381	Clean-Rite Janitorial Services	4/30/18	6/30/20	Janitorial Services	\$10,000	\$110,000	Amend service schedules; amend compensation section; add funding	September
HBE-383	Cline Consulting	4/1/18	12/31/19	Leadership Team Development	\$0	\$95,000	Add new statement of work for operations management team development	July
HBE-383	Cline Consulting	4/1/18	3/31/20	Leadership team development	\$4,000	\$99,000	Extend period of performance; add funding	November
HBE-383	Cline Consulting	4/1/18	3/31/20	Leadership team development	\$0	\$99,000	Add new statement of work for Policy team development	December
HBE-383	Cline Consulting	4/1/18	3/31/20	Leadership team development	\$0	\$99,000	Add new statement of work for IT team development	February
HBE-464	Cline Consulting	5/1/20	6/30/22	Organizational consulting services		\$249,999	New contract	April

ADDENDUM B

Exchange Contracts in Effect 2020

Contract #	Company	Start	End	Description	Additional Value	Total Contract Value	Changes	Change Made In
HBE-464	Cline Consulting	5/1/20	6/30/22	Organizational consulting services	\$0	\$249,999	Work order for May 2020 executive leadership team retreat	May
HBE-464	Cline Consulting	5/1/20	6/30/22	Organizational consulting services	\$0	\$249,999	July 2020 board retreat	June
HBE-464	Cline Consulting	5/1/20	6/30/22	Organizational consulting services	\$0	\$249,999	June 2020 administrative team retreat	June
HBE-449	COGENT Infotech	3/1/20	6/30/22	Information technology and professional services		\$3,888,000	New contract	February
HBE-169	Coolsoft	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Extend period of performance	October
HBE-451	COOLSOFT	3/1/20	6/30/22	Information technology and professional services		\$3,456,000	New contract	February
HBE-403	David Threedy	11/1/18	6/30/21	Presiding officer services	\$0	\$100,000	Extend period of performance	June
HBE-027	Deloitte	4/19/12	6/30/20	Systems Integration Contractor	\$111,720	\$196,582,521	Add funding; amend Exhibit A and Exhibit B	August
HBE-027	Deloitte	4/19/12	6/30/20	Systems Integration Contractor	\$158,004	\$196,740,525	Add funding; amend Exhibit A (List of Approved RFCs and Pricing) and Exhibit B (Deliverables and Purchase Prices)	September
HBE-027	Deloitte	4/19/12	6/30/20	Systems integration contractor	\$156,700	\$196,897,225	Add funding; amend Exhibit A (List of Approved RFCs and Pricing) and Exhibit B (Deliverables and Purchase Prices)	December
HBE-027	Deloitte	4/19/12	6/30/20	Systems integrator contractor	\$5,386	\$196,902,611	Oracle API gateway replacement funding	February
HBE-027	Deloitte	4/19/12	6/30/20	Systems integrator contractor	\$352,711	\$197,255,322	Agile design, development and implementation team 1 for sprint 9 and extend data modeling support	March

ADDENDUM B

Exchange Contracts in Effect 2020

Contract #	Company	Start	End	Description	Additional Value	Total Contract Value	Changes	Change Made In
HBE-027	Deloitte	4/19/12	6/30/20	Systems integrator contractor	\$444,167	\$197,699,489	Agile design, development and implementation teams 1, 2, and 4 for sprint 9	April
HBE-460	Deloitte	4/8/20	6/30/25	System integrator services		\$63,267,898	New contract	April
HBE-460	Deloitte	4/8/20	6/30/25	System integrator services	\$0	\$63,267,898	Amend schedule 1, section 1 "Deliverables" (add new Deliverable DEL-DDI-03)	April
HBE-460	Deloitte	4/8/20	6/30/25	System integrator services	\$0	\$63,267,898	Add new "one-time deliverable" section and first one-time deliverable (RFC ID: MS-325)	June
IAA-442	DSHS	4/24/20	3/31/21	Demographic data share project		\$16,106	New contract	April
MLA-179	Edifecs	3/13/15	3/13/20	Master license and service agreement	\$28,691	\$3,238,953	HIX account portal for state based marketplace carrier portal functionality	July
MLA-179	Edifecs	3/13/15	3/31/20	Master license and service agreement	\$403,098	\$3,642,051	Add funds and new statement of work (#1700) for health insurance exchange 8.9 enhancements	August
MLA-179	Edifecs	3/13/15	10/15/20	Master license and service agreement	\$398,071	\$4,040,122	Add new statement of work for full carrier audit and other health insurance exchange enhancements	March
MLA-179	Edifecs	3/13/15	6/30/21	Master license and service agreement	\$157,431	\$4,197,553	Health insurance exchange solution annual licenses (20 internal named users, 13 trading partners, 200,000 members) plus SpecBuilder healthcare edition annual license (1)	May

