ATTACHMENT I: STATEMENT OF WORK

1 INTRODUCTION

The purpose of this contract is for the Contractor to design, implement, and provide on-going maintenance and operation of a Medicaid Eligibility and Enrollment solution (the "Project"). The goal of DHH is to implement an automated solution that will support Medicaid eligibility and enrollment processes using modern technologies, and allow Louisiana Medicaid to be more agile in responding to the changing needs of applicants, enrollees and partners while meeting all Federal and State requirements.

Completion of the Deliverables described herein shall be implemented referencing the guidelines established by the Centers for Medicare and Medicaid Services (CMS) for ACA compliance, MITA compliance and the Seven Conditions and Standards requirements all as set forth and defined at the time of execution of the Contract. The Seven Conditions and Standards are:

1. Modularity Standard — Use of a modular, flexible approach to systems development.
2. MITA Condition — Requires states to align to and advance increasingly in MITA maturity for business, architecture, and data.
3. Industry Standards Condition — Ensures States alignment with, and incorporation of, industry standards.
4. Leverage Condition — Promotes solution sharing, leverage, and reuse of Medicaid technologies and systems within and among states.
5. Business Results Condition — Supports accurate and timely processing of claims (including claims of eligibility), adjudications, and effective communications with providers, beneficiaries, and the public.
6. Reporting Condition — Requires states to produce transaction data, reports, and performance information.
7. Interoperability Condition — Ensures seamless coordination and integration with the Exchange (whether run by DHH or federal government), and allows interoperability.

The Contractor has proposed that the Project be executed across two Releases. Release 1 provides Louisiana with a modernized Self-Service and Worker Portal and provides core functionality that will completely replace all associated legacy systems (as defined in the Data Conversion section of this SOW) in 20 months and two weeks after project start. A second release completes the Louisiana Medicaid E&E Solution, with the implementation of supporting functions and additional automation. The parties will make reasonable efforts to complete all deliverables from both Release 1 and Release 2 within 36 months from the start of the project.

2 REQUIREMENTS

The scope of service for the requirements is set forth in the "Scope of Work (as defined in Proposal Response Section)" and "Scope Clarification" columns in the following tables.

The tables below refer to proposal response sections and sub-sections under "Scope of Work (as defined in Proposal Response Section)" column. When a parent section of RFP response is referenced under the column "Scope of Work (as defined in Proposal Response Section)", the corresponding subsections of RFP response are deemed included and vice versa.

Any material changes to these services, obligations, or assumptions will require a Task Order pursuant to Section 3.2, System Enhancement and Support of this Attachment.

The requirements defined in RFP Sections III.B-H are mapped to the Statement of Work in the following manner:

2.1 BUSINESS PROCESSES

Pre-Screening for Medicaid/LaCHIP Eligibility		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
a) Must allow anonymous screening. b) Must be accessible from the Web Portal. c) Must utilize the same eligibility rules as the state's single streamlined application. d) Must allow for seamless transfer of pre-screening data directly into the state's single streamlined application if the applicant chooses to apply for Medicaid after completing the screening process.	2.2.1, 2.2.1.1, 2.2.1.2, 2.2.1.3, 2.2.1.4	

Intake		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
a) Must support paper, phone, online, and external system sources of applications, verifications, and other eligibility related forms and documents.	2.2.2.1	
b) Paper-based intake process must allow for scan verification and manipulation before scanned documents are accepted into the Eligibility and Enrollment system.	2.2.2.2	• The E&E Worker Portal will Integrate with existing high-speed scanners file stores and local scanning file stores (utilizing unique Scanner ID) • The E&E Worker Portal will populate work item on worker dashboard, based on agreed upon assignment/routing logic • The E&E Worker Portal will provide the ability to upload documents received via fax, email, or screen capture from a local machine • The E&E Worker Portal will provide the ability to manipulate document through the following: flip, rotate, and remove page (unless a 1 page document, and zoom and fit for viewing) • The E&E Worker Portal will associate scanned document to existing Person (Release 1) or Provider (Release 2) utilizing MCI and MPI • The E&E Worker Portal will provide the ability to associate meta data to one or more documents

Intake		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
		at once. The full list of meta data to be captured will be determined during design sessions. • The E&E Worker Portal will provide the ability to classify documents as “urgent” (ex. Pregnancy/high risk) • The E&E Worker Portal will provide the ability to accept or reject a document • The E&E Worker Portal will send documents to EDMS for storage
c) Must have the capability of recording, uploading, storing, playing back audio files (telephonic signatures) in the EDMS and associate them with Medicaid applications/cases. All electronic verifications and eligibility determinations received from interfaces must be stored in the EDMS and associated with pertinent case record.	2.2.2.3	The E&E Worker Portal will provide the ability to upload, store and playback audio files (telephonic signatures) is in scope for Release 1. • The E&E Solution will provide the ability for identified workers (ex. call center workers) to browse their local device to upload .wav file to the EDMS with Application or Case number metadata. The decision to use Self-Service Portal or Worker Portal will be made during design phase. • Encryption, compression, and virus scanning of the uploaded file is not the responsibility of the E&E Contractor. • Interface between EDMS and E&E Worker Portal to retrieve and play (via local desktop software) telephonic signature audio file. • The XML Electronic verifications and eligibility determinations received from interfaces will be converted to readable PDF before storing to EDMS
d) State staff must be able to invalidate applications if they are obviously invalid.	2.2.2.4	• Identified workers will have the ability to invalidate an application based on a defined list of reasons (documented during JAD sessions). Invalid applications will not count against overall application count. • Identified workers will have the ability to withdraw an application (prior to becoming a case). Withdrawn applications will count against overall application count.
e) Must generate automatic notifications to appropriate case workers upon receipt of any documentation pertaining to their cases (e.g. phone, mail, online, etc.).	2.2.2.5	When a new document is added to EDMS system that pertains to an application, individual or case in E&E system: • EDMS will provide document meta data to E&E Worker Portal • E&E Worker Portal will generate work item and populates worker dashboard based on agreed upon assignment logic

Intake		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
		• Interface between E&E Worker Portal and EDMS will provide the ability for worker to view associated document stored in the EDMS
f) Some of the external systems of pre-determined and/or to-be-determined applications for Medicaid are Centers for Medicare and Medicaid (CMS)'s FFM, DCFS' FITAP and ELE, Social Security Administration (SSA)'s SDX and LIS. The intake process must be easily extendable with new sources of applications for Medicaid.	2.2.2.6	Automated application submission from Centers for Medicare and Medicaid (CMS)'s FFM, DCFS' FITAP and ELE, Social Security Administration (SSA)'s SDX and LIS, are included in Release 1 scope. • XML requests and responses from all newly identified external parties/agencies will adhere to the agreed upon WSDL standards. • The WSDL standard for newly identified external parties/agencies will mirror the WSDL for applications that are passed from the E&E Self-Service Portal and the E&E Worker Portal. • Additional agencies/entities that choose to submit applications through an interface with the E&E system must be identified prior to the requirements phase of Release 2 to be considered for inclusion in Release 2.
g) Paper-based intake process must be able to integrate with the scanning solution used by the Department.	2.2.2.7	• The E&E Worker Portal will integrate with existing high-speed scanners file stores and local scanning file stores (utilizing unique Scanner ID) • The E&E Worker Portal will populate work item on worker dashboard, based on agreed upon assignment/routing logic • The E&E Worker Portal will provide the ability to upload documents received via fax, email, or screen capture from a local machine • The E&E Worker Portal will provide the ability to manipulate document through the following: flip, rotate, and remove page (unless a 1 page document), zoom and fit for viewing • The E&E Worker Portal will associate scanned document to existing Person (Release 1) or Provider (Release 2) utilizing MCI and MPI • The E&E Worker Portal will provide the ability to associate meta data to one or more documents at once • The E&E Worker Portal will provide the ability to specify document type • The E&E Worker Portal will provide the ability to classify documents as "urgent" (ex. Pregnancy/high risk)

Intake		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
		• The E&E Worker Portal will provide ability to accept or reject a document • The E&E Worker Portal will send documents to EDMS for storage • If necessary, the E&E Worker Portal will generate a new work item for further processing, based on agreed upon assignment/routing logic (ex. Assign scanned application to worker for manual data entry)
h) Phone-based intake process must be able to integrate with the Interactive Voice Response (IVR) solution used by the department (for applicant eligibility status checks and paper form requests, and enrollee change reporting, e.g. demographics change, card replacement, etc.) 1. Must process IVR-initiated requests automatically unless the IVR system is unable to voice-recognize required data elements 2. Must have a worker-assisted workflow path for IVR-initiated requests that failed to voice-recognize some or all of required data elements, allowing the worker to listen to the recorded audio response and manually key-in request data. 3. Must have IVR system reporting integrated with the rest of E&E system reporting.	2.2.2.8	• The IVR system will send enrollee change reporting data to the E&E Worker Portal via a webservice using a XML that conforms to the existing IVR WSDL. • If IVR is unable to voice recognize data, in addition to the XML, an audio file will be generated by IVR, stored in the EDMS, and associated to the case. • The E&E Worker Portal will consume the XML provided by IVR • Where possible, as defined during design, changes will be processed automatically in the E&E Worker Portal • Change reports that cannot be processed automatically will generate a work item on the worker dashboard based on agreed upon assignment logic • Encryption, compression, and virus scanning of the IVR audio file is not the responsibility of the E&E Contractor. • Interface between EDMS and E&E Worker Portal to retrieve and play (via local desktop software) IVR audio file. • Eligibility status checks must conform to the established WSDL for the E&E solution. Requests will come as an XML from the IVR solution to the E&E Worker Portal and a response provided back to the IVR solution. • Paper form requests will conform to existing IVR WSDL. Requests will come as an XML from the IVR solution to the E&E Worker Portal. During design, the process for sending the form with be finalized. • Card replacement requests will conform to existing IVR WSDL. Requests will come as an XML from the IVR to the E&E Worker Portal. The MMIS solution will be responsible for issuing the card replacement. • The interface between the E&E solution and MMIS for card replacements will be a nightly batch interface. The specifications of the

