



GOVERNMENT OF PUERTO RICO

Department of Health
Medicaid Program

Puerto Rico Medicaid Program
Medicaid Eligibility and Enrollment System
Request for Information
Attachment A: RFI Response Template

September 29, 2023

THIS IS A REQUEST FOR INFORMATION (RFI) ONLY THIS IS NOT A FORMAL BID SOLICITATION.

NO AWARD WILL RESULT FROM THIS RFI.

3. Requested Information

Please provide responses in the below template, deleting the <response> notation, and including your narrative in the space provided.

Respondent Legal Entity Name: D2Sol Inc

Respondent Contact Person

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3.1 History of Medicaid Eligibility and Enrollment (E&E) Systems

- a. List the Respondent's current or previous contracts that showcase experience implementing or operating Medicaid E&E system(s) in states or territories, with particular emphasis on those of similar size to Puerto Rico.

Please provide the name of the state or territory in which the Respondent holds a contract, and the start and end dates for each contract described.

Additionally, please note if any of the listed contracts involve a Curam system, and if the E&E system has been certified through the Centers for Medicare & Medicaid Services (CMS) certification process.

Active Contract Name	State or Territory	Start Date	End Date	Curam System (Y/N)	CMS Certified System (Y/N)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

3.2 General Business Experience Taking Over or Replacing a Medicaid E&E System

a. For each E&E takeover project listed in Section 3.1, provide a narrative of the Respondent's experience, including a description of the following:

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

a. Recommended best practices and lessons learned in E&E takeover.

The recommended best practices based on our experience in takeover of an E&E system are as follows:

- PRMP senior staff member must be engaged to oversee the entire take over process to avoid any conflicts between the teams and ensure the transition is smooth with all critical information shared by the outgoing vendor for continuing operation of the system.
- PRMP staff should provide insights to the new team on critical areas of importance to them and advise where the new vendor must prioritize their initial efforts.
- The outgoing team, new team and PRMP staff should be involved in defining and agreeing to a checklist with critical items defining the success of the system takeover.
- Identifying key staff members from outgoing and new vendors in areas like PMO, Business, Technical, Testing and Infrastructure, who will be responsible for the takeover in their respective areas including knowledge transition.
- The outgoing team must provide knowledge transfer sessions on the customizations done to the platform.
- The outgoing team must provide transition/hand-over documents covering critical areas like Business, Technology, Infrastructure and Training. This documentation should include the rationale for doing things in a specific way and any cheat sheets followed by the outgoing team.
- Shadowing between the outgoing and new teams for a smoother takeover. Our recommendation is a minimum of four to six weeks – During the first half the new team

will shadow the outgoing team and during the second half the outgoing team to monitor the new team.

- All access controls including the authentications for all components involved in the system will be updated by the new team one week prior to the takeover completion with all access for the outgoing team removed.
- Any cloud subscriptions which are not owned by PRMP must be transferred to the new team.
- The timing of the takeover should be scheduled such that it doesn't overlap with any critical application milestones such as Renewals, open enrollment, etc.

The recommended lessons learned based on our experience in takeover of an E&E system are as follows:

- All project documentation should be updated reflecting the latest system state as they will be a key reference to the new team for an easier transition. Some of the documents are System Design, Security Design, Functional Designs, Technical Designs, Test Plans, Test Scripts, Training Materials, Configuration Management, etc. We have had instances where the lack of documentation resulted in the team spending additional time going over the actual implementation to understand the intricacies of the system and functionality.
- It is important for the outgoing team to provide a responsive resource for a minimum period of four weeks after the takeover in critical areas like Business, Technical and Infrastructure to answer any potential questions the new team may have when they are operating and managing the system.
- It is important for the outgoing team to provide information on any current development activities related to defects and/or enhancements which are in-progress and will not be completed prior to takeover.
- It is important for the outgoing team to provide information on the runbook for the last three production deployment processes including any hot/data fixes applied on the system.

b. Challenges and/or risks

Despite intense efforts during the takeover transition phase, there may still exist some challenges and/or risks with takeover. With our team's extensive experience in implementing solutions using the Cúram platform across more than ten States, we also provide appropriate mitigation strategies for those challenges and/or risks.

