

Attachment B: Title Page, Vendor Information, Executive Summary, Subcontractor Letters, and Table of Contents

- Title Page



Puerto Rico Department of Health

D2Sol, Inc.

REDACTED - Original Technical Proposal

Puerto Rico Medicaid Program

Eligibility and Enrollment System Takeover

Request for Proposal Number 2024-PRMP-MES-EE-004

September 12, 2024

This Title Page serves as D2Sol's Intent to Bid on RFP # 2024-PRMP-MES-EE-004.

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The vendor should provide the following information regarding the person responsible for completing the vendor response. This person should also be the person the PRMP should contact for questions and/or clarifications.

Name	Bill Destache	Phone	<div style="background-color: #cccccc; border: 1px solid black; padding: 2px;">Redacted</div> (mobile)
Address	5920 S. Miami Boulevard, Suite 101	Fax	Not available
	Morrisville, NC 27560	Email	<div style="background-color: #cccccc; border: 1px solid black; padding: 2px;">Redacted</div>

Subject to acceptance by the PRMP, the vendor acknowledges that by submitting a response and signing in the space indicated below, the vendor is submitting a formal offer to meet that which is being requested within this RFP.

In addition to providing a signature to 6: *Disclosure of Response Contents* in this section, failure to sign the Submission Cover Sheet or signing it with a false statement shall void the submitted response or any resulting contracts.

Redacted

 / September 10, 2024

Original signature of Signatory Authorized to Legally Bind the Company / **Date**

Name (Typed or Printed)	Bill Destache
Title	Managing Director
Company Name	D2Sol, Inc
Physical Address	5920 S. Miami Boulevard, Suite 101
	Morrisville, NC 27560
State of Incorporation	North Carolina

By signature hereon, the vendor certifies that:

1. All statements and information prepared and submitted in response to this RFP are current, complete, and accurate.
2. The vendor's response meets the requirement of this RFP.
3. The vendor will comply with all federal and Commonwealth laws, rules, and regulations that are in force currently or anytime during the term of a resulting contract.
4. The vendor acknowledges and accepts that the full response contents and associated documents will become open to public inspection in accordance with the laws of Puerto Rico. The PRMP will hold "confidential" all response information, including both technical and cost

information, during the evaluation process, except for the questions and answers before the submittal of proposals. All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded in accordance with the laws of Puerto Rico. If a vendor provides a redacted copy of their proposal along with an unredacted copy, PRMP will publish the redacted copy of the proposal.

5. The company represented here is an authorized dealer in good standing of the products and services included in this response.
6. The vendor, any subcontracting partners, and its proposed resources are eligible to participate in this transaction and have not been subjected to suspension, debarment, or similar ineligibility determined by any federal, state, or local governmental entity; are compliant with the Commonwealth's statutes and rules relating to procurement; and are not listed on the federal government's terrorism watch list as described in Executive Order 13224. Entities ineligible for federal procurement are listed at <https://sam.gov/content/home>.
7. Prior to the award, the vendor affirms it will have all current approvals, licenses, or other qualifications needed to conduct business in Puerto Rico.
 - **Vendor Information**

The vendor should complete the following information in the subsections below:

- Primary point of contact for any questions pertaining to the vendor's payment address
- Address to which the PRMP should send legal notices for any potential future agreements

2.1 Payment Address

In the table below, the vendor should provide the name, title, and address to which the PRMP should direct payments for the goods and services within this RFP.

Table 1: Payment Information

Payment Information			
Name:	Redacted	Title:	Redacted
Address:	5920 S. Miami Boulevard, Suite 101		
City, State, and ZIP Code:	Morrisville, NC 27560		
Phone:	Redacted	Fax:	Not available
Email:	Redacted		

2.2 Legal Notice Address

In the table below, the vendor should provide the name, title, and address to which the PRMP should send legal notices.

Table 2: Legal Notice Information

Legal Notice Information			
Name:	Bill Destache	Title:	Managing Director
Address:	5920 S. Miami Boulevard, Suite 101		
City, State, and ZIP Code:	Morrisville, NC 27560		
Phone:	Redacted	Fax:	Not available
Email:	Redacted		

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- **Executive Summary**

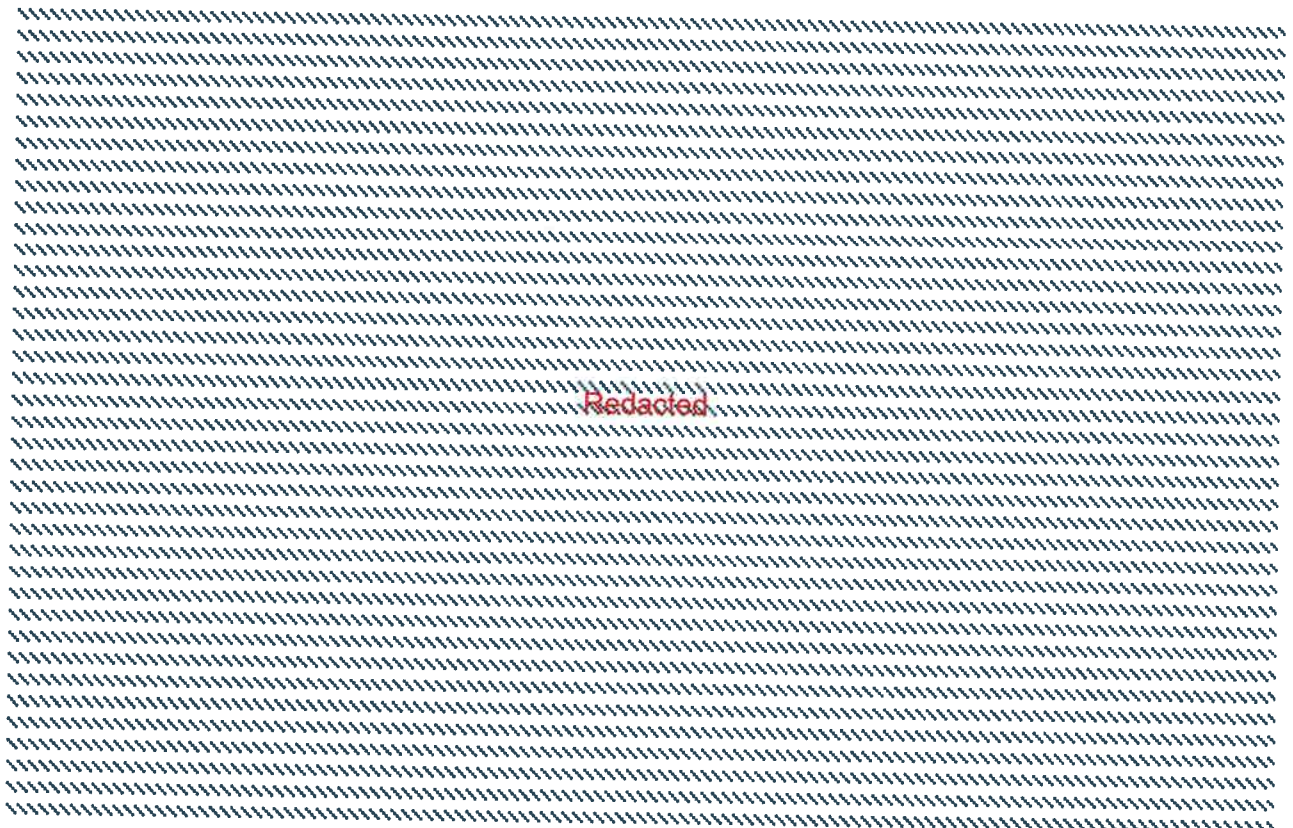
Redacted

Table 3. The D2Sol Team

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Figure 1. Cúram Worldwide Implementations





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Table 4. D2Sol-Cúram Partnerships

Redacted

- **Subcontractor Letters (If Applicable)**

See the Subcontractor Letter for Merative US L.P. on the following page.

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Attachment C: Vendor Qualifications and Experience

Organization Overview

1.1 Organization Overview

Table 5: Vendor Overview

Vendor Overview	
Company Name	D2Sol, Inc.
Name of Parent Company (If Applicable)	Not Applicable
Industry (North American Industry Classification System [NAICS])	
Type of Legal Entity	
Company Ownership (e.g., Private/Public, Joint Venture)	
Number of Full-Time Employees	
Last Fiscal Year Company Revenue	
Last Fiscal Year Company Net Income	
Percentage of Revenue from State and Local Government Clients in the United States and its Territories	Redacted
Number of Years in Business	
Number of Years Vendor Has Been Providing the Type of Services Specified in the RFP	
Number of Employees Providing the Type of Services Specified in the RFP	
Headquarters in the United States and its Territories	
Locations in the United States and its Territories	

1.2 Subcontractor Overview (If Applicable)

Table 6: Subcontractor Overview

Subcontractor Overview	
Company Name	Merative US L.P.
Name of Parent Company (If Applicable)	Merative L.P.
Industry – NAICS	
Type of Legal Entity	
Company Ownership (e.g., Private/Public, Joint Venture)	
Number of Full-Time Employees	
Last Fiscal Year Company Revenue	
Last Fiscal Year Company Net Income	
Percentage of Revenue from State and Local Government Clients in the United States and its Territories	Redacted
Number of Years in Business	
Number of Years Vendor Has Been Providing the Type of Services Specified in the RFP	
Number of Employees Providing the Type of Services Specified in the RFP	
Headquarters in the United States and its Territories	
Locations in the United States and its Territories	

Existing Business Relationships with Puerto Rico

Redacted

Business Disputes

Redacted

References

Vendor (Prime) References Form

Table 7: Vendor References – #1

Vendor Information		
Vendor Name: Redacted	Contact Name:	Redacted
	Contact Phone:	Redacted
Customer Information		
Customer Organization: Redacted	Contact Name:	Redacted
	Contact Title:	Redacted
Customer Address: Redacted	Contact Phone:	Redacted
	Contact Email:	Redacted
Total Vendor Staff:	Redacted	

Vendor Information

Objectives:

Redacted

Description:

Redacted

Vendor's Involvement:

Redacted

Key Staff

Name:		Role:	
Name:		Role:	
Name:		Role:	
Name:	Redacted	Role:	Redacted
Name:		Role:	
Name:		Role:	
Name:		Role:	
Name:		Role:	

Vendor Information				
Measurements:				
Estimated Costs:		Actual Costs:		
Redacted		Redacted		
Reason(s) for change in cost:				
Redacted				
Original Value of Vendor's Contract:		Actual Total Contract Value:		
Redacted		Redacted		
Reason(s) for change in value:				
Redacted				
Estimated Start and Completion Dates:	From:	Redacted	To:	Redacted
Actual Start and Completion Dates:	From:	Redacted	To:	Redacted
Reason(s) for the difference between estimated and actual dates:				
Redacted				
If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities:				
Redacted				

Table 8: Vendor References – #2

Vendor Information	
Vendor Name:	Contact Name:
Redacted	Redacted
	Contact Phone:
	Redacted

Vendor Information

Customer Information

Customer Organization:

Redacted

Contact Name:

Redacted

Contact Title:

Redacted

Customer Address:

Redacted

Contact Phone:

Redacted

Contact Email:

Redacted

Total Vendor Staff:

Redacted

Objectives:

Redacted

Description:

Redacted

Vendor's Involvement:

Redacted

Key Staff

Name: Redacted

Role: Redacted

Name: Redacted

Role: Redacted



Vendor Information				
Name:		Role:		
Name:		Role:		
Name: Redacted		Role: Redacted		
Name:		Role:		
Name:		Role:		
Name:		Role:		
Measurements:				
Estimated Costs:		Actual Costs:		
Redacted		Redacted		
Reason(s) for change in cost:				
Redacted				
Original Value of Vendor's Contract:		Actual Total Contract Value:		
Redacted		Redacted		
Reason(s) for change in value:				
Redacted				
Estimated Start and Completion Dates:	From:	Redacted	To:	Redacted
Actual Start and Completion Dates:	From:	Redacted	To:	Redacted
Reason(s) for the difference between estimated and actual dates:				
Redacted				
If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities:				
Redacted				

Vendor Information
Redacted

Subcontractor References (If Applicable)

Table 9: Subcontractor References – #1

Subcontractor Information		
Vendor Name: Redacted	Contact Name:	Redacted
	Contact Phone:	
Customer Information		
Customer Organization: Redacted	Contact Name:	
	Contact Title:	Redacted
Customer Address: Redacted	Contact Phone:	
	Contact Email:	
Project Information		
Total Vendor Staff:	Redacted	
Objectives: Redacted		



Subcontractor Information

Redacted

Description:

Redacted

Subcontractor Information

Vendor's Involvement:

Redacted

Key Staff

Name:		Role:	
Name:		Role:	
Name:	Redacted	Role:	Redacted
Name:		Role:	
Name:		Role:	

Project Measurements:

Estimated one-time costs:	Actual one-time costs:
Redacted	Redacted

Reason(s) for change in one-time cost:
 Redacted

Original Value of Vendor's Contract:	Actual Total Contract Value:
Redacted	Redacted

Reason(s) for change in value:
 Redacted

Estimated Start and Completion Dates:	From:	Redacted	To:	Redacted
Actual Start and Completion Dates:	From:	Redacted	To:	Redacted

Subcontractor Information	
Reason(s) for the difference between estimated and actual dates: Redacted	
If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: Redacted	

Table 10: Subcontractor References – #2

Subcontractor Information		
Vendor Name: Redacted	Contact Name:	Redacted
	Contact Phone:	
Customer Information		
Customer Organization: Redacted	Contact Name:	
	Contact Title:	
Customer Address: Redacted	Contact Phone:	Redacted
	Contact Email:	
Project Information		
Total Vendor Staff:	Redacted	
Objectives: Redacted		

Subcontractor Information

Redacted

Description:

Redacted

Vendor's Involvement:

Redacted



Subcontractor Information	
<div>Redacted</div>	
Key Staff	
Name: <div>Redacted</div>	Role: <div>Redacted</div>
Name: <div>Redacted</div>	Role: <div>Redacted</div>
Name: <div>Redacted</div>	Role: <div>Redacted</div>
Name: <div>Redacted</div>	Role: <div>Redacted</div>
Name: <div>Redacted</div>	Role: <div>Redacted</div>
Name: <div>Redacted</div>	Role: <div>Redacted</div>
Name: <div>Redacted</div>	Role: <div>Redacted</div>
Project Measurements:	
Estimated one-time costs: <div>Redacted</div>	Actual one-time costs: <div>Redacted</div>
Reason(s) for change in one-time cost: <div>Redacted</div>	
Original Value of Vendor's Contract:	Actual Total Contract Value:

Subcontractor Information				
Redacted		Redacted		
Reason(s) for change in value: Redacted				
Estimated Start and Completion Dates:	From:	Redacted	To:	Redacted
Actual Start and Completion Dates:	From:	Redacted	To:	Redacted
Reason(s) for the difference between estimated and actual dates: Redacted				
If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: Redacted				

Table 11: Subcontractor References – #3

Subcontractor Information		
Vendor Name: Redacted	Contact Name:	Redacted
	Contact Phone:	
Customer Information		
Customer Organization: Redacted	Contact Name:	
	Contact Title:	Redacted
Customer Address: Redacted	Contact Phone:	
	Contact Email:	
Project Information		

Subcontractor Information

**Total Vendor
Staff:**

Redacted

Objectives:

Redacted

Description:

Redacted

Subcontractor Information

Vendor's Involvement:

Redacted

Key Staff

Name:		Role:	
Name:		Role:	
Name:	Redacted	Role:	Redacted
Name:		Role:	
Name:		Role:	
Name:		Role:	

Project Measurements:

Estimated one-time costs:	Actual one-time costs:
Redacted	Redacted

Subcontractor Information

Reason(s) for change in one-time cost:

Redacted

Original Value of Vendor's Contract:

Redacted

Actual Total Contract Value:

Redacted

Reason(s) for change in value:

Redacted

Estimated Start and Completion Dates:

From:

Redacted

To:

Redacted

Actual Start and Completion Dates:

From:

Redacted

To:

Redacted

Reason(s) for the difference between estimated and actual dates:

Redacted

If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities:

Redacted

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Attachment D: Vendor Organization and Staffing

1. Initial Staffing Plan

Our initial staffing plan includes all the required staff to perform the Operations and Modernization of the MEDITI3G system. Our proposed staffing plan is based on our experience from similar engagements and the team we are proposing is knowledgeable, skilled, experienced, and best suited to meet the needs of the MEDITI3G system. We have included staff with different skill sets to meet all aspects and needs of the engagement who also have immense

Redacted

Our staff onboards at various stages of the project and continues to work full time depending upon their role and transition into providing their services on a need basis. The key staff as recommended by PRMP will be full time for the project and will be onsite with PRMP team for 25% of their time.

Our staff includes team members with experience and understanding of the MEDITI3G system through their involvement with the incumbent vendor team's PRMP implementation, operations, and modernization activities.

We have also included staff from the Cúram team who have direct access to the Cúram Product Development and Support organizations of the Cúram Platform on which the E&E system functionalities are implemented and delivered. This provides a differentiating advantage to PRMP in understanding the upcoming new functionality and perform necessary compliant customization and configurations. This allows PRMP to best utilize the system and maximize your investment in the platform.

The key roles as defined by PRMP are included as part of our staffing plan and their descriptions and resumes are included as part of this Attachment D. The Organization Chart for our O&M engagement with PRMP is shown below.

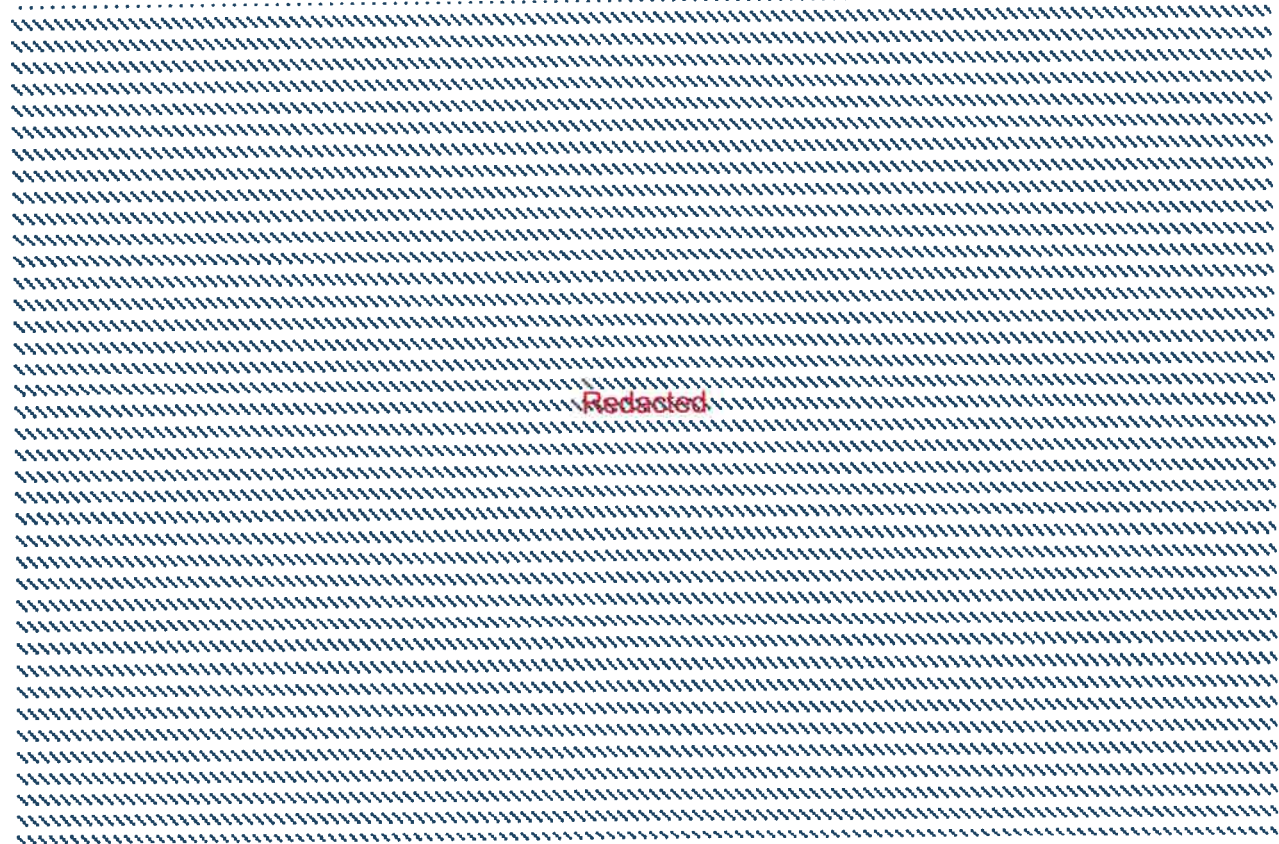


Figure 2. D2Sol O&M Organization Chart

A high-level view of the key staff and their responsibilities are as follows:

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A high-level view of the non-key staff who are included as part of our staffing plans and their responsibilities are as follows:

- **Business Analyst (BA):** Business Analysts will play a crucial role in understanding, analyzing, and documenting the business needs and requirements of the PRMP. They work closely with stakeholders to clearly and accurately translate these requirements into functional specifications for the E&E system.

This role also involves identifying opportunities for process improvements and recommending solutions to enhance system performance. Business Analysts serves as a key liaison between business stakeholders and the development team, helping to ensure effective communication and alignment throughout the project.

This role also supports the testing process by developing test cases and validating that the system meets the specified requirements, such that the final product effectively addresses the PRMP's business objectives.

- **Senior Cúram Developer:** Senior Cúram Developers will be experts in Cúram software, responsible for leading the configuration, development and customization of Cúram solutions for new enhancements or existing defects. This role involves designing, implementing, and optimizing MEDIT3G to meet the specific needs of the PRMP. They provide technical leadership, guiding and mentoring other developers, and ensuring adherence to best practices and coding standards.

Key responsibilities include overseeing the integration of Cúram with other systems, triaging and resolving advanced technical issues, and verifying the overall quality and performance of the Cúram based MEDIT3G system. They collaborate closely with business analysts and other stakeholders to understand requirements and translate them into effective solutions, contributing to the successful delivery of the project.

- **Cúram Developer:** Cúram Developers focuses on the configuration, development and customization of Cúram-based MEDIT3G system, under the guidance of the senior developers. Their responsibilities include writing and maintaining code, implementing new features, fixing defects, and verifying that the Cúram applications meet the specified requirements.
- **Scrum Master:** The Scrum Master will be a pivotal role in guiding the development team through the Scrum process, ensuring adherence to Agile principles. Their primary role is to facilitate Scrum processes, including daily stand-ups, sprint planning, retrospectives, and sprint reviews, making sure these meetings are effective and focused on achieving project goals.

The Scrum Master supports the development team by removing obstacles that may impede progress, resolving conflicts, and ensuring that the team has the necessary resources and support. They will verify that the Scrum framework is correctly implemented, promoting Agile best practices and fostering a collaborative team environment. By encouraging continuous improvement, they will help the team identify and implement process enhancements to boost efficiency and effectiveness.

- **Technical Writer:** The Technical Writer creates clear and concise documentation for all the PRMP deliverables based on the instructions from the Document Management Lead and convert complex technical information understandable for various audiences. They collaborate with developers and product teams to gather details, write and edit documents, and verifies that the content is accurate and up-to-date. They also create visual aids like diagrams and manage revisions as products evolve and provide clarity for end users and stakeholders. They will prepare meeting materials and follow with documented meeting minutes.
- **Reports and ETL Developers:** The Reports and ETL Developers are crucial for maintaining the ad-hoc and manual reporting systems along with any ETL (Extract, Transform, Load) processes involved. They focus on maintaining the existing reporting database, existing reports, and creating reports that meet stakeholder requirements. They will also support the OneX team with any required data mapping from the E&E system for the OneX system to develop a comprehensive reporting system capable of generating the E&E system related mandatory and compliancy reports.
- **Interface Developer:** The Interface Developer is essential for designing and maintaining interfaces between various systems for smooth data exchange and integration. They focus on creating and maintaining system interfaces that facilitate effective interaction and data flow between various applications including federal agencies, meeting the required functional specifications.

The role involves integrating different systems and applications, developing and maintaining APIs, and other components necessary for seamless data synchronization. They are also responsible for troubleshooting and resolving any issues related to interfaces, such as data mismatches or communication problems.

This role also includes optimizing interface performance for efficient data transfer and minimize latency and verify that systems work together seamlessly, enabling effective and reliable data integration across PRMP.

- **Notices Developer:** The Notices Developer is responsible for updating existing and creating new notices within the MEDITI3G system to meet business and regulatory requirements. This involves creating and customizing notices with appropriate layouts, content, and structure for a clear and compliant message to the beneficiaries.

They also integrate these notices into the application for automatic generation and distribution as required, with a focus on automating processes for efficiency and accuracy. They validate the notices to verify that the notices function correctly and capture necessary information.

Regular updates and maintenance are also part of their role, helping to ensure that forms and notices remain current with any changes in business processes, regulations, or system updates. Overall, they play a vital role in supporting PRMP Medicaid's communication and regulatory compliance through well-designed and properly managed notices.

- **Senior Tester:** The Senior Tester is responsible for leading the testing efforts within MEDITI3G, verifying that all components of the system are thoroughly tested and meet the required quality standards. They design and execute comprehensive test plans and strategies, create and update testing scripts, oversee the testing process, and mentor other testers. They also coordinate with development teams to identify and resolve defects for the intended functioning of the system. They play a key role in test automation and in ensuring that testing procedures are efficient and aligned with project goals.
- **Tester:** The Testers focuses on executing test cases, identifying bugs, and validating that the system meets specified requirements. They work under the guidance of the Senior Tester, carrying out the day-to-day testing activities, create and update testing scripts, including manual and automated testing, to validate system

functionality and quality. The Tester reports findings, helps in troubleshooting issues, and collaborates with the development team to validate that any identified defects are addressed. Their work is crucial in validating that the system performs as expected and is free of critical issues before deployment.

- **Automation Tester:** The Automation Tester is responsible for developing and executing automated test scripts to validate the functionality, performance, and reliability of MEDITI3G system. Their role focuses on automating repetitive testing tasks to improve efficiency, reduce manual effort, and ensure consistent testing coverage.

Key responsibilities include designing, writing, and maintaining automated test scripts using various testing tools and frameworks. The Automation Tester collaborates with developers and other QA team members to identify areas of the application that can be automated and creates test cases that mimic real-world usage scenarios.

They also monitor and analyze the results of automated tests, identifying any defects or issues that need to be addressed. The Automation Tester plays a crucial role in Continuous Integration and Continuous Delivery (CI/CD) pipelines by ensuring that automated tests are integrated into the development process, helping to catch issues early and improve the overall quality of the software.

- **Performance Tester:** The Performance Tester is responsible for evaluating the performance, scalability, and stability of the MEDITI3G system under various conditions. Their role involves conducting tests to validate that the application can handle expected and peak loads without compromising performance or user experience.

Key responsibilities include designing and executing performance test plans, including stress, load, and endurance testing, to assess how the system performs under different levels of demand. The Performance Tester simulates multiple users and monitor key performance indicators such as response times, throughput, and resource utilization.

They analyze the results of these tests to identify performance bottlenecks, potential failures, and areas that require optimization. The Performance Tester collaborates closely with developers and infrastructure team to address any performance issues, offering recommendations for improvements.

- **Training Team Member:** The Training Team Member is responsible for developing and delivering training programs to help ensure that users are well-prepared to use existing and new functionality to the MEDITI3G system. Their role includes creating training materials, such as manuals, job aids, guides, and presentations, that clearly explain system functionalities and procedures. They conduct training sessions, workshops, and hands-on demonstrations to help users gain the necessary skills and confidence.

The Training Team Member provides ongoing support and assistance to users, answering questions and addressing any issues that arise during and after the training process. They may also gather feedback from participants to continuously improve the training content and methods.

- **Infrastructure Lead:** The Infrastructure Lead is responsible for overseeing the design, implementation, maintenance, operations, and modernization of the MEDITI3G system's IT infrastructure. This role involves verifying that all hardware, software, networks, and systems are robust, scalable, and aligned with the PRMP needs.

Key responsibilities include planning and coordinating infrastructure projects, managing system upgrades, and ensuring that the infrastructure supports the MEDITI3G system effectively. The Infrastructure Lead works closely with other IT teams to integrate new technologies, optimize system performance, and verify security and compliance across all infrastructure components. They also oversee the deployment process, develop deployment plans, and manage risks and resolve any issues that arise during the deployment, ensuring minimal disruption to the business.

They also handle troubleshooting and resolving complex infrastructure issues, providing guidance to the technical team, and verifying that the infrastructure is reliable and resilient. The Infrastructure Lead plays a critical role in strategic planning, helping to ensure that the IT infrastructure evolves in line with PRMP goals and industry best practices.

- **Cloud Administrator:** The Cloud Administrator is responsible for managing and maintaining MEDITI3G's cloud environment, verifying that cloud services are efficiently and securely utilized. Their role involves overseeing the configuration, deployment, and ongoing management of cloud resources, such as virtual machines, storage, and network components.

Key responsibilities include monitoring cloud infrastructure for performance, availability, and security, such that the cloud environment is optimized for MEDITI3G needs. The Cloud Administrator handles tasks such as provisioning resources, managing access and permissions, and implementing backup and recovery solutions to protect data.

They also work on troubleshooting and resolving issues related to cloud services, with any disruption addressed quickly. They help to ensure compliance with security policies and best practices, regularly updating and patching cloud systems to protect against vulnerabilities. They oversee cloud architecture and operations, verifying that cloud-based MEDITI3G system is secure, scalable, and aligned with project needs.

- **System Administrator:** The System Administrator manages and maintains the various applications making up the MEDITI3G system and helps to ensure that they operate smoothly and securely. They handle system configuration, installation, and updates, and monitor performance to address any issues.

Their role includes providing technical support, troubleshooting problems, and implementing security measures to protect against unauthorized access for each of those applications. They also manage backup and recovery processes to safeguard critical data.

- **Database Administrator (DBA):** The Database Administrator manages and maintains MEDITI3G system's databases for performance, security, and availability. They install and configure databases, monitor and optimize performance, and implement security measures to protect data. The DBA also handles backup and recovery processes, troubleshoots issues, and performs regular maintenance and upgrades. Their role is crucial for the databases run efficiently and reliably, supporting the data management needs and helps to ensure that the databases are properly designed, optimized, and maintained to support MEDITI3G data needs.

Identification of Subcontractor Staff

D2Sol's sub-contractor Cúram by Merative, who is also the Cúram Platform provider based on which the MEDITI3G system was implemented, is providing the product experts and other staff who will support PRMP in successful transition, operations, and modernization of the MEDITI3G system. The following are the list of roles agreed between our organizations that will be staffed by the sub-contractor:

- Business Lead (Key Position) - Redacted
- Document Management Lead (Key Position) – Redacted
- Technical Lead (Key Position) – Redacted
- Quality Assurance Manager (Key Position) – Redacted
- Business Analyst – Cúram experienced business analyst team member
- Senior Cúram Developer – Cúram experienced development team leads
- Cúram Developer – Cúram experienced development team members
- Senior Tester – Cúram experienced testing team leads

- Tester – Cúram experienced testing team members
- Performance Tester – Cúram experienced performance testing team member

Subcontractor Management

D2Sol understands that when we engage with a subcontractor, effective management and clear expectations are essential for successful project outcomes. Given the two organization's history of partnerships, we have been effectively managing our relationship for the benefit of the customer for many years. The following is the detailed explanation of how D2Sol will manage our partnership with Cúram by Merative:

- **Contractual Agreement:** D2Sol and the subcontractor agree on the specific tasks, deliverables, and timelines which will be included in a Statement of Work (SOW). The SOW outlines the subcontractor's responsibilities and how they fit into the overall project. It will also include payment terms, confidentiality clauses, intellectual property rights, and dispute resolution mechanisms.
- **Performance Standards:** D2Sol establishes clear quality standards that the subcontractor must meet. These may include specific benchmarks, industry standards, staff experience, or PRMP satisfaction targets. Key Performance Indicators are defined to measure the subcontractor's performance, such as timeliness, accuracy, and adherence to PRMP project requirements.
- **Communication Protocols:** D2Sol schedules regular meetings with the subcontractor and gathers status reports from the subcontractor to discuss task progress, address issues, and verify alignment with PRMP project goals. There will be a designated primary contact person from both organizations to streamline communication and resolve any issues promptly.
- **Monitoring and Reporting:** D2Sol performs periodic reviews to assess the subcontractor's adherence to performance standards and identify areas for improvement. The subcontractor provides regular updates on their progress, which will be reviewed by D2Sol to validate that the subcontractor remains on track against deliverable and performance expectations.
- **Issue Resolution:** The two organizations have defined a process for escalating and addressing performance issues or disputes that arise and if any such issues are identified, D2Sol will work with the subcontractor to implement corrective measures and improve performance. Given our long history of partnerships, we have experienced minimal concerns.
- **Compliance and Risk Management:** D2Sol will verify that the subcontractor adheres to relevant laws, regulations, industry standards, and other mandatory requirements defined by PRMP. D2Sol also identifies potential risks associated with subcontractor performance and develops strategies to manage and mitigate these risks.
- **Integration with D2Sol's Operations:** D2Sol will verify that the subcontractor's work aligns with the overall project plan and integrates smoothly with other components of the engagement. D2Sol coordinates the allocation of resources and support to facilitate the subcontractor's work.
- **Performance Evaluation and Feedback:** D2Sol uses predefined and agreed criteria to evaluate the subcontractor's performance upon milestone completions or at regular intervals. D2Sol provides constructive feedback to the subcontractor to encourage continuous improvement and address any issues.