Intake		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
		interface file layout will be further defined during design. • IVR will provide the ability for recipients to initiate renewals. Renewal requests will conform to the existing IVR WSDL. Requests will come as an XML from the IVR to the E&E Worker Portal. A work item will be generated based on agreed upon assignment logic. Worker will then process the renewal request manually in the E&E Worker Portal. • IVR will provide the ability for applicants to initiate applications. Application requests must conform to the established WSDL for the E&E solution. Requests will come as an XML from the IVR to the E&E Worker Portal. A work item will be generated based on agreed upon assignment logic. Worker will then process the application request manually in the E&E Worker Portal. • All existing IVR WSDL will be provided to the contractor during requirement phase.
i) Must be able to associate accepted documents with central Recipient/Provider record stored in Master Person/Provider Index (MPI) that is part of Master Data Management (MDM). If the Person/Provider does not yet exist in the MPI, a new MPI record must be created at the time the document is accepted.	2.2.2.9	
j) All paper-based documents received via the intake process must be stored electronically in the document management system (EDMS) and associated with Recipients/Provider to whom those documents pertain.	2.2.2.10	

Verification Processes		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
The Eligibility and Enrollment system must support automatic verification of the following applicant information using internal and external systems/data sources including but not limited to: i. Checking Identity (e.g. CMS Data Hub-Experian) ii. Citizenship/lawful presence (e.g. CMS Data Hub-SSA/DHS) iii. Income (e.g. CMS Data Hub-TALX, RRV; LWC, LDR) iv. Allowable deductions v. Disability (e.g. CMS Data Hub-SSA) vi. Resources/Assets	2.2.3	• For the E&E solution, Automated ID proofing through the FDSH/Equifax service, Master Person Index Search and manual ID proofing are in scope for Release 1. • Identity proofing logic will be invoked for head of the household when clients create an account using the self-service/customer portal. • For the E&E solution, asset/resource verification for SSI recipients will be done via the Federal SSA interface. Asset/resource verification for non-SSI applicants will be done using an interface with DCFS. • The functionality of asset verification is in scope for Release 2. Existing MAS system will remain in place during release 1.

Eligibility Determination		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
a) Must support all Medicaid (MAGI and non-MAGI) and LaCHIP including but not limited to: i. MAGI 1. Children 2. Parent/caretaker relative 3. Pregnant women 4. Breast and cervical cancer 5. Family planning 6. Greater New Orleans Community Health Connections (GNOCHC) ii. Non-MAGI 1. Long term care (LTC) 2. Medicare eligible	2.2.4 and 2.2.4.1	• The E&E Solution will support medicaid programs/categories for which BHSF determines medicaid eligibility as defined in LA Medicaid Policy. • Final LA Medicaid Policy will be provided to the contractor during the start-up phase of the project

Eligibility Determination		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
3. Disability related 4. Aged 5. Blind 6. Waivers iii. LACHIP 1. Children 2. Unborn children		
b) Eligibility determination must happen real-time whenever possible.	2.2.4.2	• Real-Time Eligibility and Automated Renewals are in scope for Release 1. • When possible, real-time eligibility will be executed on applications entered via the Self-Service Portal and a result of Approved, Denied, or Pending will be displayed to the customer on the Self-Service Portal. • If eligibility is not determined automatically, a work item is created for the worker to manually review the application and determine eligibility. • The E&E Worker Portal will invoke calls to FDSH for verification as defined in the state verification plan
c) Eligibility processes must be automated, requiring State worker intervention only when automated processes encounter exceptions.	2.2.4.3	
d) Eligibility processes must accommodate exceptions encountered during automated processing (e.g., name mismatches, income and other verification discrepancies, etc.). If these exceptions cannot be automatically resolved, manual user interfaces and processes must allow State workers to resolve the issues and resume automated processing.	2.2.4.4	• If eligibility is not determined automatically, a work item will be created for the worker to manually review and determine eligibility.
e) Must determine standard area(s) of eligibility when automatic certification is not possible (whether	2.2.4.5	• All exception to automated eligibility will not go through the supervisory approval or second party review. • The rules of submission for supervisory approval or second party review will be defined during JADs

Eligibility Determination		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
MAGI or non-MAGI related).		
f) Must allow State workers the ability to manually determine and process eligibility.	2.2.4.6	
g) Must include an option for State workers to review automated denials.	2.2.4.7	

Enrollment and Notification		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
a) Must allow for role-based access to eligibility information (e.g, Providers, other agencies, etc.). b) Must include a process to send notifications in paper and electronic formats. c) Must include a process to automate notice of approval, denial, rejection, closure, change, etc. d) Must include a mechanism for invoicing and tracking premiums/payments. e) Must be able to transmit referrals to external systems (CMS, MMIS, LaHIPP, etc.).	2.2.5.1-5	Mechanism for invoicing and tracking premiums/payments is defined as follows: • Applies to FOA and LaCHIP programs only • E&E Worker Portal will prevent the workers from authorizing a case if the members in the case qualify for LA CHIP category of assistance until the first premium is paid (with the exception of American Indian or Alaskan Native since there is no premium). • Approved and unauthorized LaCHIP and FOA cases will be sent to the Office of Group Benefits (OGB) via an interface defined during design to communicate premium data • The E&E Worker Portal will provide the ability to process responses received back from OGB and either authorize associated cases and send data to MMIS or close pending cases that have not been authorized within 30 days

Suspensions/Reductions		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
a) Must allow a process to suspend/reduce benefits. b) Must accept specified classes of suspensions/reductions from external sources.	2.2.6.1-2	

<table>
<tr><th colspan="3">Case Review</th></tr>
<tr><th>RFP Reference</th><th>Scope of Work (as defined in Proposal Response Section)</th><th>Scope Clarification</th></tr>
<tr><td>a) Must encapsulate information used in determination to be reviewed.
b) Must support different types of case reviews.</td><td>2.2.7.1-2</td><td>Ability to conduct Case Review with basic functions described in the “CaseReviewUserGuide.pdf” file provided by DHH will be included in Release 1. This includes the following functions:
• Basic case search
• Creation of case notes
• Ability to document review decision (Eligibility Correct Decision, Errors Found Decision, Further Action Required Decision)
• Ability to sort and filter Case Reviews based on Status (Open, Analyst, Complete)
Release 2 will include the following Case Review Functionality:
• Criteria Definition
• Automated Sampling
• Manual Sampling
• Ability to perform multiple types and levels of case reviews. The types and levels of case review will be defined during design sessions.</td></tr>
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<table>
<tr><th colspan="3">Appeals</th></tr>
<tr><th>RFP Reference</th><th>Scope of Work (as defined in Proposal Response Section)</th><th>Scope Clarification</th></tr>
<tr><td>a) Must include a process for automatically registering and routing appeals.
b) Must be accessible from any screen where an authorized person may be working or interacting with an applicant or enrollee.
c) Must communicate appeals data to case management system automatically.
Must have the ability to auto-compile all appeals-related documentation from the document management system into an appeals package of documents.</td><td>2.2.8.1-4</td><td></td></tr>
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Automated Renewal Process		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
a) The system must determine, based on pre-defined rules, Members eligible for renewal. b) Must automate and record electronic verification searches for relevant data. c) The system must automatically attempt to recertify enrollees using current eligibility rules.	2.2.9.1-3	Automatic Renewal functionality is in scope for Release 1. • E&E Worker Portal will identify cases due for renewal in next two months. • Identified cases will be evaluated against the rules for auto-renewal criteria (As defined in "ID - Admin-Renewal Process Flow.pdf" in the bidders library)
d) Must automatically generate pre-populated renewal form, request for information notices and automated phone and e-mail alerts for enrollees that could not be automatically certified.	2.2.9.4	
e) Must automatically record all automated contact attempts in case notes. f) Must notify the case worker if a case has neither been closed nor renewed after all automated contact attempts have been made.	2.2.9.5 2.2.9.6	
g) Must automate notice generation including, but not limited to: i. Eligibility extension or change in benefits ii. Non-response closure notices, if no data received since initial request iii. Closures for undisputed ineligibility (moved out of state, death, etc.) iv. Notices for proof of insurance (1095-B)	2.2.9.7	

Partner Management		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
a) Application Center Processes (See Procurement Library) i. Must support application center management processes (enrollment, training, certification, etc.). ii. Must have application center payment process that allows for payment of valid applications as deemed by the automated Eligibility and Enrollment system and/or State staff. iii. Per application payment status must be available to application centers through the web portal	2.2.10.1	Application Center functions described below are in-scope for Release 1: • The E&E Worker Portal will provide the ability to apply to be an Application Center via the Self Service Portal (web versions of the AC-2 and EFT forms currently submitted via paper). Physical signature may still be required to be mailed separately and worker will not be able to approve until signature is received. • The E&E Worker Portal will create a work item on worker dashboard based on agreed upon assignment logic to register Application Center • The E&E Worker Portal will provide the ability to apply to be an Application Center Representative (ACR) via the Self Service Portal. Physical signature may still be required to be mailed separately and worker will not be able to approve until signature is received. • The E&E Worker Portal will create a work item on worker dashboard based on agreed upon assignment logic to register Application Center Representative (ACR) • The E&E Worker Portal will provide the ability to create and edit Application Centers (Organization Details, Organization Contacts, Location Information, Client Types, Certifications (add additional certifications), Surveys (add additional surveys), Contact Information (Physical and Mailing Addresses, Phone Numbers, Emails), and Notes) • The E&E Worker Portal will provide the ability to create, remove, and edit Application Center account information (application rate, effective date, payment method, routing number, Tax ID number) • The E&E Worker Portal will provide the ability to create Application Center Representatives (ACR)s: Name, Email, Phone, Trainings, and Certifications) • The E&E Worker Portal will integrate with EA IAM for workers with the appropriate security roles to provision and removal Security Roles for Application Center Representatives (ACR)s • The E&E Worker Portal will provide the ability to link Application Center Representative (ACR)s to Application Centers and set Location Roles • The E&E Worker Portal will provide the ability to update Application Center Representative (ACR) certification and training statuses • The E&E Worker Portal will provide the ability to search for Application Centers

Partner Management		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
		• The E&E Worker Portal will provide the ability to search for Application Center Representatives (ACR)s • The application center management process will support sending the AC_Invoicing_FTP_FileSpec.pdf payment information via FTP to the single identified Application Center payment vendor • Upon rendering of payment to application centers, the single identified payment vendor will return a flat file containing monthly payment information for every application center (by ACR) that has received payment for that given month. • Ability for Application Center Representatives (ACR)s with the designated security role to view the payment history by each ACR for their Application Center.