No.	Challenge and/or Risk	Mitigation
1.	Gaps between the implementation and documentation	The team gains a better understanding of the implementation by going through the system and verifying or updating the documentation to match the system and

		continuing to maintain the documentation going forward.
2.	Non-Compliant changes to the solution	Identify any non-compliant changes with customizations, our experts will identify and fix them through compliant ways and where not possible by raising product support tickets to enable hooks to fix them in a compliant way.
3.	Undocumented defects, data fixes, and in-complete implementations	The implementation team will identify and document these as part of their operation of the system and fix them through proper root cause analysis.
4.	Data quality issues	Data quality issues can be identified through the analysis of repetition of defects in similar contexts and can be fixed through proper analysis and providing fixes to areas creating the data inconsistencies. This could also in turn resolve any reporting errors.
5.	Errors with Communication Notices / Forms	Communication data errors and issues associated with the timeliness of its issuances can be identified and fixed.
6.	Errors with interfaces and missing interfaces	Interfaces used for data verification and any missed interfaces can be fixed and/or developed based on the business requirements.
7.	Infrastructure and system performance issues	Overuse of any infrastructure components or cloud instances and any performance and stability issues can be identified and improved.
8.	Training Issues and Job aids	The outgoing vendor will provide an inventory of Training material and Job aids to the new vendor for review and in collaboration with PRMP, define any gaps and needs that can thus be remediated.
9.	Role Based Security issues	User restrictions on application functionality access and/or sensitive citizen data could be adjusted using the Role Based Access Control component of Curam Platform along with a D2Sol asset which provides better representation of the same.

10.	In-Progress work areas	Our experienced team will take over any in-progress work areas and implement them to completion minimizing disruptions
11.	Key Resources not being available for transition	PRMP must compel the outgoing vendor to ensure key staff are available for transition and working in a collaborative manner.

c. Major milestones and success factors

[REDACTED]

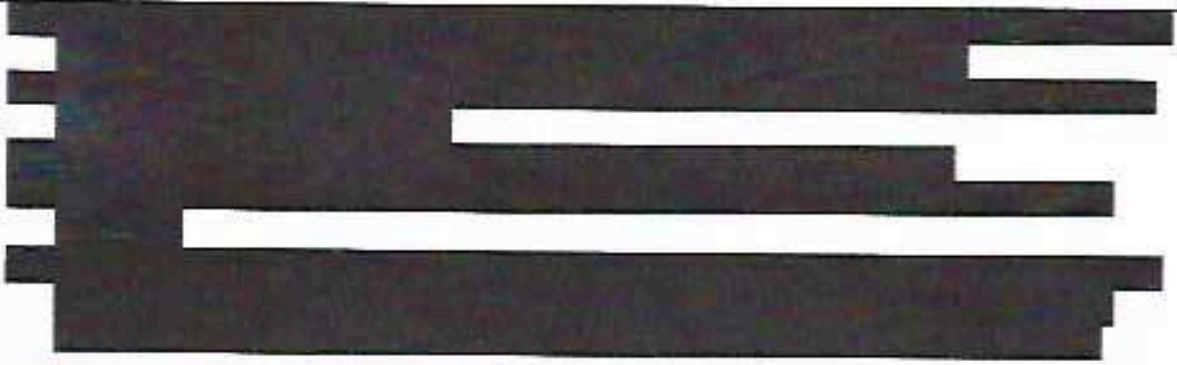
[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]



3.3 Managing the Project Schedule for the Replacement or Takeover of a Medicaid E&E System

- a. Describe the expectations, roles, and responsibilities of the outgoing Maintenance and Operations (M&O) vendor and Puerto Rico Medicaid Program (PRMP) staff during the system replacement or takeover.

The outgoing M&O vendor, PRMP staff and the new vendor must be well organized for the success of the takeover without impacting the case workers using the system and the citizens receiving benefits. For this seamless takeover, the following steps need to be followed and at each step, the members from the outgoing M&O vendor, PRMP Staff and the new vendor will have a key role to play.