2. Use of PRMP Staff

The D2Sol team has identified the following recommended staff that PRMP may provide across the project's various phases for the successful completion of the scope of work detailed in this RFP. We understand that there may be circumstances where PRMP is unable to provide the amount of time commitment from these resources, during which our team will utilize our alternative strategies to mitigate the circumstances as explained for each resource.

For O&M, our use of PRMP staff is minimal, with support of a subject matter expert (SME) requested to help assess and triage defects to determine prioritization. For transition phase and enhancements, PRMP staff expectations are increased relative to the area of the program impacted and may include a functional lead representing business interests and other roles specific to the enhancement. We will work with program leadership to identify specific recommendations.

- **PRMP Project Sponsor:** The Project Sponsor is a senior executive within PRMP who provides overall project guidance, makes high-level decisions, and ensures alignment with PRMP's strategic goals. Their key responsibility will be associated with approving major project deliverables, resolving escalated issues, and providing the necessary resources for project success.

We recommend that their time associated with the project be up to 5% of the total project time, during key decision-making points and project reviews with the D2Sol team's Advisory Board including the Account Manager. This time would be required across all the Phases of the project implementation.

Based on our understanding of the PRMP governance structure, this role may be served by the PRMP Executive Director or designee from the Executive Steering Committee (ESC). We look forward to working with the Sponsor on a strategy for securing timely approvals, acceptances, and decisions to navigate the project in the right direction.

- **PRMP Project Manager (PM):** The PRMP Project Manager serves as the main point of contact between the D2Sol team and PRMP to help us prioritize the release contents, coordinating project activities across other organizations, facilitating communication, interface with other vendors, and ensuring project deliverables meet PRMP's requirements.

We recommend that their time commitment to the project be 25-40% of the total project time during Phase I and Phase III of the project and 15-30% during Phase II of the project. The PRMP PM will work closely with the D2Sol team's PMO team.

Based on our understanding of the PRMP governance structure, this role will be served by one or more professionals from the PgMO and ePMO organizations. If PRMP cannot provide the recommended time-commitment, our team will continue to proceed with the pre-established contacts and decisions to make progress on the project until the personnel are available.

- **Subject Matter Experts (SMEs):** SMEs are PRMP staff members or other vendors with deep knowledge of the PRMP business process and who will act as a key member between the caseworker community and our team. The principle senior SME involved on a regular basis who is authorized to make decisions on behalf of the business team, may be needed from 10% to 50% depending upon specific enhancements, policy changes, or major impacts to system functionality. Additional SMEs and their time commitment needs will be dependent upon the particular enhancements being delivered and may come from a variety of existing roles. They will help our team with key decisions on the business process flows, screen designs, and other functional changes which will likely impact the caseworker. In some cases, taking advantage of experiences with other customers, we can often minimize the time and effort via interview techniques, review of process flows or wireframes to provide feedback, and other successful methods.

Additional PRMP needs will arise as enhancements move into testing phases, and the availability of experienced training, UAT testers, and helpdesk personnel. These team members may be requested for up to 20% during the training, testing, and deployment phases. They will contribute to a thorough understanding of the user needs and our ability enable the users for proficient use of the system enhancements.

Successful implementation of new enhancements requires successful user acceptance testing, and the development and delivery of user training supporting the adoption of these new capabilities. While we have provided augmentation of Program staff in other locations acting in the interests of the Program, these essential roles should not be overlooked. We will work with PRMP training and UAT staff to ensure the right support for those PRMP responsibilities.

2.1 Collaboration With Incumbent Vendor Staff

The D2Sol team's deep expertise of the Cúram product and the domain knowledge on MAGI and non-MAGI Medicaid programs allows us to perform a smooth transition from the incumbent vendor irrespective of their level of support in this engagement. This will be advantageous to PRMP as they transition to our experienced team with deep knowledge and expertise with the Cúram product and direct access to the Cúram Product organization.

At a minimum, D2Sol requires that the incumbent vendor:

1. Provide current releases of all code, configurations, and data deployed to all environments
2. Meet our transition schedule
3. Provide access to all administrative credentials for all environments and systems

Additionally, given that the incumbent vendor would be available during the transition period, our expectation from the incumbent vendor is as follows:

- Access to key staff members from the incumbent vendor's PMO, Business, Technical, Testing, and Infrastructure areas to assist with system-related queries during the takeover period.
- Conduct knowledge transfer sessions on the customizations done to the Cúram Platform.
- Provide transition/hand-over documents covering critical areas including Business, Technology, Infrastructure, Testing, and Training.
- Access to all access controls including the authentications for all components involved in the system. The D2Sol team will update access controls towards the end of the transition period removing incumbent vendor access.
- Transfer relevant Cloud subscriptions used by the MEDITI3G system to the D2Sol team.
- Update all project documentation to reflect the current system state. Documents include System Design, Security Design, Functional Designs, Technical Designs, Test Plans, Test Scripts, Training Materials, and Configuration Management, and potentially others to be determined during the Transition period.
- Accurate and current information on current development activities related to defects and enhancements which are in-progress and will not be completed prior to takeover.
- Updated Runbook for the last three (3) production deployment processes, including any hot/data fixes applied on the system.

In case of non-access to the incumbent vendor or their inability to provide any knowledge about the system, we are confident that our experienced team members with extensive Medicaid domain knowledge and Cúram product implementation experience. We will understand what has been implemented and take over the current system for enhanced operations and maintenance. Our team's executive and leadership experience include takeover and transition of existing systems and turn around to a positive customer experience with improved system stability.

The D2Sol team is the only vendor who can take over the Cúram-based Medicaid system from the incumbent vendor with very minimal risk. This is a significant benefit to PRMP as our team includes:

- D2Sol Inc. - Largest Cúram implementation organization with 170+ team members in North America.
- Cúram by Merative - Cúram product organization with access to product development and support experts. Merative has approximately 370 employees worldwide who are engaged to provide Cúram services across functions.

In support of the project-level organization, our Advisory Board provides program oversight to our delivery team as they work to meet the desired objectives of the Puerto Rico Department of Health, Puerto Rico Medicaid Program. The Advisory Board works to provide guidance to PRMP on how to maximize their investment in the Cúram Platform, share insight into what other States are doing with Cúram, and provide a two-way venue into the product development lifecycle for the Cúram product suite. Our Advisor Board members have each been on Medicaid E&E implementations, transitioned to operations and maintenance phases, and each have direct real-world experience in delivering these systems. We each have a strategic view informed by first-hand project level experience. We would like to take this opportunity to introduce our Advisory Board.

Redacted



Redacted

Our goals in establishing our team's organization include:

- Providing a team that combines extensive knowledge and experience in Medicaid, operations and modernizations, and understanding of the implementation of Medicaid E&E systems like MEDITI3G.
- Strengthening the governance structure and processes to drive operational efficiency and coordinating the contributions of the PRMP teams and stakeholders.
- Developing and cultivating strong relationships with the Puerto Rico Department of Health, Puerto Rico Medicaid Program.

The D2Sol team brings a wealth of industry knowledge, experience, and strong written and verbal communication skills. Most importantly, it brings in-depth, personal knowledge of Cúram-based Medicaid implementations. We meet and, in many cases, exceed the qualifications established by the PRMP. Resumes of our Key Personnel follow the table in the next page which presents a list of our proposed Key Personnel for the PRMP E&E project in accordance with the guidance provided by Puerto Rico.

3.1 Resumes

Table 12: Proposed Key Staff and Roles

Name	Proposed Role	Experience in Proposed Role
Redacted	Account Manager	Redacted



Name	Proposed Role	Experience in Proposed Role
		Redacted
Redacted	Business Lead	Redacted
Redacted	Document Management Lead	Redacted
Redacted	Information Security Architect/Privacy Data Protection Officer	Redacted
Redacted	Operations Manager	Redacted



Name	Proposed Role	Experience in Proposed Role
Redacted	Project Manager	Redacted
Redacted	Quality Assurance Manager	Redacted
Redacted	Technical Lead	Redacted



Name	Proposed Role	Experience in Proposed Role
		Redacted
Redacted	Testing Manager	Redacted
Redacted	Training Manager	Redacted

The D2Sol team consists of highly-skilled, Cúram knowledgeable professionals, all of whom exceed the Qualifications defined in the Eligibility and Enrollment System Takeover RFP. D2Sol and Merative have provided staff to every successful Cúram project in the United States and to every Cúram vendor. We have provided limited staff to your incumbent vendor and can now provide our skilled professionals directly to Puerto Rico. D2Sol is the leading provider of staff, and the strategic services partner to Merative, the Cúram software owner and support organization. This combination of Cúram resources and product expertise cannot be matched by any other team.

Resumes for our key staff begins on the next page.

Account Manager

Redacted



Redacted

Redacted

Business Lead

Redacted

Redacted

Document Management Lead

Redacted

Redacted

Redacted Information Security Architect / Privacy Data
Protection Officer

Redacted



Redacted

Redacted

Operations Manager

Redacted



Redacted

Redacted

Project Manager

Redacted



Redacted

Redacted

Quality Assurance Manager

Redacted



Redacted

Redacted – Technical Lead

Redacted

Redacted



Redacted

Redacted

Testing Manager

Redacted



Redacted	
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Redacted - Training Manager

Redacted

Redacted

3.2 Key Staff References

Table 13: Key Staff References

Key Staff Reference Form							
Key Staff Name:		Redacted		Proposed Role:		Redacted	
Reference 1							
Client Name:		Redacted		Client Address:		Redacted	
Contact Name:		Redacted		Contact Title:		Redacted	
Contact Phone:		Redacted		Contact Email:		Redacted	
Project Name:				Start Date:		End Date:	
Redacted				Redacted		Redacted	
Project Description:							
Redacted							
Project Role and Responsibilities:							
Redacted							
Reference 2							
Client Name:		Redacted		Client Address:		Redacted	
Contact Name:		Redacted		Contact Title:		Redacted	
Contact Phone:		Redacted		Contact Email:		Redacted	
Project Name:				Start Date:		End Date:	
Redacted				Redacted		Redacted	

Key Staff Reference Form	
Project Description: <div>Redacted</div>	
Project Role and Responsibilities: <div>Redacted</div>	

Table 14: Key Staff References –

Redacted

Key Staff Reference Form						
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Reference 1						
Client Name:	<div>Redacted</div>	Client Address:	<div>Redacted</div>			
Contact Name:	<div>Redacted</div>	Contact Title:	<div>Redacted</div>			
Contact Phone:	<div>Redacted</div>	Contact Email:	<div>Redacted</div>			
Project Name:		<div>Redacted</div>	Start Date:	<div>Redacted</div>	End Date:	<div>Redacted</div>
Project Description: <div>Redacted</div>						
Project Role and Responsibilities: <div>Redacted</div>						

Key Staff Reference Form					
Redacted					
Reference 2					
Client Name:	Redacted	Client Address:	Redacted		
Contact Name:	Redacted	Contact Title:	Redacted		
Contact Phone:	Redacted	Contact Email:	Redacted		
Project Name:		Start Date:	Redacted	End Date:	Redacted
Project Description:					
Redacted					
Project Role and Responsibilities:					
Redacted					

Table 15: Key Staff References – Redacted

Key Staff Reference Form			
Key Staff Name:	Redacted	Proposed Role:	Redacted
Reference 1			



Key Staff Reference Form				
Client Name:	Redacted	Client Address:	Redacted	
Contact Name:	Redacted	Contact Title:	Redacted	
Contact Phone:	Redacted	Contact Email:	Redacted	
Project Name:		Start Date:	Redacted	End Date:
Redacted			Redacted	Redacted
Project Description:				
Redacted				
Project Role and Responsibilities:				
Redacted				
Reference 2				
Client Name:	Redacted	Client Address:	Redacted	
Contact Name:	Redacted	Contact Title:	Redacted	
Contact Phone:	Redacted	Contact Email:	Redacted	
Project Name:		Start Date:	Redacted	End Date:
Redacted			Redacted	Redacted
Project Description:				
Redacted				

Key Staff Reference Form	
Redacted	
Project Role and Responsibilities:	
Redacted	

Table 16: Key Staff References – Redacted

Key Staff Reference Form					
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Reference 1					
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Contact Name:	Redacted	Contact Title:	Redacted		
Contact Phone:	Redacted	Contact Email:	Redacted		
Project Name:		Redacted	Start Date:	Redacted	End Date: Redacted
Project Description:					
Redacted					
Project Role and Responsibilities:					
Redacted					

Key Staff Reference Form					
Redacted					
Reference 2					
Client Name:	Redacted	Client Address:	Redacted		
Contact Name:	Redacted	Contact Title:	Redacted		
Contact Phone:	Redacted	Contact Email:	Redacted		
Project Name:		Start Date:	Redacted	End Date:	Redacted
Project Description:					
Redacted					
Project Role and Responsibilities:					
Redacted					

Table 17: Key Staff References – Redacted

Key Staff Reference Form			
Key Staff Name:	Redacted	Proposed Role:	Redacted
Reference 1			
Client Name:	Redacted	Client Address:	Redacted

Key Staff Reference Form				
Contact Name:	Redacted	Contact Title:	Redacted	
Contact Phone:	Redacted	Contact Email:	Redacted	
Project Name:		Start Date:	Redacted	End Date: Redacted
Redacted				
Project Description:				
Redacted				
Project Role and Responsibilities:				
Redacted				
Reference 2				
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Contact Name:	Redacted	Contact Title:	Redacted	
Contact Phone:	Redacted	Contact Email:	Redacted	
Project Name:		Start Date:	Redacted	End Date: Redacted
Redacted				
Project Description:				



Key Staff Reference Form	
Redacted	
Project Role and Responsibilities:	
Redacted	

Table 18: Key Staff References – Redacted

Key Staff Reference Form			
Key Staff Name:		Proposed Role:	
Redacted		Redacted	
Reference 1			
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Contact Name:	Redacted	Contact Title:	Redacted
Contact Phone:	Redacted	Contact Email:	Redacted
Project Name:		Start Date:	End Date:
Redacted		Redacted	Redacted
Project Description:			
Redacted			
Project Role and Responsibilities:			
Redacted			

Key Staff Reference Form					
Redacted					
Reference 2					
Client Name:	Redacted	Client Address:	Redacted		
Contact Name:	Redacted	Contact Title:	Redacted		
Contact Phone:	Redacted	Contact Email:	Redacted		
Project Name:		Start Date:	Redacted	End Date:	Redacted
Project Description:					
Redacted					
Project Role and Responsibilities:					
Redacted					

Table 19: Key Staff References – Redacted

Key Staff Reference Form			
Key Staff Name:	Redacted	Proposed Role:	Redacted
Reference 1			



Key Staff Reference Form							
Client Name:	Redacted		Client Address:	Redacted			
Contact Name:	Redacted		Contact Title:	Redacted			
Contact Phone:	Redacted		Contact Email:	Redacted			
Project Name:			Start Date:	Redacted	End Date:	Redacted	
Project Description:							
Redacted							
Project Role and Responsibilities:							
Redacted							
Reference 2							
Client Name:	Redacted		Client Address:	Redacted			
Contact Name:	Redacted		Contact Title:	Redacted			
Contact Phone:	Redacted		Contact Email:	Redacted			
Project Name:			Start Date:	Redacted	End Date:	Redacted	
Project Description:							
Redacted							

Key Staff Reference Form	
Redacted	
Project Role and Responsibilities:	
Redacted	

Table 20: Key Staff References – Redacted

Key Staff Reference Form					
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		Redacted			
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Client Name:		Client Address:		Redacted	
Redacted					
Contact Name:		Contact Title:			
Contact Phone:		Contact Email:			
Project Name:			Start Date:	End Date:	
Redacted			Redacted	Redacted	
Project Description:					
Redacted					
Project Role and Responsibilities:					
Redacted					

Key Staff Reference Form					
Reference 2					
Client Name:	Redacted		Client Address:	Redacted	
Contact Name:	Redacted		Contact Title:	Redacted	
Contact Phone:	Redacted		Contact Email:	Redacted	
Project Name:			Start Date:	Redacted	End Date: Redacted
Project Description:					
Redacted					
Project Role and Responsibilities:					
Redacted					

Table 21: Key Staff References – Redacted

Key Staff Reference Form			
Key Staff Name:	Redacted	Proposed Role:	Redacted
Reference 1			
Client Name:	Redacted	Client Address:	Redacted

Key Staff Reference Form					
Contact Name:	Redacted		Contact Title:	Redacted	
Contact Phone:	Redacted		Contact Email:	Redacted	
Project Name:			Start Date:	Redacted	End Date: Redacted
Project Description:					
Redacted					
Project Role and Responsibilities:					
Redacted					
Reference 2					
Client Name:	Redacted		Client Address:	Redacted	
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Contact Phone:	Redacted		Contact Email:	Redacted	
Project Name:			Start Date:	Redacted	End Date: Redacted
Project Description:					
Redacted					
Project Role and Responsibilities:					
Redacted					

Table 22: Key Staff References – Redacted

Key Staff Reference Form					
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		Redacted			
Reference 1					
Client Name:	Redacted		Client Address:	Redacted	
Contact Name:	Redacted		Contact Title:	Redacted	
Contact Phone:	Redacted		Contact Email:	Redacted	
Project Name:			Start Date:	Redacted	End Date:
Redacted					Redacted
Project Description:					
Redacted					
Project Role and Responsibilities:					
Redacted					
Reference 2					
Client Name:	Redacted		Client Address:	Redacted	
Contact Name:	Redacted		Contact Title:	Redacted	
Contact Phone:	Redacted		Contact Email:	Redacted	

Key Staff Reference Form				
Project Name: Redacted		Start Date: Redacted	End Date: Redacted	
Project Description: Redacted				
Project Role and Responsibilities: Redacted				

Attachment E: Mandatory Specifications

Submission Requirements

This RFP includes multiple sections that specify proposal submission requirements, including, but not limited to, **Section 1.3 RFP Timeline, Section 3.11 Proposal Submittal and Instructions, and Section 7: Attachments** PRMP will provide the selected vendor with on-site cubicle space for up to two vendor staff. PRMP reserves the right to reallocate its on-site space, as necessary. The vendor will be responsible for coordinating additional on-site accommodations, beyond what is provided by PRMP, for all key staff that are required to be on-site, per this RFP. 7. Attachments. The vendor must at least meet all proposal submission requirements as part of this RFP, including, but not limited to, formatting, completeness, timeliness, and accuracy, as described in the aforementioned sections. 5.4 Failure to Meet Mandatory Specifications

Mandatory Requirements

Table 23: Mandatory Requirements

Mandatory Requirement Item(s)	Vendor Meets Requirement? Y/N	Provide a Brief Narrative to Demonstrate Understanding and Fulfillment of Requirement *Response should note any exceptions to meeting requirements
<p>The vendor must provide the right of access to systems, facilities, data, and documentation to the PRMP or its designee to conduct audits and inspections as is necessary.</p>	Yes	<p>D2Sol will provide all required access to systems, facilities, data, and documentation to PRMP or its designee to conduct audits and inspections as is necessary.</p> <p>The systems and data will be stored in cloud environments wherein the approved PRMP staff or its designee will have full access.</p> <p>Our intention is to store all project related documentation in PR SharePoint and PRMP will provide our team the required access to create and maintain them.</p> <p>Our facilities are located in North Carolina and access to those facilities will be provided on a need basis and on-demand to PR staff and its designees.</p>
<p>The vendor must support the PRMP's requests for information in response to activities including, but not limited to:</p> <ol style="list-style-type: none"> 1. Compliance audits 2. Investigations 3. Legislative requests 	Yes	<p>D2Sol will support PRMP's requests for information in response to various compliance audit, investigation, and legislative requests. We will collaborate and support third-party Independent Security Assessments and annual external audits like CAFR, IRS, and CMS on behalf of PR. We support thorough evaluations by providing necessary details and system access, and monitoring metrics leveraged</p>

Mandatory Requirement Item(s)	Vendor Meets Requirement? Y/N	Provide a Brief Narrative to Demonstrate Understanding and Fulfillment of Requirement *Response should note any exceptions to meeting requirements
		<p>through auditing functions configured within.</p> <p>We will use our existing transparent and compliant record-keeping practices and procedures and commit to providing full cooperation and access to authorized representatives of PR, government auditors, and other relevant parties as required. We will maintain open communication channels and address inquiries or requests for information to facilitate smooth and efficient audits or investigations.</p>
The vendor must provide authorization from a parent, affiliate, or subsidiary organization for the PRMP to have access to its records if such a relationship exists that impacts the vendor's performance under the proposed contract.	Yes	D2Sol has no parent, affiliate, or subsidiary organizations. Should such an organization be subsequently created, D2Sol will provide all necessary access to its records and/or provide parent organization authorization if such a relationship exists.
The vendor must help ensure that all applications inclusive of internet, intranet, and extranet associated with this contract are compliant with Section 508 of the Rehabilitation Act of 1973, as amended by 29 United States Code (U.S.C.) §794d, and 36 Code of Federal Regulation (CFR) 1194.21 and 36 CFR 1194.22.	Yes	<p>The Cúram application is accessible and adheres to Web Content Accessibility Guidelines (WCAG) 2.1 (Level A & AA), US Revised Section 508, and EN 301 549 V3.1.1 standards.</p> <p>D2Sol will work with the PRMP team and help to ensure that all applications associated with this contract are compliant with Section 508 of the Rehabilitation Act of 1973, as amended by 29 United States Code (U.S.C.) §794d, and 36 Code of Federal Regulation (CFR) 1194.21 and 36 CFR 1194.22.</p>
The vendor must provide increased staffing levels if requirements, timelines, quality, or other standards are not being met, based solely on the discretion of and without additional cost to the PRMP. In making this determination, the PRMP will evaluate whether the vendor is meeting service levels as defined in the contract.	Yes	<p>D2Sol project and staffing planning is designed to allocate the staffing levels and experience required to complete tasks in line with the project plan. This project planning and resource management allows us to proactively plan and where necessary, adjust project staffing to meet the needs of the project.</p> <p>In the unlikely situation where D2Sol is not meeting the service levels defined within the contract, D2Sol will provide increased staffing levels without additional cost to PRMP to meet the requirements, timelines, quality, or standards defined.</p>
The vendor must provide evidence that staff have completed and signed all necessary	Yes	Upon request, D2Sol will provide all required evidence that staff have completed and signed

Mandatory Requirement Item(s)	Vendor Meets Requirement? Y/N	Provide a Brief Narrative to Demonstrate Understanding and Fulfillment of Requirement *Response should note any exceptions to meeting requirements
forms prior to executing work for the contract.		all necessary forms defined and provided by PRMP prior to executing work for the contract.
<p>The vendor staff must not have the capability to access, edit, and share personal data with unauthorized staff, including, but not limited to:</p> <ol style="list-style-type: none"> 1. Protected Health Information (PHI) 2. Personally Identifiable Information (PII) 3. Financial Transaction Information 4. Federal Tax Information 5. Social Security Administration (SSA) data including, but not limited to, family, friends, and acquaintance information 	Yes	<p>D2Sol staff will not have the capability to access, edit, and share personal data with unauthorized staff as defined by PRMP.</p> <p>D2Sol will employ Role-Based Access Control (RBAC) to ensure the team personnel have appropriate access privileges aligned with their job roles, regularly reviewed to adhere to the principle of least privilege. We document clear security roles and responsibilities for all personnel, including employees, partners, contractors, and third parties, ensuring alignment with PR data protection control requirements. Comprehensive education and training programs cover cybersecurity best practices, data protection policies, and incident response procedures, with periodic refreshers to reinforce key concepts. Employees are made aware of the consequences of non-compliance through training and policy reviews. Continuous monitoring and enforcement measures, such as audits and user activity monitoring, ensure adherence to security protocols. Employees are encouraged to report security incidents through established channels, with an Incident Response team in place to investigate and implement corrective measures promptly, safeguarding against unauthorized access or disclosure of sensitive information.</p>
The vendor must comply with current and future Puerto Rico and federal regulations as necessary to support the services outlined in this RFP.	Yes	D2Sol will comply with current and future Puerto Rico and federal regulations as necessary to support the services outlined in this RFP. We have been compliant with the changing regulations as required to support the services for our other Medicaid customers.
The vendor must perform according to agreed upon SLAs and associated metrics in the areas listed in Appendix 2: SLAs and Performance Standards	Yes	D2Sol will perform according to agreed upon SLAs and associated metrics in the areas listed in Appendix 2: SLAs and Performance Standards and we have defined how we will achieve that in the RFP response.

Mandatory Requirement Item(s)	Vendor Meets Requirement? Y/N	Provide a Brief Narrative to Demonstrate Understanding and Fulfillment of Requirement *Response should note any exceptions to meeting requirements
The vendor must provide a drug-free workplace, and individuals must not engage in the unlawful manufacture, distribution, dispensation, possession, abuse, or use of a controlled substance in the performance of the contract. (Drug-Free Workplace Act of 1988)	Yes	D2Sol provides and will continue to provide a drug-free workplace, and individuals must not engage in the unlawful manufacture, distribution, dispensation, possession, abuse, or use of a controlled substance in the performance of the contract. (Drug-Free Workplace Act of 1988)
The vendor must perform all work associated with this contract within the continental United States (U.S.) or U.S. Territories.	Yes	D2Sol will perform all work associated with this contract within the continental United States (U.S.) or U.S. Territories.
The vendor must comply with federal Executive Order 11246 related to Equal Employment Opportunity Act, the Clean Air Act, and the Clean Water Act.	Yes	D2Sol complies with and will continue to comply with federal Executive Order 11246 related to Equal Employment Opportunity Act, the Clean Air Act, and the Clean Water Act.
The vendor must serve as a trusted partner to the PRMP and represent the PRMP's interests in all activities performed under the resulting contract.	Yes	D2Sol will serve as a trusted partner to the PRMP and represent the PRMP's interests in all activities performed under the resulting contract.
<p>On a monthly basis the vendor must, at a minimum, include the standard invoice package contents for the PRMP, including, but not limited to:</p> <ol style="list-style-type: none"> 1. An authorized representative of the contracted party must sign an itemized description of services rendered for the invoice period. Additionally, the vendor must include a written certification stating that no officer or employee of the PRMP, its subsidiaries, or affiliates, will derive or obtain any benefit or profit of any kind from this vendor's contract. Invoices that do not include this certification will not be paid. 2. A list of all services completed within an invoice period, as well as evidence that the PRMP has accepted and approved the work. 3. Three physical and one electronic invoice packages in support of the PRMP's review and approval of each invoice. <ol style="list-style-type: none"> a. Invoice Package #1 – Original Signature and Hard Copy b. Invoice Packages #2 – #3 – Hard Copy c. Invoice Package #4 – Electronic 	Yes	On a monthly basis, D2Sol will generate and provide PRMP with detailed invoices that comply with the standard invoicing package contents as described in the requirements.

Mandatory Requirement Item(s)	Vendor Meets Requirement? Y/N	Provide a Brief Narrative to Demonstrate Understanding and Fulfillment of Requirement *Response should note any exceptions to meeting requirements
The vendor must agree that the PRMP retains ownership of all data, procedures, applications, licenses, and materials procured or developed during the contract period, in accordance with the Conditions for Enhanced Funding (CEF) and 42 CFR § 433.112.	Yes	D2Sol agrees that the PRMP retains ownership of all data, procedures, applications, licenses, and materials procured or developed during the contract period, in accordance with the Conditions for Enhanced Funding (CEF) and 42 CFR § 433.112.

Mandatory Qualifications

Table 24: Mandatory Qualifications

Mandatory Qualification Item(s)	Vendor Meets Qualification? Y/N	Provide a Brief Narrative to Demonstrate Fulfillment of Requirement
The vendor must have at least five years of experience in operating and managing an E&E system of similar size, scope, and complexity as described in this RFP.	Yes	<p>D2Sol involvement with E&E systems of similar size, scope, and complexity goes beyond the five (5) years' experience required.</p> <p>D2Sol has over 10 years of experience in managing E&E systems of similar size, scope, and complexity.</p> <p>Since 2014, D2Sol has been supporting the states of Minnesota and North Carolina in operating and managing Cúram based E&E system. Similarly, we have assisted South Carolina and the District of Columbia from 2015 and 2016 respectively.</p> <p>Details on the District of Columbia (DCAS) and North Carolina (NC FAST) O&M engagements can be found within the Vendor References in Attachment C.</p>
The vendor must be capable of providing PRMP with a Cúram E&E system, in line with PRMP's required system takeover approach.	Yes	D2Sol's experience with Cúram-based E&E implementations spans 12 years. Our involvement in multiple Cúram projects provides D2Sol with extensive experience and expertise of the Cúram product and the processes and standards developed to support Cúram implementations. Our experience with O&M takeovers in DC from multiple incumbent vendors has demonstrated that Cúram standards and processes are readily adapted

See Appendix 7: Procurement Library, PL-078 for a ruling by the Puerto Rico Supreme Court regarding vendor and staff qualifications and other considerations.

By signing below, I certify that I have reviewed and understand these mandatory specifications in their entirety and agree to meet, and will continue to meet, each of these mandatory specifications in full.

Redacted

(Contact Phone/Fax Number)

(Date)



Attachment F: Outcomes Traceability Matrix (OTM)

The D2Sol Team will meet all Mandatory Specifications as reflected in Attachment F: Outcome Traceability Matrix and in Attachment G: Response to Statement of Work within our response.