Provider Notification Processes		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
i. Must allow State staff to accept, review and approve Provider access request to the Provider notification part of the system (e.g. notification about enrollee admission, transfers, deaths, etc.) ii. Must allow approved Providers' staff to submit notifications about: 1. Enrollee admissions 2. Transfers/discharges/ deaths/status changes 3. Medicaid newborns 4. Patient liability adjustments 5. Demographic changes 6. Spend down liability (110-MNP) 7. Presumptive eligibility (PE)	2.2.10.2	FNS Frontend will remain for Release 1. Provider requests will be processed via the E&E Worker Portal during Release 1. During Release 2, FNS front end will be replaced by the Self Service Portal. The following functionality is included in scope for Release 1: • Integration with existing FNS front-end system to replace Provider Notification module from App Suite • Creation of work item on worker dashboard based on agreed upon assignment logic • Creation of automated case notes. The criteria will be defined during design sessions • Ability to combine corrected forms based on unique parent form ID and populate on worker dashboard • Ability to return form status back to existing FNS system (including Medicaid IDs assigned to newborns) • Ability to compute aggregate status of multiple forms based on unique parent form ID • Ability to generate readable PDF form using the incoming XML from FNS • Ability to associate the PDF form to a case and store it in EA EDMS solution

<table>
<tr><th colspan="3">Provider Notification Processes</th></tr>
<tr><th>RFP Reference</th><th>Scope of Work (as defined in Proposal Response Section)</th><th>Scope Clarification</th></tr>
<tr><td>8. Etc.
iii. Must allow Providers to make changes to or cancel their submissions at any time prior to processing.
iv. The processing of the Provider notifications must be automated, requiring State staff intervention only whenever exceptions occur.
v. The processing of the Provider notifications must allow for approval, change and rejection within workflows.
vi. Must allow approved Providers to check the processing status of their notifications.
vii. Must allow Medicaid staff to notify third parties of the status of Provider notifications (e.g. delivery physicians, etc.)</td><td></td><td>• Generation of work item for canceled forms
• Ability to associate PDF from EDMS to provider request work item and view request via interface with EDMS
• Medicaid newborns added to an existing Medicaid case are automatically added to that open case of the Medicaid-eligible mother.
• Generate work item for manual processing for Medicaid Newborn forms that failed to process automatically
• E&E Worker Portal will notify the providers with Medicaid ID (with related info) as listed on the 152N form once the 152N form is processed successfully.
• The Patient Liability Adjustments form will be generated in TIFF format.
• Contractor will integrate with DHH's current faxing solution (currently - push to RightFax) for PLI, 110MNP, New Born. State will work with the Contractor during the design phase to potentially eliminate the need for any or all faxing by making use of the Provider Portal.
The following functionality is included in scope for Release 2:
• Ability to apply to be a provider via the Self Service Portal. Physical signature will still be required to be mailed separately and worker will not be able to approve until signature is received.
• Creation of a work item on worker dashboard based on agreed upon assignment logic to register provider
• Ability to create and edit provider details
• Integration with EA IAM for workers with the appropriate security rights to provision and provider Security Roles for Self Service provider features
• Ability to link provider user to provider locations and specify security roles for each location
• Automated email to provider after provisioning completed by worker
• Integration with MDM solution for Master Provider Index
• Replacement of FNS frontend and ability to submit the forms currently being submitted by existing FNS system: Enrollee admissions, Transfers / discharges / deaths / status changes, Medicaid newborns, Patient liability adjustments, Demographic changes, Spend down liability (110-MNP), Presumptive eligibility (PE)</td></tr>
</table>

Provider Notification Processes		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
		• Ability to generate forms to be sent to the providers and clients based on mutually agreed upon form generation rules • Dynamic display of forms in Self-Service portal based on logged in provider • Integration with MDM solution to pre-populate online forms with MCI data • Ability to view forms submitted for all providers assigned to a provider location • Ability to integrate with E&E Worker Portal to view status (In Progress, Invalid, Processed)

2.2 GENERAL REQUIREMENTS

The Contractor must provide an Eligibility and Enrollment system that adheres to the following requirements during the course of the contract.

RFP Reference	Scope of Work (as defined in Proposal Response Section)	Scope Clarification
Must meet Level 3 of the Medicaid Information Technology Architecture (MITA). (See Procurement Library: http://new.dhh.louisiana.gov/index.cfm/newsroom/category/47)	2.3.1	
Must comply with the Health Insurance Portability and Accountability Act (HIPAA).	2.3.2	
Must comply with the CMS Seven Conditions and Standards.	2.3.3	
Must be Affordable Care Act (ACA) compliant.	2.3.4	
Must be able to pass CMS Gate Reviews.	2.3.5	• Contractor shall perform services in accordance with the applicable specifications / requirements to assist the State with passing CMS Gate Reviews.
Must be National Voter Registration Act (NVRA) compliant and adhere to State guidelines (Guidelines) and policies (for BHSF NVRA Policy, see Procurement Library).	2.3.6	• Reception Log (replaces TraMS) functionality to allow workers to manually track declaration forms and voter registration forms received in the office. • Provide link to register online from Reception Log functionality so that workers can register clients,

RFP Reference	Scope of Work (as defined in Proposal Response Section)	Scope Clarification
		track declaration forms and voter registration forms • Ability to generate NVRA mailings via EA CC component from reception log • Monthly and Quarterly reports to be generated from both reception log entries and data captured via online applications, renewals, change reports, etc…) including: o Reporting Quarter o Total number of applications for service or assistance, re-certifications, renewals, and changes of address o Total number of declaration forms received o Total number of completed voter registration applications received and forwarded to ROV
Must allow flexibility interfacing to and from other systems using industry standard formats where possible and proprietary formats when necessary.	2.3.7	
Must include comprehensive auditing of all operations within the system.	2.3.8	
Must follow Federal and State mandates regarding record keeping, including audit logs. Must provide data archiving plan for data and audit logs older than five (5) years	2.3.9	
All interfaces with internal and external systems must be centrally visible and have the ability to be monitored by State staff.	2.3.10	UDDI will continue to be used unless the Enterprise Architecture ESB component is determined and available by Milestone 1, as defined in the RFP Response, Section 2.23.7. It is assumed that once the EA ESB component has been implemented, central visibility to see status, usage history, and alerts for any issues will be available through this EA ESB component.
The contractor shall clearly identify any systems or portions of systems outlined in the proposal which are considered to be proprietary in nature.	2.3.11	
All project-related documents, user manuals and system documentation must reside and be maintained within the DHH	2.3.12	

RFP Reference	Scope of Work (as defined in Proposal Response Section)	Scope Clarification
PMO designated environment. DHH defined processes for change management must be followed. Workflows, approvals, etc. will occur within the appropriate environment.		
All business processes implemented by the system must be integrated with the unified workflow and task features of the system. (e.g., Case review process workflow and tasks should be accessible from the same web portal as eligibility determination workflows and tasks.)	2.3.13	

2.3 BUSINESS REQUIREMENTS

The newly implemented Eligibility and Enrollment system must include support for the following minimum Business Requirements.

Web Portal		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
The Web Portal must support the needs of multiple user types, from State workers and Providers to the general public. Users must be able to retrieve and input Medicaid eligibility data, securely store and manage case documentation, transmit and process routine changes to enrollee information, and complete electronic Medicaid applications which are then directly routed into the automated eligibility processes for appropriate action depending upon the nature, originator, and intended Recipient of the data. We envision a solution that integrates individual components through a task management system which may be modified by the Department to quickly adapt	2.4.1 a) 2.4.1.1 b) 2.4.1.2 c) 2.4.1.3 d) 2.4.1.4 e) 2.4.1.5 f) 2.4.1.6 g) 2.4.1.7 h) 2.4.1.8 i) 2.4.1.9 j) 2.4.1.10 k) 2.4.1.11 l) 2.4.1.12 m) 2.4.1.13 n) 2.4.1.14 o) 2.4.1.15 p) 2.4.1.16 q) 2.4.1.17	b) 2.4.1.2 - The State will be responsible for translations to the languages desired. d) 2.4.1.4 - Ability to edit/update the help text is available to users with the designated security role. h) 2.4.1.8 - Ability to update events stored in reference tables is available to individuals with the designated security role. j) 2.4.1.10 - This functionality is in scope for Release 2. • E&E Worker Protal will capture the data to complete ER-1 (rev 04/2010). • On entering Date of Death in E&E worker protal, Estate Recovery referral will be initiated when o He/She has ownership interest in home property o was 55 or older and in Nursing Home or Community based waiver program at the time of death. • E&E Worker Portal will save ER-1 form, resource information and signed rights and responsibility form as a packet in EDMS

Web Portal		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
to changing business processes. a) Must be a responsive web application that supports mobile (smartphone and tablet) and desktop screen sizes. i. All partner features of the web portal must be optimized for tablet and desktops. ii. All public features of the web portal must be optimized for phone, tablet and desktops, including the Single Streamlined application. b) Must provide a web portal in multiple languages included but not limited to English, Spanish, and Vietnamese. c) Must be Section 508 compliant for web design as well as best practices that exceeds compliance, such as well-defined rollover tooltips or intrinsically high contrast color schemes as a design choice. d) Help text must be: i. Contextual ii. Stored in a central repository iii. Global and field-level help when applicable iv. Language and reading level appropriate e) Must provide real-time chat capabilities that integrate with existing CosmoCom solution (See Procurement Library for CosmoCom Specifications). i. Includes Customer Service Representative (CSR) scheduling		• E&E Worker portal will send an email to the Program Specialist in TPL/Medicaid Recovery Unit. • There will be one email recipient per parish • Subject of the email will be the form name being sent. • Body of the email will include identifying information of the case as defined in the design session • Resource information for active Long Term Care (LTC) members will be converted from MAS to E&E solution. k) 2.4.1.11 - This functionality is in scope for Release 2. • E&E Worker Protal will capture the data to complete TPL-MR (rev. 01/2013). • TPL-MR will be initiated by the worker when a member is determined ineligible for a period of time due to fraud • For LTC/Waiver cases, the referral will only be sent if PLI change is over $50 • E&E Worker portal will send an email to the Program Specialist in TPL/Medicaid Recovery Unit. • There will be one email recipient per parish • Subject of the email will be the form name being sent. • Body of the email will include identifying information of the case as defined in the design session Fraud Referral - Must allow ability to submit fraud referral information from any screen within Eligibility and Enrollment system that should follow the fraud workflow (Report Fraud). l) 2.4.1.12 - Paper-based medical records are scanned and stored in the EA EDMS. Security and protection of medical information is managed through the EA EDMS and is independent of the E&E solution. m) 2.4.1.13 - Ability to create and/or modify welcome messages, announcements, link to documents related to Medicaid E&E, as well as link to Medicaid Policies and Procedures catalog on the Homepage of the self-service/customer portal is available to individuals with the designated security role. This functionality is included in Release 1. q) 2.4.1.17 - The E&E solution will provide appropriate non-MAGI questions required to