- Expectation Setting - The PRMP team should provide an overview of their goals and objectives to the new vendor and prioritize the critical areas of the application. This will help the new vendor to define their takeover plan in alignment with PRMP expectations and prioritizing the critical areas of the application allowing them to focus more time on those areas with the outgoing M&O vendor as part of the takeover exercise.
- New vendor onboarding - The outgoing M&O vendor along with PRMP team should onboard the new vendor personnel by providing them required privileges based on their role to access the application, code base, documentation, database, project management tools, defect tracking tools, and other components associated with the system.
- Handover Checklist – The outgoing M&O vendor and new vendor should come up with an independent checklist that should be discussed and agreed with PRMP staff. This agreed checklist becomes the guide to execute the takeover with all critical pieces of the application being covered.
- Knowledge Transfer Documents – The outgoing M&O vendor should provide a list of updated documents defined in the Checklist across all areas such as business, technical, training, configuration, and infrastructure. The new vendor must review the documents and identify any missed contents and referenced documents. PRMP should review this list and ask the outgoing M&O vendor to provide the details which may be outside of the checklist.
- Knowledge Transfer Sessions – The outgoing M&O vendor should plan for knowledge transfer sessions covering the business, technical, Infrastructure,

configuration management and training. Utilizing these sessions, the new vendor must identify questions/topics which were missed or need additional clarifications. The PRMP team should moderate these sessions and make sure the new vendor's requests are addressed appropriately.

- **New Vendor Team Shadowing** - The outgoing M&O vendor should allow their team members to pair with the new vendor team members in all their PRMP related activities such as stand-ups, design sessions, triage meetings, defect meetings, change control meetings, configuration meetings, deployment activities, hotfix and/or data fix activities, review meetings, etc. This will assist the new vendor team members to understand the processes being followed. The PRMP team should to conduct daily meetings to review any questions & concerns between the teams and quickly resolve.
- **Outgoing team monitoring** - After the shadowing activity, the new vendor will start performing all the activities and will involve the outgoing M&O vendor to monitor and advise on items which may be a deviation from the current process. The PRMP team to conduct daily meetings to review any questions & concerns between the teams and quickly resolve.
- **In-Progress Activities** – The outgoing M&O vendor should list the activities which are in-progress and planned for future releases. This should include all the existing change requests, defects, data fixes, release schedules, & any infrastructure changes. The new vendor should review those activities and plan for a seamless takeover. The PRMP team to review the work in progress and planned activities with the new vendor and provide agreement and/or comments.
- **Key Access Transfer** – The outgoing M&O vendor should provide all key access controls with the credentials to the PRMP & New vendor team. New vendor team should check all the key access controls with the credentials and report any problems to PRMP team for resolution. The new vendor will change the credentials for all access controls towards the end of the takeover phase.

b. What is the typical minimum and maximum duration for the completion of a system replacement or takeover and why? Please include a breakdown of the time between System Development Lifecycle (SDLC) phases.

Given our team's experience and expertise in working on Eligibility and Entitlement systems using the Cúram platform and with a greater understanding of the domain space, we could confidently take over the system in a minimum period of four weeks and up to six weeks.

Our confidence with the above timeline is based on our experience with MAGI and/or Non-MAGI Medicaid implementations using the Cúram platform with customers like the District of Columbia, State of North Carolina, South Carolina, Minnesota, and Missouri. Our team members have an average experience of ten or more years in the Health and Human Services domain and with development using the Cúram product.

Takeover timeline (4-6 weeks)			
Pre-Takeover	New Vendor Planning & Preparation	TBD	<p>New vendor team will identify the key staff who will be engaging with the PRMP Project and prepare them with the relevant context.</p> <p>New vendor team will prepare a draft takeover checklist to be shared with the PRMP team during week 1.</p> <p>New vendor team will prepare a kickoff presentation with all relevant details to be presented to the PRMP team during week 1.</p> <p>New vendor team will prepare a detailed draft plan for the takeover execution which will be revised and adjusted based on the feedback from the PRMP team.</p>
Week 1	Planning & Analysis	Day 1	<p>Project Kick-off meeting with PRMP Stakeholders introducing the key staff and the draft checklist.</p> <p>Understand PRMP teams' expectations and priorities and adjust the checklist and takeover plan accordingly.</p> <p>Request the outgoing vendor to provide project access within 24 hours to the list of new vendor staff members as per their role. These access items include, but are not limited to project documentation, software access, code repository, infrastructure access, tools access, application access, application ancillary component access, & any other access required for third party software (e.g., cloud provider, etc.)</p>
		Day 2	<p>New vendor team to start reviewing the project documentation, verify all access, and get familiar with the environment.</p> <p>Outgoing vendor to hand-over prepared documentation & knowledge transfer sessions plan.</p>
		Day 3	<p>New Vendor team to continue to review the project documentations, test the software access, development team, infrastructure team to test the access and set development environment on developer box.</p> <p>New Vendor, outgoing vendor and PRMP team to finalize the checklist and agree on the list of items</p>