Table 25: Outcomes Traceability Matrix (OTM)

Title	Source	Detailed Outcomes			Performance Standard	Associated SLA ID	Vendor Response Area		
		Outcomes	Metrics				Vendor's Disposition	Attachment	Section
EE1 Application	42 CFR § 433.112(b)(15) 42 CFR § 436.901	The eligibility system receives, ingests, and processes the single-streamlined applications, change of circumstances, renewal forms, and any supporting documentation requested by the state (including telephonic signatures) from individuals, for all Medicaid eligibility groups and CHIP through online via multiple browsers, mail (paper), phone, and in-person (e.g., via kiosk) applications to support eligibility determination for all Insurance Affordability Programs (Federal Health Insurance Exchange), state Medicaid or CHIP, State-Based Marketplace (SBM), Basic Health Program (BHP).	% of MAGI Applications Completed Online Calculation: % = 100 x (# of MAGI applications completed online in the month / total # of MAGI applications completed via all modes of submission) Exceptions/Clarifications: If an application contains both MAGI and non-MAGI applicants, the application will be included in the non-MAGI metric % of Non-MAGI Applications Completed Online Calculation: % = 100 x (# of Non-MAGI applications completed online in the month / total # of Non-MAGI applications completed via all modes of submission) Exceptions/Clarifications: If an application contains both MAGI and non-MAGI applicants, the application will be included in the non-MAGI metric	The vendor must provide weekly updates on compliance with outcomes associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.1	122



Title	Source	Detailed Outcomes		Performance Standard	Associated SLA ID	Vendor Response Area		
		Outcomes	Metrics			Vendor's Disposition	Attachment	Section Page #
EE2 Application	42 CFR § 433.112(b)(15) 42 CFR § 436.901	Individuals experience a user-friendly, dynamic, online application, such that subsequent questions are based on prior answers.	<p>Abandoned Online Applications Submitted through the Caseworker Portal</p> <p>Calculation: # = total number of applications started through the caseworker portal that match an application currently in the client portal with the current status as either "In Progress" or "Archived" during the same month it was started in the caseworker portal.</p> <p>Exceptions/Clarifications: Archived applications will only provide a match to an application in the caseworker portal if the archive date is during the same month of the measurement. An assumption is made that if the application is archived prior to the current month, the applicant abandoned the application for reasons other than user friendliness of the system.</p> <p>Average Number of Days an Online MAGI Application Remains Open</p> <p>Calculation: Mean = x/N; x = sum of (# of online MAGI applications completed * number of days to complete an online application); N = the number of online MAGI applications completed in one month</p> <p>Average Number of Days an Online Non-MAGI Application Remains Open</p>	The vendor must provide weekly updates on compliance with outcomes associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.1 122

Title	Source	Detailed Outcomes			Performance Standard	Associated SLA ID	Vendor Response Area		
		Outcomes	Metrics				Vendor's Disposition	Attachment	Section
			Calculation: Mean = x/N ; x = sum of (# of online Non-MAGI applications completed * number of days to complete an online application); N = the number of online Non-MAGI applications completed in one month						
EE3 Automatic Enrollment	42 CFR § 433.112(b)(15) 42 CFR § 435.230 42 CFR § 436.909 42 CFR § 436.124	Individuals eligible for automatic Medicaid eligibility are promptly enrolled (e.g., SSI recipients in 1634 states, individuals receiving a mandatory state supplement under a federally- or state-administered program, individuals receiving an optional State supplement per 42 CFR 435.230, and deemed newborns). (Automatic enrollment in Guam, Puerto Rico, and the U.S. Virgin Islands is required only for individuals receiving cash assistance under a state plan for OAA, AFDC, AB, APTD, or AABD, and deemed newborns.)	*N/A	N/A	N/A	N/A	Will Meet	Attachment G: Response to SOW	4.2.2.1.2
EE4 Income Methodologies	42 CFR § 433.112(b)(15) 42 CFR § 436.60142 CFR § 436.811-81442 CFR § 436.901	The state correctly calculate income and household composition based on Modified Adjusted Gross Income (MAGI) and non-MAGI methodologies at application and renewal. Example business rules include subtracting 5 percentage points off FPL for applicable family size	Upon contract execution, the incoming vendor should work with PRMP to establish mutually agreed upon metrics to demonstrate compliance with the applicable outcomes. Refer to MES Certification Repository: Eligibility and Enrollment (E&E) for a list of CMS' default metrics	The vendor must provide weekly updates on compliance with outcomes compliance with associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level		Will Meet	Attachment G: Response to SOW	4.2.2.1.2



Detailed Outcomes					Vendor Response Area				
Title	Source	Outcomes	Metrics	Performance Standard	Associated SLA ID	Vendor's Disposition	Attachment	Section	Page #
EE5 Electronic Verification	42 CFR § 433.112(b)(15) 42 CFR § 436.901 Consolidated Appropriations Act of 2023, Section 5101 (requiring an Asset Verification System to be implemented by 2026)	The eligibility system uses automated interfaces with electronic data sources to enable real-time or near real-time, no manual touch eligibility determinations. The data sources include (but are not limited to) SSA and the Department of Homeland Security (DHS) (directly or via the Federal Data Services Hub (FDSH)), state quarterly wage data, data from financial institutions for asset verification, Renewal and Redetermination Verification service through the FDSH, Public Assistance Reporting Information System (PARIS) to verify Medicaid coverage in other states.	Automated ("No Touch") Eligibility Determinations Calculation: % = 100 x # of individuals whose determinations made in the month were entirely automated / Total # of determinations made in the month	The vendor must provide weekly updates on compliance with outcomes compliance with associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.2	123
EE6 Timely Determinations	42 CFR § 433.112(b)(15) 42 CFR § 436.901	Individuals who apply for Medicaid based on disability receive an eligibility determination within 90 days and all other applicants receive an eligibility determination within 45 days.	Timeliness of Non-Disability Related Determinations Calculation: % = 100 X (# of non-disability related determinations (individuals) made in the month which took less than or equal to 45 days / Total # of non-disability related determinations (individuals) made in the month) Timeliness of Disability Related Determinations Calculation: % = 100 X (# of disability related determinations (individuals) made in the month which took less than or equal to 90 days / Total # of disability related determinations (individuals) made in the month)	The vendor must provide weekly updates on compliance with outcomes compliance with associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.3	124

Title	Source	Detailed Outcomes		Performance Standard	Associated SLA ID	Vendor Response Area		
		Outcomes	Metrics			Vendor's Disposition	Attachment	Section
EE7 Reasonable Opportunity Period	42 CFR § 433.112(b)(15) 42 CFR § 436.407 42 CFR § 436.901	Individuals are enrolled for up to 90 days if pending verification of citizenship or immigration status.	month) Backlog of Non-Disability Related Applications Calculation: % = 100 X (# of undetermined non-disability related applications (individuals) that are greater than 45 days from when they were received / Total # of non-disability related applications (individuals) undetermined in the month) Backlog of Disability Related Applications Calculation: % = 100 X (# of undetermined disability related applications (individuals) that are greater than 90 days from when they were received / Total # of disability related applications (individuals) undetermined in the month)					
			Upon contract execution, the incoming vendor should work with PRMP to establish mutually agreed upon metrics to demonstrate compliance with the applicable outcomes. Refer to MES Certification Repository: Eligibility and Enrollment (E&E) for a list of CMS' default metrics	The vendor must provide weekly updates on compliance with outcomes compliance with associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.4



Detailed Outcomes					Vendor Response Area				
Title	Source	Outcomes	Metrics	Performance Standard	Associated SLA ID	Vendor's Disposition	Attachment	Section	Page #
EE8 SSN Verification	42 CFR § 433.112(b)(15) 42 CFR § 436.901	Individuals are enrolled pending verification of SSN.	Upon contract execution, the incoming vendor should work with PRMP to establish mutually agreed upon metrics to demonstrate compliance with the applicable outcomes. Refer to MES Certification Repository: Eligibility and Enrollment (E&E) for a list of CMS' default metrics	The vendor must provide weekly updates on compliance with outcomes associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.4	125
EE9 Notices	42 CFR § 433.112(b)(15) 42 CFR § 436.901	Individuals receive system-generated timely automated (versus manual) eligibility notices and request for additional information for eligibility determination, as necessary.	Upon contract execution, the incoming vendor should work with PRMP to establish mutually agreed upon metrics to demonstrate compliance with the applicable outcomes. Refer to MES Certification Repository: Eligibility and Enrollment (E&E) for a list of CMS' default metrics	The vendor must provide weekly updates on compliance with outcomes associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.4	125
EE10 Notices	42 CFR § 433.112(b)(15)/42 CFR § 436.901	Individuals receive electronic notices and alerts as applicable via their preferred mode of communication (e.g., email, text that notice is available in online account).	Upon contract execution, the incoming vendor should work with PRMP to establish mutually agreed upon metrics to demonstrate compliance with the applicable outcomes. Refer to MES Certification Repository: Eligibility and Enrollment (E&E) for a list of CMS' default metrics	The vendor must provide weekly updates on compliance with outcomes associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.4	125



Detailed Outcomes							Vendor Response Area		
Title	Source	Outcomes	Metrics	Performance Standard	Associated SLA ID	Vendor's Disposition	Attachment	Section	Page #
EE11 Enrollment	42 CFR § 433.112(b)(15) 42 CFR § 436.901	Following an eligibility determination, the system promptly sends the beneficiary information to MMIS to complete enrollment into the appropriate delivery system (e.g., FFS, managed care).	Upon contract execution, the incoming vendor should work with PRMP to establish mutually agreed upon metrics to demonstrate compliance with the applicable outcomes. Refer to MES Certification Repository: Eligibility and Enrollment (E&E) for a list of CMS' default metrics	The vendor must provide weekly updates on compliance with outcomes associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.4	125
EE12 Presumptive Eligibility Applications	42 CFR § 433.112(b)(15)	The system receives Presumptive Eligibility (PE) applications from all approved entities in an automated manner and facilitates eligibility termination if no full Medicaid application is received by the end of the month following the month of PE determination.	*N/A	N/A	N/A	Will Meet	Attachment G: Response to SOW	4.2.2.1.2	123
EE13 Annual Renewals	42 CFR § 433.112(b)(15) 42 CFR § 436.901	The system uses electronic data sources to confirm eligibility, wherever possible, to facilitate ex-parte renewals.	Ex-Parte Renewals Calculation: % = 100 X (# Individuals whose redeterminations were made using the ex parte process / Total # of individuals whose redeterminations were made in the month)	The vendor must provide weekly updates on compliance with outcomes associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.2	123



Title	Source	Detailed Outcomes		Performance Standard	Associated SLA ID	Vendor Response Area		
		Outcomes	Metrics			Vendor's Disposition	Attachment	Section Page #
EE14 Annual Renewals	42 CFR § 433.112(b)(15) 42 CFR § 436.901	If ex-parte renewal cannot be completed, the system can automatically generate pre-populated renewal forms and distribute those forms via individuals' preferred communication mode.	MAGI Annual Renewals Calculation: % = 100 X (# Individuals whose MAGI-based renewals were made before their annual renewal date / Total # of individuals whose MAGI-based renewals were made in the month) Non-MAGI Annual Renewals Calculation: % = 100 X (# Individuals whose non-MAGI-based renewals were not made by their annual renewal date / Total # of individuals whose non-MAGI-based renewals were made in the month)	The vendor must provide weekly updates on compliance with outcomes compliance with associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.2 123
EE15 Eligibility Category	42 CFR § 433.112(b)(15) 42 CFR § 436.404	The system applies an automated eligibility hierarchy that places an individual in the most advantageous group for which they are eligible at initial application and renewal.	Upon contract execution, the incoming vendor should work with PRMP to establish mutually agreed upon metrics to demonstrate compliance with the applicable outcomes. Refer to MES Certification Repository: Eligibility and Enrollment (E&E) for a list of CMS' default metrics	The vendor must provide weekly updates on compliance with outcomes compliance with associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.2 123



Detailed Outcomes					Vendor Response Area				
Title	Source	Outcomes	Metrics	Performance Standard	Associated SLA ID	Vendor's Disposition	Attachment	Section	Page #
EE16 Eligibility Category	42 CFR § 433.112(b)(15) 42 CFR § 436.404	The system uses automated business rules to assign accurate eligibility categories for all the mandatory and relevant optional eligibility groups at initial application and renewal. Example business rules include: -Correct identification of individuals age 19-64 at or below 133 percent FPL (VIII group) -Correct alignment of eligibility categories to FMAP rate	Upon contract execution, the incoming vendor should work with PRMP to establish mutually agreed upon metrics to demonstrate compliance with the applicable outcomes. Refer to MES Certification Repository: Eligibility and Enrollment (E&E) for a list of CMS' default metrics	The vendor must provide weekly updates on compliance with outcomes associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.2	123
EE17 Incarcerated individuals	42 CFR § 433.112(b)(15) 42 CFR § 436.1005	Incarcerated individuals receive timely access to inpatient services and receive a timely and accurate eligibility determination upon release.	Upon contract execution, the incoming vendor should work with PRMP to establish mutually agreed upon metrics to demonstrate compliance with the applicable outcomes. Refer to MES Certification Repository: Eligibility and Enrollment (E&E) for a list of CMS' default metrics	The vendor must provide weekly updates on compliance with outcomes associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.3	124
EE18 Emergency Medicaid	42 CFR § 433.112(b)(15) 42 CFR § 436.128	Individuals whose coverage is limited to emergency services due to immigration status receive timely and accurate eligibility determination.	*N/A	N/A	N/A	Will Meet	Attachment G: Response to SOW	4.2.2.1.3	124
EE19 Retroactive Eligibility	42 CFR § 433.112(b)(15) 42 CFR § 436.901	Individuals receive timely and accurate determinations of eligibility for the three months prior to the date of application if the individual would have been eligible and received Medicaid covered services.	Upon contract execution, the incoming vendor should work with PRMP to establish mutually agreed upon metrics to demonstrate compliance with the applicable outcomes. Refer to MES Certification Repository: Eligibility and Enrollment (E&E) for a list of CMS' default metrics	The vendor must provide weekly updates on compliance with outcomes associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW	4.2.2.1.3	124



Detailed Outcomes					Vendor Response Area		
Title	Source	Outcomes	Metrics	Performance Standard	Associated SLA ID	Vendor's Disposition	Attachment Section Page #
EE20 Effective Date of Eligibility	42 CFR § 433.112(b)(15)42 CFR § 436.901	Individuals are promptly enrolled with the accurate effective date of eligibility in accordance with the approved State Plan.	Upon contract execution, the incoming vendor should work with PRMP to establish mutually agreed upon metrics to demonstrate compliance with the applicable outcomes. Refer to MES Certification Repository: Eligibility and Enrollment (E&E) for a list of CMS' default metrics	The vendor must provide weekly updates on compliance with outcomes associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW 4.2.2.1.4 125
EE26 Accessibility	42 CFR § 433.112(b)(15)42 CFR § 436.901	Persons with disabilities or with Limited English Proficiency (LEP) can submit a single streamlined application with any necessary assistance (e.g., TTY for the hearing impaired for phone applications, and language assistance for persons with LEP).	Upon contract execution, the incoming vendor should work with PRMP to establish mutually agreed upon metrics to demonstrate compliance with the applicable outcomes. Refer to MES Certification Repository: Eligibility and Enrollment (E&E) for a list of CMS' default metrics	The vendor must provide weekly updates on compliance with outcomes associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW 4.2.2.1.1 122
EE27 Appeals	42 CFR § 433.112(b)(15)	Beneficiaries and applicants can submit an appeal against an adverse action via multiple channels (e.g., online, phone, mail, in person) and the status and adjudication of an appeal can easily be accessed by necessary state staff and appellants.	Upon contract execution, the incoming vendor should work with PRMP to establish mutually agreed upon metrics to demonstrate compliance with the applicable outcomes. Refer to MES Certification Repository: Eligibility and Enrollment (E&E) for a list of CMS' default metrics	The vendor must provide weekly updates on compliance with outcomes associated metrics as part of the vendor's weekly system performance report.	SLA-003: Deliverable Service Level	Will Meet	Attachment G: Response to SOW 4.2.2.1.4 125

Attachment G: Response to SOW

In **Attachment G: Response to SOW**, vendors are expected to provide a narrative response, detailing how they can meet or exceed PRMP's specifications for vendor responsibilities, as detailed throughout this RFP. PRMP expects vendors to incorporate detailed responses to the sections and bullets listed below, including applicable references and approaches from industry standards and best practices. Additionally, PRMP expects vendors' responses to reference, address, and satisfy the applicable regulatory requirements stemming from CMS' MES Certification Repository including Conditions for Enhanced Funding and CMS Required Outcomes for the E&E Business Area.

The text response to each section (Approach to Phase I through Phase III) in **Attachment G: Response to SOW** must be 14 pages or less in 11-point font, single spaced, with each response beginning on its own page with the associated section's reference on the top of the page. The vendor may also add up to two pages of images or diagrams for each response. Responses beyond 14 pages of text and 16 total pages including images and diagrams will not be reviewed.

The following pages contains our response to the Approach to Phase I through Phase III.

1. Approach to Phase I: Transition in and Takeover

The D2Sol team has significant experience in Operations, Maintenance, and Modernization of Cúram-based Medicaid systems similar to MEDITI3G in DC, NC, SC, MN, and MO, and with Transition in and Takeover experience in DC, SC, and MN. Our team consists of experienced functional and technical staff to support the solution's technical and functional requirements from Transition in and Takeover through Operations and Modernization (O&M).

We have devised the "MEDITI3G Takeover Model" consisting of our processes and best practices for a smooth transition of the system from the incumbent vendor to our team and continuing through O&M. This model will begin at contract award and focuses on transitioning the system from the incumbent to the D2Sol team. This model will apply the best practices, product experts, and other innovative approaches based on our experience in other engagements to maintain and operate a premier class MEDITI3G system. In our model, we have embedded the SLAs, outcomes, and the following key goals defined by PRMP:

- Enhanced data management to improve the overall data landscape of PRMES where this E&E system plays a critical role.
- Aligned with rules, regulations, and standards for a compliant and a modular system with reusable and configurable components.
- Improved beneficiary experience through automation and self-service capabilities with minimal duplication of data entry and processes, through integration where applicable and automation where possible.

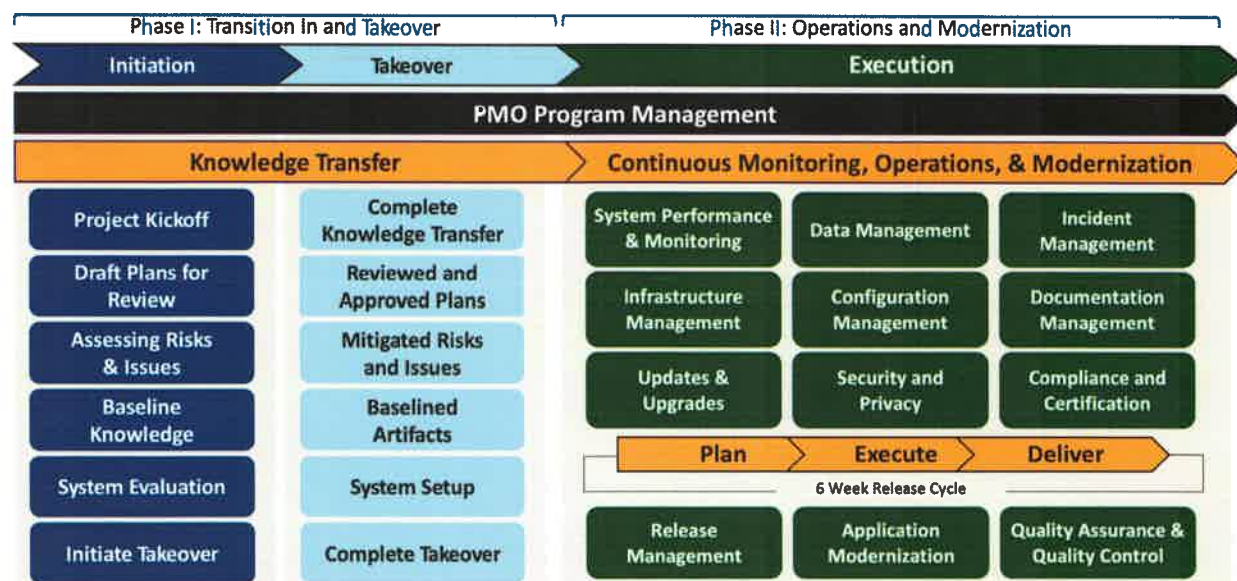


Figure 3. The MEDITI3G Takeover Model

The essence of our model lies in its simplicity, fostering ongoing learning and growth, and staying adaptable. We embrace a methodology that evolves continuously, drawing insights from our experiences across other implementations including our involvement in the DC, NC, MN, SC, and MO projects. Our foundation is built upon the principles of leading methodologies like Information Technology Infrastructure Library (ITIL) and agile, ensuring relevance and effectiveness. Our approach for MEDITI3G will be governed by the following principles:

- Use documentation, knowledge, and relationships, effectively to the benefit of the project and PRMP.
- Identify, adopt, and continue to use what works well – processes and tools.
- Incorporate and implement improvements.
- Enable feedback and continuous improvement.

- Embrace change.
- Nurture transparency and timely communication.

The figure in the previous page summarizes the “MEDITI3G Takeover Model” from the Initiation through the Execution stages, followed by descriptions of the various aspects of this operational model. Using this model, we will concentrate on the onboarding tasks, refine our established processes and practices with PRMP feedback, develop and submit the initial deliverables, work with stakeholders, and prepare the system for an efficient takeover.

Initiation Stage

The Initiation Stage creates the foundation that will allow the D2Sol team to establish a trusted partnership with PRMP and take advantage of our experience in system turnover to accelerate our adoption of the O&M responsibilities. We will perform the following activities during initiation:

- **Project kickoff:** We will introduce our key staff; confirm PRMP objectives, goals, and timeline; discuss D2Sol team plans and expectations from the incumbent vendor and PRMP stakeholders; examine the status of the current project risks and issues; walk through project timelines focusing on initial priorities, critical areas, and address other areas of concern. This stage is crucial for planning future activities.
- **Plan Reviews:** We will present our Project Schedule and Project Management Plan to PRMP for review and feedback. Future meetings and discussions will be agreed upon for further review and finalization of those plans. Our approach will help to ensure seamless and efficient continuation of MEDITI3G O&M. The plans will include:
 - Project assumptions, constraints, and the overall approach to project management.
 - Methodology for transitioning the solution and alignment with PRMP processes.
 - Roles and responsibilities of assigned resources including a detailed resource plan.
 - Expectations for communicating status, issues, and risks.
 - Processes, methods, tools, and resources applied to the support model for risk management including identification, analysis, measurement, prioritization, and mitigation.
 - Detailed approach to Knowledge Transfer (KT) from the incumbent vendor, including transition checklists and proposed KT sessions for the Transition stage.
 - Approach to address backlog reviews and assessments.
 - Process for demonstrating our team's operational takeover readiness.
- **Assessing Risks and Issues:** We will evaluate existing risks and issues within the project and propose a resolution plan to mitigate the risks and issues during the O&M Phase.
- **Baseline knowledge:** We will review and baseline current state of the system, applying best practices and prior project experience. This will include identifying the various documentation, tools, processes, and configurations for measurable improvements throughout the engagement.
- **System Evaluation:** We will assess the landscape of the existing environments, including the production system and the various components and tools making up the CMS certified MEDITI3G system. Based on our experience with Cúram deployments, we will compare the existing system setup, including all configurations, to the best practices recommended by the Cúram Product Development team. Identify any gaps or components which may not be available to our team as part of the environments transfer.
- **Initiate Takeover:** At the end of this stage, we will have adequate information to initiate the Transition in and Takeover from the incumbent vendor and will perform all relevant activities as defined in the Takeover Stage.

Takeover Stage

The Takeover Stage will focus on consolidating our knowledgebase and reinforcing as needed. In this stage, we will move forward aggressively to complete the activities that facilitate our jumpstart into the Execution Stage. The various activities we will be performing during this stage include:

- **Complete Knowledge Transfer:** We will complete the activities started in the previous stage, including the requisite knowledge acquisition from the incumbent vendor. We will consider the KT as complete once we have gathered adequate information from the incumbent vendor regarding the system and the various processes currently in place to manage the system.
- **Review and Approve Plans:** We will work with the PRMP leadership to obtain approval of our updated schedules and the Project Management Plan, incorporating changes agreed between both parties based on the review and feedback. Approved plans will be baselined to track any future changes.
- **Mitigate Risks and Issues:** Risks and Issues identified in the Initiation stage will be documented with an approved plan for mitigation. Those Risks and Issues will be baselined and tracked for closure throughout the project lifecycle.
- **Baseline Artifacts:** All identified artifacts will be baselined and tracked throughout the project lifecycle for required updates. Artifacts include documentation, tools, configurations, and processes. Missing documents and deliverables will be defined through a Deliverable Expectation Document (DED) and will be developed and submitted for approval as part of the project lifecycle.
- **System Setup:** As part of this step, we will be transferring the cloud environments, components, integrations, and tools along with implementing the Continuous Integration and Continuous Deployment (CI/CD) pipelines for deployment into those environments. Based on our System Evaluation in the previous stage, we will enhance the transferred setup as applicable to meet the SLA needs along with filling in the gaps and non-transferred components to provide a reliable, stable, and performing system for the caseworkers.
- **Complete Takeover:** At the end of this stage, we will have successfully taken over the system from the incumbent vendor. The D2Sol team will assume responsibility and continue with the next stage and phase of the project.

Execution Stage

The Execution Stage will focus on maintaining the key goals, SLAs, and outcomes defined by PRMP. This will include the implementation of the approved plans, and maintenance of the documentation, tools, processes, and configurations. This stage will focus on the operations, maintenance, and modernization of the MEDITI3G system. The Execution Stage facilitates iterative reviews, continual feedback, learning, and improvements. More information about this stage is explained in the next section “Phase II – Operations and Modernization”.

4.2.1.1 Task Group: Project Initiation and Planning

Project Initiation and Planning is aligned to the Initiation Stage as described in the previous page. It consists of activities which will begin immediately following contract execution. The activities such as project kick-off, review of plans and schedules, assessment of risks and issues, system evaluation, and knowledge baselining will help the D2Sol team to integrate into the PRMES environment and establish strong working relationships with the PRMP and other vendor staff. Our team will collaborate with PRMP and other vendor staff including the incumbent vendor to finalize the various activities and processes presented and reviewed during this task group with an approval of PRMP.

4.2.1.1.1 Domain: Onboarding

The D2Sol team will execute a comprehensive onboarding process immediately upon contract execution and assemble the required key staff and other team members. We will introduce the Advisory Board, key staff, align project scope, define responsibilities, engage stakeholders, and outline project timelines with initial areas of focus during the kickoff meeting. We will also formalize the knowledge transfer plans and activities as part of the discussion.

On approval from PRMP, we will initiate knowledge transfer activities, collaborating closely with PRMP staff and the incumbent vendor to promote a seamless transition. By leveraging our experience with system transitions of similar size and complexity including Cúram based MAGI and non-MAGI applications, we will adapt to the needs of PRMP and the MEDITI3G system and collaborate appropriately with the incumbent vendor. We understand the importance of KT and collaboration between the incumbent vendor and our team, as such, will prioritize transparent and effective communication, and thorough knowledge transfer to mitigate risks associated with a successful takeover. Given our experience and knowledge on Cúram based Medicaid systems, our team is not significantly dependent on the KT from the incumbent vendor.

Our team will produce the following deliverables as part of the Onboarding activity and do so to the level of detail defined in the Appendix 1 of the RFP.

D01: Kickoff Meeting Materials: The kickoff meeting serves as the formal start of the project and is an essential step in aligning all stakeholders involved. The Kickoff Meeting Materials deliverable includes the preparation and presentation of all materials needed for the project kickoff meeting and will address the below topics:

- **Introduction of Key Staff** – Introducing the team members and explaining their roles and responsibilities.
- **Scope Alignment** – Reviewing and confirming the project scope to confirm that all parties have a shared understanding of the objectives and deliverables.
- **Stakeholder Engagement** – Identifying and discussing key stakeholders from PRMP, the Incumbent vendor, and other relevant vendors including their roles and responsibilities for this engagement.
- **Project Timelines** – Outlining the MEDITI3G project's timeline, including key milestones, deadlines, and critical path activities.
- **Meetings** – Reviewing anticipated meetings and meeting schedules with key project stakeholders including purpose, frequency, attendees, and discussion topics.
- **Initial Areas of Focus** – Highlighting the tasks or areas that require immediate attention to get the project off to a strong start with a detailed overview of the tasks for the first three (3) months.
- **Other Key Areas** – Addressing any other critical topics that need to be discussed at the MEDITI3G project's outset to achieve a successful start.

D02: Vendor and System Transition Plan: The Vendor and System Transition Plan is a comprehensive document outlining the strategy and process for transitioning from the incumbent vendor to the D2Sol team. This plan is crucial for maintaining continuity and minimizing disruption to the system. The plan will include:

- **Knowledge Transfer Activities** – Detailing the process and timeline for transferring critical knowledge from the incumbent vendor to our team, fully preparing our team members to assume system operations. This will define the various areas, topics, and expectations based on which knowledge transfer will be performed by the incumbent vendor.
- **Collaboration Framework** – Establishing a framework for collaboration between the incumbent vendor, the D2Sol team, PRMP, and other relevant vendors including stakeholder identification and responsibilities.
- **Timeline and Milestones** – Establishing specific timeline for transition with a projected cutoff date, including key milestones and deadlines for a smooth and timely Transition in and Takeover.
- **Risk Mitigation Strategies** – Identifying potential risks associated with the transition and outlining mitigation strategies. This will help to ensure that the system remains fully operational throughout the process.
- **Checklists** – Defining the checklists for various components and steps involved in the transition allowing a transparent view of the tasks to be performed across stakeholders.

4.2.1.1.2 Domain: Project Management

The D2Sol team's approach to Project Management is structured to support a cohesive and streamlined execution of all project phases in alignment with PRMP's goals and standards. Our methodology based on the PMBOK integrates industry best practices with the specific requirements outlined by PRMP to deliver a successful project outcome.

Coordination and Alignment: We will establish strong lines of communication and collaboration with the PRMP PgMO, the PRMP ePMO vendor, and other applicable PRMES vendors. This involves:

- Conducting kick-off meetings to establish roles, responsibilities, and expectations and alignment on project responsibilities and become familiar with the processes and tools that will be used.
- Scheduling regular meetings with PRMP PgMO, ePMO, and other vendors to support continuous alignment on project tasks, timelines, and any necessary adjustments.

Governance Structure: Our well-honed governance structure is a valuable tool for communications, risk mitigation, escalation, and resource management that leverages and integrates seamlessly with the PRMP PgMO MES governance structure. This integration helps to ensure consistency in decision-making and project oversight. Risks and impacted changes flow through the tiers of the governance model for appropriate mitigation, resolution, or escalation. Our project management approach is inherently a monitoring system that carefully assigns project resources in the most efficient manner and then continuously compares project performance against plans to identify issues and develop corrective actions.

Our staffing model includes an Advisory Board consisting of experienced executives from both our services and the product organization, who will meet with PRMP leadership and stakeholders. Initial meetings will be scheduled monthly, and eventually scheduled at a frequency determined by PRMP. The goal is to understand concerns raised by PRMP and to provide guidance on the best way forward in transition, operation, maintenance, and modernization of the MEDITI3G system. This Advisory Board is supported by our on-site project leadership team, provides insight into your challenges and successes, and allows PRMP to leverage the full extent of the Cúram Platform and the experiences of other Cúram Medicaid customers.

Project Schedule Development and Maintenance: We will refine our proposed detailed project schedule during Phase I, utilizing Microsoft Project to manage and track progress by:

- Refining the comprehensive project schedule that includes all key milestones, deliverables, and timelines for all phases. This schedule will be submitted for review by PRMP PgMO and ePMO to support alignment with broader enterprise-wide initiatives.
- Maintaining and regularly updating the project schedule, with adjustments made as necessary to reflect the latest project developments.
- Maintaining a schedule for Phases II and III, ensuring that release activities are properly managed and coordinated with support from the ePMO vendor as needed.

Project Management Methodology: Our project management approach aligns with the latest standards from the Project Management Institute® (PMI®) PMBOK Guide® 7th edition and the Medicaid Information Technology Architecture (MITA) standards. This approach includes implementation of SLAs and adoption of Industry Standards, including ISO/IEEE 12207-2008 and CMMI guidelines. This allows our project management practices to be robust, consistent, and aligned with industry best practices.

Our project management approach is underpinned by our proven delivery approach, adhering to industry best practices and standards for software development lifecycles. Leveraging PMI and Agile practices, we will present a comprehensive plan that will align seamlessly with the project requirements. This approach integrates our deep expertise in cloud-based solutions, Cúram, data management, security, and user experience to exceed PRMP expectations. The tenets of effective project management as we see it can be summarized as:

- Managing the project proactively.

- Planning operations, maintenance, and modernization needs as well as dependencies effectively.
- Monitoring status and implementing controls communicating variances to plan periodically.
- Implementing corrective actions and documenting lessons learned for future improvements.

Staffing and Resource Management: As described in the Staffing Plan and Appendix 3, we believe we have brought the best and right size team to Puerto Rico from the largest group of Cúram services resources with exceptional experience and qualifications to successfully create, maintain, and deliver on the O&M objectives. With PRMP, we will continuously review the skills and staffing levels to exceed our service level commitments and reach into our deep pool of experts to augment and support our team as required. Our methodology includes a Staffing Management Plan to have key staff available as required and constantly reviewing resource allocation to confirm that staffing levels remain appropriate and are adjusted as necessary to meet project demands.

SDLC Methodology: The Software Development Lifecycle (SDLC) strategy and approach of the D2Sol team will support the PRMP needs by delivering a quality solution. We propose a Hybrid Agile project management strategy and approach that incorporates SDLC best practices. This approach is built on the principle of taking full advantage of our out-of-the-box solution and its functionality.

Advantages of our Hybrid Agile SDLC

- ✓ Provides accountability and structure typical of the Waterfall approach.
- ✓ Maintains the flexibility and responsiveness of the iterative approach.
- ✓ Allows for faster time to client value.
- ✓ Allows us to tailor and incorporate the best practices within the project constraints.
- ✓ Facilitates opportunities to engage and collaborate with PRMP throughout the SDLC.
- ✓ Allows PRMP to review the progress with confidence that the requirements have been understood and implemented as needed and expected.
- ✓ Drives coordination and communication among and across teams through constant engagement.
- ✓ Drives a comprehensive, disciplined program and project management planning and execution.
- ✓ Conducts planning, development, demos, and retrospectives to deliver incremental value to PRMP.

Our team will produce the following deliverables as part of the Project Management activity which will include all details related to the deliverables as defined in the Appendix 1 of the RFP and summarized below.

D03: Monthly Status Report: This deliverable will include a comprehensive overview of the project's activities, challenges, risks, and key metrics. The report will be structured to provide PRMP with clear visibility into project status, helping to ensure transparency and facilitating informed decision-making.

D04: Project Schedule: The Project Schedule will be a detailed task-by-task schedule and timeline that outlines all project activities, milestones, and deadlines. This schedule will be developed using Microsoft Project identifying the start and end dates, durations, work estimates, resources, predecessors, and successors for each task, deliverable, and milestone. The MEDITI3G Project Schedule will be integrated with the enterprise-wide project schedule managed by the ePMO vendor.

D05: Project Management Plan: The Project Management Plan will serve as a roadmap and guide for how the project will be executed and controlled from initiation through completion. The Project Management Plan will include the 12 Plans as defined in the RFP and will be submitted individually to PRMP for review and approval.

D06: Outcomes Management Plan: This plan will outline how project outcomes will be defined, measured, and managed with traceability, including naming conventions, versioning strategy and approach to track and manage changes to requirements.