Web Portal		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
ii. Real-time decision support identifying CSR availability f) Must support multiple user types both internal and external. Multiple user type of the Proposals may include, but are not limited to: i. State workers ii. Partner users (e.g. application centers, nursing homes, hospitals, etc.) iii. Public users g) Role-based security and authority h) Calendar i. System/group/personal calendar of important eligibility dates (cut-off dates, holidays, staff availability, notice expiration dates for individual cases, appeal dates, etc.). ii. Must be able to integrate with Microsoft Exchange/ Outlook. i) User interface to support task lists for State and partner users which are populated through trigger events (verification workflow may trigger person match issues, eligibility determination process may trigger manual review of task for Medicaid analyst, paper document receipt notification to caseworker). i. Multi-escalation paths ii. Automated alerts via multiple methods (e.g., e-mail, text message, etc.) iii. Ability to define custom task resolution interfaces (e.g., whenever person match issue		determine such eligibility as defined by the LA Medicaid policy.

Web Portal		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
task is being resolved, person iv. match specific user-interface must be displayed to the user to allow for the resolution of the issue.) v. Ability to group tasks by worker specified criteria (e.g., person, Provider, application ID, etc.) vi. Ability to balance tasks/work between State staff based upon configurable rules (e.g. experience level, hours worked, availability) vii. Ability to automatically assign tasks that use workload balancing rules, task metadata, and case data to specific workers. viii. Ability to add, reorder and sort by any column and/or combination. ix. Ability to specify the status of a task such as x. indicating the task is in progress or awaiting response, etc. xi. Allow the user to configure e-mail notifications related to their task list (e.g., task assignment, etc.) j) Recovery Referral i. Must allow ability to submit recovery referral information from any screen within the Eligibility and Enrollment system which should follow the recovery workflow (See Procurement Library for BHSF Form TPL/MR).		

Web Portal		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
k) Fraud Referral i. Must allow ability to submit fraud referral information from any screen within Eligibility and Enrollment system that should follow the fraud workflow (Report Fraud). l) Medicaid Case Management i. Must provide secure contextual access to all documents pertaining to people, Providers, etc., stored in EDMS. These records do not include medical records. ii. Case Notes a. Must a have a unified view of automated and manually-creates notes, clearly indicating the type and source of the note, in addition to the note information itself. b. Must have automated case notes created for all case events as defined by the Department (e.g. started an application, application submitted, eligibility determined, requested appeal, etc.) c. Must allow designated State staff configure which E&E events trigger automated notes and what the content of those notes should be. d. Must have an API to allow other system components (e.g. eligibility determination,		

Web Portal		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
verification, etc.) as well as external systems to programmatically add manual and automated notes for anything and anyone related to the Medicaid Case. iii. Must provide clear view of the whole case including: 1. household members 2. present and past eligibility determinations 3. contact information 4. program/ process specific details (disability information, resource/asset information, recovery, TPL and fraud, etc.) iv. Must include integrated tasks and workflows. v. Automated alerts with the ability to establish triggers configurable by State staff. vi. Must allow for special case classifications which would designate highly secured/classified information for an enrollee. When classification is designated this would interact with workflows, role-based security, etc. This would allow for varying degrees of highly-restricted access to information linked to this enrollee. m) State staff must have the ability to manage content for all role based defined features and functions of the portal		

Web Portal		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
(links, texts, documents, etc.). n) All Applicant, enrollee, and partner communications must be accessible through the web portal (notices, e-mails, text messages, etc.). o) State staff must have the ability to post messages and/or alerts on the appropriate level, as designated by the Department, to the portal: global, user-type-specific (i.e. public, partner, worker), organization/location-specific (i.e. for specific partners or worker locations), public/partner/worker-user-specific (i.e. for specific user(s) across the system). p) Must be able to modify enrollee information, track and identify changes, and tell who made the changes, including but not limited to: i. Recipient changes (demographic changes, Medicaid card replacements, name changes, manage care plan selection changes, etc.). ii. Nursing facility changes (admit, discharge, death, level of care, transfer, etc.). iii. Hospitals (Newborns, presumptive eligibility, etc.) iv. Provider (Patient liability adjustments) v. State staff (Ability to modify, update, all areas) q) Single, streamlined Medicaid application		

Web Portal		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
i. Per official CMS ACA guideline compliance, including real-time eligibility. ii. Must accommodate State-specific CMS approved customizations. iii. Must accommodate unique presentation requirements of all user types (i.e. public, partner, and worker users). 1. State workers must be able to enter paper applications into Eligibility and Enrollment system with the same ease and efficiency as the online single, streamlined applications. a. Must allow State workers to modify a previously submitted application.		

Workflows		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
a) Must trigger workflows based on specified rules *Note: The following are examples of occurrences which may generate a manual event. This is not an all-inclusive list. 1. Manual determination of ineligibility 2. Members aging out 3. Death 4. Renewal, etc. b) Must be capable of designating conditions for the trigger event	a) 2.4.2.1 b) 2.4.2.2 c) 2.4.2.3	

Workflows		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
c) Must be capable of spawning task action items or State staff based on triggered events.		

Document Management		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
a) Must include ability to store documents pertaining to Recipients, Providers, cases, and Medicaid operations (manuals, policies, procedures, etc.). b) Must allow for maintenance and versioning of operational documents. c) Must allow role-based access permissions to various document classes	a) 2.4.3.1 b) 2.4.3.2 c) 2.4.3.3	a) Section 2.4.3.1 - The ability to store documents is in scope for Release 1. b) Section 2.4.3.2 - The ability to maintain and version is in scope for Release 1. c) Section 2.4.3.3 - The ability to allow role-based access to documents is in scope for Release 1

Master Person Index		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
a) Must provide a modular master person index for all data related to applicants, enrollees, and other more generally, people involved in any way in E&E processes. b) Interface must support any import and/or matching processes along with conflict resolutions. c) Every component of the Eligibility and	a) 2.4.4.1 b) 2.4.4.2 c) 2.4.4.3 d) 2.4.4.4	The E&E MDM component is used unless the Enterprise Architecture ESB component is determined and available by Milestone 1, as defined in the RFP Response, Section 2.23.7.

Master Person Index		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
Enrollment system must utilize this master person index including the intake process, verification process, etc. d) Must automatically notify designated State staff of any data conflicts and allow for manual resolution of those conflicts.		

Master Provider Index		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
a) Must provide a modular master Provider index for all data related to Providers, Facilities, Support coordinator agencies, and other Partners providing services to the Department. b) Interface must support any import and/or matching processes along with conflict resolutions. c) Every component of the Eligibility and Enrollment system must utilize this master Provider index including the intake process, verification process, etc d) Must be able to synchronize with multiple sources of Provider data (MMIS, HSS, etc.).	2.4.5 a) 2.4.5.1 b) 2.4.5.2 c) 2.4.5.3 d) 2.4.5.4	

External Interfaces		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
The complete list of interfaces with layouts can be found in the Procurement	2.4.6	Interfaces for Department of Corrections and the Vital Records Registry are in scope for Release 1.

External Interfaces		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
Library; the examples below are illustrative and should not be considered the final list of interfaces : a) Intake 1. CMS' FFM 2. DCFS' FITAP and ELE 3. SSA's SDX and LIS b) Verification 1. Checking Identity (CMS Data Hub-Experian) 2. Citizenship/lawful presence (CMS Data Hub-SSA/DHS) 3. Income (CMS Data Hub-TALX, RRV; LWC, LDR) 4. Disability (CMS Data Hub-SSA) c) Referral 1. CMS 2. MMIS Note: All current file layouts used for interfaces in today's environment are located in the procurement library under the MEDS Specifications folder and are complete as of the date of the RFP publication. This list and/or layouts could change slightly as current production requirements change. The Contractor will be responsible for all data interfaces needed for production at go-live. All interfacing must accommodate current layouts and file transfer procedures as defined or required by the State. Any storage by the contractor of data related to this contract, and any exchanges of such data between the contractor and any other person or entity (including but not limited to a subcontractor, DHH, or another DHH contractor), shall be conducted in compliance with all requirements, conditions, methods, or protocols specified by the	a) 2.4.6.1 b) 2.4.6.2 c) 2.4.6.3	• Verification of SSN, Identity, Citizenship, Immigration Status, Income and Disability is automated in Release 1. The sources for these verifications are provided below. 1. SSN (CMS Data Hub- SSA) 2. Checking Identity (CMS Data Hub-Experian) 3. Citizenship/Lawful Presence (CMS Data Hub-SSA/DHS) 4. Income (CMS Data Hub-TALX, LWC, LDR) 5. Disability (CMS Data Hub-SSA) • In Release 1, the automated renewal process will utilize the individual verification services implemented for Real Time Eligibility. • These services will verify the information for each case separately • In Release 2, RRV bulk service will be implemented. • With implementation of RRV bulk service, multiple cases will be sent to CMS Data Hub for verification as one package transaction • RRV service will provide all verification results in bulk for each case. • E&E Worker Portal will use the verifications received to run automated renewal In Release 1, The E&E Solution will provide the DHH-DCFS Master Person Index integration. The functionality will include: • A one-time initial load of DCFS CAFÉ MCI persons to the DHH EA MCI • After the initial load, there will be a scheduled load of DCFS CAFÉ MCI persons for any newly added persons or modified persons. The schedule will be mutually agreed upon during design phase • A one-time initial load of DHH EA MCI persons to the DCFS CAFÉ MCI • After the initial load, there will be a scheduled load of DHH EA MCI persons for any newly added persons or modified persons. The schedule will be mutually agreed upon during design phase In Release 1, The E&E Solution will integrate with the DCFS CAFÉ Worker Portal Cross Program Case Search functionality to share select data elements from the DCFS case summary stored in CAFÉ to the E&E Solution Worker Portal. The functionality will include: • The DCFS Case Summary Data will be displayed to E&E users on stand-alone summary screen(s). This data will not pre-populate any of the existing E&E solution screens

External Interfaces		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
State, and only with the prior approval of the State. Where applicable, the State will specify the timing and frequency of data exchanges to be conducted by the contractor, as well as the data layouts, formats, and content to be used in such exchanges. The requirements and specifications set forth in this paragraph shall supersede any conflicting method, protocol, process, data layout, format, or content proposed by the contractor in its response to the RFP.		• The data shown to the DHH user will follow the data sharing MOU currently in place between DHH and the DCFS agencies and as defined in the existing DCFS Case Summary XML • This service will be implemented by invoking the existing DCFS Case Summary WebService and by passing the DCFS Case ID Number(s) from MCI, source system (DHH), worker ID, and business reason for search as the request parameters from the E&E Worker Portal In Release 2, The E&E self-service solution will integrate with CAFE Economic Stability (ES) Customer Portal for TANF and SNAP applicants requesting for medicaid benefit. The functionality will include: • Utilize the token generated by CAFÉ to accept data from CAFÉ to pre-populate medicaid application data in E&E Self-Service Portal.