			<p>to be completed for a successful takeover and adjust changes to plan if any.</p> <p>Outgoing vendor to hand-over remaining documentation from checklist & prepare knowledge transfer sessions plan.</p>
		Day 4	<p>PRMP team to review the access to the new team.</p> <p>Outgoing vendor to share the Knowledge transfer sessions plans.</p> <p>Outgoing vendor to prepare the list of in-progress activities and future deployment plans along with the list of defect fixes planned.</p> <p>New Vendor continues to review the documentation, and the knowledge transfer plans to align their team accordingly.</p>
		Day 5	<p>Outgoing vendor to submit the list of in-progress activities and future deployment plans along with the list of defect fixes planned to the new vendor.</p> <p>New Vendor continues to review the project documentation including the list of in-progress activities and future deployment plans along with the list of defect fixes planned.</p> <p>Outgoing vendor to resolve any issues related to access controls for the new vendor and provide clarifications on questions related to the project.</p>
Week 2	Knowledge transfer sessions	Each day	<p>Outgoing team to deliver Knowledge Transfer (KT) sessions for each area agreed in the checklist and as per the plan.</p> <p>New Vendor key staff to attend the Knowledge Transfer sessions as per their area of responsibility.</p> <p>New Vendor continues to review the project documentation including the list of in-progress activities and future deployment plans along with the list of defect fixes planned.</p> <p>New Vendor and PRMP team to meet daily on takeover progress and resolve conflicts if any.</p> <p>New Vendor team to shadow the outgoing vendor team in all project related activities as agreed in the checklist.</p>

Week 3 or Week 3 & 4	Knowledge Transfer Sessions and New Vendor Shadowing	Each day	<p>Outgoing team continues to deliver Knowledge Transfer (KT) sessions for each area agreed in the checklist and as per the plan and additional details requested by the new vendor.</p> <p>New Vendor key staff to attend the Knowledge Transfer sessions as per their area of responsibility.</p> <p>New Vendor team to shadow the outgoing vendor team in all project related activities as agreed in the checklist.</p> <p>New Vendor and PRMP team to meet daily on takeover progress and resolve conflicts if any.</p>
Week 4 or Week 5 & 6	New Vendor Takeover	Each day	<p>New Vendor team performs day-to-day activities on the PRMP system with the M&O team monitoring and providing guidance.</p> <p>New Vendor team will start supporting the system across all areas of functionality and start working on defect prioritization, defect fix, enhancement implementation, deployments, etc.,</p> <p>Outgoing M&O team will be on standby to answer any questions from the new vendor regarding the application and process.</p> <p>New Vendor and PRMP team to meet daily on takeover progress and resolve conflicts if any.</p> <p>M&O team access will be removed towards the end of this activity.</p>
Ongoing Weeks	Post Takeover	Each day	<p>New Vendor team performs the day-to-day operations with full control of the system along with the PRMP team.</p> <p>New Vendor and PRMP team to meet regularly on status, prioritization, etc.,</p>

c. Describe risks and challenges associated with vendor transition and possibility of service interruption during the transition period of the system replacement or takeover. What risk mitigation strategies do you recommend?

With the D2Sol team's deep expertise of the Cúram product and the domain knowledge on MAGI, Medicaid, SNAP & TANF programs, we are confident that the takeover will be done with minimal risks, which we understand is the goal of PRMP. Based on our experience, we

believe the following are potential risks & challenges during the takeover period and the recommended corresponding mitigation strategies.