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Exchange Contracts in Effect 2020

Contract #	Company	Start	End	Description	Additional Value	Total Contract Value	Changes	Change Made In
HBE-452	Elegant Solutions	3/1/20	6/30/22	Information technology and professional services		\$432,000	New contract	February
HBE-453	E-Solutions	3/1/20	6/30/22	Information technology and professional services		\$216,000	New contract	February
HBE-411	Faneuil	4/1/19	6/30/22	Call center services	\$0	\$29,000,757	Faneuil to provide HCA with contact center services for guidance and technical support for the SEBB Program's first annual Open Enrollment	August
HBE-411	Faneuil	4/1/19	6/30/22	Call center services	\$449,242	\$29,449,999	Add schedule 10 (statement of work 3): COVID-19 response	April
HBE-394	Financial Designs	9/1/19	8/31/20	Full service enrollment center	\$12,605	\$22,989	Extend period of performance; add funding; change WAHBE contract manager; incorporate new marketing plan	August
HBE-395	FND Insurance	9/1/18	8/31/20	Full service enrollment center	\$15,000	\$30,000	Extend period of performance; add funding; change WAHBE contract manager; incorporate new marketing plan	August
HBE-337	Get Insured	5/12/17	6/30/20	Consumer decision support tool for QHP shopping on HPF	\$9,600	\$1,378,920	Incorporate a change request to add program type indicator to the provider search feature on the consumer decision support tool	August
HBE-337	GetInsured	5/12/17	6/30/20	Consumer decision support tool for Qualified Health Plan shopping on Healthplanfinder	\$43,200	\$1,422,120	Add a change request to add the following requirements to the Smart Planfinder page: ADA compliance, user interface refresh, and remove toggle and replace with input text	March

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Contract #	Company	Start	End	Description	Additional Value	Total Contract Value	Changes	Change Made In
HBE-337	GetInsured	5/12/17	6/30/21	Consumer decision support tool for Qualified Health Plan shopping on Healthplanfinder	\$447,400	\$1,869,520	Extend period of performance and add funds	June
HBE-396	GHB Insurance	9/1/18	8/31/20	Full service enrollment center	\$14,800	\$29,800	Extend period of performance; add funding; change WAHBE contract manager; incorporate new marketing plan	August
SLA-410	Glassdoor	12/21/18	12/18/20	Job recruiting site package	\$7,920	\$15,120	Services renewal	November
HBE-402	Gloria Johnson	11/1/18	6/30/21	Presiding officer services	\$50,000	\$150,000	Extend period of performance, add funding, and change WAHBE contract manager	June
DES-233	Granicus	8/30/17	6/10/20	Digital Communications Solutions	\$35,557	\$182,437	Communications cloud advanced package subscription renewal	August
IAA-440	HCA	10/7/19	10/31/20	System integrator QA oversight		\$118,000	New contract	October
HBE-441	Health Insurance Solutions NW	9/1/19	8/31/20	Full service enrollment center		\$15,000	New contract	August
MLA-362	Hewlett Packard Enterprise	8/3/17	8/2/20	Software support and licensing	\$31,458	\$119,886	LoadRunner annual renewal - controller + monitors site software; web 2.0 protocol bundle - virtual user software	August
MLA-362	Hewlett Packard Enterprise	8/3/17	8/2/20	Software support and licensing	\$16,166	\$136,051	Fortify annual renewal - security center build to order starter edition; 1M fules subscription support	August
MLA-362	Hewlett Packard Enterprise	8/3/17	8/2/20	Software support and licensing	\$80,777	\$174,359	LoadRunner license verification perpetual license, support and maintenance	April