Business Intelligence		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
The Contractor must ensure the newly implemented Eligibility and Enrollment system includes and/or provides/supports the minimum Business Intelligence (BI) requirements listed below. 1. Must have the ability to run BI reporting functions during normal business hours without degrading normal system functions. 2. Standardized Reports (See Procurement Library) i. Must be able to produce all reports/ performance indicators required by CMS ii. Must be able to produce all reports iii. Must be able to produce reports necessary for internal Medicaid operations 3. Ad Hoc Reporting	2.5	

Business Intelligence		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
i. Must provide COTS ad hoc reporting tool usable by state workers ii. This tool must be able to connect to the Enterprise Data Warehouse as well as other transactional data sources using most of the common standard protocol (SQL protocol, web services, etc.) 4. Must also include other standardized functions typically found in Business Intelligence solutions (predictive analytics, data mining, etc.)		

2.4 TECHNICAL REQUIREMENTS

Definitions:

Development (DEV) – A supplementary environment to the local, personal development environments configured on individual developer machines and/or to the local or remote, collaborative development environments configured and maintained on Contractor resources. Most unit testing and some integration testing is done in the Development environment. This environment never contains any real, production data, and therefore it does not include PHI/PII.

System Integration Testing (SIT) - An environment used to test processes that exercise integration and functional testing of all components of the E&E solution, including integration with external componets identified in the SOW and needed by the E&E solution (CMS data hub, EA components, legacy systems, partner systems) prior to deployment in the User Acceptance Testing (UAT) environment. All testing activities within the SIT environment are performed by the Contractor. Any issues discovered in the developed software are corrected within the DEV environment and follow normal release processes to be promoted to the SIT environment for re-testing. This environment never contains any real, production data, and therefore it does not include PHI/PII.

User Acceptance Testing (UAT) – An environment used to assess if the system can support day-to-day business and user scenarios and to validate that the system meets the requirements as defined in the scope of work for UAT in all material respects. All testing activities within the UAT environment are performed by the State. Any issues discovered in the developed software are corrected within the DEV environment and follow normal release processes to be promoted to SIT and later, to UAT environments for re-testing. The data in the UAT environment is mock data or data provided and de-identified by the State. If contractor assistance with de-identification is required, it will be evaluated and prioritized through Change Control process.

Training (TRN) – An environment utilized by business users to promote the learning of a system for day-to-day business operations. The data in the TRN environment is mock data or data provided and de-identified by the State. If contractor assistance with de-identification is required, it will be evaluated and prioritized through Change Control process.

Production (PRD) – An environment where software and other products are put into operation for their intended uses by end users.

Please refer to RFP Section III.F for full technical requirements.

Enterprise Service Bus (ESB)		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
Enterprise Service Bus (ESB): must use at least for integrations with other internal and external systems, including public E&E API management.	2.6.1.1	UDDI will continue to be used unless the Enterprise Architecture ESB component is determined and available by Milestone 1, as defined in the RFP Response, Section 2.23.7.

Master Data Management (MDM)		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
Master Data Management (MDM): must use for Master Person and Provider Indexes, and for any department-wide reference and hierarchical data.	2.6.1.2	The E&E MDM component will continue to be used unless the Enterprise Architecture MDM component is determined and available by Milestone 1, as defined in the RFP Response, Section 2.23.7. • E&E solution will use a daily batch job (non-real Time) to synchronize department-wide reference and hierarchical data. • Department wide reference and hierarchical data that needs to be synchronized will be identified during design session • E&E solution will use reference and hierarchical data housed within its database (reference tables) as per the existing functionality of the base solution.

Data Warehousing (DWH)		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
Data Warehousing (DWH): Must extract, transfer, and load (ETL) all E&E data to and implement analytics and reporting off of the centralized DWH.	2.6.1.3	The E&E DWH component will continue to be used unless the Enterprise Architecture DWH component is determined and available by Milestone 1, as defined in the RFP Response, Section 2.23.7.

Identity and Access Management (IAM)/Single Sign-On (SSO)		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
Identity and Access Management (IAM)/Single Sign-On (SSO): The proposed	2.6.1.4	The E&E IAM component will continue to be used unless the Enterprise Architecture IAM component is determined and available by Milestone 1, as defined in the RFP Response, Section 2.23.7.

Identity and Access Management (IAM)/Single Sign-On (SSO)		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
solution shall integrate directly with Microsoft's active directory services for both authentication and authorization. Solution must support native NTML authentication to enable single sign on for internal users. Additionally, the proposed solution must be capable of an accumulative least restrictive access model that maps all application access groups to nested Active Directory group memberships. Please note: the proposed solution must not require a manual process to create any user profile\record for internal users, as this should be inherited from the user's membership to AD authorization groups.		

Document Management (EDMS)		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
Document Management (EDMS): Must use to store all applicant, enrollee, provider and other eligibility and enrollment-related documents.	2.6.1.5	The E&E EDMS component will continue to be used unless the Enterprise Architecture EDMS component is determined and available by Milestone 1, as defined in the RFP Response, Section 2.23.7. EDMS that was originally planned for Release 2 is moved to Release 1. No more than 10 Terabytes of documents and data will be migrated into the EDMS solution.

Consumer Communications (CC)		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
Consumer Communications (CC): Must use for communication template authoring, approval, and	2.6.1.6	The E&E CC component will continue to be used unless the Enterprise Architecture CC component is determined and available by Milestone 1, as defined in the RFP Response, Section 2.23.7.

Consumer Communications (CC)		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
distribution, as well as must integrate with the state-wide print operations solution. The proposed technology must seamlessly integrate with Ricoh ProcessDirector for all print, insert, and/or mail applications. The technology must be capable of being driven by Ricoh ProcessDirector and must allow for bi-directional file-based communication with Ricoh ProcccessDirector.		

Business Rules Engine (BRE)		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
Business Rules Engine (BRE): Must use for all department-wide business rules and optionally, for eligibility and enrollment-specific business rules.	2.6.1.7	The E&E BRE component will continue to be used unless the Enterprise Architecture BRE component is determined and available by Milestone 1, as defined in the RFP Response, Section 2.23.7. • Modifications to the business rules will be implemented based on effective date logic as prescribed by federal/state regulations

The State will provide documentation of existing internal controls, including controls implemented for the hosted provider, to be able to complete the CMS artifacts and requirement documents. Beyond Release 2 go-live, the State will perform updates to the State's security policies & procedures for CMS compliance.

The contractor will conduct two application vulnerability scan (white and blac box) using HP Fortify and IBM AppScan during the project duration.

If any of the EA components are available before their E&E equivalent is implemented, the Contractor will work with the EA Technical Governance Team/integrator to utilize the available EA components as part of the initial E&E solution. For example, if EA Data Warehousing (DWH) component is available before E&E Contractor had a chance to implement DWH for E&E, the Contractor must integrate with the existing EA DWH from the start and utilize it for all analytical processing needs within E&E. For those EA components that become available only after their counterparts have been implemented as part of the E&E solution, the Contractor must switch to using all of the remaining EA components and obsolete corresponding E&E implementations as detailed in their EA Integration Plan.

Hosting Requirements		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
Contractor must host its solution entirely on state-owned hardware/assets. The solution/system must be able to pass all CMS and IRS security.	2.6.2	The state will define the requirement for the HA/DR environment. Contractor will work with the State to define and plan optimal hardware and software configuration for the E&E solution in order to satisfy downtime and response time SLAs. The State will be responsible for creation of an active-passive or active-active HA/DR environment.

Software Component Requirements		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
All components of the system must utilize the Identity and Access Management/Single Sign-On (IAM/SSO) component for authentication and authorization.	2.6.3	The E&E IAM component will continue to be used unless the Enterprise Architecture IAM component is determined and available by Milestone 1, as defined in the RFP Response, Section 2.23.7.

Other Requirements		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
Provide application lifecycle management environments (ALM) for the system including at least the following: a. Development b. System integration testing (SIT) c. User acceptance testing (UAT) d. Training e. Production	2.6.4.1	The state will define the requirement for the HA/DR environment. Contractor will work with the State to define and plan optimal hardware and software configuration for the E&E solution in order to satisfy downtime and response time SLAs. The State will be responsible for creation of an active-passive or active-active HA/DR environment.
The Contractor is responsible for procuring and maintaining hardware and software resources which are sufficient to perform successfully the services detailed in this RFP. All such costs must be contained within the proposal; no additional expenses will be paid.	2.6.4.2	

Other Requirements		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
The Contractor should adhere to state and federal regulations and guidelines as well as industry standards and best practices for systems or functions required to support the requirements of this RFP.	2.6.4.3	
The Contractor shall clearly identify any systems or portions of systems outlined in the proposal which are considered to be proprietary in nature.	2.6.4.4	
Unless explicitly stated to the contrary, the Contractor is responsible for all expenses required to obtain access to DHH or State systems or resources that are relevant to successful completion of the requirements of this RFP. The Contractor is also responsible for expenses required for the State to obtain access to the Contractor's systems or resources that are relevant to the successful completion of the requirements of this RFP. Such expenses are inclusive of hardware, software, network infrastructure and any licensing costs.	2.6.4.5	
Any confidential information must be encrypted to FIPS 140-2 standards when at rest or in transit.	2.6.4.6	
Contractor-owned resources must be compliant with industry standard physical and procedural safeguards (NIST SP 800-114, NIST SP 800-66, NIST 800-53A,	2.6.4.7	The E&E solution is compliant with the standard and guidelines as defined in "Attachment III – Hardware Software Environment.docx", Section 3.0 – Standards and Guidelines.