D07: Certification Management Plan: This plan will detail our approach for continuing to meet CMS' and PRMP's required certification outcomes and metrics reporting.

D08: Outcome Traceability Matrix: The Outcome Traceability Matrix (OTM) provided by the RFP will be populated with the actual outcomes and maintained throughout the project. The D2Sol team understands that we may be required to submit additional versions of the OTM throughout the life of the contract.

4.2.1.2 Task Group: System Setup

The System Setup task group covers technical and business requirements related to the preparation of the system takeover. The D2Sol team will work with PRMP and the incumbent vendor to review existing system setup and documentation to understand the existing system, including technical and business components. We will identify areas of improvements if any based on our prior experience and product guidelines which would improve the current system's specifications. We will execute a comprehensive transition strategy to work with PRMP and the incumbent vendor to take over the system, and other support details such as licenses.

Our team will follow a structured approach that minimizes risks and helps ensure that the system is transferred to our team along with the required access controls and integrations to the Continuous Integration and Continuous Deployment (CI/CD) pipelines to help ensure an end-to-end integrated system. Based on the areas of improvements identified, we will perform incremental changes to the transferred environments to improve system setup, performance, and stability. The transferred system allows D2Sol and PRMP to utilize the existing Authorization to Operate (ATO) certification as permitted by CMS.

Here is a high-level outline of our proposed approach for system setup:

1. **Transfer Plan:** We will develop a detailed transfer plan that includes:
 - A specific timeline for the transfer of the environments
 - A communication plan to keep stakeholders informed
 - A checklist of tasks to be completed before, during, and after the transfer
 - A plan to monitor the system post-transfer to quickly identify and resolve any issues
 - A backup and restore plan to mitigate any unexpected issues
2. **Identify Access:** We will identify all required access for our team members to the transferred system and will work with the incumbent vendor to configure the same within the existing cloud environment before it is transferred to be managed by our team.
3. **System Baseline:** We will baseline various metrics of the existing system including functionality and performance.
4. **Non-Transferred Components:** We will work with the incumbent vendor to identify any components which may not be transferred as part of the environment transfer to our team and plan for alternatives which will be included in the system before it is transferred and managed by our team. Alternatives could be due to license constraints or intellectual property rights.
5. **Set Up Development Tools:** We will design, configure, and implement the Azure DevOps as a source code repository, development, and issue management tool.
6. **Set Up CI/CD:** We will configure the CI/CD builders and pipelines for automated package builds, test execution, compliance checks, and deployments into the environments.
7. **New Components Testing:** We will create new environments to test the newly introduced components along with the new CI/CD pipelines to test the deployments and integrations into the new components to address any configuration issues.
8. **System Updates:** As identified in the previous steps, we will configure the existing environments (prior to transfer) to utilize the new CI/CD pipelines, newly introduced components, and other required changes along with disabling any non-transferred components and the incumbent vendor's CI/CD pipelines.

9. **Test Scripts:** We will work with the incumbent vendor to transfer all the test scripts for various types of testing such as the vulnerability, automation, and performance tests and provision the same tools for executing those tests to maximize reuse.
10. **Testing:** We will perform multiple rounds of testing in all the updated environments identified for transfer to verify and validate the test scripts, functionality, performance, and compare with the baseline, including:
 - **Unit Testing:** Testing individual components to ensure they function as expected.
 - **System Integration Testing (SIT):** Verifying that the system integrates seamlessly with all the required components including the new ones introduced and that data flows correctly between them.
 - **User Acceptance Testing (UAT):** Involving key stakeholders to validate that the system meets the business requirements and is ready for production.
 - **Performance and Load (Volume) Testing:** Executing performance and load testing in the staging environment to validate that the system can handle the expected volume of data and user activity without degradation in performance.
11. **Decommission:** Post successful testing, we will work with the incumbent vendor to decommission and remove all components which are not part of the transfer.
12. **Go-Live and Post Transfer Support:** The transfer of the system will be scheduled during a low-traffic period to minimize disruption, where the environments will be transferred and our team assumes full responsibility in operating and modernization of the MEDITI3G system. Our team will provide immediate post-transfer support to address any issues and verify that the system is fully operational. We will also disable all incumbent vendor access to the environment along with replacing secure keys used for accessing the system.
13. **Continuous Monitoring and Optimization:** Post transfer, we will continuously monitor the system for optimal performance and stability. We will gather feedback from users to make any required adjustments.

This careful and methodical approach will help us mitigate risks and achieve a successful transition to the system managed by our team.

4.2.1.2.1 Domain: Data Management

Our approach to Data Management is focused on supporting all aspects of data creation, storage, maintenance, usage, sharing, and archiving which will be managed efficiently and securely, in alignment with PRMP's business rules and requirements. Based upon our prior project takeover experiences in SC, DC, and MN, we will employ best practices in data management such that data integrity, security, and accessibility are upheld throughout the project lifecycle. Our D2Sol team is the only Cúram team that has merged two live Cúram instances into a single Cúram instance utilizing proven data management methods which demonstrates our data management capabilities.

Data Conversion and Legacy Data Management: For any data conversion needed to support the existing system, we will create a comprehensive Data Conversion Plan to manage the transition of legacy data into the system. This includes Data Mapping, Data Cleansing, and Data Validation/Testing.

Data Gathering and Maintenance: We will review any existing processes for gathering and maintaining data required for beneficiary functionality such as the data sets to support CMS certification, and update or develop new ones, including:

- **Data Collection Processes** – Processes for the consistent collection and maintenance of data, confirming that all beneficiary information is up-to-date and accurate.
- **Ongoing Monitoring** – Monitoring tools to track, audit, and monitor data changes, confirming that modifications are traceable and meet PRMP's standards.
- **Data Dictionary Management** – Maintaining a detailed data dictionary, including a crosswalk between beneficiary transactions and the operational data store allowing clear and consistent data definitions across the system.

Collaboration on Enterprise Data Models: We will work with PRMP and other PRMES vendors to develop and maintain alignment between the Cúram E&E data model and any other enterprise data models for the Eligibility & Enrollment (E&E) system. This collaboration will include the data model and also check that the data models are compatible and integrate seamlessly with other PRMES modules, supporting enterprise-wide data consistency.

Data Security and Access Controls: Data security is a critical component of our approach. We will establish, maintain, and track processes and procedures to support:

- **Role-Based Access Controls (RBAC)** – Implementing RBAC to confirm that the required data is accessible to authorized users, with strict controls over who can view or manipulate specific data sets.
- **Secure Data Handling** – Verifying data is accessed from known origins, manipulated from appropriate sources, and all data handling processes are secure and compliant with PRMP's security standards.
- **Data Encryption and Traceability** – Applying encryption to all data in transit and at rest and maintain traceability for all data manipulations to ensure full accountability and transparency.

The D2Sol team will produce the following deliverables as part of the Data Management activity which will include details related to the deliverables as defined in the Appendix 1 of the RFP:

D09: Incident Management Plan: This deliverable will include our approach to defining, reporting, logging, managing, tracking, and resolving incidents related to the MEDITI3G system.

D10: Turnover and Closeout Management Plan: This plan will outline the process and steps we will perform to manage the turnover of the system at the end of the contract and closeout of all activities.

D11: Capacity Plan: The Capacity Plan will detail how we will manage Business, Service, and IT component capacity management along with the processes and tools for quantifying the production capacity levels and meeting changing demands of the system.

D12: Database Design Document: This document will provide a detailed design of the MEDITI3G database structures including the logical and physical data designs, including the auto generated Cúram Analysis Documentation with detailed data dictionary.

D13: Data Conversion Plan: The Data Conversion Plan (DCP) will describe our strategy, preparation, and specifications for converting data from the source to target system(s) or within the existing system.

D14: Data Management Plan: This plan will describe how we will manage data throughout the project lifecycle. It will include Data Governance Framework, Data Handling Procedures, Compliance, and Auditing.

D15: Disaster Recovery and Business Continuity Plan: This plan will define the resources, actions, and tasks required to protect and recover data and the data infrastructure in the event of a disaster.

4.2.1.2.2 Domain: Integration and Interfaces

The D2Sol team has been successfully supporting similar integrated systems and interfaces in DC, NC, SC, MN, SD, and MO. Our approach to the Integration and Interfaces domain is centered around supporting the E&E system to be fully integrated into the broader Puerto Rico Medicaid Enterprise System (PRMES) and required federal agencies. This will involve careful planning, execution, and ongoing maintenance of integration points throughout the engagement's lifecycle along with the transfer of existing integration points from the incumbent vendor. We will work closely with the MMIS vendor, other relevant vendors, and PRMP to maintain seamless interoperability between the E&E system and all other PRMES modules. We will be transferring the existing integration and interfaces as part of the cloud environment transfer.

Service-Oriented Architecture (SOA) Implementation: We will leverage SOA such that all modules within the PRMES, including the E&E system communicate effectively. SOA will enable the exchange of data and services between systems in a standardized, modular manner, allowing for greater flexibility and scalability. We will promote standardized interfaces where possible so that the integration points between the E&E system and other PRMES

modules are standardized using industry protocols such as NIEM, HL7, and FHIR. This standardization will promote consistent and reliable data exchange across systems.

Collaboration with Other Vendors: Integration success depends on effective collaboration with other PRMES vendors, including the MMIS and EDW vendors. We will:

- Actively collaborate with these vendors such that the E&E system is properly integrated into the overall PRMES architecture. This includes joint planning sessions, shared technical documentation, and regular status meetings to address any integration challenges.
- Utilize shared technology services across PRMES modules to streamline integration efforts, verifying that the E&E system can efficiently access and share data with other modules.

Support for Enterprise Data Warehouse (EDW) Integration: We understand that PRMP is in the process of implementing an EDW to support the PRMES. In NC and DC, we created their EDWs, and we will work with your EDW vendor on alignment with this initiative and support them with the required data mapping on the E&E system for any reporting and analytics needs and capabilities. We will be working closely with the EDW vendor to align on data models, exchange formats, and performance requirements, to support the broader data analytics goals of PRMP.

Compliance with Standards: Maintaining compliance with industry standards is crucial for secure and effective integration. We will support the E&E system to continue to comply with standards like CAQH-CORE, HL7, and FHIR, enabling secure and interoperable data exchanges. We will support regular audits and updates to the system to maintain compliance with evolving standards and regulations.

Our team will produce the following deliverable as part of the Integration and Interfaces activity which will include all details as defined in the Appendix 1 of the RFP.

D16: System Integration and Interface Design Plan: This deliverable will outline our approach to integrating the E&E system with other PRMES modules and external systems. It will leverage existing documentation where possible, and include:

- A detailed description of the system's integration architecture, including SOA components, data flow diagrams, and the use of standardized protocols along with the scalability and adaptability.
- Specifications for each integration point, including scope, inputs, outputs, assumptions, constraints, data formats, communication protocols, error handling, and security measures.
- Alignment with relevant standards, such as HIPAA, NIEM, HL7, and FHIR, such that the system meets all regulatory and interoperability requirements.

4.2.1.2.3 Domain: Training

Our approach to Training is designed to support all users of the E&E system, both internal and external to PRMES, such that they are fully equipped to understand and operate the system effectively. We will review existing user training materials that are available, assess them for improvements and additions for better usability and adoption of the system. We will continuously work with PRMP training experts to determine next steps to support the user population. This involves developing training plans and materials, delivering hands-on and train-the-trainer sessions, and training activities that are aligned with the specific needs of each user group as agreed to with PRMP.

Tailored Training Activities: We will work closely with PRMP to identify all user groups that require training, including PRMP staff, and other relevant stakeholders along with a thorough assessment of their training needs based on their roles and responsibilities. This allows us to tailor training activities and job aids to the specific needs of each group, helping to ensure that users receive the appropriate level of instruction and support.

Hands-On and Train-the-Trainer Models: We will deliver hands-on training sessions to all staff identified by PRMP needing training. These sessions will be interactive and practical, allowing users to engage directly with the E&E system in a controlled environment. In addition to direct training, we will introduce a train-the-trainer model, empowering key staff members or senior super-users in each office to train other users. This approach helps to ensure that training is scalable and sustainable over time.

Development and Maintenance of Training Materials: We will develop training materials in formats approved by PRMP, ensuring consistency and quality across all training resources. We will take over the existing training materials and update them as needed to meet PRMP expectations. These materials may include user manuals, quick reference guides or job aids, and other resources tailored to the specific needs of each user group. Training materials will be regularly updated to reflect changes or upgrades to the E&E system, assuring that all users have access to the most current information.

Training Delivery: We will provide training that will include training for User Acceptance Testing (UAT) and other critical phases of the system lifecycle. Training will be delivered in locations provided by PRMP and formats that are accessible to all user groups. This allows that all users, regardless of their location or accessibility needs, receive the training they require.

Digital Adoption: We recommend PRMP consider WhatFix, a Digital Adoption Platform, to onboard, train, and support the PRMP solution users within the Cúram application. This platform enables our team to create and deliver contextual and customized content within the application environment using flows, helpful tips, videos, links, and text. End-users are not required to leave the application for information, improving user productivity and engagement. WhatFix acts as an overlay on the Cúram solution providing guidance to the users. D2Sol is a premium partner with WhatFix and has invested in trained staff who could build help and guidance flows within the framework on top of Cúram. Our team has the capability to digitize adoption of the MEDITI3G application with the PRMP users in both English and Spanish if PRMP is interested. We have included pricing for this in the assumptions section as an optional component which can be included at PRMP's discretion.

Our team will produce the following deliverables as part of the Training activity which will include all details related to the deliverables as defined in the Appendix 1 of the RFP.

D17: Training Plan: This deliverable will include a training schedule, approach, activities, course outlines, course descriptions, delivery formats, tools, and other training related information in relation to the E&E system.

D18: Training Materials: This deliverable will include all materials needed to support the training activities. These materials will include user manuals, guides, presentations, demonstrations, and handouts used to guide users through the features and functionalities of the E&E system.

4.2.1.2.4 Domain: User Interface

The Cúram Platform provides all features listed in the User Interface domain and are readily available out-of-the-box for use by the MEDITI3G system. Our team will leverage features to improve the user interface and user experience. We will support preferred stakeholder communication methods, comply with PRMP and federal accessibility requirements, and ensure user-friendly, role-based configurable UI. The Cúram E&E system is accessible and adheres to Web Content Accessibility Guidelines (WCAG) 2.1 (Level A & AA), US Revised Section 508, and EN 301 549 V3.1.1 standards.

4.2.1.2.5 Domain: System Configuration

The D2Sol team will follow a structured approach that leverages existing documentation and incorporates knowledge gained from collaboration with the incumbent vendor. Our process begins with a review of the system's functional, technical, and design documents. This allows us to identify any necessary system configuration adjustments that align with PRMP's current and future needs. We will also update these documents as required, so that they accurately reflect the system's evolving configuration.

Our team will engage in detailed knowledge transfer sessions with the incumbent vendor, where we will gather critical information about the existing configuration of the system and any potential gaps we identify. During the transition stage, we will review the system configurations in the transferred system for their consistency and perform updates as required to enhance the system operation. In limited circumstances, any changes to configuration may require PRMP to seek additional approval or authorization to operate, which our team will carefully evaluate and implement in consultation with PRMP. This allows our team to help ensure that the configuration aligns with previous certification efforts and meets all required outcomes, metrics, and conditions for enhanced funding.

Our team will produce the following deliverables as part of the System Configuration activity which will include all details related to the deliverables as defined in the Appendix 1 of the RFP.

D19: System Configuration Management Plan: This plan will outline the processes and procedures we will use to manage and implement system configurations. It will include version control, change management protocols, and strategies to maintain system integrity during updates.

D20: Detailed System Design Document: This document will provide a comprehensive overview of the system's architecture, including the technical specifications, design considerations, and any updates or changes made during the configuration process.

D21: System Requirement Document/Backlog of User Stories and Use Cases: This deliverable will compile business and system requirements, including user stories and/or use cases in the backlog.

D22: Implementation Plan: The Implementation Plan will detail the steps and timelines for deploying the system configurations. It will include details related to transition, takeover, and implementation activities covering resource allocation, risk management, and contingency planning to facilitate a smooth engagement.

D23: Systems Operations Plan: This plan will provide guidance for the ongoing operations, maintenance, and modernization activities including the tools and approaches. It covers both functional and non-functional components.

4.2.1.3 Task Group: System Deployment/Go-Live

This task group covers requirements related to taking over and transitioning from the incumbent vendor as part of go-live. We will coordinate with the incumbent vendor and PRMP to transition the responsibilities and assume full responsibility of the E&E system along with a transfer of the environments which will be considered as a Go-Live. At this point, all the prior work such as identification of non-transferrable components and the implementation of equivalent components, and testing of the whole integrated system will have been completed. We will schedule the transfer during a low-traffic period to minimize disruption. Our team will provide immediate post-transfer support to address any issues and verify that the system is fully operational. As defined in the "System Setup" Task Group, we will perform the required configuration, migration, validation, and verification prior to the System Deployment/Go Live, such that the business functionality of the transferred system is confirmed to be consistent with the business functionality baselined prior to the transfer.

4.2.1.3.1 Domain: Testing and Operational Readiness

Our Testing and Operational Readiness approach involves a comprehensive and structured testing process where the system and supporting services meet the specifications and project outcomes, paving the way for a successful Go-Live. Our testing strategy will align with CMS MES Testing Guidance and Framework, and it will involve close collaboration with PRMP, the ePMO, PgMO, and other designated stakeholders.

Master Test Plan Development: We will create a Master Test Plan that outlines our testing strategy, schedules, and objectives. This plan will be shared with PRMP to align on expectations and methodologies for various testing phases, including Development Testing, System Integration Testing (SIT), User Acceptance Testing (UAT), Operational Readiness Testing (ORT), Parallel Testing, Regression Testing, and Volume (Load/Stress) Testing.

Testing Execution and Management: Our team will conduct the required testing activities, document the results, and track outcomes in alignment with the Master Test Plan. We will confirm that the test cases and scripts are executed according to plan, and defects resolved promptly. Transparency will be maintained by sharing evidence of results and quality metrics with PRMP and CMS.

Incident Response and Handling: We will either develop or adhere to an existing Incident Response Handling Plan to address functional and non-functional issues or defects that arise during testing across the various environments. This helps to ensure that any disruptions are minimized, and the system's integrity is maintained.

Operational Readiness Management: Testing results across the various environments will inform our operational readiness. We will manage the process leading up to go-live, verifying that all systems are fully prepared and that the go-live decision is based on a thorough assessment of readiness.

Our team will produce the following deliverables as part of the Testing and Operational Readiness activity which will include all details related to the deliverables as defined in the Appendix 1 of the RFP.

D24: Operational Readiness Plan: This plan will detail the activities required to prepare the system for go-live, including readiness criteria, risk management, and contingency planning.

D25: Master Test Plan: The Master Test Plan will outline the overall testing strategy, schedules, responsibilities, and objectives. It will serve as a roadmap for all testing activities throughout the project lifecycle.

D26: Test Cases & Scripts: This provides detailed instructions for executing each test covering all processes within the E&E system across all environments including the regression and volume testing.

D27: System Readiness for UAT: This deliverable will confirm that the system is ready for User Acceptance Testing, with necessary preparations completed, and environments configured and ready for UAT initiation.

D28: Test Results: We will compile and share detailed test results, including pass/fail metrics and defect reports across test cases and scripts executed across all environments.

D29: Go/No-Go Checklist: This will be a living document across the entire Phase I and will summarize the criteria that must be met before proceeding to go-live, ensuring that all critical aspects of the system have been addressed.

D30: HIPAA Statement: A formal statement confirming that all testing and operational readiness activities comply with all applicable Puerto Rico and federal regulations including HIPAA.

D31: Independent, Third-Party Security, and Privacy Controls Assessment Report: This report from the third-party audit will cover compliance with NIST SP 800-171 and/or NIST SP 800-53 standards and all relevant controls in HIPAA, Health Care Industry Security Approaches pursuant to Cybersecurity Act of 2015, Section 405(d), Open Web Application Security Project Top 10.

4.2.1.3.2 Domain: Hosting and Licensing

Our approach is to provide a robust, scalable, and secure cloud-based hosting environment for the E&E system utilizing the Azure Government cloud with US Gov Virginia as the primary region and US Gov Texas as the Disaster Recovery region. This will include comprehensive support for system provisioning, maintenance, and compliance with federal standards along with business continuity and disaster recovery through meticulous planning and execution.

Before the hosting environment is transferred from the incumbent vendor, the D2Sol team will validate that all system components have obtained a Federal Risk and Authorization Management Program (FedRAMP) Certification, FedRAMP Risk Assessment that indicates compliance, or a documented NIST 800-53 rev 4 at a "moderate" system risk assessment designation or higher. The transferred environment will be designed to integrate with other PRMES systems for security and regulatory compliance. It will also offer scalability to accommodate future growth and be cost-effective to meet budgetary constraints.

Business Continuity and Disaster Recovery (BC/DR)

- **BC/DR Planning** – We will create and maintain a Business Continuity Plan (BCP) and Disaster Recovery Plan (DRP) in alignment with PRMP requirements and applicable Puerto Rico and federal regulations. These plans will help to assure that the E&E system will remain operational during periods of malfunction or disaster.
- **Critical Services Hierarchy** – We will establish a hierarchy of critical services and infrastructure to prioritize restoration efforts in the event of a disruption. This helps to restore essential services first, minimizing impact on operations.

- **Business Impact Analysis (BIA)** – Through BIA process, we will determine the Recovery Time Objective (RTO), and Recovery Point Objective (RPO) based on PRMP's business needs with respect to the MEDITI3G system. This analysis will guide the recovery standards we set for the system based on the SLAs.
- **Disaster Recovery Environment** – A disaster recovery environment will be set up, including backup systems and network connectivity compliant with the RFP, to ensure rapid recovery in the event of a disruption.
- **License Management:** We will maintain a comprehensive directory of all PRMP-attributed licenses for the E&E system, including detailed records of vendor-owned and third-party licenses. This ensures transparency and accountability in license management. We are including the Subscription and Support cost for the below licenses as part of this engagement.

Table 26: Included Licenses

License	Usage
Cúram by Merative as indicated in Fifth Important update	Used as the MEDITI3G system's implementation platform
IBM - WebSphere Application Server	Used to deploy the Cúram application in all environments
IBM - DB2	Used as the application database in all environments
Infosphere Data Replication for DB2	Used to replicate data for High Availability Disaster Recovery
Time Travel Software	Used to perform Time Travel testing in System Test and UAT environments

At the conclusion of the contract, or at PRMP's discretion, we will fully transfer all applicable licenses to PRMP. Any licenses that cannot be transferred will be documented in writing, such that PRMP is fully informed of all licensing arrangements.

4.2.1.3.3 Domain: User, System, and Product Documentation

The D2Sol team will develop, update, and maintain both technical and non-technical documentation related to the MEDITI3G system. This documentation will support PRMP and designated stakeholders by providing clear, accurate, and up-to-date information for operating the system and troubleshooting any issues. Since the system is operational, the D2Sol team will leverage existing documentation where available.

We will develop comprehensive user and system documentation that complies with PRMP standards. This documentation will cover all aspects of the system, including operational procedures, processing features, and technical specifications. We will create or revise detailed user manuals to describe the operational and processing features of the system.

All documentation will be reviewed and updated at least annually to help ensure it remains accurate and relevant. Any documentation affected by system changes will be updated prior to the deployment of new code or configurations to keep users informed of the latest system features and changes.

We will implement updates per our change management process. This will help to ensure that all changes to the system are documented and communicated effectively, maintaining the integrity and accuracy of the documentation.

We will manage user access to current and historical documentation. We will use PRMP's SharePoint as a repository for project related documentation. This will provide ready access to documentation for authorized users and version control of historical documents accessible for reference and auditing purposes.

Our team will produce the following deliverable as part of the User, System, and Product Documentation activity which will include all details as defined in the Appendix 1 of the RFP.

D32: User, System, and Product Documentation: This comprehensive deliverable will include all relevant documentation related to the E&E system. It will consist of User Documentation, System Documentation and Product Documentation necessary to support users in executing system related business processes.

2. Approach to Phase II: Operations and Modernization

The D2Sol team, after the successful transition of the MEDITI3G system from the incumbent vendor, will initiate the Phase II – Operations and Modernization (O&M), where we will be maintaining, operating, and modernizing the MEDITI3G system. Our team has extensive experience and knowledge in maintaining, operating, and modernizing Cúram-based Medicaid systems. We perform similar O&M and enhancement work currently in DC, NC, SC, MN, and MO. While similar, each of our projects has unique cultural and local dependencies that our team readily adapts to as we continuously deliver and exceed our customers' expectations. Based on our lessons learned from those engagements and applied proven best practices we are confident that we will provide PRMP with unparalleled O&M services to the MEDITI3G system meeting and expanding your existing and future business and technical capabilities.

Below we provide explanations of how we will address the key goals defined by PRMP.

Data Management

- Enhance data sharing by adding missing interfaces and utilizing more information from existing ones.
- Improve data accuracy by identifying and fixing user experience (UX) issues that lead to data entry errors, especially in E&E data.
- Expand the availability of analytical data based on our comprehensive understanding of Cúram data models and supporting the OneX team with required data mapping helping them in extracting new data insights.
- Assess and improve system performance continuously by aligning configurations with the Cúram performance tuning guide and promoting a culture of ongoing performance monitoring and optimization.

Alignment with Rules, Regulations, and Standards

- Implement and adapt the Cúram Medicaid solution to accommodate evolving PR and federal policies and new initiatives. For example, our team implemented pandemic unwinding for multiple customers.
- Monitor CMS policies, particularly those related to the streamlining of benefit eligibility determinations, benefit calculations, and delivery, including the changes that may have a direct impact on Commonwealth Medicaid benefit delivery.

Improve Beneficiary Experience

- Improve self-service features and removing duplicative steps where applicable. This includes improving clarity and accessibility of notices such that decisions are easier for recipients to understand.
- Reduce system disruptions by minimizing planned downtimes through strategic release planning and enhancements to Cúram deployment processes including automation where applicable.

In addition to the above, a subset of the D2Sol team's key goals for the PRMP MEDITI3G O&M include:

- **Support the Welfare of Puerto Rico Residents:** Help PRMP provide essential services that benefit its residents by maintaining a reliable and stable MEDITI3G system.
- **Provide Daily Coordination and Management:** Support the daily management and coordination of Integration services, facilitating seamless support for PRMP while collaborating with other teams.
- **Monitor, Metrics, and Key Performance Indicators (KPIs) Metrics:** Establish and manage monitoring, metrics, and KPIs including PRMP defined outcomes to remain transparent and accountable to PRMP stakeholders. This may include dashboards where applicable for near real-time viewing of the outcomes.
- **Support Project Management Services:** Assist in project management activities by managing communications, coordinating staff, collaborating with IV&V contractors, and providing progress reports.
- **Reduce System Issues and Increase System Stability:** Use best practices, proactive system monitoring, incident and problem management processes, and root cause analysis to minimize system outages.

- **Reduce System Incident Resolution Times:** Employ subject matter experts and best practices to streamline incident resolution processes and improve system functionality.
- **Mitigate Risk and Unplanned Events:** Develop a comprehensive Risk Management Plan to identify and manage planned and unplanned events, minimizing impact on the user community.

The D2Sol team is a highly agile and effective team with a proven record of delivering and maintaining successful Cúram-based projects. Key differentiators include a comprehensive team where D2Sol has exclusively partnered with Cúram by Merative, the MEDITI3G software solution provider, integrating access to Cúram product development into our core team. The D2Sol team combines the two largest Cúram services providers in the world enabling us to provide exclusive access to a powerhouse of 540+ Cúram services professionals. We have more in-depth knowledge of Cúram than any other Systems Integrator and we know how to leverage what is in the product to meet operations, maintenance, and modernization challenges. Our model is to leverage out-of-the-box functionality, when possible, as opposed to unnecessary customizations that drive up the cost to Puerto Rico, allowing PRMP to leverage the capabilities of the Cúram Platform to the full extent. These key differentiators set the D2Sol team apart from other System Integrators with limited Cúram experience and resource capacity.

Our Advisory Board consisting of experienced executives will meet with PRMP leadership and stakeholders monthly initially, and regularly on a schedule at PRMP's discretion thereafter. We respect PRMP leadership's knowledge and experience and see them as a crucial element to guide and inform the priorities of the Advisory Board, as it provides guidance on how best to achieve PRMP's strategic goals. These sessions will help us to understand PRMP concerns and advise on the best path forward in operating and modernizing the MEDITI3G system.

From our developers, business analysts, and other expert team members, through our executive team, we have each been on Medicaid E&E implementations, transitioned to operations and maintenance phases, and each have direct real-world experience in delivering these systems. We have a strategic view informed by first-hand project level experience.

We have included security professionals, quality control, and quality assurance professionals and other team members who will validate the MEDITI3G system for compliance with the system security and privacy standards and federal and local guidelines. This will allow us to meet required compliance standards with the system running as intended and produce the desired outcomes. The D2Sol team is committed to following all relevant laws and regulations, including those from Puerto Rico and CMS.

The D2Sol team has created an O&M Framework based on a solid foundation, utilizing ITIL 4.0 as its base. We have customized this framework to suit the requirements of the Government sector in Health and Human Services by incorporating additional best practices based on our experience from DC, NC, SC, and MN. Our framework includes a wide range of practices that are essential for the success of O&M projects. We have categorized these practices into three (3) key areas:

- **General Management Practices:** These practices are developed from various general business domains and will be adapted to suit PRMP service management requirements. They include principles of effective governance, strategic planning, financial management, and risk management tailored to the specific needs of the Government Health and Human Services sector.
- **Service Management Practices:** These practices are developed within the service management industry and are designed to deliver the high-quality services that meet customer needs and expectations. They cover service design, service transition, service operation, continual service improvement, and service level management, all of which are necessary for maintaining the operational excellence of government services, especially in health and human services.
- **Technical Management Practices:** These practices are drawn from technology management domains and have been customized to align with the requirements of government contracts in health and human services. They involve managing technical aspects, such as infrastructure, applications, security, and data management, to provide reliable, secure, and efficient IT systems that support healthcare operations.

The integration of each category promotes comprehensive coverage of all aspects crucial for the successful O&M of IT systems, especially in the health and human services sector. Our approach, shown in figure below, will be tailored to PRMP, and will help to align with industry standards and best practices while addressing the unique needs of the MEDITI3G system.

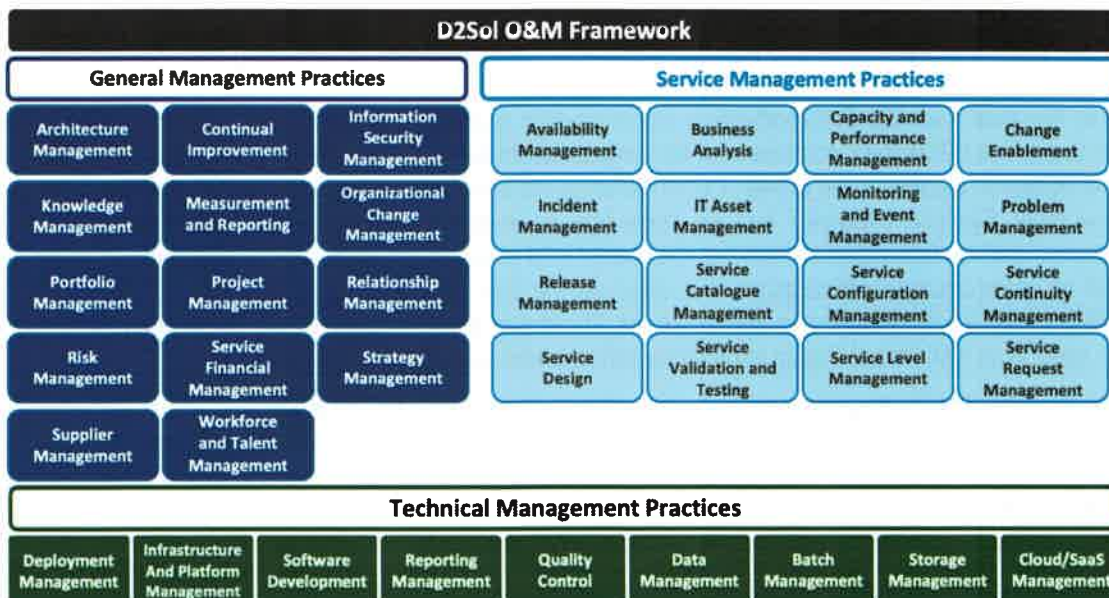


Figure 4. D2Sol O&M Framework

Our team will continue to maintain the deliverables prepared as part of Phase I. Throughout Phase II we will create and provide the following additional deliverables:

Monthly Status Report (D03) – This report will be provided to PRMP on or before the 5th of every month and will include the status for the previous month including details such as Executive Summary, Schedule Updates, Risk and Issues, Change Requests, Outcomes and SLA Compliance, and Corrective Action Plans as defined in the RFP.