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Contract #	Company	Start	End	Description	Additional Value	Total Contract Value	Changes	Change Made In
HBE-444	IdeaCrew, Inc.	11/15/19	2/15/20	HRA calculator tool hosting agreement		\$0	New contract	November
HBE-455	Infojini	3/1/20	6/30/22	Information technology and professional services		\$3,456,000	New contract	February
HBE-462	Information Services Group Public Sector	2/18/20	7/15/20	Consulting services for system integrator contract transition activities		\$499,000	New contract	February
HBE-333	Karen Merrikin	1/12/17	12/31/20	ACA Repeal and Replace Consultation Services	\$0	\$98,000	Extend period of performance	November
HBE-108	KJS Company	10/10/12	6/30/23	810 Jefferson Street lease	\$150,000	\$6,414,304	Leasehold improvements	August
HBE-108	KJS Company	10/10/12	6/30/23	810 Jefferson Street lease	\$10,750	\$6,425,054	Revise onsite storage to include all storage areas (basement and floors 1-5)	November
HBE-108	KJS Company	10/10/12	6/30/23	810 Jefferson Street lease	\$25,000	\$6,450,054	Leasehold improvements	December
HBE-108	KJS Company	10/10/12	6/30/23	810 Jefferson Street lease	\$50,000	\$6,500,054	Leasehold improvements	February
HBE-108	KJS Company	10/10/12	6/30/23	810 Jefferson Street lease	\$200,000	\$6,700,054	Leasehold improvements	April
HBE-415	Korean Women's Association	7/1/19	6/30/21	Lead navigator organization services	\$75,000	\$150,000	Extend period of performance, add funds, amend WAHBE contract manager, and revise key performance indicators	April
MLA-414	Microsoft	2/1/19	1/31/20	Premier support services (unified)	\$21,254	\$143,044	Add up to 150 proactive support credits	January
MLA-461	Microsoft	2/1/20	1/31/21	Unified support services		\$142,323	New contract	January
MLA-461	Microsoft	2/1/20	1/31/21	Unified support services	\$62,838	\$205,161	Add up to 444 proactive support credits	February
MLA-461	Microsoft	2/1/20	1/31/21	Unified support services	\$16,410	\$221,571	GitHub workshop	April
MLA-461	Microsoft	2/1/20	1/31/21	Unified support services	\$142,001	\$363,572	Add up to 988 proactive credits, 119 proactive service delivery management time, and 5 hours extended service delivery management time	May

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Contract #	Company	Start	End	Description	Additional Value	Total Contract Value	Changes	Change Made In
HBE-086	Milestone	9/21/15	12/31/20	Information technology consulting services	\$0	\$4,500,000	Extend Systems Analyst Tester - Expert work order	June
IAA-392	OHSU Center for Health System Effectiveness	6/18/18	6/30/20	WA-APCD data sharing agreement and licenses	\$2,500	\$33,006	Additional data linkage work	April
MLA-042	Oracle	3/30/16	3/30/21	Oracle products EXCEPT VM and Linux	\$90,004	\$5,417,993	Oracle technical assistance with Oracle Access Manager (OAM) for architectural review and operational assessment of OAM project	September
MLA-042	Oracle	3/30/16	3/30/21	Oracle products	\$43,334	\$5,461,327	Renewal: GoldenGate - named user plus perpetual license; GoldenGate - processor perpetual	March
MLA-042	Oracle	3/30/16	5/30/21	Oracle products	\$1,334,894	\$6,796,221	Renewal of technical support services	April
IAA-392	Oregon Health Sciences University	6/18/18	6/30/20	WA All-Payer Claims Database (APCD) data sharing agreement and licenses	\$7,500	\$30,506	Adding custom report and associated data access fee	December
HBE-429	Peninsula Community Health Services	7/1/19	6/30/21	Lead navigator organization services	\$55,000	\$110,000	Extend period of performance, add funds, amend WAHBE contract manager, and revise key performance indicators	April
HBE-430	Public Health Seattle & King County	7/1/19	6/30/21	Lead navigator organization and enrollment center services	\$623,000	\$1,246,000	Extend period of performance, add funds, amend WAHBE contract manager, and revise key performance indicators	May
HBE-386	Quinn Thomas	7/1/18	6/30/20	Strategic partner for advertising, marketing & communications	\$36,000	\$2,313,446	Add social media influencers to task 2; add funding	October