No.	Risks & Challenges during takeover	Recommended Mitigation Strategy
1.	Any planned technical or business release implementation during the takeover or immediate weeks following takeover might get delayed.	PRMP needs to plan that no critical enhancement and defect fix releases are planned during the transition period and at least for 3 weeks after transition. However, it is recommended that at least one minor release occur during the transition period so that the new vendor can learn the current deployment process from the outgoing vendor to prevent any interruptions post takeover.
2.	Any potential unplanned hot fix or data fix which needs to be applied to production in the immediate weeks following takeover might get delayed if those scenarios were not covered in the takeover phase.	Handover document to be tested by the new vendor during the transition phase. PRMP can allocate a defined bucket of hours (Time and Material) or via other contractual obligation for the key staff of the outgoing vendor for at least 4 weeks post takeover, which can be used for any consultation on a need basis to understand any problems not encountered or knowledge transferred during the transition phase.
3.	There could be an impact to the system due to non-compliant or non-documented practices, examples of which include but not limited to manual batch process, ad hoc data fixes and manual system actions like releasing a workflow, reassessing a case, etc.	Handover document to be tested by the new vendor during the transition phase. PRMP can allocate a defined bucket of hours (Time and Material) or via other contractual obligation for the key staff of the outgoing vendor for at least 4 weeks post takeover, which can be used for any consultation on a need basis to understand any problems not encountered or knowledge transferred during the transition phase.
4.	Cloud subscription transfer may result in access interruptions due to new roles and access controls for accessing the components of the application that need to be set up. This will not have any system interruption but may impact any changes to system components to be impacted until the access roles are defined and implemented.	Cloud Subscription transfer needs to be planned over a weekend which will provide enough time for the new vendor to set up their access and access controls.

3.4 Staffing Approach for a Medicaid E&E System

- a. Provide the ideal staffing approach for the design, development/configuration, implementation period. How do you approach staffing shortages when state/territory resources or SMEs are limited?

The ideal staffing approach for the maintenance and operations period including design, development/configuration and implementation is as follows:

- The vendor team should have an Executive sponsor who will interlock with the PRMP executive team and would act as an escalation point.
- The vendor team must have a dedicated Project Manager who will interlock with the PRMP PMO team and will help with managing the overall plan, process change requests, provide various approvals, etc.,
- The vendor team must have leads and architects in Technical, Business and Infrastructure areas who will work closely with the Project Manager and PRMP SMEs and Architecture team to manage the solution and drive the Key Performance Index (KPI) targets for PRMP.
- The vendor team must have a release manager who will work with the Project manager and user groups to prioritize the defects, enhancements into current and future deployments and re-prioritize the needs based on the demands of maintaining the backlog and in-progress activities without major disruptions.
- The vendor team should have a reasonably sized development team which includes the Cúram developers, business analysts, reporting developers, interface developers, notice developers, infrastructure, and application support staff, testing team, and training & organization change management team.
- During the initial year or two, this team may be of a reasonable size, beyond which it may decrease reducing cost as the system stability is improved and efficiencies are implemented with minimal defects and predictable minor enhancements which go into the system as part of ongoing maintenance.
- Based on our experience, a basic lights-on team is not possible to maintain a MAGI and/or Medicaid enterprise system due to the changing federal and territory policies along with the yearly rituals associated with recertification, rate tables, COLA changes, etc., which at times would require special batches, reports, additional interfaces, etc.,

The D2Sol team will bring up an experienced team who will have Cúram product expertise along with the domain knowledge of MAGI and Medicaid programs. Most of our functional team members are ex-caseworkers & policy members, who understand both the Cúram product and its processes along with the policy knowledge on MAGI and Medicaid programs. They can read and interpret State/Territory policies and can convert them into functional requirements. In case of limited PRMP SMEs, our team members can step up to act as SMEs and can review policies and help PRMP take appropriate decisions. They can also review the Cúram product implementation and present the gaps against the PRMP policies to the PRMP Staff. This in turn may result into new requirements which need to be implemented to fill in the gaps. Outside of the outgoing team, we could also bring on staff who have appropriate expertise to act as PRMP SMEs to help the PRMP team during periods where they see limited availability of their SME team. We also follow this process in our District of Columbia implementation.

