

**INSTRUCTIONS**

The cost for each Customer Engagement Center deliverable shall be complete and include all expenses, including travel, per diem and out-of-pocket expenses as well as administrative and/or overhead expenses.

The total of proposed pricing will automatically transfer to the summary tab.

Name of Deliverable	Deliverable Elements	Price
<b>DDI Phase I = 5% of Total DDI Cost</b>		
Staffing Plan	<ul style="list-style-type: none"> <li>• <b>Staffing Plan for each phase of the project that includes:</b></li> <li>• Staffing requirements;</li> <li>• Location of staff;</li> <li>• Resumes of key personnel;</li> <li>• Project roles;</li> <li>• Project responsibilities;</li> <li>• Resource allocation;</li> <li>• Staff development and training;</li> <li>• Staff reporting/organizational structure; and,</li> <li>• How changes in staff will be handled throughout all phases of the project.€4</li> </ul>	\$ 28,962.00
Project Management Plan	<ul style="list-style-type: none"> <li>• <b>Project Management Plan;</b></li> <li>• Project Schedule</li> <li>• Deliverable Expectation Documents (DED), as requested;</li> <li>• Weekly and Ad-Hoc Status Reports;</li> <li>• Project Status meeting agendas and minutes (for meetings owned by the Contractor);</li> <li>• Reporting documents to beWellnm Board, as requested;</li> </ul>	\$ 28,962.00
Annual Work Cycle Plan	<ul style="list-style-type: none"> <li>• Procedural, compliance, and regulatory milestones (inspection, certification, reporting, auditing, etc.).</li> </ul>	\$ 14,480.00
Subtotal DDI Phase I		\$ 72,404.00
<b>DDI Phase II = 35% of Total DDI Cost</b>		

Center Design Deliverables	<ul style="list-style-type: none"> <li>•DEDs, if applicable</li> <li>•Requirements Definition and Validation Plan;</li> <li>•JAR session minutes;</li> <li>•Requirements traceability matrix (RTM);</li> <li>•Requirements specification document (RSD);</li> <li>•Interface value proposition</li> <li>•Diagram of call center technology</li> <li>•Detailed system design plan;</li> <li>•JAD session minutes;</li> <li>•Detailed system design document (DSD);</li> <li>•Interface control document;</li> <li>•Data management plan; and,</li> <li>•Disaster recovery/business continuity plan.</li> </ul>	\$ 72,406.00
Data Migration	<ul style="list-style-type: none"> <li>•Migration requirements matrix;</li> <li>•Migration plan;</li> <li>•Migration test results;</li> <li>•Migration quality assurance plan; and,</li> <li>•Updated RTM (Requirement Traceability Matrix).</li> </ul>	\$ 144,808.00
Center Development Deliverables	<ul style="list-style-type: none"> <li>•DEDs;</li> <li>• CRM Software Value Proposition</li> <li>•Unit test results; and,</li> <li>•Updated RTM.</li> </ul>	\$ 144,808.00
Center Testing Deliverables	<ul style="list-style-type: none"> <li>•Test plan;</li> <li>•Test environments;</li> <li>•System test cases;</li> <li>•Final test report;</li> <li>•UAT training plan;</li> <li>•UAT cases and data; and,</li> <li>•Updated RTM.</li> </ul>	\$ 144,808.00
Subtotal DDI Phase II		\$ 506,830.00
<b>DDI Phase III - 60% of Total DDI Cost</b>		

Center Implementation Deliverables	<ul style="list-style-type: none"> <li>•Implementation Plan</li> <li>•Training Plan</li> <li>•Training Materials</li> <li>•Training Reports</li> <li>•Operating Procedures and Manuals</li> <li>•Faciliatory and Participant Guides</li> </ul>	\$	506,829.00
IVV	IVV Sign Off	\$	362,022.00
Subtotal DDI Phase III		\$	868,851.00
<b>Total DDI Pricing</b>		\$	<b>1,448,085.00</b>
<b>Transition Cost from 10/1/2020 to 12/31-2020</b>			
Flat Fee for operations	• Cost to operate the Customer Engagement Center during the transition period	\$	161,720.00
<b>Total DDI and Transition</b>		\$	<b>1,609,805.00</b>

**INSTRUCTIONS**

The cost for each deliverable for the technology and financial management/billing system shall be complete and include all expenses, including travel, per diem and out-of-pocket expenses as well as administrative and/or overhead expenses.

The total of proposed pricing will automatically transfer to the summary tab.