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Contract #	Company	Start	End	Description	Additional Value	Total Contract Value	Changes	Change Made In
HBE-386	Quinn Thomas	7/1/18	6/30/21	Strategic partner for advertising, marketing and communications	\$385,000	\$2,698,446	Add funding; extend period of performance; add new statement of work; change WAHBE contract manager	March
HBE-386	Quinn Thomas	7/1/18	6/30/21	Strategic partner for advertising, marketing and communications	\$395,492	\$3,093,938	Add funding and add new statement of work for COVID-19 "Where to Get Health Insurance" campaign plan	April
HBE-386	Quinn Thomas	7/1/18	6/30/21	Strategic Partner for advertising, marketing & communications	\$600,000	\$3,693,938	Incorporate deliverable for paid media buy	May
HBE-398	Rice Insurance	9/1/18	8/31/20	Full service enrollment center	\$14,900	\$29,900	Extend period of performance; add funding; change WAHBE contract manager; incorporate new marketing plan	August
HBE-457	Rose International	3/1/20	6/30/22	Information technology and professional services		\$1,296,000	New contract	February
HBE-335	Ruxed	3/7/17	6/30/20	Design, development and implementation of HBE's SharePoint/Intranet	\$100,000	\$496,000	Extend the due date and add additional funds necessary for completion of the backlog of WAHBE post-development activities	July
HBE-335	Ruxed	3/7/17	6/30/21	Design, development and implementation of WAHBE's SharePoint/intranet	\$72,800	\$568,800	Extend period of performance; add funding; add new statement of work for backlogged projects; change WAHBE contract manager; revise post-development maintenance and support plan	February
MLA-437	Sage Intacct	7/18/19	7/17/20	Intacct licensing and support		\$139,314	New contract	August
MLA-437	Sage Intacct	7/18/19	7/17/20	Intacct licensing and support	\$30,841	\$170,155	Contracts module enhanced customization work	August

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Contract #	Company	Start	End	Description	Additional Value	Total Contract Value	Changes	Change Made In
MLA-437	Sage Intacct	7/18/19	7/17/21	Intacct licensing and support	\$148,707	\$318,862	Intacct licensing and support renewal	June
HBE-431	Sea Mar Community Health Centers	7/15/19	6/30/20	Lead navigator organization services		\$632,000	New contract	July
HBE-431	Sea Mar Community Health Centers	7/15/19	6/30/21	Lead navigator organization services	\$632,000	\$1,264,000	Extend period of performance, add funds, amend WAHBE contract manager, and revise key performance indicators	May
DES-252	SHI	10/1/19	9/30/22	Enterprise agreement (software)		\$950,000	New contract	October
DES-253	SHI	10/1/19	9/30/22	Enterprise agreement (cloud solutions)		\$3,900,000	New contract	October
DES-252	SHI	10/1/19	9/30/22	Enterprise agreement (software)	\$600,000	\$1,550,000	Additional not-to-exceed funds for expenses related to software	April
HBE-197	SiteCrafting	7/26/15	12/31/20	Corporate website development	\$4,268	\$177,128	Add funds	June
HBE-458	SoftHQ	3/1/20	6/30/22	Information technology and professional services		\$2,592,000	New contract	February
HBE-399	Suzie Health Solutions	9/1/18	8/31/20	Full service enrollment center	\$14,988	\$24,938	Extend period of performance; add funding; change WAHBE contract manager; incorporate new marketing plan	August
HBE-171	TEKSystems	9/21/15	12/31/19	Optional use contract for technical staffing	\$0	\$4,000,000	Extend Software QA/Testing - Expert work order	July
HBE-171	TEKsystems	9/21/15	12/31/19	Optional use contract for technical staffing	\$0	\$4,000,000	Add software QA/testing – expert work order	September
HBE-171	TEKsystems	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Extend period of performance	October

