

ARMEDICA, INC. LICENSE AND TECHNICAL SUPPORT SERVICES AGREEMENT

LICENSE AGREEMENT

This License Agreement the "Agreement") is entered into as of February 11, 2013 ("Effective Date") between Armedica, Inc. and CGI Technologies and Solutions Inc. ("CGI")

WHEREAS CGI has entered into an Agreement with the **State of Vermont, Department of Vermont Health Access** ("DVHA") effective December 13, 2012 pursuant to which CGI has agreed to provide certain software and services to DVHA for the Health Benefit Exchange (HBE) Implementation Project (the "Prime Contract").

WHEREAS under the Prime Contract CGI is required to provide and license to DVHA certain software of Armedica, and accordingly the parties have entered into this License in order to set forth the terms on which Armedica will license software to CGI that CGI may use and transfer the license to DVHA for the purposes of the Prime Contract.

A. Agreement Definitions

"You" and "your" refers to the individual or entity that has executed this Agreement and ordered programs and/or services from Armedica, Inc. ("Armedica") or an authorized distributor. The term "ancillary programs" refers to third party materials listed in Ordering Document VT HBE-1 attached hereto as Exhibit A (the "Order") which may only be used for the purposes of installing or operating the programs with which the ancillary programs are delivered. The term "program documentation" refers to the program user manual and program installation manuals as well as all updates to such manuals delivered pursuant to the terms of the Order. The term "programs" refers to the software products owned or distributed by Armedica listed in the Order which you have ordered, program documentation, and any program updates acquired through technical support. The term "services" refers to technical support, or training services which you have ordered pursuant to the Order.

B. Applicability of Agreement

This Agreement is valid for the order which this Agreement accompanies. An order is only binding when it has been signed by you and Armedica.

C. Rights Granted

Armedica shall sell, and CGI shall purchase on behalf of DVHA, a license to the Armedica software listed in the Order (the "Armedica Software") for use by CGI and DVHA upon the terms and conditions of set forth herein and in the Order.

Upon execution of this Agreement and the Order, you will be the "Licensee" of the Software and will have the non-exclusive, nonassignable (except for assignment to DVHA as set forth herein), royalty free, perpetual (unless otherwise specified in the Order), limited right to use the Armedica Software and receive any services set forth in the Order solely for the purposes of your performance of the Prime Contract, and subject to the terms of this Agreement and the Order. You may allow your agents and contractors (including, without limitation, outsourcers) to use the Armedica Software for this purpose and you are responsible for their compliance with this agreement in such use. For programs that are specifically designed to allow your customers and suppliers to interact with you in the furtherance of your internal business operations, such use is allowed under this Agreement. Program documentation is delivered with the Armedica Software. Services are provided based on Armedica's policies for the applicable services ordered, which are specified in the Order (except technical support services, which are as specified in section H of this Agreement). Upon payment for services, you have the nonexclusive, nonassignable, royalty free, perpetual, limited right to use for your internal business operations and to assign to DVHA anything developed by Armedica and delivered to you under this Agreement; however, certain deliverables may be subject to additional license terms provided in the Order.

D. Assignment Rights.

Armedica also grants you the right to transfer this license to the Armedica Software to DVHA upon the installation of the Armedica Software in your the Phoenix Data Center and execution of license transfer documentation by the DVHA under which the DVHA agrees to be bound by this Agreement. CGI shall provide Armedica a copy of such executed license transfer documentation. Upon such transfer, DVHA shall be the Licensee. Any use of the Armedica Software by CGI after such assignment shall be as an agent or contractor of DVHA as permitted herein, and subject to the terms and conditions of this Agreement.

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E. Ownership and Restrictions

Armedica or its licensors retain all ownership and intellectual property rights to the Armedica Software. The Armedica Software is commercial off-the-shelf software; no custom programs will be delivered under this Agreement. You may make a sufficient number of copies of the Armedica Software for your licensed use and one copy of each program media. The Armedica Software is licensed, not sold, and you acquire only the rights expressly granted to you.

Third party technology that may be appropriate or necessary for use with the Armedica Software is set forth in the Order. Such third party technology is licensed to you under the terms of the third party technology license agreement specified in the Order and not under the terms of this Agreement.

You may not:

- remove or modify any program markings or any notice of Armedica's or its licensors' proprietary rights;
- make the programs or materials resulting from the services available in any manner to any third party for use in the third party's business operations (except for such access as is expressly permitted for assignment to DVHA as contemplated in Section D above.);
- cause or permit reverse engineering (unless required by law for interoperability), disassembly or decompilation of the programs (the foregoing prohibition includes but is not limited to review of data structures or similar materials produced by programs);
- disclose results of any program benchmark tests without Armedica's prior written consent.

F. Warranties, Disclaimers and Exclusive Remedies

Armedica warrants that the Armedica Software will operate in all material respects as described in the updated program documentation delivered with the third product release of the Armedica Software for one year after delivery (i.e., via physical shipment or electronic download) of such third product release described in the Order. You must notify Armedica of any program warranty deficiency within one year after such delivery. Armedica also warrants that services will be provided in a professional manner consistent with industry standards. You must notify Armedica of any services warranty deficiencies within 90 days from performance of the deficient services.

ARMEDICA DOES NOT GUARANTEE THAT THE PROGRAMS WILL PERFORM ERROR FREE OR UNINTERRUPTED OR THAT ARMEDICA WILL CORRECT ALL PROGRAM ERRORS.