Name of Deliverable	Deliverable Elements	Price
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**DDI Phase I = 5% of Total DDI Cost**

Staffing Plan	<ul style="list-style-type: none"> <li>• <b>Staffing Plan for each phase of the project that includes:</b></li> <li>• Staffing requirements;</li> <li>• Location of staff;</li> <li>• Resumes of key personnel;</li> <li>• Project roles;</li> <li>• Project responsibilities;</li> <li>• Resource allocation;</li> <li>• Staff development and training;</li> <li>• Staff reporting/organizational structure; and,</li> <li>• How changes in staff will be handled throughout all phases of the project.C4</li> </ul>	\$ 212,488.00
Project Management Plan	<ul style="list-style-type: none"> <li>• <b>Project Management Plan;</b></li> <li>• Project Schedule</li> <li>• Deliverable Expectation Documents (DED), as requested;</li> <li>• Weekly and Ad-Hoc Status Reports;</li> <li>• Project Status meeting agendas and minutes (for meetings owned by the Contractor);</li> <li>• Reporting documents to beWellnm Board, as requested;</li> </ul>	\$ 212,488.00
Annual Work Cycle Plan	<ul style="list-style-type: none"> <li>• Procedural, compliance, and regulatory milestones (inspection, certification, reporting, auditing, etc.).</li> </ul>	\$ 106,245.00
<b>Subtotal DDI Phase I</b>		<b>\$ 531,221.00</b>

**DDI Phase II = 35% of Total DDI Cost**

System Design Deliverables	<ul style="list-style-type: none"> <li>•DEDs, if applicable</li> <li>•Requirements Definition and Validation Plan;</li> <li>•JAR session minutes;</li> <li>•Requirements traceability matrix (RTM);</li> <li>•Requirements specification document (RSD);</li> <li>•Business rules document;</li> <li>•Architectural diagrams;</li> <li>•Detailed system design plan;</li> <li>•JAD session minutes;</li> <li>•Detailed system design document (DSD);</li> <li>•Interface control document;</li> <li>•Database design document;</li> <li>•Data management plan; and,</li> <li>•Disaster recovery/business continuity plan.</li> <li>• Security and Privacy Plan</li> </ul>	\$ 531,221.00
Data Migration	<ul style="list-style-type: none"> <li>•Migration requirements matrix;</li> <li>•Migration plan;</li> <li>•Migration test results;</li> <li>•Migration quality assurance plan; and,</li> <li>•Updated RTM (Requirement Traceability Matrix).</li> </ul>	\$ 1,062,442.00
System Development Deliverables	<ul style="list-style-type: none"> <li>•DEDs;</li> <li>•Individual Exchange environments;</li> <li>•Individual Exchange environment plan;</li> <li>•Unit test results; and,</li> <li>•Updated RTM.</li> </ul>	\$ 1,062,442.00
System Testing Deliverables	<ul style="list-style-type: none"> <li>•Test plan, including Privacy and Security;</li> <li>•Test environments;</li> <li>•System test cases;</li> <li>•Final test report;</li> <li>•UAT training plan;</li> <li>•UAT cases and data; and,</li> <li>•Updated RTM.</li> </ul>	\$ 1,062,442.00
Subtotal DDI Phase II		\$ 3,718,547.00
<b>DDI Phase III - 60% of Total DDI Cost</b>		

System Implementation Deliverables	<ul style="list-style-type: none"> <li>•Implementation Plan</li> <li>•Training Plan</li> <li>•Training Materials</li> <li>•Training Reports</li> <li>•Operating Procedures and Manuals</li> </ul>	\$	3,718,547.00
IVV	IVV Sign Off	\$	2,656,106.00
Subtotal DDI Phase III		\$	6,374,653.00
<b>Total DDI Pricing</b>		<b>\$</b>	<b>10,624,421.00</b>
<b>Transition Cost from 10/1/2020 to 12/31-2020</b>			
Flat Fee for operations	• Cost to operate these services during the transition period	\$	1,186,521.00
<b>Total DDI and Transition</b>		<b>\$</b>	<b>11,810,942.00</b>
<b>Additional Costs for Multi-Tenant and Multi-Contributor Functionality</b>			
Additional Total Cost for multi-tenant functionality	Enter total costs to implement this solution for plan year 2021	\$	-
Additional Total Cost for multi-contributor functionality	Enter total costs to implement this solution for plan year 2021	\$	-

Provide a flat, fixed fee for each year of ongoing Maintenance and Operations years for Technology (including Financial Management and Billing)

Year	Time Period	Price
M&O Year 1	January 1, 2021 - December 31, 2022	\$ 3,401,829.00
M&O Year 2	January 1, 2022 - December 31, 2023	\$ 3,401,829.00
M&O Year 3	January 1, 2023 - December 31, 2024	\$ 3,401,829.00
Total		\$ 10,205,487.00