- b. List the ideal staffing model for the M&O period of the replacement or takeover. Name the type and number of resources estimated for this project.**

- Determine the correct training approach for each job task (instructor led, train the trainer, virtual or eLearning, just-in-time learning modules, job aids, print materials, etc.).
 - Train the trainer is an effective method as it not only economically delivers live training and content to end users, but it also places a go-to or subject matter expert in remote offices for quick resolution of questions and a feedback mechanism back to the training team.
 - Other training methods are also very effective depending on the circumstances, like just-in-time learning modules (2-3 minute quick videos that address a specific task) that a user can review just prior to acting on a task.
 - The appropriate training method should be considered depending on the situation, with critical tasks potentially having multiple delivery options.
- Develop training materials, review for quality and applicability, and conduct dry runs.
- Plan training execution, logistics (scheduling, classroom or system prep, communications), and deliver training.
- Assess training feedback, adjust training content and methods, report on training results.

Completed and approved learning assets are delivered to PRMP, posted to the appropriate repository, such as a Learning Management System (LMS) and transferred to the appropriate material owners. Where it doesn't already exist, PRMP should implement a Learning Management System to host and deliver training material, track student progress, and generate reports for staff evaluation on the effectiveness of the training program.

For each release, we recommend training materials that include the following components:

- Basic Overview and Navigation of the PRMP
- Orientation to case types and structure.
- Evidence types and management.
- Case management.
- How to process Medicaid Eligibility.
- Incorporate business procedures.
- Develop user skills as it relates to executing transactions and processing data in PRMP.

Department of Health Medicaid Program engagement throughout the training development and delivery process is essential. PRMP staff related tasks would include assistance in defining user groups, training environments, infrastructure, and resources. PRMP subject matter experts involvement in design workshops, prioritization of tasks and job changes, review of training materials and feedback, and

ultimately approving the training approach and materials supports successful knowledge transfer to staff and caseworkers.

3.5 Cost Estimates and Models for the Replacement or Takeover of a Medicaid E&E System

- a. Provide the typical price range for the replacement or takeover of a Medicaid E&E System and elaborate on key considerations, drivers, and components for pricing.

[Redacted]

[Redacted]

[Redacted]

[Redacted]

- b. For the projects you have mentioned in this RFI response, what were your implementation and operational costs? What are the main cost drivers?

[Redacted]

[Redacted]

- [REDACTED]
- c. Describe how system enhancements are typically managed. What recommendations do you have for controlling enhancements costs?

System enhancements in a Medicaid E&E system are common due to changes in Federal and State/Territory policies along with yearly mandatory changes related to re-assessments, reference values such as Federal Poverty Limit, Cost of Living Allowance, etc. Cúram product upgrades along with their roadmap presentations, could help PRMP in reducing enhancement costs as those needs may be addressed through product upgrades (e.g., responsiveness in rendering of application in various layouts such as Desktop, Tablets and Mobiles devices, improvements in application usability like efficient screen layouts, dynamic menus and action buttons, and reduced clicks to complete tasks).

Our recommendations to control the enhancement costs are to include some of the above-mentioned changes as part of the M&O contract which will be done by the M&O team as part of the ongoing releases by including them in the backlog. Any major enhancement work like replacing an additional legacy system or including a new major program, etc., can be planned as a Change Request based on a predefined rate card from the vendor as part of the M&O Contract or a pre-defined bucket of additional optional hours included as part of the M&O Contract. The clip level of effort hours for Change Requests can also be included as part of the M&O Contract below which the vendor is responsible to include them as part of their ongoing M&O work.

3.6 Documentation

1. List and describe documentation that is essential to plan and execute a replacement or takeover (before, during, and after).

Below is the list of documentation that is required before the takeover for planning purpose:

- Defect Report - Pending defect count categorized on Severity.
- Enhancement Report - Pending enhancement count categorized on Priority.
- System Architecture (Physical and Logical) - Explaining various components of the system.
- Interface Count - Count of number of interfaces categorized on its type (e.g., inbound vs outbound)
- Batch Count - Count of number of batches categorized on the frequency of execution.
- Reports Count - Count of number of reports categorized on complexity and frequency.
- Notices Count - Count of number of notices triggered from the system.
- System Size - Number of environments, Database size, and its growth rate

Below are the list of documentation that is required during the takeover phase for detailed analysis and understanding:

- Existing work plan - Defining the immediate and future releases planned with defects or enhancements included in them along with Change Control Board approvals.
- System Design Document - Containing the latest system configurations and architecture including Disaster recovery and Contingency testing.
- System Security Plan - Containing the details of security configuration of the system including Identity access management and Incident response.
- Configuration management - Containing the details of the various environments, branching strategies, DevOps processes, etc.
- Recent Release Runbooks and Release Notes - Containing information about deployment procedure and contents of the release.
- Functional Design Documents - Details of the functional designs implemented in the system along with process flows.
- Technical Design Documents - Details of the technical designs based on the functional designs.
- Test Scripts - Details of the steps involved in the testing the application and any automation test scripts if available.
- Batch Run book - Listing of all batch jobs and their schedule.
- Reports design - Catalog of all reports & visualizations, schedules, and expirations including the ETL scripts.
- Data quality report - including the list of data fixes applied on the system, their root cause analysis, and the corresponding fix to functionality to prevent future data fix.
- Notices Design - Listing all notices, including their data requirements and triggers.

2. What documentation is not essential, but may be desirable?

The below are some of the documents which are desirable but not essential:

- Past Release notes and its associated release documentation
- Business & IT Organizational Charts
- Software Assessment & Inventory – Annual report of all software, versions, renewal dates, & count of licenses
- Past project status reports & Executive reports
- Daily Monitoring reports for production & non-production environments
- Response times from Remote & Local sites
- Test plans, use cases, and test results
- Past Training and Knowledge transfer materials
- Vulnerability assessment of environments, including an Information Security Risk Assessment and Corrective Action Plan
- Quality Control Plan and Procedures

3. What documentation would be helpful to include in a future “bidders’ library” to assist offerors?

The below are some of the documents/information which would be helpful to include in the future “bidder’s library”:

- Physical and logical application architecture diagrams
- System Metrics regarding the number of programs implemented, reports, batches, notices, environments, database size, database growth rate, interfaces, etc.,
- Plan metrics regarding the number of defects, defect growth rate, enhancements, releases planned, etc.,
- Service Level Agreements

4. When there is limited written information, how do you address gaps/what alternate ways do you use to estimate level of effort or project risk?

When there is limited information on how to address gaps, the D2Sol team will utilize our experience in implementing similar functionality in nearly ten different State Medicaid systems utilizing the Cúram platform to come up with an accurate level of effort. Our implementation experience helps us to effectively build a comparative view of the PRMP E&E system in accurately portraying the needed staff and capacity.

The PRMP team may further manage their risk of cost escalation due to limited written information by building a "pool of hours" which the agency could utilize for unanticipated issues or gaps, as well as prospective enhancements to the system and gain if left unused.

Regardless of the availability of written information, as described in Section 3.3 of this informational response, we advocate for a period of overlapping shadowing and outgoing vendor guidance. In pairing new vendor staff alongside outgoing vendor staff in daily work activities, capturing functional and technical attributes of the system, access and identity controls, monitoring and reporting functions, and then performing in these roles with the outgoing vendor continuing to be alongside, the gaps in needed information can be mitigated and project risk reduced.

o **3.7 Alternative Approaches**

- a. **The current Puerto Rico E&E System is a CMS Certified system, running on a Cúram platform. What do you recommend as PRMP considers options for modernizing and enhancing their solution? Please provide any additional information regarding alternative approaches that may be beneficial for PRMP to consider ahead of a potential future procurement.**

[REDACTED]

[REDACTED]

[REDACTED]

b. Considering the layouts of the existing solution depicted in Section 2 of the RFI, do any modules lend themselves well to enhancements or modernization?

[REDACTED]

c. Is the Respondent willing to provide an E&E system demo or provide additional information upon PRMPs request?

Yes

Yes, D2Sol is willing to provide an E&E system demo or provide additional information such as the best practices we have followed with customers who have leveraged the full benefits of the Cúram Platform and the various assets we have harvested as part of our experience with the customer implementations which can bring in quick wins. We are also a key integration partner with Merative, the product developer for Cúram, and are regularly engaged with them on planned product enhancements, feedback from our clients, tight integration with their support organization, and believe that this partnership ultimately brings increased value and speed to market for our client's solutions.

3.8 Anticipated Engagement and Potential Barriers

a. Should PRMP release an E&E takeover or replacement RFP over the next several months, what limiting factors or constraints might prevent your organization from participating?

[REDACTED]

[REDACTED]