System Performance Report (D33) – This report will be provided to PRMP on or before Thursday of every week and will include the system metrics for the previous week. All metrics as defined in the RFP along with the various outcome metrics defined in the “Attachment_F_OTM.xlsx” file of the RFP will be included in the report. In addition to the weekly reporting of the System Performance, most information will be automated and made available to PRMP through a near real-time dashboard. Changes to enhance the details of any of the metrics and outcomes being reported will be discussed and mutually agreed between our team and PRMP stakeholders.

Our maintenance, operation, and modernization activities in this phase are defined below across the various Task Groups along with our approach to all the Outcomes for the MEDITI3G system.

4.2.2.1 Task Group: E&E System Functionality

The D2Sol and Merative collective staff has a better understanding of the Cúram Platform, has designed and developed the software used by over 50+ governments worldwide. Our Technical Manager was a leader within the software development organization for a decade working with the team who created the solution. The D2Sol team's experience in Medicaid modernization projects exceeds 20 years beginning with the first implementation in Utah, a customer who continues to use our Cúram-based solution.

While other vendors consider the current needs for a Medicaid E&E system, our companies work far in advance with CMS to understand upcoming program changes, factor in how to incorporate those changes into the Cúram product. We then enable our staff in advance on implementing those out-of-the-box capabilities to assist our customers in achieving their desired outcomes and being compliant with CMS policies and regulations. No other vendor has that

strategic relationship with CMS or insight into upcoming product changes. This unique knowledge with the product direction allows our team to address the responsibilities outlined in the E&E functions in alignment with PRMP's current local and CMS certification outcomes by taking the following steps:

- **Understand CMS Certification Requirements:** Stay current with the most recent CMS certification guidelines and processes incorporating the advance insights from our product management leaders. This includes reviewing any updates from CMS and PR Medicaid regulations to ensure compliance with the latest standards.
- **Compliance with PRMP Guidelines:** Align all E&E system functionalities with the PRMP's current operational requirements. This may involve regular consultations with PRMP to understand their evolving needs and any changes in policy or process.
- **Ongoing Support for CMS Reporting:** We will be creating dashboards where applicable and extract the required metrics defined by PRMP for meeting ongoing CMS reporting requirements. We will support the OneX team with required data mapping and other details to generate accurate and timely reports as required by CMS for certification and oversight purposes.
- **Continuous Monitoring and Updates:** Establish a system for continuous monitoring of both the E&E functions and CMS certification outcomes. We will proactively implement necessary updates or modifications to the system when new requirements or changes are identified.
- **Training and Documentation:** Provide comprehensive training to the PRMP designated trainers on any new features or updates to the E&E system for smooth operation and compliance. Maintain detailed documentation of all system changes, processes, and compliance measures.
- **Regular Audits and Reviews:** Conduct regular internal audits and reviews of the E&E system to ensure ongoing compliance with CMS certification requirements. Any identified issues will be addressed promptly with corrective actions.

This allows us to support PRMP in maintaining compliance with CMS certification requirements and meet ongoing reporting obligations maximizing out-of-the-box capabilities. Our team members understand the various domains listed by Puerto Rico and their associated functions and yearly routine maintenance activities required for a compliant MEDITI3G system.

4.2.2.1.1 Domain: E&E Application Design and Accommodations

The D2Sol team as part of O&M will implement the improvements identified during Phase I and new improvements identified through Phase II. We will prioritize the improvements required to improve stability, efficiency, and effectiveness of MEDITI3G and present them to PRMP for approval. Examples of these improvements are:

- Introducing configurable parameters where applicable to reduce code changes to the application.
- Pre-populating fields and forms based on the information available in the system, reducing user entry and associated errors.
- Including new interfaces that can be used to pre-populate information on certain screens.
- Optimizing the workflow with the appropriate level of granularity to avoid manual interventions.
- Refactoring and reformatting big forms and pages to improve the User Experience (UX) for both the browser and mobile users.
- Introducing a human-centered design approach to the citizen portal application to improve the citizen experience, facilitating more self-service, improving service delivery, and reducing caseworker workload.
- Improving accessibility of the application through help text to allow screen readers and other accessibility software to seamlessly interact with the Cúram application.
- Verifying the citizen facing application functions across Mobile, Tablet, and Desktop form factors.

- Reinforcing accessibility design and testing for commonly used screens against screen readers and high contrast modes.

To improve application design and accessibility accommodations, the outcomes specified by PRMP will be tracked and reported weekly. Since the data required for these outcomes is currently available in MEDITI3G system, we will build interactive dashboards to display the required outcomes with varying filter criteria. We will use those dashboards to extract the outcome measurement numbers in the System Performance Report.

For outcomes related to the Citizen Portal application and accessibility, we will define a baseline and recommend a

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As part of the MEDITI3G modernization process, we may recommend PRMP select a small user group from the citizen community to identify challenges in the application process. These challenges can be converted into areas of improvement for implementation in the system. Our focus is to continuously improve the outcome metrics captured in comparison to the baseline.

EE1 Application and EE2 Application: Our team will measure the percentage of applications submitted online against the total number of applications received by the system through all methods. This metric will be reported for both MAGI and non-MAGI application types as mentioned in the metric calculation. We will measure the number of applications initiated against the reasons the application was not completed by the applicant. This outcome will also calculate the average number of days an online application remains open for each category of the application. We could also include metrics such as the total time taken for the user to complete the application.

EE26 Accessibility: Our team will work with PRMP stakeholders to define the required metrics required for compliance against this accessibility outcome. We will measure accessible features used by the applicant during the application process which will be captured in the system. For example, if the applicant opts for a TTY based telephone for application submission, it can be tracked in the Cúram system by adding additional application reception mode "Phone with TTY" to the dropdown.

Our team can enable Google Analytics (Free) on the Citizen Portal application to capture various metrics such as understanding the abandonment rates in the application process along with general usage metrics.

4.2.2.1.2 Domain: Automated E&E Processes

The D2Sol team, with its experience and expertise in implementing and maintaining Cúram across multiple Medicaid customers, is dedicated to meeting PRMP's automation requirements for the Eligibility and Enrollment (E&E) processes. By utilizing advanced Cúram features, we aim to significantly reduce manual intervention, streamline operations, and help to ensure accurate and timely eligibility determinations. Our team will work with the PRMP team to identify inefficiencies and implement alternate strategies for automation, improving the caseworker efficiency.

Our team has experience improving the automated end-to-end processing of the Medicaid application through automatic verifications through interfaces, leveraging previously gathered information, and other improvements

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system and enable an advanced and efficient Automated E&E process.

EE3 Automatic Enrollment: The D2Sol team has expertise in building interfaces for automatic enrollments and maintaining the same in states such as DC, MN, NC, and SC. We will evaluate the MEDITI3G system to identify improvements or implementations required to enable automatic enrollments for eligible individuals. Our approach will support the system with automatic enrollment for SSI recipients, individuals receiving state supplements, and deemed newborns. If any part of the process prevents automatic enrollment (such as mandatory verifications), we will work with

PRMP SMEs to identify a strategy to improve the process, resulting in an improved percentage of Automatic Enrollment.

EE13 Annual Renewals and EE14 Annual Renewals: The D2Sol team will provide PRMP with renewal statistics. These will include calculation of the percentage of redeterminations made using ex-parte in comparison to the total redeterminations received that month and the percentage of MAGI and non-MAGI based renewals performed before their annual renewal date compared to the total renewals processed in that month. We will include a near real-time dashboard showing this information as part of the application.

We have expertise with integrating and maintaining electronic data sources to confirm eligibility and facilitate ex-parte renewals. We will review the current system design and incorporate best practices and lessons learned to enhance the electronic data source integration capabilities and add processing layers to trigger notices if there are any issues with the renewal process. If ex-parte renewal cannot be completed, the system can automatically generate and distribute pre-populated renewal forms through individuals' preferred communication methods. Our goal is to streamline PRMP's renewal process and improve overall system efficiency.

EE15 Eligibility Category and EE16 Eligibility Category: The D2Sol team has expertise with developing, maintaining, and enhancing automated eligibility hierarchies that place individuals in the most advantageous group for which they are eligible, both during initial application and renewal process. We have handled adverse actions and program alignment requirements applying correct effective dates for determining eligibility for new benefits or a change in benefits.

We will review the system's current use of automated business rules to confirm the accurate assignment of eligibility categories for all mandatory and relevant optional groups. This includes correctly identifying individuals aged 19-64 at or below 133 percent FPL (VIII group) and properly aligning eligibility categories. Our approach enhances the system's accuracy and efficiency in eligibility determinations. We will work with PRMP stakeholders to define the required metrics required for compliance against this outcome.

EE5 Electronic Verification: The D2Sol team will measure the monthly percentage of no-touch applications against the total applications received. We will include a near real-time dashboard for this information as part of the application.

Our team has expertise in implementing and maintaining automated interfaces with electronic data sources to facilitate real-time or near-real-time eligibility determinations without manual intervention. We will assess the system's integration with critical data sources, including SSA, DHS (directly or via the Federal Data Services Hub (FDSH)), state quarterly wage data, financial institutions for asset verification, and the Renewal and Redetermination Verification service through FDSH. We will verify integration with the Public Assistance Reporting Information System (PARIS) to verify Medicaid coverage across states. The D2Sol team has experience working with Medicaid SMEs to refine policies and procedures, and enhance verification rules to maximize electronic verification.

EE4 Income Methodologies: The D2Sol team worked with numerous states to configure systems to accurately calculate income and household composition using MAGI and non-MAGI methodologies at application and renewal. To support accurate calculations, we will maintain the required business rules related to MAGI and non-MAGI programs. An important aspect of accurate eligibility determination is the explainability of rules calculations and we have experience in building display rules that describe income and other calculations in an intuitive manner using relevant business terminology. We will explore opportunities for improvement in the existing display rules. Our approach to maintain business rules and follow best practices from other states will allow the system to adhere to the local, state and federal guidelines, providing precise eligibility determinations. We will work with PRMP stakeholders to define the required metrics required for compliance against this outcome.

EE12 Presumptive Eligibility Application: The D2Sol team experience in configuring systems to automatically receive Presumptive Eligibility (PE) applications from all approved entities extends to every state where we provide services. Our team will manage the system efficiently to facilitate eligibility termination if no complete Medicaid application is received by the end of the month following the PE determination. This automated process will streamline the management of PE cases, to comply with Medicaid regulations and reduce manual intervention.

4.2.2.1.3 Domain: Timely and Accurate E&E Application Processing

Automation plays a crucial role in the system and contributes to timeliness and accuracy by streamlining routine tasks such as data verification and eligibility assessments, reducing the need for manual intervention. Automated workflows and auto-escalation features enhance the efficiency of eligibility determination processing, allowing rapid resolutions to any encountered delays or errors. We will review, test, and validate the eligibility and entitlement rules for timeliness and accuracy including time-travel scenarios and will fix identified issues to satisfy PRMP requirements. Our approach includes:

- Providing Cúram Eligibility Rules test coverage to improve accuracy and automated validation.
- Performing automated functional tests for various eligibility scenarios to validate accuracy when rules change.
- Identifying and resolve UX issues that might be causing inaccurate determination due to data errors.
- Monitoring metrics related to eligibility overrides vs system determined eligibility.

We are committed to maintaining a system that facilitates efficient processing and decision-making without impediments.

EE6 Timely Determinations: The D2Sol team will measure the timeliness of related determinations and backlog of related applications of the Non-Disability and Disability individuals.

Our team will review the system to verify that it meets the required eligibility determination timelines - 90 days for disability-based applications and 45 days for all other applications. As part of the O&M effort, we will include a near real-time dashboard providing the determination processing time information as part of the application. These improvements will provide better visibility into processing times and help to ensure timely, accurate eligibility decisions for all applicants.

EE18 Emergency Medicaid: The D2Sol team will review the current system to verify that it provides timely and accurate eligibility determinations for individuals whose coverage is limited to emergency services due to immigration status. Based on our current understanding of MEDITI3G through the SMC Intake Form, PRMP does not enroll individuals in Emergency Medicaid. If PRMP decides to enroll individuals in Emergency Medicaid, our team as part of the enhancement pool will utilize the Cúram Product framework to configure the Emergency Medicaid along with the required rules, eligibility, and entitlement criteria to manage the newly enrolling individuals. This will allow PRMP to meet the objectives for CMS compliance and provide appropriate coverage for those eligible under emergency service criteria.

EE17 Incarcerated Individuals: The D2Sol team will work with PRMP stakeholders to define the metrics required for compliance against this outcome and will include the data against the metrics in our weekly System Performance Report. Based on our understanding of MEDITI3G through the SMC Intake Form, the PR Department of Corrections and Rehabilitation does not have an electronic integration option, and the incarceration details are entered manually into the system by the caseworker. Our team has experience integrating both a file based and an electronic interface with the Cúram system to update data such as the incarceration details in the system, and we will use our expertise to integrate the incarceration data when they are available electronically. This integration will provide automated advantage towards the incarcerated individuals receiving timely access to inpatient services and accurate eligibility determinations upon release.

EE19 Retroactive Eligibility: The D2Sol team will evaluate the existing implementation of Retroactive Eligibility functionality in the system and confirm that the individuals receive timely and accurate eligibility determinations for the period three (3) months prior to the date of application, provided they have been eligible and received Medicaid-covered services. If there are gaps or defects in the implementation, we will resolve them that MEDITI3G is compliant against Retroactive Eligibility Functionality. Our team will work with PRMP stakeholders to define the required metrics required for compliance against this outcome and will include the data against the metrics in our weekly System Performance Report.

4.2.2.1.4 Domain: Managing Eligibility Determinations and Related Activities

The D2Sol team has utilized the Cúram product to support comprehensive eligibility determination processes and related benefit delivery activities. We understand that managing eligibility determination in an accurate and timely way is critical to Puerto Rico's Medicaid program. We continuously look to identify opportunities to drive efficiencies in the process and implement alternate strategies to improve the eligibility processing and determinations. D2Sol has realized success in North Carolina driving improvements in accurate application processing achieving high compliance rates and receiving praise from CMS. We will collaborate with the PRMP team to identify any opportunities to drive efficiencies in the process and implement alternate strategies to improve the accuracy and efficiency of the eligibility processing and determinations.

EE27 Appeals: The D2Sol team will work with PRMP stakeholders to define the metrics required for compliance against the EE27 Appeals outcome and will include the data against the metrics in our weekly System Performance Report.

Our understanding of MEDIT3G is that the Appeals functionality is not currently implemented, and that PR has plans to deploy the appeals functionality. Our team has experience implementing the Cúram appeals functionality in Minnesota (2 instances), Missouri, and California, allowing caseworkers to initiate the appeals process through the MEDIT3G application and for citizens to initiate appeals via the Citizen Portal (Online) application. PRMP can leverage this experience to enhance the current system to support multiple channels for submitting appeals against adverse actions, including online, phone, mail, and in-person options. Our team can review and optimize the Citizen Portal flow to provide a user-friendly experience allowing citizens to submit and track their appeals. The Cúram Appeals module has features that allow PRMP staff and appellants to securely access the status and adjudication of their appeals. These improvements will facilitate the accessible, transparent, and efficiently managed process.

EE20 Effective Date of Eligibility: The D2Sol team will continue to monitor and refine the system to confirm that individuals are enrolled with the correct effective eligibility date in accordance with the approved State Plan. We will make the enrollment process seamless and efficient, providing timely and precise application of eligibility dates while adhering to state regulations and policies. Our team will work with PRMP stakeholders to define the metrics required for compliance against this outcome. Our recommended metric related to this outcome is the count of individuals who have incorrect effective date of eligibility through the automatic eligibility determination process.

EE11 Enrollment: The D2Sol team will continue to refine and optimize the existing MMIS interface process to verify that it sends beneficiary information for enrollment on the agreed upon schedule to the appropriate delivery system (e.g., FFS, managed care). We will focus on minimizing errors and providing accurate data transmission to maintain compliance and facilitate seamless enrollment. We will optimize the interface for reliable and efficient data exchange. Our team will work with PRMP stakeholders to define the metrics required for compliance against this. Our recommended metric is the number of beneficiaries which are not sent to MMIS.

EE9 Notices and EE10 Notices: The D2Sol team will assess and improve the notice functionality by leveraging our expertise from other state implementations. We will innovate and enhance a compliant solution that provides timely, automated eligibility notices and requests for additional information to individuals. Additionally, we will enhance the system to deliver electronic notices and alerts via preferred communication modes (e.g., email, text), notifying individuals when updates or notices are available in their online accounts. Our approach will streamline communication, improve efficiency, and maintain compliance with regulatory requirements. We will work with PRMP stakeholders to define the metrics required for compliance against this outcome.

EE7 Reasonable Opportunity Period: The D2Sol team will verify that the individuals are enrolled for up to 90 days while pending verification of citizenship or immigration status. Our team will focus on maintaining and finding efficiencies in the current implementation and will optimize processes to ensure continued compliance, effective management of provisional enrollments, and timely access to coverage while pending necessary verifications. We will work with PRMP stakeholders to define the metrics required for compliance against this outcome.

EE8 SSN Verification: The D2Sol team will maintain the current implementation to confirm that individuals are enrolled pending verification of their Social Security Number (SSN). We will continuously monitor the interface to minimize errors

and reduce manual intervention, focusing on maintaining efficiency and accuracy in enrollment. We will strive to ensure the smooth handling of provisional enrollments while verifying SSNs and optimizing the system to support effective and error-free operations. We will work with PRMP stakeholders to define the metrics required for compliance against this outcome.

4.2.2.1.5 Domain: System-Generated Reporting, Metrics, and Data

The D2Sol team understands that PRMP does not have the capability to generate automatic system generated reports, however PRMP is implementing the OneX project to develop a data warehouse and the required reporting capability. The D2Sol team will support the OneX vendor by mapping E&E system data. The OneX vendor will use mapped data to build the required ETL (Extract-Transform-Load) scripts to retrieve data needed to system-generate CMS and PRMP required reports. Until the automated reporting is implemented, our team will fulfill the reporting requests by manually meeting the needs of PRMP.

Our team will include dashboards related to the outcome measurements in the Cúram application with authorized access providing valuable insights into system performance, metrics, and other critical data areas. Our solution along with the OneX solution will include the following capabilities:

- **Standard and Ad Hoc Reports:** Our team will support the OneX team with the required data-mapping allowing them to create both standard and ad hoc reports in flexible formats defined by PRMP. This will enable users to generate reports tailored to the specific needs and preferences of PRMP.
- **Role-Based Access:** We will work with the OneX team to establish and maintain role-based user access to reporting functionalities and documentation, helping to ensure that users have appropriate access to the reports and data they need based on their roles.
- **Configurable Dashboards:** We will support the OneX team to build configurable dashboards that present vital aggregated current and historical operational data, supporting comprehensive analysis and monitoring of system performance, case progression, interface transactions, and overall system productivity.
- **Executive Dashboards:** We will develop executive dashboards related to the outcome metrics defined for specific users to provide insights into overall system performance, enabling informed decision making.

By leveraging our reporting and data management expertise, we will complement PRMP's OneX team by supporting them with required details. This will allow them to build reports which will provide insights into the MEDIT3G system outcomes effectively supporting PRMP's oversight, CMS certification, and performance tracking requirements.

4.2.2.2 Task Group: Ongoing Operations/Enhancements

The D2Sol team has been providing continuous support for system maintenance, operations, and modernization to Cúram Medicaid customers in DC, NC, SC, MN, and MO. With our experience we understand the needs of a Cúram Medicaid system and can provide PRMP with unmatched service and support to maintain and operate the MEDIT3G system in compliance with local, federal, and current industry standards and requirements. In the sections below we provide additional information on how we will address the needs across the various domains.

From an operational perspective, having an available system, stable, and properly sized is essential to being able to provide continuous eligibility and enrollment services to caseworkers and citizens. In our principle states where we provide direct O&M services to DC, NC, SC, and MN, outside of occasional schedule updates, these States do not have system outages or unavailability periods.

To the extent we are engaged in MN and DC, we also provide significant enhancements on a regular release cycle of 2-3 month intervals, providing new capabilities and business functions including renewal self-service for citizens who have to provide additional evidence or verifications. The ability to provide enhancements to support eligibility and enrollment activity in a no-touch or self-service way, reduces the burden on caseworkers, allowing them to spend more time dedicated to their clients who need more hands-on support.

4.2.2.2.1 Domain: Compliance

The D2Sol team will adopt a comprehensive and structured approach to meet compliance, and alignment with the stated mandates, fostering a strong and respectful partnership with PRMP. As we have done in our other state Medicaid projects, our product and services teams will continuously monitor changes in local, state, and federal laws, regulations, policies, and standards and regularly inform project teams on the impact of those changes to the implementations to maintain compliance with those regulations and policies. The following provides a view of how our team will fulfill these requirements:

- **Comply with local and federal laws, regulations, policies, and standards:** Our team will work with PRMP to monitor and verify adherence to their policy requirements. Updates to the pertinent laws, regulations, and compliance requirements will be monitored and any changes will be incorporated into the current process to maintain compliance.
- **Provide reports and audits as required by PRMP:** The D2Sol team will implement dashboards and work with OneX team on an automated reporting system where OneX will generate accurate and timely reports alongside our weekly System Performance Report. Until the new reporting system provided by OneX is available, we will support the creation of reports for compliance and readiness of PRMP audits. We will maintain communication channels with PRMP to address reporting or auditing concerns.
- **Support independent third-party security and privacy controls assessments:** The D2Sol team will coordinate with PRMP's third-party assessors, providing necessary information and support. Documentation and evidence of security and privacy controls will be maintained to facilitate these assessments. Our team will act on assessment findings to remediate security and privacy controls.
- **Demonstrate compliance with SSAE-16 SOC 1 Type 2 and SOC 2 Type 2:** The D2Sol team will schedule and conduct yearly assessments with PRMP's accredited auditors and will perform gap analyses to identify areas of non-compliance and implement remediation plans. Annual compliance reports will be produced and submitted to PRMP demonstrating adherence to SSAE-16 SOC 1 Type 2 and SOC 2 Type 2 standards.
- **Provide PRMP-authorized users access to vendor facilities and records:** D2Sol will provide all required access to systems, facilities, data, and documentation to PRMP or its designee to conduct audits and inspections as is necessary. The systems and data will be stored in cloud environments wherein the approved PRMP staff or its designee will have full access. Our intention is to store all project related documentation in PR SharePoint and PRMP will provide our team the required access to create and maintain them. Our facilities are located in North Carolina and access to those facilities will be provided on a need basis and on-demand to PR staff and its designees.
- **Retain records and reports in accordance with PRMP policies and procedures:** Our team will comply with digital and physical record retention requirements per PRMP policies and procedures. Protocols for the secure disposal of records once they are no longer needed will be updated, following PRMP guidelines.
- **Follow industry-standard practices and policies:** Continuous training is provided to our staff on industry-standard practices and emerging trends which will allow PRMP to stay updated with best practices related to system architecture, design, security, and accessibility.

As part of this Phase II, the D2Sol team will deliver the D33 System Performance Report to PRMP on or before Thursday of every week. This report will include the system metrics for the previous week. It will also include the various compliance metrics and any deviations from the same.

4.2.2.2.2 Domain: Certification

The D2Sol team will effectively address the requirements for maintaining and if required, renewing CMS certification status, to maintain continued compliance and high service levels for PRMP by implementing the following strategies:

- **Maintain historic E&E service levels:** The D2Sol team will adhere to the outcomes and metrics agreed upon between PRMP and CMS. This will involve implementing monitoring and reporting on systems to continuously track and report service levels. We will conduct periodic reviews with PRMP to confirm that the service levels are being met and to identify areas for improvement.
- **Demonstrate evidence of compliance with outcomes and metrics:** The D2Sol team will maintain documentation of adherence to the outcomes and metrics established during the final CMS certification review. We will conduct internal audits that will verify ongoing compliance and to address issues. Our weekly System Performance Report deliverable will include the service levels showcasing adherence to the agreed outcomes and metrics.
- **Support CMS certification status maintenance:** The D2Sol team will implement a plan to address changes in CMS requirements or system performance. We will identify, document, and provide the ongoing training to stay current with the latest CMS guidelines and certification requirements. We will support, alongside PRMP, PgMO, ePMO vendor, and other applicable PRMES vendors, a unified approach to maintaining CMS certification.
- **Provide certification support during a formal certification process:** We will prepare the necessary documentation, evidence, and support materials in line with CMS's certification guidance. With PRMP, PgMO, ePMO vendor, and other applicable PRMES vendors, we will support a seamless certification process. We will also verify that the aspects of the system meet CMS certification requirements before and during any certification process.

The D2Sol team has reviewed the SMC Intake Form and other resources in Appendix 7: Procurement Library for context and guidance on the last certification effort. We will analyze historical certification efforts to identify best practices and potential areas of improvement.

4.2.2.2.3 Domain: Upgrades

The D2Sol team understands that at the discretion of PRMP, they have allocated 20,000 hours annually (the "enhancement pool") for the purpose of upgrades, updates, and enhancements. When PRMP identifies the need to perform any of these activities, or act upon the recommendations for enhancements by the D2Sol team, we will work collaboratively to size, scope, and present an estimate for the work which PRMP can then reallocate a portion of that enhancement pool to authorize the task(s).

Our O&M support includes services such as defect fixes, software installation, re-installation, configuration, security patching, version patching, and integration of software components which are not part of the enhancement pool.

Maintaining Alignment with Federal Guidance, PRMP Initiatives, and Pending Change Requests (CRs)

The D2Sol team as part of Phase I will conduct meetings with PRMP, the incumbent vendor, and other stakeholders to review the status of pending and planned CRs along with new PRMP initiatives including changes to the Federal Guidelines. This will allow our team to perform realignment as necessary and avoid duplication of work. Our team will subsequently assess the current state of each CR, identify gaps or outstanding tasks, and develop a realignment plan to verify that each CR is complete and meets the needs of PRMP. We will further assess recent federal guidance and PRMP initiatives helping to ensure that the E&E system remains compliant and aligned with evolving requirements.

Supporting Non-Disruptive Configuration Changes and System Upgrades

Collaboration between PRMP and the D2Sol team is essential to develop a release schedule for non-disruptive maintenance and enhancement releases into production. We will incorporate proactive system maintenance activities including minor system upgrades. Our team will prioritize the operations and modernization tasks with approval from PRMP and schedule them in the upcoming releases.

The D2Sol team's non-disruptive configuration changes and system upgrades will include activities like defect fixes, minor enhancements, minor system updates, security patches, performance improvements, and yearly routine updates such as Federal Poverty Limit and Cost of Living Allowance updates.

The D2Sol team will best utilize the Cúram applications configuration capabilities to perform any releases related to configuration changes with minimal disruption to the production environment. Comprehensive testing will be performed before each release.

Data fixes may be performed in real time with minimal to zero downtime to the production environment. Data fixes will be evaluated for their need and comprehensive testing will be performed in the lower environments to avoid unintentional impacts to the existing system resulting in data quality issues. Each data fix may be associated with a potential code fix or a root cause problem which may resolve the need for data fixes in the near term.

The D2Sol team will develop backup, and rollback plans to support quick recovery in case of issues during system upgrades. We will maintain version control for configuration changes, data fixes, and code changes to track modifications and revert to previous states if necessary.

The D2Sol team will implement controls to identify, test, and deploy necessary industry patches and security updates, promptly and effectively. This includes monitoring vendor advisories and security bulletins to identify new patches and updates, assessing their relevance and criticality to PRMP. Upon successful testing, patches will be implemented according to the established schedule, prioritizing critical patches to address high-risk vulnerabilities promptly. This proactive approach ensures that critical updates and patches are promptly deployed to mitigate vulnerabilities, unauthorized access, data breaches, and other security incidents, and enhances the overall security posture of the E&E system.

Upgrading Licenses to Align with Newest Available Versions

The D2Sol team has extensive experience in Medicaid O&M projects based on Cúram of similar scale and complexity to MEDITI3G. We recognize the critical importance of software updates in ensuring the continued reliability, security, and performance of MEDITI3G and its associated applications. As part of our major software upgrade methodology and as the Cúram product owner, we will have early insight from our product management organization on upcoming features and changes to the release. We will work with PRMP business leaders to see how this functionality fits within their vision and roadmap.

By leveraging the software, we minimize unnecessary customizations to reduce future upgrade costs. In some cases, it may be more beneficial to implement a lighter weight “technical upgrade”, allowing PRMP to take advantage in the latest underlying improvements to the software and staying aligned with the vendor’s support policy, while minimizing impacts to system users. In other cases, we may recommend a full “functional upgrade”, delivering improved user experience, functional updates, and new training to those system users.

While all Cúram customers have access to promote their needs with the product organization, only the D2Sol team with Merative as our exclusive partner can facilitate access for PRMP to convey their needs directly to the product organization and hear back on the Cúram roadmap.

Our software upgrade methodology further includes:

- A proactive approach to software updates management, staying abreast of the latest releases, patches, and security vulnerabilities associated with the technologies and platforms utilized in the PRMP ecosystem.
- Timely deployment of software updates mitigating security risks and maintaining system integrity.
- Carefully planned deployment schedules to minimize disruption to system operations and end-user productivity while ensuring maximum protection against emerging threats and vulnerabilities.
- Testing protocols include comprehensive regression testing, where we verify that the updated software functions as expected and does not introduce new issues or conflicts with existing system components.
- Risk management strategies to mitigate potential adverse effects, including evaluating the potential impact of software updates on system stability, data integrity, and user experience, allowing us to make informed decisions and minimize disruption.

For upgrades such as a Cúram Upgrade or Major Middleware upgrades, our team will develop a license upgrade plan to ensure that PRMP’s licenses are upgraded within six (6) months of the release of and not more than one (1) version

behind a new version, upon approval of PRMP. This plan will include timelines, resource allocation, impact analysis, and an estimate.

Our team will work closely with other MEDITI3G software vendors to understand the impact of new versions, including any new features, deprecated functionality, or required system changes. We will also execute our training plan to familiarize ourselves with the new features and changes introduced by software upgrades, prepare training materials and delivery strategy, and activate our training program to support end-users of the new functionality.

4.2.2.2.4 Domain: Security and Privacy

The D2Sol team's Information Security Architect/Privacy Data Protection Officer will manage the existing security framework of the solution, maintaining and enhancing it to comply with established policies, systems, and regulations such as NIST 800-53, IRS, HIPAA, CMS MARS-E 2.2, and any PRMP specifications related to security and privacy.

Our Officer will handle security and privacy management, oversee tools, processes, and documentation, including Identity and Access Management, and provide security operations support, monitoring, analyzing, and responding to security incidents within the MEDITI3G system. They will conduct risk assessments, develop strategies, and implement controls to mitigate threats, managing security policies and compliance through regular audits.

Our team will establish Incident Response Plans, manage vulnerabilities through assessments and patch management, and provide Security Awareness Training to our staff. Continuous Monitoring and Threat Intelligence will track unauthorized access and emerging threats, while maintaining security documentation and reporting to keep PRMP stakeholders informed. We will support Security Governance and Oversight, assist in Business Continuity and Disaster Recovery planning and testing, and implement lessons learned from other Cúram O&M projects like NC, DC, and MN to govern the security and privacy of the MEDITI3G system. Through these efforts, we aim to help ensure robust security measures and regulatory adherence for the MEDITI3G system.

The D2Sol team and our Information Security Architect/Privacy Data Protection Officer leverage regulatory and industry leading best practices such as CMS MARS-E 2.2, HIPAA/HITECH, FIPS 140-2, CIS Level 1 Benchmark, NIST 800-53 Rev 4 to meet all security requirements. Key elements of our security approach include:

- **Consistent Development Standards and Security:** Application of consistent development standards with explicit security considerations. Coding, user interface, database, and field naming conventions adhere to industry standards and incorporate security techniques like obfuscation.
- **Interface Partner Data Exchange Security:** Development of interface partner data exchange agreements with rigorous testing to ensure secure design, implementation, and testing of interfaces, while adhering to data exchange security protocols.
- **Legacy System Resource Authorization and Security Updates:** Emphasis on security during the authorization process for Legacy System resources, ensuring updated security-related files and scripts to confirm adherence to role-based security access determinations.
- **Incorporation of DevOps Continuous Feedback:** Integration of security considerations into the continuous feedback process to verify consistent addressing and validation of security measures throughout development.
- **Validation of Security Methodology:** Active participation in sessions to validate security methodology and escalate security-related findings and concerns for joint resolution and implementation with PRMP.
- **Authorization Protocols and Change Control:** Strict adherence to authorization protocols and initiation of Change Control for security-related access changes, confirming compliance with PR security standards.
- **Collaboration with PRMP and Vendor Technical Resources:** Close collaboration with the PRMP resources for quality reviews, vulnerability identification and remediation, secure testing, and preparation for third-party tests, ensuring adherence to role-based security access determinations.

- **Release Management and Code Migration Procedures:** Exercise of release management practices to plan, manage, and control software builds, along with adherence to code migration procedures, ensuring security measures are maintained during deployment.