Other Requirements		
RFP Reference	**Scope of Work (as defined in Proposal Response Section)**	**Scope Clarification**
ISO 17788, etc.) for confidential information (HITECH, HIPAA part 164).		
Any Contractor use of flash drives or external hard drives for storage of DHH data must first receive written approval from the Department and upon such approval shall adhere to FIPS 140-2 hardware level encryption standards.	2.6.4.8	
• All Contractor utilized computers and devices must: ○ Be protected by industry standard virus protection software, which is automatically updated on a regular schedule. ○ Have installed all security patches that are relevant to the applicable operating system and any other system software. ○ Have encryption protection enabled at the Operating System level.	2.6.4.9	

2.5 DATA CONVERSION

The purpose of the new Solution is to automate Medicaid eligibility and enrollment processes, thus eliminating the need for the existing Medicaid Eligibility Data System (MEDS) or any of the ancillary Eligibility and Enrollment (E&E)-related systems. A listing and brief description of the current systems is below:

RFP Reference	Scope of Work (as defined in Proposal Response Section)	Scope Clarification
The Contractor must convert existing data from all legacy and ancillary systems Medicaid Eligibility Data System MEDS mainframe • Electronic Case Record (ECR) • Tracking and Mailer System (TRAMS) • Medicaid Application System (MAS) • Application Suite • Medicaid Eligibility Determination Team (MEDT) • Notices • Provider Requests • Change Requests • Application Center Management and Payment • Online Services • Online Application (OLA/ACACAS) • Online Change Requests • Facility Notification System (FNS) • Automated Notices • Medicaid Security System • Case Review	2.7.1	

2.6 TRAINING

The Contractor must provide the following training:

RFP Reference	Scope of Work (as defined in Proposal Response Section)	Scope Clarification
How to use Eligibility and Enrollment System • Must provide on-site training at one or more DHH-specified locations training up to fifty plus (50+) key staff (Train-The-Trainer). • Must include self-paced online courses which allow Members to start,	2.8.1	A Learning Management System (LMS) is not in scope of this RFP. The scope of training includes creating training materials, providing those materials to the state and delivering Train-the-Trainer sessions to up to 50 staff/trainers as described in the RFP Response, Section 2.8.1.

RFP Reference	Scope of Work (as defined in Proposal Response Section)	Scope Clarification
stop, pause and restart as necessary. • Must have the ability to document and verify that training has taken place. • Must include training materials.		
How to operate and maintain Eligibility and Enrollment System On-site training must be provided at DHH for key non-technical staff responsible for operating and maintaining the system. All training material must be provided in electronic form and submitted to DHH for review prior to training sessions. In addition to on-site training, self-paced online courses with start, stop, pause and restart options must also be included. Training must include, but is not limited to: • Enterprise Service Bus (ESB) management • Master Data Management (MDM) • Business Intelligence management • Identity and Access Management • Document Management • Consumer Communications management • Business Rules management	2.8.2	

Additional services that were listed in section 2.23.18 of the Contractor's proposal are not included in the scope of this project.

3 DESCRIPTION OF SERVICES/TASKS

The Contractor will design, implement, and support a Medicaid Eligibility and Enrollment solution for the State of Louisiana.

The Contractor will perform the following phases, tasks, and deliverables described in section 3.0 – REQUIREMENTS of this SOW.

3.1 OPERATIONS AND MAINTENANCE

Definitions:

"Adaptive" – Adaptive maintenance includes modifications and updates applied to E&E solution software components that keep the system operational.

"Corrective" - Corrective maintenance is concerned with investigating defects that are observed after the E&E solution is implemented in production.

"Preventative" – Preventive maintenance involves analyzing software components and implementing necessary changes to reduce the future occurrence of errors and performance issues.

For each task for Operations and Maintenance, the following roles are defined:

- Lead: Responsible for executing the task and completing required associated activities
- State Support Role: Responsible for supporting the execution, participating for learning purposes and completing any tasks that are executable by State staff only
- Contractor Support Role: Assist with planning of the execution of tasks and be available for questions

State is responsible for gathering and providing to the Contractor, at a minimum, performance measurement data, system logs and access to the State's helpdesk system. Contractor will use the aforementioned data as a foundation for the appropriate tasks below.

Operations		
Tasks	**State Role**	**Contractor Role**
Batch Job Monitoring and Reporting (Adaptive) - Monitor the start and successful completion of batch jobs, reporting on batch job errors and apply fixes	Lead	Support
Application File Management (Preventive) - Define the archiving and purge guidelines for file management. This also includes managing batch data files securely and scheduling archiving and purge activities	Lead	Support
Performance Monitoring and Tuning (Preventive) - Conduct performance analysis to identify performance issues. Provide performance monitoring reports.	Lead	Support
Performance Tuning (Preventive) - Conduct performance tuning activities that need to be undertaken based on performance analysis conducted and identified performance issues	Support	Lead
Capacity Monitoring (Preventive) - Manage capacity monitoring activities that needs to be conducted as per need based on performance baselines defined	Lead	Support
Backup & Recovery (Adaptive) - Perform routine backup/recovery of the application databases and the overall system repositories, files, and information required for the functioning of the system	Lead	Support
Database Usage Monitoring (Preventive) - Perform database usage monitoring activities that need to be done on the production databases	Lead	Support
Access Management: ISAM Only (Preventive) – Perform usage monitoring on ISAM related components. Monitor the various processes for functioning of these tools per the defined requirements. All other security related activities are the State's responsibility.	Support	Lead

Maintenance		
Tasks	**State Role**	**Contractor Role**
Triage Support (Corrective) - Analyze incidents observed in the application that causes application functionality to not function as defined and route the issue accordingly. Based on this analysis, Contractor will provide a monthly action plan to the State which will be triaged, at a minimum, on business impact and level of effort.	Support	Lead
Incident Triage Support (Corrective) - Analyze defect observed in the IAM solution (ISAM only) that causes application functionality to not function as defined and route the issue accordingly. All other security related activities are State's responsibility.	Support	Lead
Architecture Management (Preventive) - Analyze potential changes and other component upgrades are in line with the defined architecture for the overall solution	Support	Lead
Application Security Maintenance (Preventive) – Review that the application and related components are compliant to defined security standards	Support	Lead
Performance Management (Preventive) – Adhere to the performance standards of the application components	Support	Lead
Performance Analysis and Tuning (Preventive) - Undertake performance tuning activities based on application-specific performance analysis conducted and identified performance issues. Provide a monthly action plan based on analysis.	Support	Lead

Technology Management		
Tasks	**State Role**	**Contractor Role**
Release Planning (Adaptive) - Perform release planning for development, patch upgrades and security patches	Lead	Support
The State provides infrastructure support including monitoring, hardware maintenance, support of hardware, COTS upgrades, database recovery and back-ups. Contractor works with the State to identify and plan for these activities as identified in the project work plan.	Lead	Support
Vendor Management (Adaptive) - Communicate with and manage resolution of Level 3 support requests that require application or technical support from external vendors.	Support	Lead
Disaster Recovery Planning & Management (Preventive) - Manage the Business continuity planning exercise and disaster recovery management steps that need to be performed in case of any unplanned outages	Lead	Support
Architecture Management (Preventive) - Review that new enhancements/ changes and other component upgrades are in line with the defined architecture for the overall solution	Lead	Support
Patch, Upgrade Management for Infrastructure components (Adaptive) - Perform planning and conducting upgrade and patch updates for infrastructure components like Operating systems, network components, hardware components.	Lead	Support
Patch, Upgrade Management for Application components (Adaptive) - Perform planning of upgrade and patch updates for application software components, i.e. all software installed on top of the operating system in support of the E&E solution.	Support	Lead
Patch, Upgrade Management for Application components (Adaptive) - Conducting upgrade and patch updates for application software	Lead	Support

Technology Management		
Tasks	**State Role**	**Contractor Role**
components, i.e. all software installed on top of the operating system in support of the E&E solution.		
Infrastructure Performance Management (Preventive) - Manage the performance standards of the infrastructure components like the network, storage components, operating system, hardware components.	Lead	Support
Application Performance Management (Preventive) - Manage the performance standards of the application components, i.e. all software installed on top of the operating system in support of the E&E solution.	Support	Lead

3.2 SYSTEM ENHANCEMENT AND SUPPORT HOURS

The State will be entitled to 70,000 System Enhancement and Support hours to be invoiced monthly as documented in Attachment V - Payment Schedule. These hours will be subject to mutually agreeable Task Order(s) that must be defined (i.e., requirements and design) 12 weeks prior to the end of the construction phase of the scheduled release. This milestone may be adjusted in the Work Plan for specific enhancement requests. If the milestone is missed, the enhancement will be considered for the next release (i.e., Release 2 or Release 3).

Once the Detailed Requirements Specification and the Detailed Design Specification documents are approved, any requested modifications to the specification will be considered a Task Order.

Contractor shall respond in writing to a Task Order request within ten (10) business days of receipt advising State of the amount of System Enhancement and Support hours will be used to complete the Task Order, any impact on schedule, new deliverables required to document the change(s), and expected State responsibilities.

All Task Orders must be approved in writing by the State Project Director.

The full amount of 70,000 hours will be available for use from the start of the Contract and can be used at any time throughout the Contract term with the following restrictions: 80% of the hours must be submitted and approved by the State by the 45th day following the Release 1 Production deployment, with the remaining 20% of the hours submitted and approved by the Release 2 Production deployment.