Provide a flat, fixed fee for each year of ongoing Maintenance and Operations years for the Customer Engagement Center

Year	Time Period	Price
M&O Year 1	January 1, 2021 - December 31, 2022	\$ 1,300,000.00
M&O Year 2	January 1, 2022 - December 31, 2023	\$ 1,300,000.00
M&O Year 3	January 1, 2023 - December 31, 2024	\$ 1,300,000.00
Total		\$ 3,900,000.00

Provide a flat, fixed fee for DDI and each year of ongoing Maintenance and Operations years for Mailroom functions

Year	Time Period	Price
DDI	January 2020 - August 31, 2021	
Transiton Period	September 1, 2020 - December 31, 2021	
M&O Year 1	January 1, 2021 - December 31, 2022	
M&O Year 2	January 1, 2022 - December 31, 2023	
M&O Year 3	January 1, 2023 - December 31, 2024	
M&O Subtotal		\$ -
Total		\$ -

**Note:** Cost included in Customer Engagement Center



### Hourly Rate Schedule for Change Orders and Other Changes

Prices quoted for change orders shall remain in effect for the duration of the contract.

Proposers shall provide firm, fixed hourly rates for change orders, including updated documentation.

Proposers shall provide a firm, fixed hourly rate for each staff classification identified on the project. Proposers shall not provide a single compilation rate.

<b>Classification Title</b>	<b>Hourly Rate</b>
Application Architect	\$190.00
Associate Developer / QA / BA	\$98.00
Developers / QA / BA / Security Engineer	\$157.00
Lead Developer / QA/ BA / Architect	\$190.00
Technical Writer	\$157.00
Director Technology	\$227.00
Director Program Management	\$227.00
Project Manager	\$206.00
Solutions Architect	\$190.00
VP Implementation/ VP Technology/ VP Program Management	\$320.00

### Total carried from other Tabs

Solution	DDI and Transition Price	M&O Price	Total
Individual Marketplace Technology	\$ 11,810,942.00	\$ 10,205,487.00	\$ 22,016,429.00
Customer Engagement Center	\$ 1,609,805.00	\$ 3,900,000.00	\$ 5,509,805.00
Mail	\$ -	\$ -	\$ -
Total	\$ 13,420,747.00	\$ 14,105,487.00	\$ 27,526,234.00

### Final Notes:

**Should beWellnm decide to launch your Individual Exchange for Plan Year 2022, we will honor the same BAFO price for Plan Year 2022 as provided herein.**

Mailroom pricing is included in our Customer Engagement Center costs.

The Customer Engagement Center effort is priced based on a mailroom integrated solution. Our current price for the Customer Engagement Center solution and staff is \$1.3M per year for each M&O year to support approximately 35k calls and the mailroom. **The price would be reduced by approximately \$300k every year in M&O, dropping to \$1M per year, if the call volume was 20k. If the volume were to increase to 45k calls, our price would not go up and remained fixed.**

### Rationale for BAFO Price Reduction:

Since submitting our original pricing, we have further examined this opportunity to ensure that we demonstrate our objective of establishing a true partnership with beWellnm. We believe such a partnership would be mutually beneficial and therefore reduced the overall price by 45% as part of our best and final offer.

We worked to identify opportunities to provide more attractive pricing to beWellnm while still making the engagement commercially viable for us. We determined that beWellnm would be very similar to any other state transitioning from healthcare.gov to a SBM. For example, once a certain data format was agreed upon with CMS with this migration, it is unlikely CMS would change that format for any other state migrating from healthcare.gov. Typically, we would treat certain activities, such as data migration, as implementation specific so we would charge that activity as part of DDI. However, since we observed that any data migration scripts developed for healthcare.gov to an SBM would likely not change, such development work could be reusable for other migrations. Consequently, we decided that, in the spirit of a partnership, it made sense for us to not charge such migration script development activity as DDI. Instead, we would invest in doing such work through our own internal Product Research & Development (R&D) budget rather than impose such charges on beWellnm as part of DDI. Similar efficiencies have been accounted for in our premium billing, and integrated Customer Engagement Center and mailroom functions. We are further willing to offer significant reductions in the future by combining the premium billing of SHOP and Individual into a single solution. We believe we can scale our offering to beWellnm as a shared platform at no cost, instead providing considerable financial benefit back to beWellnm if the same platform is shared by other tenants.

The expectation is that this investment would provide a return with future healthcare.gov to SBM engagements. This philosophy was used as the basis of identifying other such work initially classified as DDI, that could be funded by our internal R&D investment.

Further, by making such R&D investments and identifying other efficiencies, we have simply passed those savings on to beWellnm in the form of a price reduction with the confidence that we can make beWellnm a referenceable customer in the future and help us to expand into other states.