The D2Sol team will use MEDIT3G Identity and Access Management software providing single sign-on (SSO) capabilities between system components, such as between Cúram and tools used by the PRMP Staff. Single sign-on allows seamless authentication and enhances user experience while maintaining security, privacy, and compliance.

The D2Sol Security team will maintain a comprehensive written information security program, in alignment with the federal privacy and data security requirements, based on the following:

- **CMS MARS-E 2.2:** This security framework from the CMS helps to ensure the protection of electronic protected health information (ePHI).
- **IRS Publication 1075:** This publication by the Internal Revenue Service (IRS) provides guidance on safeguarding federal tax information.
- **HIPAA Security Rule:** The Health Insurance Portability and Accountability Act (HIPAA) Security Rule establishes national standards to protect individuals' electronic protected health information (ePHI).
- **HITECH Act:** The Health Information Technology for Economic and Clinical Health Act (HITECH Act) expands on HIPAA by requiring covered entities to implement specific security measures to address breaches of unsecured PHI.
- **FIPS 140-2:** The Federal Information Processing Standard (FIPS) Publication 140-2 is a security standard that specifies requirements for cryptographic modules.
- **CIS Level 1 Controls:** The Center for Internet Security (CIS) Critical Security Controls (CSC) Level 1 provides a prioritized set of foundational controls for basic cyber hygiene.

The D2Sol team is committed to strict adherence to HIPAA compliance standards, particularly those related to the protection of Protected Health Information (PHI) and electronic PHI (ePHI) as specified in HIPAA 164.314(b)(2)(iii). This includes:

- Implementation of administrative, physical, and technical safeguards to ensure the confidentiality, integrity, and availability of PHI.
- Prioritization of privacy and security of sensitive health information, protecting against unauthorized access, disclosure, or misuse.
- Adoption of security measures in line with industry best practices and regulations, including encryption, access controls, regular audits, and annual staff training.
- Implementation of access control mechanisms, including user authentication, role-based access controls, and encryption, to restrict PHI and ePHI access to authorized individuals only.
- Establishment of policies and procedures for granting/revoking access privileges, conducting access reviews, and enforcing monitoring and auditing for HIPAA compliance.

The D2Sol team will establish a comprehensive process to identify, report, and respond to any actual, attempted, or suspected theft, accidental disclosure, loss, or inability to account for PHI and PII. This includes incident detection, thorough investigation, timely reporting to relevant authorities, and implementing corrective actions to prevent recurrence. Our team will confirm compliance with regulatory requirements and maintain transparency with stakeholders throughout the incident management process.

Our team will work closely with PRMP stakeholders to understand any specific needs of security and privacy compliance outside of what has been described above and will implement the same to improve the system compliance level.

3. Approach to Phase III: Turnover and Contract Closeout

The D2Sol team's approach to Phase III – Turnout and Contract Closeout will focus on fulfilling all remaining contract requirements, supporting a seamless transition of system operations, documentation, and assets to PRMP or its designee, and achieving a smooth contract closeout. Our structured methodologies will guide the turnover process, maintaining system functionality and fulfilling all obligations through the contract's conclusion. During this phase, we will continue to support the Phase II tasks of Task Group: E&E System Functionality and Ongoing Operations/Enhancements,

We understand that Phase III begins upon notice of termination and/or six (6) months prior to contract closeout and ends once contract requirements have been fulfilled and the contract concludes. We will include all stakeholders for the MEDITI3G, including business managers, operational users, clients and PRMP ITS support services.

We will achieve the following outcomes for PRMP:

- **Service Continuity:** Our approach will prioritize avoiding disruptions to services provided to clients and system users during the turnover period, providing a seamless transition.
- **Orderly Transition:** We will provide a structured, complete, controlled transition to PRMP, inclusive of formalized Knowledge Transfer Plans including Training, in accordance with RFP requirements.
- **Technical and Operational Support:** We are committed to providing the necessary technical and operational services and information to facilitate an informed, coordinated, complete transfer of activity.
- **PRMP and Incoming O&M vendor Preparation:** Our knowledge transfer program will prepare PRMP staff and the incoming O&M vendor to confidently assume MEDITI3G maintenance and operational support responsibilities.

We have extensive experience taking over Cúram-based Medicaid projects from other vendors including those in SC, DC, and MN, and have experienced the challenges in the turnover from those vendors. We will take proactive steps starting from day one on the project so that PRMP does not experience those same challenges.

Supporting Transition and Takeover Activities – Our Approach

The foundation of a successful turnover is the performance of Phases I and Phase II, and the continuous maintenance of documentation throughout. The execution of Phase III and its related turnover will follow a seamless plan to facilitate a successful transition. The D2Sol team's approach to performing turnover is detailed and aligned with PR's turnover requirements. Our understanding of PR's turnover objectives promotes a commitment to a seamless transition if a different contractor is awarded the next contract or if the services are brought in-house.

Our proposal encompasses comprehensive turnover planning and services to transition the MEDITI3G and all the related application support activities that were maintained and operated until invocation of turnover. This includes transitioning both the central solution we delivered and the interfacing components within the internal and external providers that connect to the MEDITI3G.

The D2Sol team will take a methodical and formalized approach to turnover, confirming every step is carefully planned and executed. We will lead the turnover, with PRMP permission and approval. Our proactive assistance to the incoming vendor taking over the O&M is guided by best practices, aimed at avoiding adverse impacts on the MEDITI3G Project stakeholders and the recipients during the turnover period. We will strive to maintain uninterrupted services for your clients and system users throughout the turnover period.

Collaboration is at the core of our approach, and we are successful only when the incoming O&M provider is successful. We will work hand-in-hand with PRMP and advise the incoming O&M vendor during the turnover, supplying all required information and transferring relevant material and responsibilities to the incoming O&M vendor transparently. Key aspects of our approach are included below:

- **Customer-Centric Approach:** We will take time to understand what PRMP and the incoming O&M vendor need and confirm PRMP and the incoming O&M vendor's available resources and skill sets. Based on this, we will customize our Turnover approach.
- **Experience-Driven Planning:** Drawing from our experience in O&M projects, for example in DC, SC, and MN, we recognize the importance of a well-defined Transition Plan, and we will tailor our transition approach to suit the unique needs of PRMP.
- **Early Engagement:** Upon receiving notification from PRMP of the need for transition, we will proactively engage with both PRMP and the incoming O&M vendor to initiate discussions and gather necessary information.
- **Update the Turnover and Closeout Management Plan:** Within the stipulated timeframe, the D2Sol team will work with the incoming O&M vendor and update the Turnover and Closeout Management Plan (Deliverable D10) for PRMP. This plan will be collaboratively updated with the incoming O&M vendor to maintain alignment with all parties' expectations. We explain the deliverable further in section 4.2.3.1.1 under the task details.
- **Training Activities:** During the transition period we will train the incoming entity on the application, but also the system processes for the new O&M vendor.
- **Responsibility Definition:** The Turnover and Closeout Management Plan will define our responsibilities and the incoming O&M vendor. Clarity in roles and expectations is vital for a successful transition.
- **Joint Coordinated Management Team:** We will establish a Joint Coordinated Management Team consisting of representatives from the D2Sol team, PRMP, and the incoming O&M vendor. Collectively this team will facilitate effective communication, coordination, cooperation, and consultation throughout the transition and ongoing work.
- **Regular Meetings and Status Reports:** The Joint Coordinated Management Team will conduct regular meetings to address transition-related concerns and to monitor the progress and work of the various subgroups. Status reports, as agreed with PRMP, will be submitted to provide transparency and progress tracking.
- **Support for Phase-In Requirements:** We will support the phase-in requirements for transition. This includes providing necessary assistance, knowledge transfer, and cooperation to enable a successful handover of responsibilities to the incoming O&M vendor.
- **Specialized Technical Turnover:** We will cater to the unique technical aspects of the turnover, enabling the seamless transition of applications and operations.
- **Identification of Critical Tasks:** We will meticulously identify and prioritize critical tasks specific to MEDIT3G that are imperative for a smooth and orderly turnover.
- **Timeframe Management:** Our approach includes well-defined timeframes for the completion of each activity aligned with PRMP's objectives, and a collaborative management strategy to keep the turnover on track.
- **Resource Allocation:** We will identify a comprehensive list of the resources required for the turnover, encompassing contributions from PRMP, the D2Sol team, and the incoming O&M vendor.
- **System Turnover Objectives:** We will outline the precise objectives for the system turnover, establishing a clear path to success.
- **Detailed Work Breakdown Structure (WBS) Plan:** Our approach includes a structured Gantt chart that maps out the work plan activities into the project schedule, offering a visual representation of the entire turnover process.

- **Documenting Activity Timeframes and Responsibilities:** We will document activity timeframes and the associated responsibilities, maintaining clarity and accountability at each step of the turnover journey.

The D2Sol team's turnover planning identifies all services designed to assist the incoming O&M vendor's team, who will take over ongoing system O&M. Our team brings extensive experience in large-scale maintenance projects, particularly conversions from legacy systems, providing a comprehensive system knowledge transition to the incoming O&M vendor's team members.

Supporting Transition and Takeover Activities – Our Methodology Overview

Our methodology is built on clear documentation, well-defined processes, and efficient procedures, which have been integral to our past successes in serving clients and their citizens. Our turnover methodology is structured around three (3) crucial steps: Plan, Execute, and Complete. These steps serve as the foundation for a detailed and comprehensive approach for a successful turnover. To accomplish this, we will undertake the following key actions:

- Perform project services including turnover planning while PRMP identifies the incoming O&M vendor.
- Deploy qualified, experienced staff for turnover and knowledge transfer tasks.
- Maintain clear communication channels with both PRMP and the incoming O&M vendor throughout the turnover period.
- Share information proactively to facilitate a successful transition.
- Provide information as requested by PRMP and the incoming O&M vendor.
- Monitor continuously the effectiveness of the turnover process by gathering feedback from involved parties and reporting feedback within the status reports.
- Tune and adjust the processes as necessary.

Our turnover methodology focuses on delivering services to the incoming O&M vendor in a way that is seamless and efficient and to make certain there is no negative impact to MEDITI3G end users and business operations.

The Figure on the next page shows a high-level overview of our Turnover Methodology, with a visual representation of the phases, approach, activities, and deliverables.

PHASES	ACTIVITIES	INPUT	OUTPUT
01 Plan Turnover	<ul style="list-style-type: none"> – Agree on scope, objectives, approach, deliverables, and schedule – Agree on templates, structure and content – Review/detail approach and schedule – Prepare components, services, resources, and tools – Draft, concur, and finalize planning phase – Baseline output – Maintain baselined documents 	<ul style="list-style-type: none"> • Lessons Learned Report • Baselines Deliverables 	<ul style="list-style-type: none"> – Agreed Turnover Templates – Baselines Turnover Plan
02 Execute Turnover	<ul style="list-style-type: none"> – Assess status and evaluate entry criteria, dependencies – Rebaseline deliverables and Turnover artifacts – Assemble components, services, resources, and tools – Lock in detailed schedule and milestones – Provide agreed turnover services with QA – Prioritize Production Operations and avoid impact – Manage issues, conflicts, and risks 	<ul style="list-style-type: none"> • Re-Baselined Turnover Plan • Re-Baselined Deliverables 	<ul style="list-style-type: none"> – Turnover Assessment Reports
03 Complete Turnover	<ul style="list-style-type: none"> – Assess and summarize turnover services, issues, and risks – Rebaseline handover deliverables and Turnover artifacts – Documented lessons learned – Address actions and issues – Prepare and submit final report – Complete turnover to the incoming O&M vendor – Close the project 	<ul style="list-style-type: none"> • Turnover Assessment Reports • Re-Baselined Deliverables 	<ul style="list-style-type: none"> – Turnover Completion Report

Figure 5. Turnover Methodology

Turning Over Documentation/Assets

The D2Sol team will turn over all the necessary and required documentation and assets. This work is detailed in subsections below 4.2.3.1.1 Domain: Documentation Updates and Asset Transfer.

Continued System Maintenance

The D2Sol team will continue to maintain the system and satisfy its obligations per the earlier phases throughout Phase III through contract closeout. This work covers all the tasks in the scope of Phase II: Operations and Modernization: 4.2.2.1 Task Group: E&E System Functionality and 4.2.2.2 Task Group: Ongoing Operations/Enhancements.

4.2.3.1 Task Group: Transition Out, Turnover, and Closeout

This task group outlines our plan to transition out of the project, turn over the system, and satisfy all contract obligations efficiently and effectively. The details of this task work will be documented in an updated Turnover and Closeout Management Plan. The details of this plan are provided in the domain below for document updates.

4.2.3.1.1 Domain: Documentation Updates and Asset Transfer

The D2Sol team will provide comprehensive and accurate documentation and support asset transfer to PRMP or its designee. A high-level overview of our Turnover approach is provided below:

1. Turnover and Closeout Management Plan

- We will update the Turnover and Closeout Management Plan to coordinate and manage the turnover process for Phase III.
- The plan will outline schedules, responsibilities, and milestones to ensure all activities are completed within six (6) months of contract expiration.
- The plan will include:
 - Transition approach

- Staffing
- Tasks
- Schedule
- Knowledge Transfer Activities to the PRMP or a designated agent
- Project documentation, Operational documentation, and work artifacts – listed below under documentation updates
- Training activities
- Data authorized for transfer and backups
- Project communication associated with risk management and project status reporting during the transition
- Transition or closure of active correspondence, as applicable
- Other details that support a successful takeover

2. Documentation Updates

- Provide updated project and system documentation, including user manuals, system configurations, and any other relevant documents.
- Validate that documentation is current, accurate, and compliant with PRMP standards.
- Provide documentation listed below within the time frame requested by the PRMP and documented in the Turnover Work Plan. Additionally, we will use our quality processes to help deliverables meet PRMP approval.
- The final documentation list to be transferred is subject to the PRMP review and approval. We group the documents as follows:
 - System Architecture Documentation, including System Design Documents, Integration Specifications, and interface details.
 - Configuration Management Documentation, including Configuration Management Plan, System Configuration Records.
 - Operational Procedures and Guidelines, including Service Level Agreement (SLA) Documentation.
 - Security and Compliance Documentation
 - Maintenance and Support Documentation, including Maintenance Schedules and Support Logs.
 - Testing and Validation Documentation
 - Disaster Recovery and Business Continuity Documentation
 - Training and User Manuals
 - Data Management Documentation, including Data Dictionaries.

3. Any Vendor-Specific Documentation, such as Licensing Information and Product Documentation.

- Transfer all assets designed for and/or owned by PRMP, including licenses, hardware, and software.
- Provide an inventory list and status of all transferred assets to PRMP for validation.

4. Final Material Delivery

- Deliver all final materials to PRMP's satisfaction within the established timeframe.

- PRMP will withhold the final three months of payments until PRMP confirms receipt and satisfaction with the final materials.

4.2.3.1.2 Domain: Knowledge Transfer and Contract Closeout

We will facilitate a transition of system functionality and services with minimal disruption to system users using the following approach:

1. Collaborative Training and Orientation Sessions
 - The D2Sol team will propose recommended sessions, topics, durations, and documentation. PRMP and the incoming O&M vendor will be able to review and provide feedback. We will update the session plans based on the feedback.
 - The D2Sol team will lead these sessions as needed.
 - Participate in collaborative sessions with PRMP and/or its designee to share insights regarding system specifications and transition responsibilities.
 - Provide detailed walkthroughs and Q&A sessions to validate thorough knowledge transfer.
2. Turnover Schedules and Timelines
 - The D2Sol team will propose the turnover approach, turnover topics, and materials. PRMP and the incoming O&M vendor may review and provide feedback. We will update the turnover plans based on the feedback.
 - Coordinate and refine turnover schedules and timelines, aligning key activities and milestones across all applicable parties.
 - Monitor progress and adjust timelines as necessary to address any emerging issues.
3. Monitoring and Reporting
 - Continually monitor and report on the status of ongoing work, focusing on critical areas during the transition.
 - Provide regular updates to PRMP to ensure transparency and accountability.
4. Maintaining Positive Relationships
 - Maintain a positive working relationship with PRMP and its designee throughout the transition period.
 - Keep lines of communication open and address any concerns promptly.
5. Vacating Office Space
 - Vacate PRMP-assigned office space and return any physical property and equipment timely.
 - Confirm returned items are in good condition and accounted for.
6. Validation and Completion
 - Verify that all tasks defined in the final contract and any applicable amendments are completed.
 - Receive validation from PRMP that all required contract activities were completed to the required level of completeness and quality.

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Attachment H: Initial Project Schedule

Table 27: Initial Project Schedule

ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
1	1	Phase I: Transition in and Takeover	282 d?	01-Jan-2025	29-Jan-2026	
2	1.1	Contract Execution Date	0 d	01-Jan-2025	01-Jan-2025	PRMP
3	1.2	Project Initiation and Planning	282 d?	01-Jan-2025	29-Jan-2026	D2Sol
4	1.2.1	Internal Kickoff	1 d	02-Jan-2025	02-Jan-2025	D2Sol
5	1.2.2	Onboard PMO resources to get started	5 d	03-Jan-2025	09-Jan-2025	D2Sol
6	1.2.3	Domain : Project Management	19 d?	03-Jan-2025	29-Jan-2025	D2Sol
7	1.2.3.1	Start Project on Internal Company Systems	5 d	03-Jan-2025	09-Jan-2025	D2Sol
8	1.2.3.2	Start Initiation and Planning steps of the Project	5 d	03-Jan-2025	09-Jan-2025	D2Sol
9	1.2.3.3	Prepare for the Project - Identify the project sponsors and the initial project team	5 d	03-Jan-2025	09-Jan-2025	D2Sol
10	1.2.3.4	Prepare for the Project - Review and Update the project charter	5 d	03-Jan-2025	09-Jan-2025	D2Sol
11	1.2.3.5	Review Cost/Scope/Schedule/Quality	5 d?	03-Jan-2025	09-Jan-2025	D2Sol
12	1.2.3.6	Perform Initial Risk Identification	8 d	03-Jan-2025	14-Jan-2025	D2Sol
13	1.2.3.7	Refine Initial Project Plan	8 d	03-Jan-2025	14-Jan-2025	D2Sol
14	1.2.3.8	Create DRAFT Project Management Plans - for Kickoff Guidance	8 d	03-Jan-2025	14-Jan-2025	D2Sol
15	1.2.3.9	Construct Kickoff Meeting Materials (Agenda, Slide Deck, etc.)	8 d	03-Jan-2025	14-Jan-2025	D2Sol
16	1.2.3.10	Conduct Kickoff Meeting	1 d	15-Jan-2025	15-Jan-2025	D2Sol
17	1.2.3.11	Update Plans according to the Project Kickoff Meeting Feedback	10 d	16-Jan-2025	29-Jan-2025	D2Sol
18	1.2.3.12	Finalize PMO Roles/Responsibilities with PRMP Team	5 d	16-Jan-2025	22-Jan-2025	D2Sol
19	1.2.3.13	Establish Meeting Cadence with the Client Stakeholders	10 d	16-Jan-2025	29-Jan-2025	D2Sol
20	1.2.3.14	Establish Project Governance with PRMP	10 d	16-Jan-2025	29-Jan-2025	D2Sol
21	1.2.3.15	Plan and Schedule Project Meetings for the Implementation Activities	10 d	16-Jan-2025	29-Jan-2025	D2Sol
22	1.2.4	Deliverables - Project Management:	277 d?	08-Jan-2025	29-Jan-2026	D2Sol
23	1.2.4.1	D03: Monthly Status Report	250 d	16-Jan-2025	31-Dec-2025	D2Sol
24	1.2.4.2	D04: Project Schedule (initial delivery)	32 d?	16-Jan-2025	28-Feb-2025	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
25	1.2.4.2.1	Develop Content and Submit	12 d?	16-Jan-2025	31-Jan-2025	D2Sol
26	1.2.4.2.2	Review	10 d?	03-Feb-2025	14-Feb-2025	PRMP
27	1.2.4.2.3	Revise and Resubmit	5 d?	17-Feb-2025	21-Feb-2025	D2Sol
28	1.2.4.2.4	Final Review and Approval	5 d?	24-Feb-2025	28-Feb-2025	PRMP
29	1.2.4.3	D04: Project Schedule (recurring updates)	218 d	01-Apr-2025	29-Jan-2026	D2Sol
30	1.2.4.4	D05: Project Management Plan	38 d?	08-Jan-2025	28-Feb-2025	D2Sol
31	1.2.4.4.1	Develop Content and Submit	18 d?	08-Jan-2025	31-Jan-2025	D2Sol
32	1.2.4.4.2	Review	10 d?	03-Feb-2025	14-Feb-2025	PRMP
33	1.2.4.4.3	Revise and Resubmit	5 d?	17-Feb-2025	21-Feb-2025	D2Sol
34	1.2.4.4.4	Final Review and Approval	5 d?	24-Feb-2025	28-Feb-2025	PRMP
35	1.2.4.5	D06: Outcomes Management Plan	38 d?	08-Jan-2025	28-Feb-2025	D2Sol
36	1.2.4.5.1	Develop Initial Content and Submit	18 d?	08-Jan-2025	31-Jan-2025	D2Sol
37	1.2.4.5.2	Review	10 d?	03-Feb-2025	14-Feb-2025	PRMP
38	1.2.4.5.3	Revise and Resubmit	5 d?	17-Feb-2025	21-Feb-2025	D2Sol
39	1.2.4.5.4	Final Review and Approval	5 d?	24-Feb-2025	28-Feb-2025	PRMP
40	1.2.4.6	D07: Certification Management Plan	50 d?	16-Jan-2025	26-Mar-2025	D2Sol
41	1.2.4.6.1	Develop Content and Submit	30 d?	16-Jan-2025	26-Feb-2025	D2Sol
42	1.2.4.6.2	Review	10 d?	27-Feb-2025	12-Mar-2025	PRMP
43	1.2.4.6.3	Revise and Resubmit	5 d?	13-Mar-2025	19-Mar-2025	D2Sol
44	1.2.4.6.4	Final Review and Approval	5 d?	20-Mar-2025	26-Mar-2025	PRMP
45	1.2.4.7	D08: Outcome Traceability Matrix (Initial)	30 d?	16-Jan-2025	26-Feb-2025	D2Sol
46	1.2.4.7.1	Develop Content and Submit	10 d?	16-Jan-2025	29-Jan-2025	D2Sol
47	1.2.4.7.2	Review	10 d?	30-Jan-2025	12-Feb-2025	PRMP
48	1.2.4.7.3	Revise and Resubmit	5 d?	13-Feb-2025	19-Feb-2025	D2Sol
49	1.2.4.7.4	Final Review and Approval	5 d?	20-Feb-2025	26-Feb-2025	PRMP
50	1.2.4.8	D08: Outcomes Traceability Matrix (Interim)	30 d?	10-Apr-2025	21-May-2025	D2Sol
51	1.2.4.8.1	Develop Content and Submit	10 d?	10-Apr-2025	23-Apr-2025	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
52	1.2.4.8.2	Review	10 d?	24-Apr-2025	07-May-2025	PRMP
53	1.2.4.8.3	Revise and Resubmit	5 d?	08-May-2025	14-May-2025	D2Sol
54	1.2.4.8.4	Final Review and Approval	5 d?	15-May-2025	21-May-2025	PRMP
55	1.2.4.9	D08: Outcomes Traceability Matrix (Final)	30 d?	13-Nov-2025	24-Dec-2025	D2Sol
56	1.2.4.9.1	Develop Content and Submit	10 d?	13-Nov-2025	26-Nov-2025	D2Sol
57	1.2.4.9.2	Review	10 d?	27-Nov-2025	10-Dec-2025	PRMP
58	1.2.4.9.3	Revise and Resubmit	5 d?	11-Dec-2025	17-Dec-2025	D2Sol
59	1.2.4.9.4	Final Review and Approval	5 d?	18-Dec-2025	24-Dec-2025	PRMP
60	1.2.5	Domain: Onboarding Activities	142 d	10-Jan-2025	28-Jul-2025	D2Sol
61	1.2.5.1	Onboard key staff and other required resources	10 d	10-Jan-2025	23-Jan-2025	D2Sol
62	1.2.5.2	Host a project kickoff meeting (covered above in Project Management)	1 d	15-Jan-2025	15-Jan-2025	D2Sol
63	1.2.5.3	Begin knowledge transfer activities	3 d	16-Jan-2025	20-Jan-2025	D2Sol
64	1.2.5.4	Meet with PRMP staff to discuss the knowledge transfer plan and activities	10 d	21-Jan-2025	03-Feb-2025	D2Sol
65	1.2.5.5	Provide approval to the knowledge transfer plan and activities	5 d	04-Feb-2025	10-Feb-2025	PRMP
66	1.2.5.6	Knowledge Transfer Sessions	120 d	11-Feb-2025	28-Jul-2025	D2Sol
67	1.2.5.6.1	Development guidelines	6 mons	11-Feb-2025	28-Jul-2025	D2Sol[50%], Incumbent[50%]
68	1.2.5.6.2	Development Process	6 mons	11-Feb-2025	28-Jul-2025	D2Sol[50%], Incumbent[50%]
69	1.2.5.6.3	Documentation Access	6 mons	11-Feb-2025	28-Jul-2025	D2Sol[50%], Incumbent[50%]
70	1.2.5.6.4	Infrastructure Design	6 mons	11-Feb-2025	28-Jul-2025	D2Sol[50%], Incumbent[50%]
71	1.2.5.6.5	System Configuration	6 mons	11-Feb-2025	28-Jul-2025	D2Sol[50%], Incumbent[50%]
72	1.2.5.6.6	Test Scripts	6 mons	11-Feb-2025	28-Jul-2025	D2Sol[50%], Incumbent[50%]
73	1.2.5.6.7	Release Planning	6 mons	11-Feb-2025	28-Jul-2025	D2Sol[50%], Incumbent[50%]
74	1.2.6	Deliverables – for Onboarding Activities	41 d?	01-Jan-2025	26-Feb-2025	D2Sol
75	1.2.6.1	D01: Kickoff Meeting Materials	30 d?	01-Jan-2025	11-Feb-2025	D2Sol
76	1.2.6.1.1	Develop Content and Submit	10 d?	01-Jan-2025	14-Jan-2025	D2Sol



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77	1.2.6.1.2	Review	10 d?	15-Jan-2025	28-Jan-2025	PRMP
78	1.2.6.1.3	Revise and Resubmit	5 d?	29-Jan-2025	04-Feb-2025	D2Sol
79	1.2.6.1.4	Final Review and Approval	5 d?	05-Feb-2025	11-Feb-2025	PRMP
80	1.2.6.2	D02: Vendor and System Transition Plan	36 d?	08-Jan-2025	26-Feb-2025	D2Sol
81	1.2.6.2.1	Develop Content and Submit	16 d?	08-Jan-2025	29-Jan-2025	D2Sol
82	1.2.6.2.2	Review	10 d?	30-Jan-2025	12-Feb-2025	PRMP
83	1.2.6.2.3	Revise and Resubmit	5 d?	13-Feb-2025	19-Feb-2025	D2Sol
84	1.2.6.2.4	Final Review and Approval	5 d?	20-Feb-2025	26-Feb-2025	PRMP
85	1.3	System Setup Activities	235 d?	06-Feb-2025	31-Dec-2025	D2Sol
86	1.3.1	Set up supporting infrastructure	20 d	13-Feb-2025	12-Mar-2025	D2Sol
87	1.3.2	Set up development tools	15 d	13-Mar-2025	02-Apr-2025	D2Sol
88	1.3.3	Validate development guidelines	5 d	03-Apr-2025	09-Apr-2025	D2Sol
89	1.3.4	Verify and update documentation	30 d	13-Feb-2025	26-Mar-2025	D2Sol
90	1.3.5	Evaluate infrastructure design	5 d	13-Mar-2025	19-Mar-2025	D2Sol
91	1.3.6	Review system configuration	5 d	20-Mar-2025	26-Mar-2025	D2Sol
92	1.3.7	Set up CI/CD pipeline	10 d	20-Mar-2025	02-Apr-2025	D2Sol
93	1.3.8	Review test scripts	5 d	20-Mar-2025	26-Mar-2025	D2Sol
94	1.3.9	Review deployment process	10 d	20-Mar-2025	02-Apr-2025	D2Sol
95	1.3.10	Domain : Data Management	200 d	20-Mar-2025	24-Dec-2025	D2Sol
96	1.3.10.1	As needed - Create and execute plans for conversion of legacy data	200 d	20-Mar-2025	24-Dec-2025	D2Sol
97	1.3.10.2	As needed - Gather and maintain data required for beneficiary functionality	200 d	20-Mar-2025	24-Dec-2025	D2Sol
98	1.3.10.3	Track, audit, and monitor any data changes	200 d	20-Mar-2025	24-Dec-2025	D2Sol
99	1.3.10.4	Maintain a data dictionary	200 d	20-Mar-2025	24-Dec-2025	D2Sol
100	1.3.10.5	Collaborate to develop enterprise data models for the E&E system	200 d	20-Mar-2025	24-Dec-2025	D2Sol
101	1.3.10.6	Establish, maintain, and track processes and procedures to protect data	200 d	20-Mar-2025	24-Dec-2025	D2Sol
102	1.3.11	Deliverables - Data Management	150 d?	06-Feb-2025	03-Sep-2025	D2Sol
103	1.3.11.1	D09: Incident Management Plan	35 d?	06-Feb-2025	26-Mar-2025	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
104	1.3.11.1.1	Develop Content and Submit	15 d?	06-Feb-2025	26-Feb-2025	D2Sol
105	1.3.11.1.2	Review	10 d?	27-Feb-2025	12-Mar-2025	PRMP
106	1.3.11.1.3	Revise and Resubmit	5 d?	13-Mar-2025	19-Mar-2025	D2Sol
107	1.3.11.1.4	Final Review and Approval	5 d?	20-Mar-2025	26-Mar-2025	PRMP
108	1.3.11.2	D10: Turnover and Closeout Management Plan (initial delivery)	35 d?	20-Mar-2025	07-May-2025	D2Sol
109	1.3.11.2.1	Develop Content and Submit	15 d?	20-Mar-2025	09-Apr-2025	D2Sol
110	1.3.11.2.2	Review	10 d?	10-Apr-2025	23-Apr-2025	PRMP
111	1.3.11.2.3	Revise and Resubmit	5 d?	24-Apr-2025	30-Apr-2025	D2Sol
112	1.3.11.2.4	Final Review and Approval	5 d?	01-May-2025	07-May-2025	PRMP
113	1.3.11.3	D11: Capacity Plan	40 d?	20-Mar-2025	14-May-2025	D2Sol
114	1.3.11.3.1	Develop Content and Submit	20 d?	20-Mar-2025	16-Apr-2025	D2Sol
115	1.3.11.3.2	Review	10 d?	17-Apr-2025	30-Apr-2025	PRMP
116	1.3.11.3.3	Revise and Resubmit	5 d?	01-May-2025	07-May-2025	D2Sol
117	1.3.11.3.4	Final Review and Approval	5 d?	08-May-2025	14-May-2025	PRMP
118	1.3.11.4	D12: Database Design Document	40 d?	20-Mar-2025	14-May-2025	D2Sol
119	1.3.11.4.1	Develop Content and Submit	20 d?	20-Mar-2025	16-Apr-2025	D2Sol
120	1.3.11.4.2	Review	10 d?	17-Apr-2025	30-Apr-2025	PRMP
121	1.3.11.4.3	Revise and Resubmit	5 d?	01-May-2025	07-May-2025	D2Sol
122	1.3.11.4.4	Final Review and Approval	5 d?	08-May-2025	14-May-2025	PRMP
123	1.3.11.5	D13: Data Conversion Plan	50 d?	20-Mar-2025	28-May-2025	D2Sol
124	1.3.11.5.1	Develop Content and Submit	30 d?	20-Mar-2025	30-Apr-2025	D2Sol
125	1.3.11.5.2	Review	10 d?	01-May-2025	14-May-2025	PRMP
126	1.3.11.5.3	Revise and Resubmit	5 d?	15-May-2025	21-May-2025	D2Sol
127	1.3.11.5.4	Final Review and Approval	5 d?	22-May-2025	28-May-2025	PRMP
128	1.3.11.6	D14: Data Management Plan	40 d?	15-May-2025	09-Jul-2025	D2Sol
129	1.3.11.6.1	Develop Content and Submit	20 d?	15-May-2025	11-Jun-2025	D2Sol
130	1.3.11.6.2	Review	10 d?	12-Jun-2025	25-Jun-2025	PRMP