3.3 SUMMARY OF FUNCTIONALITY BY RELEASE

The following tables provide summary of the functionality proposed for Release 1 and Release 2 of E&E Solution. This is only for summarization purposes, the scope of services is defined in section 2.0 - REQUIREMENTS of this SOW.

Release 1 Self-Service Portal Functionality	
Modules	**Functionality**
Account Management	Account Management capabilities allow customers to create and manage an online account, including password reset and account update.
My Account	My Account provides access to information regarding their applications, benefits, changes, and the status of any pending applications.
Pre-Screening	The Pre-Screening module provides the ability for the general public, partners, providers, and workers to initiate a screening for benefits from the Self-Service Portal homepage without creating an account and does not collect personally identifying information.
Applications	The online application module of the Self-Service Portal adheres to the single streamlined application requirements and queues dynamic screens based on the household circumstances. This module will also be NVRA compliant.
Change Reporting	The change reporting module of the self-service portal allows recipient the ability to report changes to demographics, name, and Managed Care plan. Additionally, users are given the ability to request Medicaid card replacements. While a user is reporting a change, voter registration options are also provided in compliance with the NVRA.
Support Functions	The self-service portal also includes support functions that help users navigate the self-service portal. This includes help text to assist users with field, page, and

Release 1 Self-Service Portal Functionality	
Modules	**Functionality**
	system process through an online user guide as well as real-time chat capabilities, and multiple languages (English, Spanish, and Vietnamese) across the web screens.
Partner Services	Partner Service module will support Application Center Processes via Self Service Portal. This functionality will include, Create, Update, Delete Application Center (including account information), Application Center Representative (ACR) training and certification, Interface with Application Center Payment Vendor, UI for Application Centers to view the application status.

Release 1 Worker Portal Functionality	
Modules	**Functionality**
Workload Management	The Workload Management module of the Worker Portal that will provide worker dashboard that incorporates workload balancing and assignment logic to assign tasks to the appropriate workers. Amongst other functionality, system alerts generated to notify workers of case changes or required actions are configurable during design to set a priority, due date, and dynamic text in the alert description. Calendar functionality displays important eligibility dates (cut-off dates, holidays, staff availability, notice expiration dates, appeal dates, etc.).
Intake/Registration	The Intake/Registration module of the Worker Portal supports paper, phone, online, and external system sources of applications, verifications, and other eligibility related forms and documents. In addition, workers will be able to modify or invalidate a previously submitted application. The module will also provide the ability to link the recorded signature with the case or application. The phone call will be associated to the application and case number for indexing within the document management system and can be retrieved by workers and played back in the Worker Portal
Case Management	The Case Management Module features pre-defined workflows that allow staff to accomplish tasks using a screen or set of screens (workflow). Authorized users have the ability to mark a case as confidential to protect highly secured/classified information for an enrollee. The module will also include manually-created and automatic case note triggers that will clearly indicate the type and source of the note. The Case Management module includes integration with provider notifications and allow notifications to be processed in the worker portal for changes and demographic updates.
Eligibility	The Eligibility module of the Worker Portal provides the ability for workers to execute eligibility determinations for MAGI, non-MAGI, and LaCHIP programs across standard area(s) or eligibility including household composition, non-financial characteristics, financials, resources, and verifications. A worker can access, review, and update the case data through the case management module of the Worker Portal. The Eligibility Determination and Benefit Calculation (EDBC) module houses the workflows to determine eligibility for the State's Medicaid programs. As part of the eligibility determination, the solution first creates assistance units (AUs) and then performs a determination of eligibility without manual intervention. The system also provides the ability for authorized workers to manually override eligibility determinations via the override feature in the Eligibility Determination workflow. The functionality also provides the ability to auto-populate data from external sources (as defined in the Detailed Requirement Specification Document Deliverable) throughout the worker portal. Real time verification is then conducted using electronic data sources to gather the necessary and available verifications. Upon completion of this process automated process will run eligibility, and authorize the benefit. Behind the scenes, the notice of determination (or denial) will then be sent to the enrollee/applicant.

Release 1 Worker Portal Functionality	
Modules	**Functionality**
Real-time Eligibility	Real-time determination of eligibility via the online application will be achieved through verifications performed in real-time through a variety of Federal and State interfaces with eligibility executed against program rules stored in the Business Rules Engine. It also achieves integration with the CMS Federal Data Services Hub to perform Remote Identity Proofing, verify citizenship, lawful presence, income and disability. Whenever possible, the user receives an immediate determination of eligibility upon completing and submitting the application. Additionally, pre-determined applications from the CMS' FFM will follow a similar process where real-time eligibility will be evaluated leveraging application and verification information provided by CMS. If Eligibility Determination is unable to be completed in real-time, the application is transferred to the Worker Portal for determination to be completed by a worker.
Renewals	The functionality to auto-renew cases based on pre-defined case selection criteria will be implemented.
Premium based Programs	The functionality to control prevent or allow workers to authorize FOA and LaCHIP programs based on the payment of premium will be implemented.
Enrollment	The enrollment functionality will be implemented to support authorization and enrollment with MMIS integration. The system will be configured to support the suspension or reduction in benefits through the case management and eligibility determination processes. Additionally, our proposed solution will accept certain classes of suspension/reductions from external sources such as Providers via provider notifications.
Notices	The notices of case action will be automatically generated based on eligibility results such as approvals, denials, rejections, closures and changes. Upon authorization of the associated changes, a notification is generated via the notices engine. Voter registration forms are included with generated notices as applicable.
Document Management	The Document Management module of the Worker Portal will be configured to integrate with the department's scanning solution. Upon the arrival of a document, a task or alert will be presented to the user via the worker dashboard.
Data Exchanges – Federal	For Release 1, our proposed Louisiana Medicaid E&E solution interfaces with the CMS Federal Data Services Hub (FDSH) for the following services: Citizenship verification via SSA Composite and the Verify Lawful Presence (VLP) service processed by the U.S. Department of Homeland Security's (DHS) Systematic Alien Verification for Entitlements (SAVE) program to verify Citizenship/Lawful presence when relevant; SSA Composite; Real-time verification of income based on data from Equifax (TALX). These real-time verifications support no touch automation of eligibility determination and increase productivity, efficiency, and accuracy.
Data Exchanges – State	Worker Portal will also be configured to integrate with state data exchanges defined in bidder's library.
Master Person Index	The Worker Portal will integrate with the Enterprise Architecture Master Person Index that maintains specific core data related to recipients. The Master Person Index is used as part of the intake process to perform clearance and registration and stores verification as a part of the master person record.
Content Management	The functionality to create and/or modify welcome messages, announcements, link to documents related to Medicaid E&E, as well as link to Medicaid Policies and Procedures catalog on the Homepage of the self-service/customer portal will be available to uses with appropriate roles.
Partner Management	Release 1 will also introduce functionality related to managing partners. Such functionality includes application center management processes for enrollment,

Release 1 Worker Portal Functionality	
Modules	**Functionality**
	training, payments, and certification. The partner payment functionality will replicate functionality currently managed through the Application Center Management and Payment system. Additionally, this module will allow State workers to accept, review and approve provider access requests.
System Support Functions	System Support Functions within the Worker Portal will be implemented. It will include audit trail (action history) functionality that allows select staff, based on role based security, to view case history. Additional support functions include configurable reference tables, role based security capabilities, exception and audit log monitoring using Security Information Event Management (SIEM) and security event logs from security components including IBM Security Access Manager (ISAM) and IBM Security Identity Manager (ISIM).
Reporting	The Reporting module of the Worker Portal that will provide standardized state and federal reports, Medicaid operational reports, CMS Key Performance Indicators, and Voter Registration related reporting capabilities. Our reporting solution for Release 1 includes only those reports critical to the business process and Medicaid eligibility determinations required by the State. The remaining reports will be planned to be implemented in Release 2. We will work with the State to configure based on report requirements elaborated during Release 1.
Case Review – QA/QC	Quality Assurance/Quality Control module in release 1 will implement the functionality of basic case search, creation of case notes, ability to sort and filter case notes and the ability to document review decisions.
Integration with State Systems	As part of Release 1, the Medicaid E&E solution will integrate with the DCFS Print Shop, Scanner file storage, LaHIPP, DCFS, MMIS, IVR System, DHH Accounts Payable, App Center Management & Payment, and Facility Notification System (FNS). This integration will be facilitated by the Enterprise Service Bus, where possible.

Release 1 EA Component	
Module	**Functionality**
Identity & Access Management (IAM)	The Identity and Access Management component of the Medicaid E&E Solution is established during Release 1. Users are able to seamlessly and securely log in to the worker and self-service features. Identity is managed using the features of the IAM solution and made visible through security management in the worker portal and the MyAccount in the self-service portal. Account management features in Release 1 save time and money for support staff. Security is a key component of the first release so that staff are able to access and process cases securely.
Business Rules Engine (BRE)	A core component of Release 1, the Business Rules Engine (BRE) enables the Medicaid policy into a real time, machine driven way to make benefit determinations in a matter of seconds. The business rules engine is service enabled and offers a number of pre-built services to run eligibility, made available to the worker portal in Release 1 and the self-service portal in Release 2.
Consumer Communications (CC)	Consumer Communications, enabled by HP Exstream, allows important notices of decision, denial, and approval to be sent to applicants and recipients. Service enabled, the HP Exstream engine, provides a number of services for document generations and communication routing and distribution.
Enterprise Service Bus (ESB)	A core component of Release 1, the Enterprise Service Bus (ESB) orchestrates a number of business services in Release 1.
Master Data Management (MDM)	The management of hierarchal data is achieved in Release 1 through the use of the Master Data Management product The Master Person Index will be implemented as part of the MDM Enterprise Architecture in Release 1.

Release 1 EA Component	
Module	**Functionality**
Document Management (EDMS)	The Enterprise Document Management component will be implemented store all applicant, enrollee, provider and other eligibility and enrollment-related documents.

