Information and Communications Technology and Services (ICTS) Assessment and Recommendations

Executive Summary

July 12 2017

C4HCO Current State Assessment
Overall, various critical functional areas are in need of significant improvement

1 PLAN MANAGEMENT
A. Plan certification (life cycle management)
B. Premium stabilization program management
C. Administration: business rules, workflows

2 ELIGIBILITY MANAGEMENT
A. Eligibility processing (individual, SHOP)
B. Administration: business rules, workflows

3 MARKETPLACE EXPERIENCE MANAGEMENT
A. Marketplace (functionality) setup
B. Marketplace account management (individual, SHOP)
C. Comparison shopping/decision support (individual, SHOP)
D. Plan selection (individual, SHOP)
E. Administration: business rules, user experience, workflows

4 ENROLLMENT MANAGEMENT
A. Enrollment processing (individual, SHOP)
B. Administration: business rules, workflows

5 PREMIUM AND COST OFFSETS MANAGEMENT
A. Tax credit/CSR processing (individual)
B. Premium processing (SHOP)
C. Client financial account management
D. Administration: business rules, workflows

6 BROKER AND NAVIGATOR MANAGEMENT
A. Broker/navigator certification
B. Broker/navigator preparedness
C. Broker/navigator performance management
D. Broker/navigator technology management
E. Broker/navigator relationship management
F. Administration: business rules, workflows

7 APPEALS MANAGEMENT
A. Appeals processing
B. Administration: business rules, workflows

8 CUSTOMER SERVICE
A. Public information management
B. Inquiry management
C. Complaint/suggestion management
D. Administration: business rules, workflows

9 FINANCIAL MANAGEMENT
A. Funds management
B. Financial transaction processing
C. Financial accounting
D. Financial audit management
E. Administration: business rules, workflows

10 INFORMATION / KNOWLEDGE / CONTENT MANAGEMENT
A. Information aggregation and coding/enrichment
B. Information life cycle management
C. Analytics and visualization
D. Report management
E. Survey management
F. Organizational knowledge and content (life cycle) management

Major changes recommended

More focused/targeted changes possible

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ICTS Pathways
Each pathway entails different benefits, risks and costs

#	Pathway Name	Main Benefits	Key Risks	Cost Range ($MM)	Time Range (Years)
1	Tactical Fixes	• Presumably easier to implement	• No relief from current state of complexity, issues, costs and vendor dependencies	DEEMED INFEASIBLE; NOT COSTED	
2	**Unified Customer Service Technology**	• **Enables seamless support by contact center** • **Will highlight inter-system inconsistent data~1.5**	• **Does not address certain critical functional and systemic issues** • **Adds to already complex environment**	**~$10-$20** **M&O= ~$1-2/yr**	**~1.5**
3a	**Comprehensive Contact Center Technology Replacement**	• **Seamless and "industry-standard" contact center** • **Improved ability to manage "customer experience"**	• **Risk of breaking something that works**	**~$5-$25** **M&O = $0.5-$3/yr**	**~1-2**
3b	**Contact Center Operations Replacement**	• **Improve overall customer experience** • **Reduce costs and quality simultaneously (assuming vendor with real experience)** • **Potentially can staff internally**	• **Obtaining approval/support to insource**	**Transition $1-$2** **Ops = ~10%-20% reduction vis-à-vis current state**	**~1-2**
4	**ICT Overhaul with Select Contact Management Insourcing**	• **Replace with industry-proven COTS products and services most notably performance-based SaaS**	• **Obtaining approval/support to insource** • **Replacement of multiple vendors and technology solutions**	**$15.50 - $19.50 PMPM**	**~2 (1½ possible)**

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Recommendation and Rationale
ICT Overhaul with Select Contact Management Insourcing

- While the end-goal is to completely overhaul the technology base for C4HCO, the approach is a risk-mitigated incremental over-haul

- Implementation details

  - Develop and issue an RFP/"invitation to negotiate" for the technology that allows vendors to bid on the entirety and/or components (e.g. plan management, marketplace experience management, enrollment management, customer service)

  - In parallel, focus on contact management center operations

    - Build a core team that can handle more complex customer interactions

    - RFP/"invitation to negotiate" for capacity augmentation (e.g. for open enrollment)

  - Partner with an "integrator" that is NOT supplying any of the core technology whose interests are aligned with C4HCO - analogous to a "buyer's agent"

  - Implement contact management organizational and technology changes first – prior to OE2018

  - Implement other ICT components subsequently – prior to OE2019

- Additionally:

  - Strengthen internal project management and vendor management functions

  - Consider streamlining/consolidating various databases/data marts/data stores

  - Consider streamlining internal knowledge management systems: Intranet, knowledge officer

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