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
131	1.3.11.6.3	Revise and Resubmit	5 d?	26-Jun-2025	02-Jul-2025	D2Sol
132	1.3.11.6.4	Final Review and Approval	5 d?	03-Jul-2025	09-Jul-2025	PRMP
133	1.3.11.7	D15: Disaster Recovery and Business Continuity Plan (initial delivery)	50 d?	26-Jun-2025	03-Sep-2025	D2Sol
134	1.3.11.7.1	Develop Content and Submit	30 d?	26-Jun-2025	06-Aug-2025	D2Sol
135	1.3.11.7.2	Review	10 d?	07-Aug-2025	20-Aug-2025	PRMP
136	1.3.11.7.3	Revise and Resubmit	5 d?	21-Aug-2025	27-Aug-2025	D2Sol
137	1.3.11.7.4	Final Review and Approval	5 d?	28-Aug-2025	03-Sep-2025	PRMP
138	1.3.12	Domain : Integration and Interfaces	200 d	20-Mar-2025	24-Dec-2025	D2Sol
139	1.3.12.1	Establish (as needed) and maintain connections between the E&E system and other applicable systems and/or databases	200 d	20-Mar-2025	24-Dec-2025	D2Sol
140	1.3.12.2	Provide services (implementation, configuration, and operational activities) as needed to keep the E&E system fully integrated into the overall PRMES platform	200 d	20-Mar-2025	24-Dec-2025	D2Sol
141	1.3.12.3	Collaborate with the MMIS vendor, and other relevant vendors as applicable for proper integration of the E&E system into the broader PRMES	200 d	20-Mar-2025	24-Dec-2025	D2Sol
142	1.3.12.4	Configure and update the system in support of other PRMES modules	200 d	20-Mar-2025	24-Dec-2025	D2Sol
143	1.3.12.5	Support the EDW project	200 d	20-Mar-2025	24-Dec-2025	D2Sol
144	1.3.13	Deliverables - Integration and Interfaces	50 d?	20-Mar-2025	28-May-2025	D2Sol
145	1.3.13.1	D16: System Integration and Interface Design Plan	50 d?	20-Mar-2025	28-May-2025	D2Sol
146	1.3.13.1.1	Develop Content and Submit	30 d?	20-Mar-2025	30-Apr-2025	D2Sol
147	1.3.13.1.2	Review	10 d?	01-May-2025	14-May-2025	PRMP
148	1.3.13.1.3	Revise and Resubmit	5 d?	15-May-2025	21-May-2025	D2Sol
149	1.3.13.1.4	Final Review and Approval	5 d?	22-May-2025	28-May-2025	PRMP
150	1.3.14	Domain : Training	185 d	17-Apr-2025	31-Dec-2025	D2Sol
151	1.3.14.1	Deliver a training approach documented in a training plan	30 d	17-Apr-2025	28-May-2025	D2Sol
152	1.3.14.2	Develop and maintain training materials in the PRMP-approved formats	155 d	29-May-2025	31-Dec-2025	D2Sol
153	1.3.14.3	Deliver training to all staff in accordance with the approved training plan	155 d	29-May-2025	31-Dec-2025	D2Sol
154	1.3.14.4	Deliver training in support of User Acceptance Testing (UAT), Operational Readiness Testing (ORT), operations, and new releases (including upgrades)	155 d	29-May-2025	31-Dec-2025	D2Sol



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155	1.3.15	Deliverables - Training	90 d?	17-Apr-2025	20-Aug-2025	D2Sol
156	1.3.15.1	D17: Training Plan	50 d?	17-Apr-2025	25-Jun-2025	D2Sol
157	1.3.15.1.1	Develop Content and Submit	30 d?	17-Apr-2025	28-May-2025	D2Sol
158	1.3.15.1.2	Review	10 d?	29-May-2025	11-Jun-2025	PRMP
159	1.3.15.1.3	Revise and Resubmit	5 d?	12-Jun-2025	18-Jun-2025	D2Sol
160	1.3.15.1.4	Final Review and Approval	5 d?	19-Jun-2025	25-Jun-2025	PRMP
161	1.3.15.2	D18: Training Materials	60 d?	29-May-2025	20-Aug-2025	D2Sol
162	1.3.15.2.1	Develop Content and Submit	40 d?	29-May-2025	23-Jul-2025	D2Sol
163	1.3.15.2.2	Review	10 d?	24-Jul-2025	06-Aug-2025	PRMP
164	1.3.15.2.3	Revise and Resubmit	5 d?	07-Aug-2025	13-Aug-2025	D2Sol
165	1.3.15.2.4	Final Review and Approval	5 d?	14-Aug-2025	20-Aug-2025	PRMP
166	1.3.16	Domain : User Interface Activities	200 d	20-Mar-2025	24-Dec-2025	D2Sol
167	1.3.16.1	Support activities related to User Interface	200 d	20-Mar-2025	24-Dec-2025	D2Sol
168	1.3.17	Domain : System Configuration	200 d	20-Mar-2025	24-Dec-2025	D2Sol
169	1.3.17.1	Help inform any system configuration needs prior to the incoming vendor taking over the system	200 d	20-Mar-2025	24-Dec-2025	D2Sol
170	1.3.17.2	Review, use, maintain, and update, as needed, the existing system functional, technical, and design documents to guide the configuration of the system and ongoing maintenance	200 d	20-Mar-2025	24-Dec-2025	D2Sol
171	1.3.18	Deliverables - System Configuration	167 d?	20-Mar-2025	07-Nov-2025	D2Sol
172	1.3.18.1	D19: System Configuration Management Plan	40 d?	20-Mar-2025	14-May-2025	D2Sol
173	1.3.18.1.1	Develop Content and Submit	20 d?	20-Mar-2025	16-Apr-2025	D2Sol
174	1.3.18.1.2	Review	10 d?	17-Apr-2025	30-Apr-2025	PRMP
175	1.3.18.1.3	Revise and Resubmit	5 d?	01-May-2025	07-May-2025	D2Sol
176	1.3.18.1.4	Final Review and Approval	5 d?	08-May-2025	14-May-2025	PRMP
177	1.3.18.2	D20: Detailed System Design Document	50 d?	15-May-2025	23-Jul-2025	D2Sol
178	1.3.18.2.1	Develop Content and Submit	30 d?	15-May-2025	25-Jun-2025	D2Sol
179	1.3.18.2.2	Review	10 d?	26-Jun-2025	09-Jul-2025	PRMP
180	1.3.18.2.3	Revise and Resubmit	5 d?	10-Jul-2025	16-Jul-2025	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
181	1.3.18.2.4	Final Review and Approval	5 d?	17-Jul-2025	23-Jul-2025	PRMP
182	1.3.18.3	D21: System Requirement Document/Backlog of User Stories and Use Cases	50 d?	24-Jul-2025	01-Oct-2025	D2Sol
183	1.3.18.3.1	Develop Content and Submit	30 d?	24-Jul-2025	03-Sep-2025	D2Sol
184	1.3.18.3.2	Review	10 d?	04-Sep-2025	17-Sep-2025	PRMP
185	1.3.18.3.3	Revise and Resubmit	5 d?	18-Sep-2025	24-Sep-2025	D2Sol
186	1.3.18.3.4	Final Review and Approval	5 d?	25-Sep-2025	01-Oct-2025	PRMP
187	1.3.18.4	D22: Implementation Plan (Initial delivery)	40 d?	03-Apr-2025	28-May-2025	D2Sol
188	1.3.18.4.1	Develop Content and Submit	20 d?	03-Apr-2025	30-Apr-2025	D2Sol
189	1.3.18.4.2	Review	10 d?	01-May-2025	14-May-2025	PRMP
190	1.3.18.4.3	Revise and Resubmit	5 d?	15-May-2025	21-May-2025	D2Sol
191	1.3.18.4.4	Final Review and Approval	5 d?	22-May-2025	28-May-2025	PRMP
192	1.3.18.5	D22: Implementation Plan (Updated)	30 d?	29-Sep-2025	07-Nov-2025	D2Sol
193	1.3.18.5.1	Develop Content and Submit	10 d?	29-Sep-2025	10-Oct-2025	D2Sol
194	1.3.18.5.2	Review	10 d?	13-Oct-2025	24-Oct-2025	PRMP
195	1.3.18.5.3	Revise and Resubmit	5 d?	27-Oct-2025	31-Oct-2025	D2Sol
196	1.3.18.5.4	Final Review and Approval	5 d?	03-Nov-2025	07-Nov-2025	PRMP
197	1.3.18.6	D23: Systems Operations Plan (Initial Delivery)	50 d?	20-Mar-2025	28-May-2025	D2Sol
198	1.3.18.6.1	Develop Content and Submit	30 d?	20-Mar-2025	30-Apr-2025	D2Sol
199	1.3.18.6.2	Review	10 d?	01-May-2025	14-May-2025	PRMP
200	1.3.18.6.3	Revise and Resubmit	5 d?	15-May-2025	21-May-2025	D2Sol
201	1.3.18.6.4	Final Review and Approval	5 d?	22-May-2025	28-May-2025	PRMP
202	1.3.18.7	D23: Systems Operations Plan (Updated)	30 d?	29-Sep-2025	07-Nov-2025	D2Sol
203	1.3.18.7.1	Develop Content and Submit	10 d?	29-Sep-2025	10-Oct-2025	D2Sol
204	1.3.18.7.2	Review	10 d?	13-Oct-2025	24-Oct-2025	PRMP
205	1.3.18.7.3	Revise and Resubmit	5 d?	27-Oct-2025	31-Oct-2025	D2Sol
206	1.3.18.7.4	Final Review and Approval	5 d?	03-Nov-2025	07-Nov-2025	PRMP
207	1.4	System Deployment/Go-Live Activities	250 d?	16-Jan-2025	31-Dec-2025	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
208	1.4.1	Domain: Testing and Operational Readiness	80 d?	07-Aug-2025	26-Nov-2025	D2Sol
209	1.4.1.1	Support all necessary testing activities in alignment with the CMS MES Testing Guidance and Framework	80 d	07-Aug-2025	26-Nov-2025	D2Sol
210	1.4.1.2	Complete testing activities, specific to the testing type and project phase	1 d?	07-Aug-2025	07-Aug-2025	D2Sol
211	1.4.1.3	Collaborate with PRMP staff and other relevant stakeholders for testing activities, including the ePMO and PgMO support services vendors	1 d?	07-Aug-2025	07-Aug-2025	D2Sol
212	1.4.1.4	Provide PRMP and designees with transparency into testing activities within each test environment, including identification and timely resolution of defects impacting both the functional and non-functional test environments	1 d?	07-Aug-2025	07-Aug-2025	D2Sol
213	1.4.1.5	Support Operational readiness by testing results and progress	1 d?	07-Aug-2025	07-Aug-2025	D2Sol
214	1.4.1.6	Manage the process and schedule moving toward go-live	1 d?	07-Aug-2025	07-Aug-2025	D2Sol
215	1.4.2	Finalize System setup/configuration	10 d	07-Aug-2025	20-Aug-2025	D2Sol
216	1.4.3	Finalize System Deployment to test environments	10 d	21-Aug-2025	03-Sep-2025	D2Sol
217	1.4.4	Conduct System testing	1 mon	04-Sep-2025	01-Oct-2025	D2Sol
218	1.4.5	Conduct User Acceptance testing	6 wks	02-Oct-2025	12-Nov-2025	PRMP
219	1.4.6	Domain : Roll Out the System and Go-LIVE	7.75 d	13-Nov-2025	24-Nov-2025	D2Sol
220	1.4.6.1	Readiness Review (Production Ready Go/No-Go Decision)	1 d	13-Nov-2025	13-Nov-2025	D2Sol
221	1.4.6.2	Receive the GO Decision for this TRANSFER	0 d	13-Nov-2025	13-Nov-2025	D2Sol
222	1.4.6.3	Implement Data Migration Plan - Run Conversion Scripts - As needed	3 d	14-Nov-2025	18-Nov-2025	D2Sol
223	1.4.6.4	Perform Pre-Launch Tests	3 d	14-Nov-2025	18-Nov-2025	D2Sol
224	1.4.6.5	Execute the Roll-Out Plan Steps and Deploy to PRODUCTION	3 d	19-Nov-2025	21-Nov-2025	D2Sol
225	1.4.6.6	Execute Go-Live and Monitoring	3 d	19-Nov-2025	21-Nov-2025	D2Sol
226	1.4.6.7	Execute Post Release Validation Steps	2 hrs	24-Nov-2025	24-Nov-2025	D2Sol
227	1.4.6.8	Generate and Review a Release Report	3 hrs	24-Nov-2025	24-Nov-2025	D2Sol
228	1.4.6.9	TRANSFER Operations of the Production Environment	3 hrs	24-Nov-2025	24-Nov-2025	D2Sol
229	1.4.6.10	Conduct Post-Deployment Review	3 hrs	24-Nov-2025	24-Nov-2025	D2Sol
230	1.4.6.11	Transition to Support and Maintenance	0 d	24-Nov-2025	24-Nov-2025	D2Sol
231	1.4.7	Deliverables - Testing and Operational Readiness	190 d?	03-Apr-2025	24-Dec-2025	D2Sol
232	1.4.7.1	D24: Operational Readiness Plan	30 d?	07-Aug-2025	17-Sep-2025	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
233	1.4.7.1.1	Develop Content and Submit	10 d?	07-Aug-2025	20-Aug-2025	D2Sol
234	1.4.7.1.2	Review	10 d?	21-Aug-2025	03-Sep-2025	PRMP
235	1.4.7.1.3	Revise and Resubmit	5 d?	04-Sep-2025	10-Sep-2025	D2Sol
236	1.4.7.1.4	Final Review and Approval	5 d?	11-Sep-2025	17-Sep-2025	PRMP
237	1.4.7.2	D25: Master Test Plan	40 d?	10-Apr-2025	04-Jun-2025	D2Sol
238	1.4.7.2.1	Develop Content and Submit	20 d?	10-Apr-2025	07-May-2025	D2Sol
239	1.4.7.2.2	Review	10 d?	08-May-2025	21-May-2025	PRMP
240	1.4.7.2.3	Revise and Resubmit	5 d?	22-May-2025	28-May-2025	D2Sol
241	1.4.7.2.4	Final Review and Approval	5 d?	29-May-2025	04-Jun-2025	PRMP
242	1.4.7.3	D26: Test Cases & Scripts	65 d?	05-Jun-2025	03-Sep-2025	D2Sol
243	1.4.7.3.1	Develop Content and Submit	45 d?	05-Jun-2025	06-Aug-2025	D2Sol
244	1.4.7.3.2	Review	10 d?	07-Aug-2025	20-Aug-2025	PRMP
245	1.4.7.3.3	Revise and Resubmit	5 d?	21-Aug-2025	27-Aug-2025	D2Sol
246	1.4.7.3.4	Final Review and Approval	5 d?	28-Aug-2025	03-Sep-2025	PRMP
247	1.4.7.4	D27: System Readiness Certificate for UAT	30 d?	13-Nov-2025	24-Dec-2025	D2Sol
248	1.4.7.4.1	Develop Content and Submit	10 d?	13-Nov-2025	26-Nov-2025	D2Sol
249	1.4.7.4.2	Review	10 d?	27-Nov-2025	10-Dec-2025	PRMP
250	1.4.7.4.3	Revise and Resubmit	5 d?	11-Dec-2025	17-Dec-2025	D2Sol
251	1.4.7.4.4	Final Review and Approval	5 d?	18-Dec-2025	24-Dec-2025	PRMP
252	1.4.7.5	D28: Test Results report	25 d?	13-Nov-2025	17-Dec-2025	D2Sol
253	1.4.7.5.1	Develop Content and Submit	5 d?	13-Nov-2025	19-Nov-2025	D2Sol
254	1.4.7.5.2	Review	10 d?	20-Nov-2025	03-Dec-2025	PRMP
255	1.4.7.5.3	Revise and Resubmit	5 d?	04-Dec-2025	10-Dec-2025	D2Sol
256	1.4.7.5.4	Final Review and Approval	5 d?	11-Dec-2025	17-Dec-2025	PRMP
257	1.4.7.6	D29: Go/No-Go Checklist	160 d?	03-Apr-2025	12-Nov-2025	D2Sol
258	1.4.7.6.1	Initial Content	120 d?	03-Apr-2025	17-Sep-2025	D2Sol
259	1.4.7.6.2	Finalize Content and Submit	10 d?	02-Oct-2025	15-Oct-2025	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
260	1.4.7.6.3	Review	10 d?	16-Oct-2025	29-Oct-2025	PRMP
261	1.4.7.6.4	Revise and Resubmit	5 d?	30-Oct-2025	05-Nov-2025	D2Sol
262	1.4.7.6.5	Final Review and Approval	5 d?	06-Nov-2025	12-Nov-2025	PRMP
263	1.4.7.7	D30: HIPAA Statement	30 d?	02-Oct-2025	12-Nov-2025	D2Sol
264	1.4.7.7.1	Develop Content and Submit	10 d?	02-Oct-2025	15-Oct-2025	D2Sol
265	1.4.7.7.2	Review	10 d?	16-Oct-2025	29-Oct-2025	PRMP
266	1.4.7.7.3	Revise and Resubmit	5 d?	30-Oct-2025	05-Nov-2025	D2Sol
267	1.4.7.7.4	Final Review and Approval	5 d?	06-Nov-2025	12-Nov-2025	PRMP
268	1.4.7.8	D31: Independent, Third-Party Security, and Privacy Controls Assessment Report	30 d?	13-Nov-2025	24-Dec-2025	D2Sol
269	1.4.7.8.1	Develop Content and Submit	10 d?	13-Nov-2025	26-Nov-2025	D2Sol
270	1.4.7.8.2	Review	10 d?	27-Nov-2025	10-Dec-2025	PRMP
271	1.4.7.8.3	Revise and Resubmit	5 d?	11-Dec-2025	17-Dec-2025	D2Sol
272	1.4.7.8.4	Final Review and Approval	5 d?	18-Dec-2025	24-Dec-2025	PRMP
273	1.4.8	Domain : Hosting and Licensing	200 d	20-Mar-2025	24-Dec-2025	D2Sol
274	1.4.8.1	Support the hosting environment for all system components	200 d	20-Mar-2025	24-Dec-2025	D2Sol
275	1.4.8.2	Prepare for hosting responsibility turnover to the PRMP, and other authorized parties, during project closeout	200 d	20-Mar-2025	24-Dec-2025	D2Sol
276	1.4.8.3	Support business continuity and disaster recovery of E&E system operations during periods of system malfunction or a disaster event	200 d	20-Mar-2025	24-Dec-2025	D2Sol
277	1.4.8.4	Create and maintain plans, conduct necessary activities, and test required measures to ensure continuity and recovery	200 d	20-Mar-2025	24-Dec-2025	D2Sol
278	1.4.8.5	Provide PRMP with the appropriate licensing for the E&E system	200 d	20-Mar-2025	24-Dec-2025	D2Sol
279	1.4.8.6	Manage a directory/log of all PRMP-attributed licenses for the E&E system	200 d	20-Mar-2025	24-Dec-2025	D2Sol
280	1.4.8.7	Fully transfer license to PRMP at the conclusion of the contract or at PRMP's discretion	200 d	20-Mar-2025	24-Dec-2025	D2Sol
281	1.4.9	Domain : User, System, and Product Documentation	249 d	16-Jan-2025	30-Dec-2025	D2Sol
282	1.4.9.1	Develop and update user and system documentation compliant with Commonwealth standards	249 d	16-Jan-2025	30-Dec-2025	D2Sol
283	1.4.9.2	Develop and update user manuals that detail the operational and processing features provided by the system	249 d	16-Jan-2025	30-Dec-2025	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
284	1.4.9.3	Implement and document updates per the defined E&E system change management process	249 d	16-Jan-2025	30-Dec-2025	D2Sol
285	1.4.9.4	Manage user access to current and historical user, system, and product documentation	249 d	16-Jan-2025	30-Dec-2025	D2Sol
286	1.4.10	Deliverable - User, System, and Product Documentation	250 d?	16-Jan-2025	31-Dec-2025	D2Sol
287	1.4.10.1	D32: User, System, and Product Documentations	250 d?	16-Jan-2025	31-Dec-2025	D2Sol
288	1.4.10.1.1	Develop Content and Submit	230 d	16-Jan-2025	03-Dec-2025	D2Sol
289	1.4.10.1.2	Review	10 d?	04-Dec-2025	17-Dec-2025	PRMP
290	1.4.10.1.3	Revise and Resubmit	5 d?	18-Dec-2025	24-Dec-2025	D2Sol
291	1.4.10.1.4	Final Review and Approval	5 d?	25-Dec-2025	31-Dec-2025	PRMP
292	1.4.11	Payment Milestone 1: PRMP Acceptance of D01-D10	0 d?	07-May-2025	07-May-2025	PRMP
293	1.4.12	Payment Milestone 2: PRMP Acceptance of D11-D23	0 d?	01-Oct-2025	01-Oct-2025	PRMP
294	1.4.13	Payment Milestone 3: PRMP Acceptance of D24-D31	0 d?	31-Dec-2025	31-Dec-2025	PRMP
295	2	Phase II : Operations and Modernization	1304 d?	29-Jan-2026	29-Jan-2031	D2Sol
296	2.1	Operations and Modernization - Base Term	261 d?	29-Jan-2026	29-Jan-2027	D2Sol
297	2.1.1	Operations and Modernization - Year 1 (Not Applicable)	0 d	29-Jan-2026	29-Jan-2026	D2Sol
298	2.1.2	Operations and Modernization - Year 2	261 d?	30-Jan-2026	29-Jan-2027	D2Sol
299	2.1.2.1	Provide E&E System Maintenance Services	261 d	30-Jan-2026	29-Jan-2027	D2Sol
300	2.1.2.2	Provide E&E System Operations Services	261 d	30-Jan-2026	29-Jan-2027	D2Sol
301	2.1.2.3	Provide E&E System Enhancement Services	261 d	30-Jan-2026	29-Jan-2027	D2Sol
302	2.1.2.4	Maintain compliance and security standards	261 d	30-Jan-2026	29-Jan-2027	D2Sol
303	2.1.2.5	Ongoing Data Management Support	261 d	30-Jan-2026	29-Jan-2027	D2Sol
304	2.1.2.6	Quarterly Performance Testing	261 d	30-Jan-2026	29-Jan-2027	D2Sol
305	2.1.2.7	Annual Disaster Recovery Testing	261 d	30-Jan-2026	29-Jan-2027	D2Sol
306	2.1.2.8	E&E System Functionality	261 d	30-Jan-2026	29-Jan-2027	D2Sol
307	2.1.2.8.1	Domain: E&E Application Design and Accommodations	261 d	30-Jan-2026	29-Jan-2027	D2Sol
308	2.1.2.8.1.1	Support configuration of the E&E system to provide individuals with a user-friendly, dynamic, online application	261 d	30-Jan-2026	29-Jan-2027	D2Sol
309	2.1.2.8.2	Domain: Automated E&E Processes	261 d	30-Jan-2026	29-Jan-2027	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
310	2.1.2.8.2.1	Support limiting manual intervention/inputs and re-entry and promoting automation, whenever possible	261 d	30-Jan-2026	29-Jan-2027	D2Sol
311	2.1.2.8.3	Domain: Timely and Accurate E&E Application Processing	261 d	30-Jan-2026	29-Jan-2027	D2Sol
312	2.1.2.8.3.1	Support a fully functioning, available, and set up with automatic processes to support timely eligibility determinations for all applicable applicants and eligibility categories	261 d	30-Jan-2026	29-Jan-2027	D2Sol
313	2.1.2.8.4	Domain: Managing Eligibility Determinations and Related Activities	261 d	30-Jan-2026	29-Jan-2027	D2Sol
314	2.1.2.8.4.1	Support the E&E system being capable of facilitating eligibility determinations and all related activities	261 d	30-Jan-2026	29-Jan-2027	D2Sol
315	2.1.2.8.5	Domain: System-Generated Reporting, Metrics, and Data	261 d	30-Jan-2026	29-Jan-2027	D2Sol
316	2.1.2.8.5.1	In the absence of system-generated reporting, fulfill reporting requests manually while vendors work to implement and achieve the reporting specifications	261 d	30-Jan-2026	29-Jan-2027	D2Sol
317	2.1.2.8.5.2	When system-generated reporting is available, support the reporting functionality	261 d	30-Jan-2026	29-Jan-2027	D2Sol
318	2.1.2.9	Ongoing Operations/Enhancements	261 d?	30-Jan-2026	29-Jan-2027	D2Sol
319	2.1.2.9.1	Maintain a log of Enhancement Request with PRMP	261 d	30-Jan-2026	29-Jan-2027	D2Sol
320	2.1.2.9.2	Get a priority of enhancement requests from PRMP	261 d	30-Jan-2026	29-Jan-2027	D2Sol
321	2.1.2.9.3	Apply the project SDLC to implement the changes	261 d	30-Jan-2026	29-Jan-2027	D2Sol
322	2.1.2.9.4	Maintain a monthly release schedule, with PRMP approval	261 d	30-Jan-2026	29-Jan-2027	D2Sol
323	2.1.2.9.5	Domain: Compliance	261 d	30-Jan-2026	29-Jan-2027	D2Sol
324	2.1.2.9.5.1	Fulfill and maintain alignment with Commonwealth and federal mandates	261 d	30-Jan-2026	29-Jan-2027	D2Sol
325	2.1.2.9.6	Deliverable – Compliance	261 d	30-Jan-2026	29-Jan-2027	D2Sol
326	2.1.2.9.6.1	D33: System Performance Report - weekly	261 d	30-Jan-2026	29-Jan-2027	D2Sol
327	2.1.2.9.7	Domain : Certification	261 d	30-Jan-2026	29-Jan-2027	D2Sol
328	2.1.2.9.7.1	Support the maintenance of CMS certification of the E&E system	261 d	30-Jan-2026	29-Jan-2027	D2Sol
329	2.1.2.9.7.2	Support PRMP with maintaining its CMS certification status throughout the duration of the contract	261 d	30-Jan-2026	29-Jan-2027	D2Sol
330	2.1.2.9.8	Domain: Upgrades	261 d	30-Jan-2026	29-Jan-2027	D2Sol
331	2.1.2.9.8.1	Keep PRMP's E&E system current with software updates and related releases	261 d	30-Jan-2026	29-Jan-2027	D2Sol
332	2.1.2.9.8.2	Maintaining alignment with federal guidance, PRMP initiatives, and pending change requests	261 d	30-Jan-2026	29-Jan-2027	D2Sol
333	2.1.2.9.8.3	Support non-disruptive configuration changes and system upgrades	261 d	30-Jan-2026	29-Jan-2027	D2Sol
334	2.1.2.9.8.4	Upgrade licenses to align with newest available versions	261 d	30-Jan-2026	29-Jan-2027	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
335	2.1.2.9.9	Domain: Security and Privacy	261 d	30-Jan-2026	29-Jan-2027	D2Sol
336	2.1.2.9.9.1	Comply with Commonwealth and federal security guidelines	261 d	30-Jan-2026	29-Jan-2027	D2Sol
337	2.1.2.9.9.2	Support utilization of Identity Access Management (IdAM)	261 d	30-Jan-2026	29-Jan-2027	D2Sol
338	2.1.2.9.9.3	Support single sign-on (SSO) access	261 d	30-Jan-2026	29-Jan-2027	D2Sol
339	2.1.2.9.10	Deliverable - Operations and Modernization	261 d?	30-Jan-2026	29-Jan-2027	D2Sol
340	2.1.2.9.10.1	D03: Monthly Status Report (Fifth of every month)	261 d	30-Jan-2026	29-Jan-2027	D2Sol
341	2.1.2.9.10.2	D15: Disaster Recovery and Business Continuity Plan July 1 - Updated	50 d?	19-Jun-2026	27-Aug-2026	D2Sol
342	2.1.2.9.10.2.1	Develop Content and Submit	30 d?	19-Jun-2026	30-Jul-2026	D2Sol
343	2.1.2.9.10.2.2	Review	10 d?	31-Jul-2026	13-Aug-2026	PRMP
344	2.1.2.9.10.2.3	Revise and Resubmit	5 d?	14-Aug-2026	20-Aug-2026	D2Sol
345	2.1.2.9.10.2.4	Final Review and Approval	5 d?	21-Aug-2026	27-Aug-2026	PRMP
346						
347	2.2	Operations and Modernization - Optional Term 1	522 d?	01-Feb-2027	30-Jan-2029	D2Sol
348	2.2.1	Operations and Modernization - Year 3	261 d?	01-Feb-2027	31-Jan-2028	D2Sol
349	2.2.1.1	Provide E&E System Maintenance Services	261 d	01-Feb-2027	31-Jan-2028	D2Sol
350	2.2.1.2	Provide E&E System Operations Services	261 d	01-Feb-2027	31-Jan-2028	D2Sol
351	2.2.1.3	Provide E&E System Enhancement Services	261 d	01-Feb-2027	31-Jan-2028	D2Sol
352	2.2.1.4	Maintain compliance and security standards	261 d	01-Feb-2027	31-Jan-2028	D2Sol
353	2.2.1.5	Ongoing Data Management Support	261 d	01-Feb-2027	31-Jan-2028	D2Sol
354	2.2.1.6	Quarterly Performance Testing	261 d	01-Feb-2027	31-Jan-2028	D2Sol
355	2.2.1.7	Annual Disaster Recovery Testing	261 d	01-Feb-2027	31-Jan-2028	D2Sol
356	2.2.1.8	E&E System Functionality	261 d	01-Feb-2027	31-Jan-2028	D2Sol
357	2.2.1.8.1	Domain: E&E Application Design and Accommodations	261 d	01-Feb-2027	31-Jan-2028	D2Sol
358	2.2.1.8.1.1	Support configuration of the E&E system to provide individuals with a user-friendly, dynamic, online application	261 d	01-Feb-2027	31-Jan-2028	D2Sol
359	2.2.1.8.2	Domain: Automated E&E Processes	261 d	01-Feb-2027	31-Jan-2028	D2Sol
360	2.2.1.8.2.1	Support limiting manual intervention/inputs and re-entry and promoting automation, whenever possible	261 d	01-Feb-2027	31-Jan-2028	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
361	2.2.1.8.3	Domain: Timely and Accurate E&E Application Processing	261 d	01-Feb-2027	31-Jan-2028	D2Sol
362	2.2.1.8.3.1	Support a fully functioning, available, and set up with automatic processes to support timely eligibility determinations for all applicable applicants and eligibility categories	261 d	01-Feb-2027	31-Jan-2028	D2Sol
363	2.2.1.8.4	Domain: Managing Eligibility Determinations and Related Activities	261 d	01-Feb-2027	31-Jan-2028	D2Sol
364	2.2.1.8.4.1	Support the E&E system being capable of facilitating eligibility determinations and all related activities	261 d	01-Feb-2027	31-Jan-2028	D2Sol
365	2.2.1.8.5	Domain: System-Generated Reporting, Metrics, and Data	261 d	01-Feb-2027	31-Jan-2028	D2Sol
366	2.2.1.8.5.1	In the absence of system-generated reporting, fulfill reporting requests manually while vendors work to implement and achieve the reporting specifications	261 d	01-Feb-2027	31-Jan-2028	D2Sol
367	2.2.1.8.5.2	When system-generated reporting is available, support the reporting functionality	261 d	01-Feb-2027	31-Jan-2028	D2Sol
368	2.2.1.9	Ongoing Operations/Enhancements	261 d?	01-Feb-2027	31-Jan-2028	D2Sol
369	2.2.1.9.1	Maintain a log of Enhancement Request with PRMP	261 d	01-Feb-2027	31-Jan-2028	D2Sol
370	2.2.1.9.2	Get a priority of enhancement requests from PRMP	261 d	01-Feb-2027	31-Jan-2028	D2Sol
371	2.2.1.9.3	Apply the project SDLC to implement the changes	261 d	01-Feb-2027	31-Jan-2028	D2Sol
372	2.2.1.9.4	Maintain a monthly release schedule, with PRMP approval	261 d	01-Feb-2027	31-Jan-2028	D2Sol
373	2.2.1.9.5	Domain: Compliance	261 d	01-Feb-2027	31-Jan-2028	D2Sol
374	2.2.1.9.5.1	Fulfill and maintain alignment with Commonwealth and federal mandates	261 d	01-Feb-2027	31-Jan-2028	D2Sol
375	2.2.1.9.6	Deliverable – Compliance	261 d	01-Feb-2027	31-Jan-2028	D2Sol
376	2.2.1.9.6.1	D33: System Performance Report - weekly	261 d	01-Feb-2027	31-Jan-2028	D2Sol
377	2.2.1.9.7	Domain : Certification	261 d	01-Feb-2027	31-Jan-2028	D2Sol
378	2.2.1.9.7.1	Support the maintenance of CMS certification of the E&E system	261 d	01-Feb-2027	31-Jan-2028	D2Sol
379	2.2.1.9.7.2	Support PRMP with maintaining its CMS certification status throughout the duration of the contract	261 d	01-Feb-2027	31-Jan-2028	D2Sol
380	2.2.1.9.8	Domain: Upgrades	261 d	01-Feb-2027	31-Jan-2028	D2Sol
381	2.2.1.9.8.1	Keep PRMP's E&E system current with software updates and related releases	261 d	01-Feb-2027	31-Jan-2028	D2Sol
382	2.2.1.9.8.2	Maintaining alignment with federal guidance, PRMP initiatives, and pending change requests	261 d	01-Feb-2027	31-Jan-2028	D2Sol
383	2.2.1.9.8.3	Support non-disruptive configuration changes and system upgrades	261 d	01-Feb-2027	31-Jan-2028	D2Sol
384	2.2.1.9.8.4	Upgrade licenses to align with newest available versions	261 d	01-Feb-2027	31-Jan-2028	D2Sol
385	2.2.1.9.9	Domain: Security and Privacy	261 d	01-Feb-2027	31-Jan-2028	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
386	2.2.1.9.9.1	Comply with Commonwealth and federal security guidelines	261 d	01-Feb-2027	31-Jan-2028	D2Sol
387	2.2.1.9.9.2	Support utilization of Identity Access Management (IdAM)	261 d	01-Feb-2027	31-Jan-2028	D2Sol
388	2.2.1.9.9.3	Support single sign-on (SSO) access	261 d	01-Feb-2027	31-Jan-2028	D2Sol
389	2.2.1.9.10	Deliverable - Operations and Modernization	261 d?	01-Feb-2027	31-Jan-2028	D2Sol
390	2.2.1.9.10.1	D03: Monthly Status Report (Fifth of every month)	261 d	01-Feb-2027	31-Jan-2028	D2Sol
391	2.2.1.9.10.2	D15: Disaster Recovery and Business Continuity Plan July 1 - Updated	50 d?	21-Jun-2027	27-Aug-2027	D2Sol
392	2.2.1.9.10.2.1	Develop Content and Submit	30 d?	21-Jun-2027	30-Jul-2027	D2Sol
393	2.2.1.9.10.2.2	Review	10 d?	02-Aug-2027	13-Aug-2027	PRMP
394	2.2.1.9.10.2.3	Revise and Resubmit	5 d?	16-Aug-2027	20-Aug-2027	D2Sol
395	2.2.1.9.10.2.4	Final Review and Approval	5 d?	23-Aug-2027	27-Aug-2027	PRMP
396						
397	2.2.2	Operations and Modernization - Year 4	261 d?	01-Feb-2028	30-Jan-2029	D2Sol
398	2.2.2.1	Provide E&E System Maintenance Services	261 d	01-Feb-2028	30-Jan-2029	D2Sol
399	2.2.2.2	Provide E&E System Operations Services	261 d	01-Feb-2028	30-Jan-2029	D2Sol
400	2.2.2.3	Provide E&E System Enhancement Services	261 d	01-Feb-2028	30-Jan-2029	D2Sol
401	2.2.2.4	Maintain compliance and security standards	261 d	01-Feb-2028	30-Jan-2029	D2Sol
402	2.2.2.5	Ongoing Data Management Support	261 d	01-Feb-2028	30-Jan-2029	D2Sol
403	2.2.2.6	Quarterly Performance Testing	261 d	01-Feb-2028	30-Jan-2029	D2Sol
404	2.2.2.7	Annual Disaster Recovery Testing	261 d	01-Feb-2028	30-Jan-2029	D2Sol
405	2.2.2.8	E&E System Functionality	261 d	01-Feb-2028	30-Jan-2029	D2Sol
406	2.2.2.8.1	Domain: E&E Application Design and Accommodations	261 d	01-Feb-2028	30-Jan-2029	D2Sol
407	2.2.2.8.1.1	Support configuration of the E&E system to provide individuals with a user-friendly, dynamic, online application	261 d	01-Feb-2028	30-Jan-2029	D2Sol
408	2.2.2.8.2	Domain: Automated E&E Processes	261 d	01-Feb-2028	30-Jan-2029	D2Sol
409	2.2.2.8.2.1	Support limiting manual intervention/inputs and re-entry and promoting automation, whenever possible	261 d	01-Feb-2028	30-Jan-2029	D2Sol
410	2.2.2.8.3	Domain: Timely and Accurate E&E Application Processing	261 d	01-Feb-2028	30-Jan-2029	D2Sol
411	2.2.2.8.3.1	Support a fully functioning, available, and set up with automatic processes to support timely eligibility determinations for all applicable applicants and eligibility categories	261 d	01-Feb-2028	30-Jan-2029	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
412	2.2.2.8.4	Domain: Managing Eligibility Determinations and Related Activities	261 d	01-Feb-2028	30-Jan-2029	D2Sol
413	2.2.2.8.4.1	Support the E&E system being capable of facilitating eligibility determinations and all related activities	261 d	01-Feb-2028	30-Jan-2029	D2Sol
414	2.2.2.8.5	Domain: System-Generated Reporting, Metrics, and Data	261 d	01-Feb-2028	30-Jan-2029	D2Sol
415	2.2.2.8.5.1	In the absence of system-generated reporting, fulfill reporting requests manually while vendors work to implement and achieve the reporting specifications	261 d	01-Feb-2028	30-Jan-2029	D2Sol
416	2.2.2.8.5.2	When system-generated reporting is available, support the reporting functionality	261 d	01-Feb-2028	30-Jan-2029	D2Sol
417	2.2.2.9	Ongoing Operations/Enhancements	261 d?	01-Feb-2028	30-Jan-2029	D2Sol
418	2.2.2.9.1	Maintain a log of Enhancement Request with PRMP	261 d	01-Feb-2028	30-Jan-2029	D2Sol
419	2.2.2.9.2	Get a priority of enhancement requests from PRMP	261 d	01-Feb-2028	30-Jan-2029	D2Sol
420	2.2.2.9.3	Apply the project SDLC to implement the changes	261 d	01-Feb-2028	30-Jan-2029	D2Sol
421	2.2.2.9.4	Maintain a monthly release schedule, with PRMP approval	261 d	01-Feb-2028	30-Jan-2029	D2Sol
422	2.2.2.9.5	Domain: Compliance	261 d	01-Feb-2028	30-Jan-2029	D2Sol
423	2.2.2.9.5.1	Fulfill and maintain alignment with Commonwealth and federal mandates	261 d	01-Feb-2028	30-Jan-2029	D2Sol
424	2.2.2.9.6	Deliverable – Compliance	261 d	01-Feb-2028	30-Jan-2029	D2Sol
425	2.2.2.9.6.1	D33: System Performance Report - weekly	261 d	01-Feb-2028	30-Jan-2029	D2Sol
426	2.2.2.9.7	Domain : Certification	261 d	01-Feb-2028	30-Jan-2029	D2Sol
427	2.2.2.9.7.1	Support the maintenance of CMS certification of the E&E system	261 d	01-Feb-2028	30-Jan-2029	D2Sol
428	2.2.2.9.7.2	Support PRMP with maintaining its CMS certification status throughout the duration of the contract	261 d	01-Feb-2028	30-Jan-2029	D2Sol
429	2.2.2.9.8	Domain: Upgrades	261 d	01-Feb-2028	30-Jan-2029	D2Sol
430	2.2.2.9.8.1	Keep PRMP's E&E system current with software updates and related releases	261 d	01-Feb-2028	30-Jan-2029	D2Sol
431	2.2.2.9.8.2	Maintaining alignment with federal guidance, PRMP initiatives, and pending change requests	261 d	01-Feb-2028	30-Jan-2029	D2Sol
432	2.2.2.9.8.3	Support non-disruptive configuration changes and system upgrades	261 d	01-Feb-2028	30-Jan-2029	D2Sol
433	2.2.2.9.8.4	Upgrade licenses to align with newest available versions	261 d	01-Feb-2028	30-Jan-2029	D2Sol
434	2.2.2.9.9	Domain: Security and Privacy	261 d	01-Feb-2028	30-Jan-2029	D2Sol
435	2.2.2.9.9.1	Comply with Commonwealth and federal security guidelines	261 d	01-Feb-2028	30-Jan-2029	D2Sol
436	2.2.2.9.9.2	Support utilization of Identity Access Management (IdAM)	261 d	01-Feb-2028	30-Jan-2029	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
437	2.2.2.9.9.3	Support single sign-on (SSO) access	261 d	01-Feb-2028	30-Jan-2029	D2Sol
438	2.2.2.9.10	Deliverable - Operations and Modernization	261 d?	01-Feb-2028	30-Jan-2029	D2Sol
439	2.2.2.9.10.1	D03: Monthly Status Report (Fifth of every month)	261 d	01-Feb-2028	30-Jan-2029	D2Sol
440	2.2.2.9.10.2	D15: Disaster Recovery and Business Continuity Plan July 1 - Updated	50 d?	20-Jun-2028	28-Aug-2028	D2Sol
441	2.2.2.9.10.2.1	Develop Content and Submit	30 d?	20-Jun-2028	31-Jul-2028	D2Sol
442	2.2.2.9.10.2.2	Review	10 d?	01-Aug-2028	14-Aug-2028	PRMP
443	2.2.2.9.10.2.3	Revise and Resubmit	5 d?	15-Aug-2028	21-Aug-2028	D2Sol
444	2.2.2.9.10.2.4	Final Review and Approval	5 d?	22-Aug-2028	28-Aug-2028	PRMP
445						
446	2.3	Operations and Modernization - Optional Term 2	522 d?	30-Jan-2029	29-Jan-2031	D2Sol
447	2.3.1	Operations and Modernization - Year 5	261 d?	30-Jan-2029	29-Jan-2030	D2Sol
448	2.3.1.1	Provide E&E System Maintenance Services	261 d	30-Jan-2029	29-Jan-2030	D2Sol
449	2.3.1.2	Provide E&E System Operations Services	261 d	30-Jan-2029	29-Jan-2030	D2Sol
450	2.3.1.3	Provide E&E System Enhancement Services	261 d	30-Jan-2029	29-Jan-2030	D2Sol
451	2.3.1.4	Maintain compliance and security standards	261 d	30-Jan-2029	29-Jan-2030	D2Sol
452	2.3.1.5	Ongoing Data Management Support	261 d	30-Jan-2029	29-Jan-2030	D2Sol
453	2.3.1.6	Quarterly Performance Testing	261 d	30-Jan-2029	29-Jan-2030	D2Sol
454	2.3.1.7	Annual Disaster Recovery Testing	261 d	30-Jan-2029	29-Jan-2030	D2Sol
455	2.3.1.8	E&E System Functionality	261 d	30-Jan-2029	29-Jan-2030	D2Sol
456	2.3.1.8.1	Domain: E&E Application Design and Accommodations	261 d	30-Jan-2029	29-Jan-2030	D2Sol
457	2.3.1.8.1.1	Support configuration of the E&E system to provide individuals with a user-friendly, dynamic, online application	261 d	30-Jan-2029	29-Jan-2030	D2Sol
458	2.3.1.8.2	Domain: Automated E&E Processes	261 d	30-Jan-2029	29-Jan-2030	D2Sol
459	2.3.1.8.2.1	Support limiting manual intervention/inputs and re-entry and promoting automation, whenever possible	261 d	30-Jan-2029	29-Jan-2030	D2Sol
460	2.3.1.8.3	Domain: Timely and Accurate E&E Application Processing	261 d	30-Jan-2029	29-Jan-2030	D2Sol
461	2.3.1.8.3.1	Support a fully functioning, available, and set up with automatic processes to support timely eligibility determinations for all applicable applicants and eligibility categories	261 d	30-Jan-2029	29-Jan-2030	D2Sol
462	2.3.1.8.4	Domain: Managing Eligibility Determinations and Related Activities	261 d	30-Jan-2029	29-Jan-2030	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
463	2.3.1.8.4.1	Support the E&E system being capable of facilitating eligibility determinations and all related activities	261 d	30-Jan-2029	29-Jan-2030	D2Sol
464	2.3.1.8.5	Domain: System-Generated Reporting, Metrics, and Data	261 d	30-Jan-2029	29-Jan-2030	D2Sol
465	2.3.1.8.5.1	In the absence of system-generated reporting, fulfill reporting requests manually while vendors work to implement and achieve the reporting specifications	261 d	30-Jan-2029	29-Jan-2030	D2Sol
466	2.3.1.8.5.2	When system-generated reporting is available, support the reporting functionality	261 d	30-Jan-2029	29-Jan-2030	D2Sol
467	2.3.1.9	Ongoing Operations/Enhancements	261 d?	30-Jan-2029	29-Jan-2030	D2Sol
468	2.3.1.9.1	Maintain a log of Enhancement Request with PRMP	261 d	30-Jan-2029	29-Jan-2030	D2Sol
469	2.3.1.9.2	Get a priority of enhancement requests from PRMP	261 d	30-Jan-2029	29-Jan-2030	D2Sol
470	2.3.1.9.3	Apply the project SDLC to implement the changes	261 d	30-Jan-2029	29-Jan-2030	D2Sol
471	2.3.1.9.4	Maintain a monthly release schedule, with PRMP approval	261 d	30-Jan-2029	29-Jan-2030	D2Sol
472	2.3.1.9.5	Domain: Compliance	261 d	30-Jan-2029	29-Jan-2030	D2Sol
473	2.3.1.9.5.1	Fulfill and maintain alignment with Commonwealth and federal mandates	261 d	30-Jan-2029	29-Jan-2030	D2Sol
474	2.3.1.9.6	Deliverable – Compliance	261 d	30-Jan-2029	29-Jan-2030	D2Sol
475	2.3.1.9.6.1	D33: System Performance Report - weekly	261 d	30-Jan-2029	29-Jan-2030	D2Sol
476	2.3.1.9.7	Domain : Certification	261 d	30-Jan-2029	29-Jan-2030	D2Sol
477	2.3.1.9.7.1	Support the maintenance of CMS certification of the E&E system	261 d	30-Jan-2029	29-Jan-2030	D2Sol
478	2.3.1.9.7.2	Support PRMP with maintaining its CMS certification status throughout the duration of the contract	261 d	30-Jan-2029	29-Jan-2030	D2Sol
479	2.3.1.9.8	Domain: Upgrades	261 d	30-Jan-2029	29-Jan-2030	D2Sol
480	2.3.1.9.8.1	Keep PRMP's E&E system current with software updates and related releases	261 d	30-Jan-2029	29-Jan-2030	D2Sol
481	2.3.1.9.8.2	Maintaining alignment with federal guidance, PRMP initiatives, and pending change requests	261 d	30-Jan-2029	29-Jan-2030	D2Sol
482	2.3.1.9.8.3	Support non-disruptive configuration changes and system upgrades	261 d	30-Jan-2029	29-Jan-2030	D2Sol
483	2.3.1.9.8.4	Upgrade licenses to align with newest available versions	261 d	30-Jan-2029	29-Jan-2030	D2Sol
484	2.3.1.9.9	Domain: Security and Privacy	261 d	30-Jan-2029	29-Jan-2030	D2Sol
485	2.3.1.9.9.1	Comply with Commonwealth and federal security guidelines	261 d	30-Jan-2029	29-Jan-2030	D2Sol
486	2.3.1.9.9.2	Support utilization of Identity Access Management (IdAM)	261 d	30-Jan-2029	29-Jan-2030	D2Sol
487	2.3.1.9.9.3	Support single sign-on (SSO) access	261 d	30-Jan-2029	29-Jan-2030	D2Sol
488	2.3.1.9.10	Deliverable - Operations and Modernization	261 d?	30-Jan-2029	29-Jan-2030	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
489	2.3.1.9.10.1	D03: Monthly Status Report (Fifth of every month)	261 d	30-Jan-2029	29-Jan-2030	D2Sol
490	2.3.1.9.10.2	D15: Disaster Recovery and Business Continuity Plan July 1 - Updated	50 d?	19-Jun-2029	27-Aug-2029	D2Sol
491	2.3.1.9.10.2.1	Develop Content and Submit	30 d?	19-Jun-2029	30-Jul-2029	D2Sol
492	2.3.1.9.10.2.2	Review	10 d?	31-Jul-2029	13-Aug-2029	PRMP
493	2.3.1.9.10.2.3	Revise and Resubmit	5 d?	14-Aug-2029	20-Aug-2029	D2Sol
494	2.3.1.9.10.2.4	Final Review and Approval	5 d?	21-Aug-2029	27-Aug-2029	PRMP
495						
496	2.3.2	Operations and Modernization - Year 6	261 d?	30-Jan-2030	29-Jan-2031	D2Sol
497	2.3.2.1	Provide E&E System Maintenance Services	261 d	30-Jan-2030	29-Jan-2031	D2Sol
498	2.3.2.2	Provide E&E System Operations Services	261 d	30-Jan-2030	29-Jan-2031	D2Sol
499	2.3.2.3	Provide E&E System Enhancement Services	261 d	30-Jan-2030	29-Jan-2031	D2Sol
500	2.3.2.4	Maintain compliance and security standards	261 d	30-Jan-2030	29-Jan-2031	D2Sol
501	2.3.2.5	Ongoing Data Management Support	261 d	30-Jan-2030	29-Jan-2031	D2Sol
502	2.3.2.6	Quarterly Performance Testing	261 d	30-Jan-2030	29-Jan-2031	D2Sol
503	2.3.2.7	Annual Disaster Recovery Testing	261 d	30-Jan-2030	29-Jan-2031	D2Sol
504	2.3.2.8	E&E System Functionality	261 d	30-Jan-2030	29-Jan-2031	D2Sol
505	2.3.2.8.1	Domain: E&E Application Design and Accommodations	261 d	30-Jan-2030	29-Jan-2031	D2Sol
506	2.3.2.8.1.1	Support configuration of the E&E system to provide individuals with a user-friendly, dynamic, online application	261 d	30-Jan-2030	29-Jan-2031	D2Sol
507	2.3.2.8.2	Domain: Automated E&E Processes	261 d	30-Jan-2030	29-Jan-2031	D2Sol
508	2.3.2.8.2.1	Support limiting manual intervention/inputs and re-entry and promoting automation, whenever possible	261 d	30-Jan-2030	29-Jan-2031	D2Sol
509	2.3.2.8.3	Domain: Timely and Accurate E&E Application Processing	261 d	30-Jan-2030	29-Jan-2031	D2Sol
510	2.3.2.8.3.1	Support a fully functioning, available, and set up with automatic processes to support timely eligibility determinations for all applicable applicants and eligibility categories	261 d	30-Jan-2030	29-Jan-2031	D2Sol
511	2.3.2.8.4	Domain: Managing Eligibility Determinations and Related Activities	261 d	30-Jan-2030	29-Jan-2031	D2Sol
512	2.3.2.8.4.1	Support the E&E system being capable of facilitating eligibility determinations and all related activities	261 d	30-Jan-2030	29-Jan-2031	D2Sol
513	2.3.2.8.5	Domain: System-Generated Reporting, Metrics, and Data	261 d	30-Jan-2030	29-Jan-2031	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
514	2.3.2.8.5.1	In the absence of system-generated reporting, fulfill reporting requests manually while vendors work to implement and achieve the reporting specifications	261 d	30-Jan-2030	29-Jan-2031	D2Sol
515	2.3.2.8.5.2	When system-generated reporting is available, support the reporting functionality	261 d	30-Jan-2030	29-Jan-2031	D2Sol
516	2.3.2.9	Ongoing Operations/Enhancements	261 d?	30-Jan-2030	29-Jan-2031	D2Sol
517	2.3.2.9.1	Maintain a log of Enhancement Request with PRMP	261 d	30-Jan-2030	29-Jan-2031	D2Sol
518	2.3.2.9.2	Get a priority of enhancement requests from PRMP	261 d	30-Jan-2030	29-Jan-2031	D2Sol
519	2.3.2.9.3	Apply the project SDLC to implement the changes	261 d	30-Jan-2030	29-Jan-2031	D2Sol
520	2.3.2.9.4	Maintain a monthly release schedule, with PRMP approval	261 d	30-Jan-2030	29-Jan-2031	D2Sol
521	2.3.2.9.5	Domain: Compliance	261 d	30-Jan-2030	29-Jan-2031	D2Sol
522	2.3.2.9.5.1	Fulfill and maintain alignment with Commonwealth and federal mandates	261 d	30-Jan-2030	29-Jan-2031	D2Sol
523	2.3.2.9.6	Deliverable – Compliance	261 d	30-Jan-2030	29-Jan-2031	D2Sol
524	2.3.2.9.6.1	D33: System Performance Report - weekly	261 d	30-Jan-2030	29-Jan-2031	D2Sol
525	2.3.2.9.7	Domain : Certification	261 d	30-Jan-2030	29-Jan-2031	D2Sol
526	2.3.2.9.7.1	Support the maintenance of CMS certification of the E&E system	261 d	30-Jan-2030	29-Jan-2031	D2Sol
527	2.3.2.9.7.2	Support PRMP with maintaining its CMS certification status throughout the duration of the contract	261 d	30-Jan-2030	29-Jan-2031	D2Sol
528	2.3.2.9.8	Domain: Upgrades	261 d	30-Jan-2030	29-Jan-2031	D2Sol
529	2.3.2.9.8.1	Keep PRMP's E&E system current with software updates and related releases	261 d	30-Jan-2030	29-Jan-2031	D2Sol
530	2.3.2.9.8.2	Maintaining alignment with federal guidance, PRMP initiatives, and pending change requests	261 d	30-Jan-2030	29-Jan-2031	D2Sol
531	2.3.2.9.8.3	Support non-disruptive configuration changes and system upgrades	261 d	30-Jan-2030	29-Jan-2031	D2Sol
532	2.3.2.9.8.4	Upgrade licenses to align with newest available versions	261 d	30-Jan-2030	29-Jan-2031	D2Sol
533	2.3.2.9.9	Domain: Security and Privacy	261 d	30-Jan-2030	29-Jan-2031	D2Sol
534	2.3.2.9.9.1	Comply with Commonwealth and federal security guidelines	261 d	30-Jan-2030	29-Jan-2031	D2Sol
535	2.3.2.9.9.2	Support utilization of Identity Access Management (IdAM)	261 d	30-Jan-2030	29-Jan-2031	D2Sol
536	2.3.2.9.9.3	Support single sign-on (SSO) access	261 d	30-Jan-2030	29-Jan-2031	D2Sol
537	2.3.2.9.10	Deliverable - Operations and Modernization	261 d?	30-Jan-2030	29-Jan-2031	D2Sol
538	2.3.2.9.10.1	D03: Monthly Status Report (Fifth of every month)	261 d	30-Jan-2030	29-Jan-2031	D2Sol
539	2.3.2.9.10.2	D15: Disaster Recovery and Business Continuity Plan July 1 - Updated	50 d?	19-Jun-2030	27-Aug-2030	D2Sol