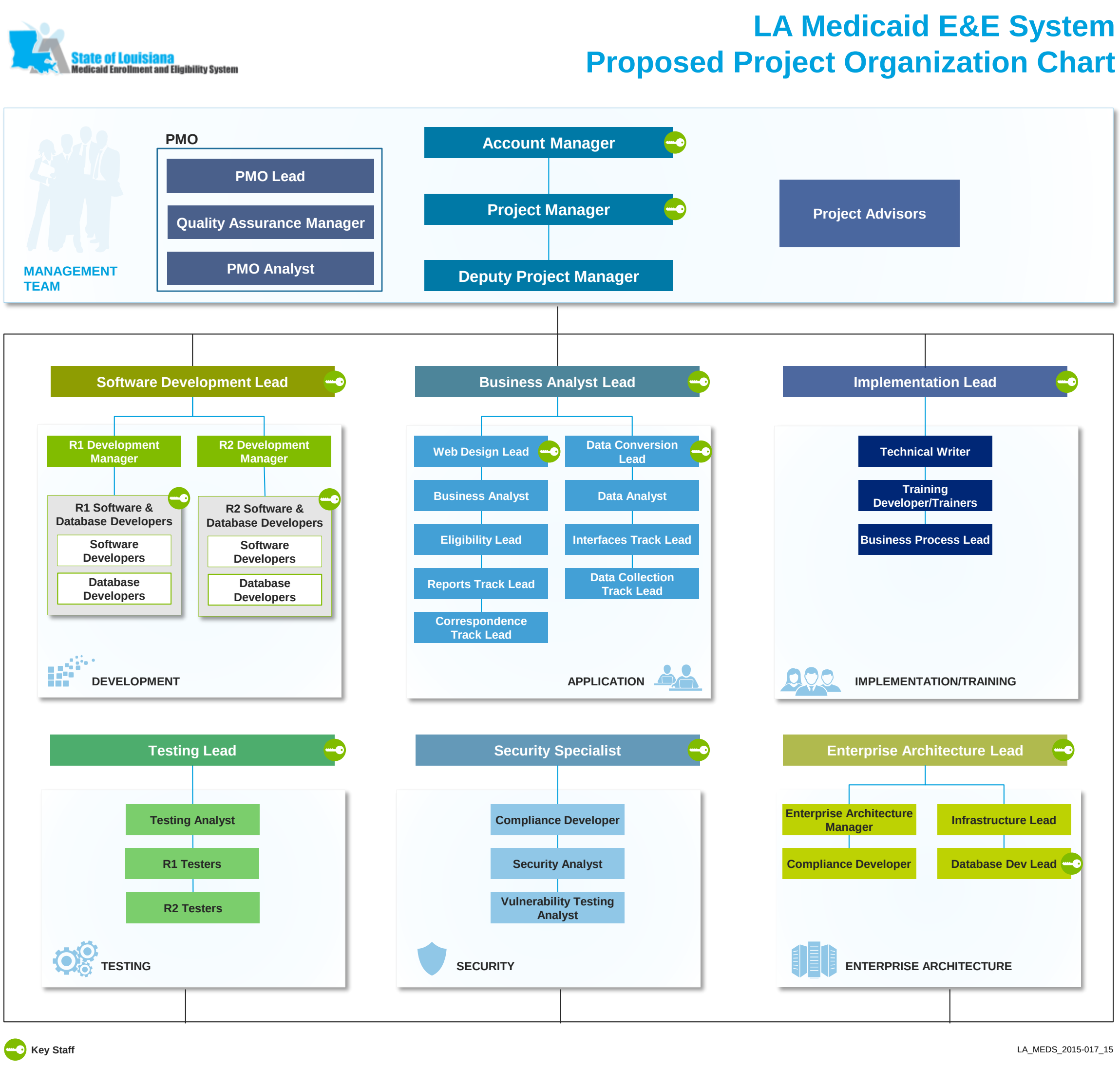
Release 2 Self-Service Portal Functionality	
Module	**Functionality**
My Account	In Release 2 of our proposed LA Medicaid E&E solution customers will be able to access enhanced functionality in the My Account module of the Self-Service Portal. As a result, customers will be able to report changes/complete renewals, upload documents to be stored in the Enterprise Document Management System (EDMS), and view electronic notices.
Provider Services	The Self-Service portal will replace the FNS front end with Release 2. This functionality will be configured to allow approved providers to check the processing status of their notifications; allow providers to make changes to or cancel their submission at any time prior to processing; and allow providers to request access to the Provider Services module. This functionality will be of similar in scope to the functionality currently maintained by the Facility Notification System (FNS).
Online Notices	In Release 2, the Self-Service Portal will have the ability to capture notification preferences from enrollees through the Online Notices module. Enrollees can indicate if they would like to be notified via paper mail or electronically. Additionally, enrollees who indicated they would like to receive electronic notices will receive a text message or email instructing them to check their Online Notices module.

Release 2 Worker Portal Functionality	
Module	**Functionality**
Workload Management	Calendar functionality is integrated with Microsoft Outlook, and continues to display important eligibility dates (cut-off dates, holidays, staff availability, notice expiration dates, appeal dates, etc.).
Data Exchanges Federal	Our proposed solution will be customized to integrate with the Renewals and Redeterminations Verification (RRV) service to support bulk automated renewals by performing and recording automated verification searches for relevant data. The RRV service is expected to support bulk verification (ex. income, disability, and citizenship) for multiple cases in one request.
Data Exchanges State	LA Medicaid E&E solution will allow workers the ability to submit recovery and fraud referral information.
Asset Verification	E&E solution will integrate the Asset Verification Services (DCFS for non-SSI medicaid recipients and SSA for SSI medicaid recipients).
Document Management	In Release 2, the Document Management module will extend the existing configuration with the scan solution and upon arrival of a document, allow the user to view the document directly in the worker portal.
Reporting	The Reporting module in the Worker Portal of our proposed solution is enabled by a COTS product offering ad hoc reporting capability out of the box. The self-service BI reporting will build tables and chart based reports.
Provider Index	In Release 2, the Worker Portal will integrate with the Enterprise Architecture Master Provider Index that maintains specific core data related to providers. The Master Provider Index is used as part of the processing of notifications from the providers.
Appeals	Our proposed solution captures and records appeal information in the Appeals module of the Worker Portal.
Case Review – QA/QC	Our solution features a Quality Assurance/Quality Control module that can sample and review active and closed Medicaid cases for automated sampling. Additionally, workers can indicate they would like the supervisor to review the determination during the eligibility determination workflow.

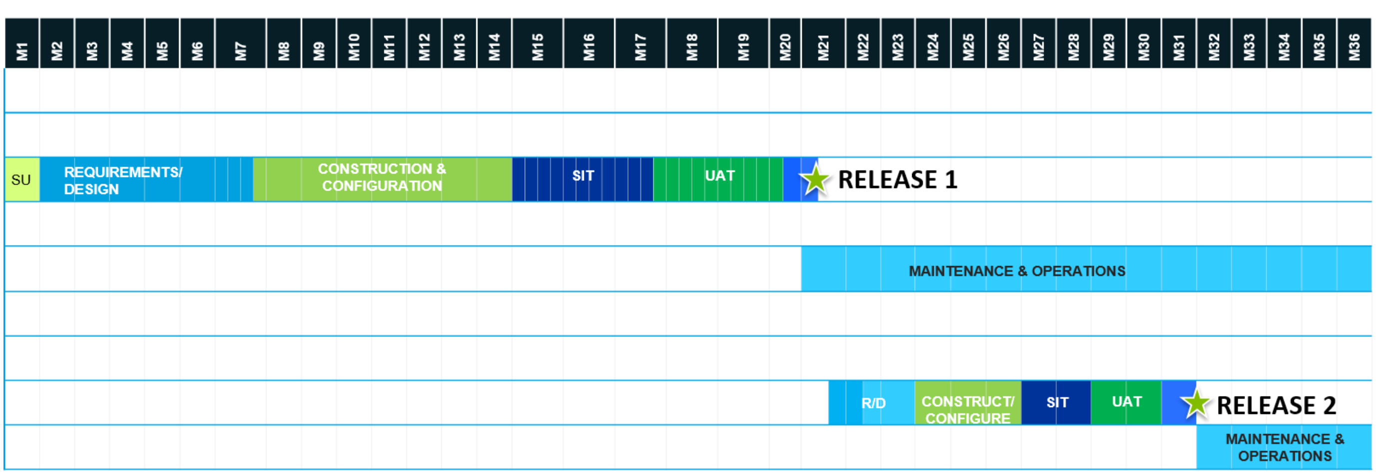
Release 2 EA Component	
Module	**Functionality**
Data Warehousing (DWH)	With the worker and self-service portals operating with full functionality, data is exposed and shared with the Data Warehouse (DWH). The Data Warehouse is capable of accepting the data and uses a set of services to achieve analytics and reports, driving key business decisions for the State.

3.4 PROJECT ORGANIZATION AND SCHEDULE

The project organization chart by position is depicted below:



The following timeline illustrates the Contractor's proposed activities that will be underway related to the execution of this Project. This timeline represents the duration months of the high level tasks addressed through this Statement of Work, where each month is depicted based on a period of 4 business weeks. The schedule below is for illustration purpose only. The final project schedule will be documented in the mutually agreed Project Baseline Work Plan.



3.5 PERFORMANCE MEASURES AND MONITORING PLAN

The performance of the contract will be measured by the State Project Director, authorized on behalf of the State, to evaluate the contractor's performance against the criteria in the Statement of Work.

Contractor will document and deliver to the State Project Director, or designee, the results and approval by DHH personnel of each completed deliverable. The State will measure the performance by the quality of the completed deliverable.

Contractor will provide monthly status reports to the State. These Reports shall include:

- Work accomplished for each work period
- Production goals for the next reporting period
- Any product or documentation that is delivered
- Meetings held, planned, or requested, including the minutes thereof
- Current status of risks, issues or problems that are encountered, need to be addressed or resolved
- Summary of approved project changes
- Other relevant information which must be reviewed and discussed

3.6 DELIVERABLES

The project shall include the following phases: Start-up, Detailed requirement definition, Design phase, Construction and Configuration, Data conversion, Testing, Training, implementation and roll-out, operations and Maintenance, and Transition.

The start-up period shall begin after the contract is fully executed. All costs incurred prior to the start-up period are the responsibility of the Contractor. The Contractor shall be responsible for all initial and recurring costs required for access to State systems, as well as State access to the Contractor's systems. These costs include, but are not limited to, hardware, software, licensing, authority/permission to utilize any patents, annual maintenance, networks and support and connectivity with the State.

Contractor agrees to provide the deliverables listed in Attachment V: Payment Schedule.