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Contract #	Company	Start	End	Description	Additional Value	Total Contract Value	Changes	Change Made In
HBE-171	TEKsystems	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Add resource title: IT Security Analyst	November
HBE-171	TEKsystems	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Extend Software QA/Testing - Expert work order	November
HBE-171	TEKsystems	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Extend Software QA/Testing - Senior work order	November
HBE-171	TEKsystems	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Add IT Security Analyst - Expert work order	November
HBE-171	TEKsystems	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Add Software QA/Testing - Expert work order	January
HBE-171	TEKsystems	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Extend Software QA/Testing - Expert work order	March
HBE-171	TEKsystems	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Extend Software QA/Testing - Expert work order	April
HBE-171	TEKsystems	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Extend IT Security Analyst - Expert work order	April
HBE-171	TEKsystems	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Extend Software QA/Testing - Expert work order	May
HBE-171	TEKsystems	9/21/15	6/30/20	Optional use contract for technical staffing	\$0	\$4,000,000	Extend Software QA/Testing - Expert work order	June
HBE-432	Tri Cities Community Health	7/2/19	6/30/20	Lead navigator organization services		\$111,000	New contract	July
HBE-432	Tri Cities Community Health	7/2/19	6/30/21	Lead navigator organization services	\$111,000	\$222,000	Extend period of performance, add funds, amend WAHBE contract manager, and revise key performance indicators	April
MLA-465	Trustwave	6/15/20	8/31/20	Security assessment		\$65,640	New contract	June
MLA-436	UserZoom	7/22/19	7/21/20	Subscription for cloud-based/online user testing tool		\$86,784	New contract	July

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Contract #	Company	Start	End	Description	Additional Value	Total Contract Value	Changes	Change Made In
MLA-436	UserZoom	7/22/19	7/21/21	Subscription for cloud-based/online user testing tool	\$105,790	\$192,574	Subscription renewal for cloud-based/online user testing tool	June
HBE-459	V Group	3/1/20	6/30/22	Information technology and professional services		\$1,296,000	New contract	February
HBE-425	Wakely	6/11/19	6/30/22	Enrollment projections and standardized benefit plan design	\$210,000	\$493,150	Add two statements of work: COVID-19 and legislative subsidy study	April
HBE-425	Wakely	6/11/19	6/30/22	Enrollment projections and standardized benefit plan design services	\$27,000	\$520,150	Add additional funds for statement of work 1	June
HBE-425	Wakely Consulting Group	6/11/19	6/30/22	Enrollment projections and standardized benefit plan design services	\$0	\$283,150	Add reimbursement for travel and other expenses language to Exhibit B-statement of work	August
HBE-433	Wenatchee Valley Hospital	7/1/19	6/30/21	Lead navigator organization services	\$156,000	\$312,000	Extend period of performance, add funds, amend WAHBE contract manager, and revise key performance indicators	April
SLA-439	Wipfli	7/16/19	7/15/20	PositivePay for Intacct (subscription)		\$1,312	New contract	July
SLA-439	Wipfli	7/16/19	7/15/21	PositivePay for Intacct (subscription)	\$1,313	\$2,624	PositivePay for Intacct renewal	June
HBE-434	Yakima Neighborhood Health Services	7/1/19	6/30/20	Lead navigator organization and enrollment center services		\$215,000	New contract	July
HBE-434	Yakima Neighborhood Health Services	7/1/19	6/30/21	Lead navigator organization services	\$215,000	\$430,000	Extend period of performance, add funds, amend WAHBE contract manager, and revise key performance indicators	April