ID	WBS	Name	Duration	Start Date	Finish Date	Resource Names
540	2.3.2.9.10.2.1	Develop Content and Submit	30 d?	19-Jun-2030	30-Jul-2030	D2Sol
541	2.3.2.9.10.2.2	Review	10 d?	31-Jul-2030	13-Aug-2030	PRMP
542	2.3.2.9.10.2.3	Revise and Resubmit	5 d?	14-Aug-2030	20-Aug-2030	D2Sol
543	2.3.2.9.10.2.4	Final Review and Approval	5 d?	21-Aug-2030	27-Aug-2030	PRMP
544						
545	3	Phase III - Turnover and Contract Closeout	155 d?	15-Aug-2030	19-Mar-2031	D2Sol
546	3.1	Plan Turnover	50 d?	15-Aug-2030	23-Oct-2030	D2Sol
547	3.1.1	Update Turnover Templates	15 d	15-Aug-2030	04-Sep-2030	D2Sol
548	3.1.2	Update Turnover and Closeout Management Plan	15 d	05-Sep-2030	25-Sep-2030	D2Sol
549	3.1.3	Deliverables for this stage	35 d?	05-Sep-2030	23-Oct-2030	D2Sol
550	3.1.3.1	D10: Turnover and Closeout Management Plan (Updated prior to closeout)	35 d?	05-Sep-2030	23-Oct-2030	D2Sol
551	3.1.3.1.1	Develop Content and Submit	15 d?	05-Sep-2030	25-Sep-2030	D2Sol
552	3.1.3.1.2	Review	10 d?	26-Sep-2030	09-Oct-2030	PRMP
553	3.1.3.1.3	Revise and Resubmit	5 d?	10-Oct-2030	16-Oct-2030	D2Sol
554	3.1.3.1.4	Final Review and Approval	5 d?	17-Oct-2030	23-Oct-2030	PRMP
555	3.2	Execute Turnover	75 d	24-Oct-2030	05-Feb-2031	D2Sol
556	3.2.1	Assessment Reports	75 d	24-Oct-2030	05-Feb-2031	D2Sol
557	3.2.2	Documentation Updates	75 d	24-Oct-2030	05-Feb-2031	D2Sol
558	3.2.3	Knowledge Transfer Sessions	75 d	24-Oct-2030	05-Feb-2031	D2Sol
559	3.3	Complete Turnover	30 d?	06-Feb-2031	19-Mar-2031	D2Sol
560	3.3.1	Transfer System Responsibilities	10 d	06-Feb-2031	19-Feb-2031	D2Sol
561	3.3.2	Turnover Completion Report	30 d?	06-Feb-2031	19-Mar-2031	D2Sol
562	3.3.2.1	Develop Content and Submit	10 d?	06-Feb-2031	19-Feb-2031	D2Sol
563	3.3.2.2	Review	10 d?	20-Feb-2031	05-Mar-2031	PRMP
564	3.3.2.3	Revise and Resubmit	5 d?	06-Mar-2031	12-Mar-2031	D2Sol
565	3.3.2.4	Final Review and Approval	5 d?	13-Mar-2031	19-Mar-2031	PRMP

Attachment I: Terms and Conditions Response

This section describes the Terms and Conditions of the RFP, the PRMP's expectations of vendors, and compliance with federal procedures.

1. Title Page

The vendor should review **Attachment I: Terms and Conditions Response**, signing each provided signature block using blue ink in order to note the vendor's acknowledgment and intent of compliance. The vendor should identify any exceptions to the Terms and Conditions. If exceptions are not noted in **Attachment I: Terms and Conditions Response** of the RFP but raised during contract negotiations, the PRMP reserves the right to cancel the negotiation if, at its sole discretion, it deems that to be in the best interests of the PRMP.

2. RFP Terms and Conditions

RFP Terms and Conditions consist of provisions throughout this RFP. Moreover, these provisions encapsulate instructions, Commonwealth, and federal procedures, and the PRMP's expectations of the vendor when submitting a proposal. The vendor should understand and strictly adhere to the RFP Terms and Conditions. Failure to follow any instructions within this RFP may, at the PRMP's sole discretion, result in the disqualification of the vendor's proposal.

Please provide an authorized signature stipulating the vendor's acknowledgment, understanding, and acceptance of these RFP Terms and Conditions.

Redacted

September 10, 2024

Printed Name/Signature of Authorized Personnel

Date

3. Customary Terms and Conditions

The selected vendor will sign a contract with the PRMP to provide the services described in the vendor's response. The following documents shall be included in any contract(s) resulting from this RFP:

- **Appendix 2: SLAs and Performance Standards**
- **Appendix 6: Proforma Contract Draft** *Inclusive of Health Insurance Portability and Accountability Act (HIPAA) Business Associate Agreement*

Please provide a signature stipulating the vendor's acknowledgment, complete review, and acceptance of these documents.

Redacted

September 10, 2024

Printed Name/Signature of Authorized Personnel

Date

If the vendor is **not** taking exceptions to any of the PRMP Customary Terms and Conditions, then the vendor needs to provide a binding signature stipulating its acceptance of these documents. If the vendor is taking exceptions to any of the PRMP Customary Terms and Conditions, then the vendor should write "Taking Exceptions" on the line below and should follow the instructions for

taking exceptions, as listed in **Attachment I: Terms and Conditions Response**, Section 6: Exceptions.

Redacted

September 10, 2024

Printed Name/Signature of Authorized Personnel

Date

4. Mandatory Requirements and Terms

The following items are mandatory terms and documents. Please be advised, the vendor should provide its affirmative acceptance of these items in order to move forward with consideration under this RFP.

- **Attachment E: Mandatory Specifications**
- The awarded vendor must be registered with the "Registro Único de Proveedores de Servicios Profesionales" (RUP) from the Puerto Rico General Services Administration (ASG) and with the Puerto Rico Treasury Department (Hacienda) for the collection of sales and use tax (IVU) as a provider (if applicable) in the Sistema Unificado de Rentas Internas (SURI). The PRMP shall not award a contract, unless the vendor provides proof of such registration or provides documentation from the Puerto Rico Treasury Department that the vendor is exempt from this registration requirement in the SURI system. The foregoing is a mandatory requirement of an award of a contract pursuant to this solicitation. For more information, please refer to the PR Treasury Department's web site <http://www.hacienda.pr.gov>
- Prior to the contract resulting from this RFP being signed, the successful vendor must provide a Certificate of Insurance issued by an insurance company licensed or authorized to provide insurance in Puerto Rico. Each Certificate of Insurance shall indicate current insurance coverage meeting minimum requirements as specified by this RFP. A failure to provide a current Certificate of Insurance will be considered a material breach and grounds for contract termination. A list of the insurance policies that may be included in this contract are provided in Error! Reference source not found. A performance bond may be required for the contract resulting from this RFP.
- **Appendix 2: SLAs and Performance Standards**
- **Appendix 6: Proforma Contract Draft**, inclusive of HIPAA BAA

Vendors that are not able to enter into a contract under these conditions should not submit a bid.

Please provide an authorized signature stipulating the vendor's acknowledgment, understanding, and acceptance of the mandatory requirements and terms stipulated in this section.

Redacted

September 10, 2024

Printed Name/Signature of Authorized Personnel

Date

5. Commercial Materials

The vendor should list any commercial and proprietary materials it will deliver that are easily copied, such as commercial software, and in which the PRMP will have less than full ownership (“Commercial Materials”). Generally, these will be from third parties and readily available in the open market. The vendor need not list patented parts of equipment.

No commercial materials other than licensed software identified in Attachment A are included in this proposal.

6. Exceptions

The vendor should indicate exceptions to the PRMP’s Terms and Conditions in this RFP. Any exceptions should include an explanation for the vendor’s inability to comply with such terms or conditions and, if applicable, an alternative language the vendor would find acceptable. Rejection of the PRMP’s Terms and Conditions, in part or in whole, or without any explanation, may be cause for the PRMP’s rejection of a vendor’s proposal. If an exception concerning the Terms and Conditions is not noted in this response template, but raised during contract negotiations, the PRMP reserves the right to cancel the negotiation, at its sole discretion, if it deems that to be in the best interests of the PRMP. Further, all exceptions are subject to PRMP’s approval and may be rejected at PRMP’s discretion.

The terms and conditions of a vendor’s software license, maintenance support agreement, and SLA, if applicable, will be required for purposes of contract negotiations for this operation. Failure to provide the applicable vendor terms, if any, as part of the RFP response may result in rejection of the vendor’s proposal.

Instructions: Identify and explain any exceptions to the PRMP’s terms and conditions using the tables provided below, adding tables, as needed. If no changes are listed, the vendor indicates that no changes to the Terms and Conditions are proposed and that the vendor intends to accept them as written if the vendor’s proposal is selected. Mandatory specifications and terms noted in this RFP are non-negotiable.

- The vendor may add additional tables, as appropriate
- Do not submit vendor’s Standard Terms and Contracting Provisions in lieu of stipulating exceptions below
- Making revisions to the PRMP statutes and regulations is prohibited
- The PRMP has no obligation to accept any exception(s).

6.1

Table 28: Exception #1

Document Title (Reference Specific Contractual Document and Section in Which Exception is Taken)	Vendor's Explanation (Required for Any Rejection/Exception)	Vendor's Proposed Alternative Language (If Applicable) Cross-Reference to Specific Section of Vendor's Terms, If Any Provided as Part of the RFP Response
Redacted	Redacted	Redacted

6.2

Table 29: Exception #2

Document Title (Reference Specific Contractual Document and Section in Which Exception is Taken)	Vendor's Explanation (Required for Any Rejection/Exception)	Vendor's Proposed Alternative Language (If Applicable) Cross-Reference to Specific Section of Vendor's Terms, If Any Provided as Part of the RFP Response
Redacted	Redacted	Redacted



6.3

Table 30: Exception #3

Document Title (Reference Specific Contractual Document and Section in Which Exception is Taken)	Vendor's Explanation (Required for Any Rejection/Exception)	Vendor's Proposed Alternative Language (If Applicable) Cross-Reference to Specific Section of Vendor's Terms, If Any Provided as Part of the RFP Response
Redacted	Redacted	Redacted

Appendix 5 Disclosure of Lobbying Activities Response

The vendor shall also disclose if any corporation was, or has been, hired to perform lobbying activities or notify if any partner or employees of the corporation are engaged in this type of activity.

This disclosure must be delivered via a written certification by the legal representative of the vendor. If there were no lobbying activities, then a negative certification must be sent as part of the process.

Failure to disclose this information will result in disqualification from the process.

As the legal representative for D2Sol, Inc., I, Bill Destache, hereby certifies that D2Sol, Inc., has not hired any corporation, firm, or individual to perform lobbying activities, nor do we have any partner or employees engaged in this type of activity.

Redacted

September 10, 2024

Printed Name/Signature of Authorized Personnel

Date