FOR ANY BREACH OF THE ABOVE WARRANTIES, YOUR EXCLUSIVE REMEDY AND ARMEDICA'S ENTIRE LIABILITY SHALL BE: (A) THE CORRECTION OF PROGRAM ERRORS THAT CAUSE BREACH OF THE WARRANTY IN ACCORDANCE WITH ARMEDICA'S SUPPORT POLICIES; OR, IF ARMEDICA CANNOT SUBSTANTIALLY CORRECT SUCH BREACH IN A COMMERCIALY REASONABLE MANNER, YOU MAY END YOUR PROGRAM LICENSE AND RECOVER THE FEES YOU PAID TO ARMEDICA FOR THE PROGRAM LICENSE AND ANY UNUSED, PREPAID TECHNICAL SUPPORT FEES YOU HAVE PAID FOR THE PROGRAM LICENSE; OR (B) THE REPERFORMANCE OF THE DEFICIENT SERVICES; OR, IF ARMEDICA CANNOT SUBSTANTIALLY CORRECT A BREACH IN A COMMERCIALY REASONABLE MANNER, YOU MAY END THE RELEVANT SERVICES AND RECOVER THE FEES YOU PAID TO ARMEDICA FOR THE DEFICIENT SERVICES.

TO THE EXTENT NOT PROHIBITED BY LAW, THESE WARRANTIES ARE EXCLUSIVE AND THERE ARE NO OTHER EXPRESS OR IMPLIED WARRANTIES OR CONDITIONS INCLUDING WARRANTIES OR CONDITIONS OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.

G. Indemnification

If a third party makes a claim against Licensee, that the Armedica Software or any related information, design, specification, instruction, software, data, or material ("Material") furnished by Armedica, and used by the Licensee infringes a third party's intellectual property rights, Armedica, at its sole cost and expense, will defend Licensee against the claim and indemnify Licensee from all damages, liabilities, costs and expenses awarded by the court to the third party claiming infringement or the settlement agreed to by Armedica, if the Licensee does the following:

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- notifies Armedica promptly in writing, not later than 30 days after the Licensee receives notice of the claim (or sooner if required by applicable law);
- gives Armedica sole control of the defense and any settlement negotiations; and
- gives Armedica the information, authority, and assistance Armedica reasonably needs to defend against or settle the claim.

If Armedica believes or it is determined that any of the Material may have violated a third party's intellectual property rights, Armedica may choose to either modify the Material to be noninfringing (while substantially preserving its utility or functionality) or obtain a license to allow for continued use, or if these alternatives are not commercially reasonable, Armedica may end the license for, and require return of, the applicable Material and refund any fees paid to Armedica for it and any unused, prepaid technical support fees paid to Armedica for the license. Armedica will not indemnify the Licensee to the extent the Licensee alters the Material or uses it outside the scope of use identified in the documentation for the Armedica Software or if the Licensee fails to use an updated version of the Materials, if the infringement claim could have been avoided by using an unaltered current version of the Material which was provided to the Licensee. Armedica will not indemnify the Licensee to the extent that an infringement claim is based upon any information, design, specification, instruction, software, data, or material not furnished by Armedica or agreed to be included in the Armedica Software as set forth in the Order. Armedica will not indemnify you to the extent that an infringement claim is based upon the combination of any Material with any products or services not provided by Armedica. Armedica will not indemnify you for infringement caused by your actions against any third party if the Armedica program(s) as delivered to you and used in accordance with the terms of this Agreement would not otherwise infringe any third party intellectual property rights. Armedica will not indemnify you for any infringement claim that is based on: (1) a patent that you were made aware of prior to the effective date of this Agreement (pursuant to a claim, demand, or notice); or (2) your actions prior to the effective date of this Agreement. This section provides the parties' exclusive remedy for any infringement claims or damages.

H. Technical Support

For purposes of the Order, technical support consists of annual technical support services you may have ordered for the programs. The standard annual technical support (including first year and all subsequent years) stated in Ordering Document VT HIX-1 attached hereto is provided under Armedica's technical support policies which are attached to and hereby incorporated into this Agreement. Armedica may update such policies from time to time on notice to you, as long as any policy changes do not materially degrade the scope of support. If you discontinue support at any time and then restart it, you will in any event restart support on the terms of the technical support policies in effect at the time of the restart.

Technical support is effective upon the effective date of the Order unless otherwise stated in the Order.

Software Update License & Support (or any successor technical support offering to Software Update License & Support, "SULS") acquired with the Order may be renewed annually and, if you renew SULS for the same number of licenses for the same programs, you may renew SULS for the first four (4) years after the initial annual SULS period at the same price as set forth in Ordering Document VT HIX-1 attached hereto.

I. End of Agreement

If either of us breaches a material term of this Agreement and fails to correct the breach within 30 days of written specification of the breach, then the breaching party is in default and the nonbreaching party may terminate this Agreement. If Armedica ends this Agreement as specified in the preceding sentence, you must pay within 30 days all amounts which have accrued prior to such end, as well as all sums remaining unpaid for programs ordered and/or services received under this Agreement plus related taxes and expenses. Except for nonpayment of fees, the non-breaching party may agree in its sole discretion to extend the 30 day period for so long as the breaching party continues reasonable efforts to cure the breach. You agree that if you are in default under this agreement, you may not use those programs and/or services ordered. Provisions that survive termination or expiration are those relating to confidentiality, limitation of liability, infringement indemnity, payment, and others which by their nature are intended to survive.

J. Fees and Taxes

CGI shall purchase the license to the Armedica Software for the fees set forth in the Ordering Document VT HIX-1. All fees payable to Armedica are due within 45 days from your receipt of the applicable invoice. You agree to pay any sales, value-added or other similar taxes imposed by applicable law that Armedica must pay based on the

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programs and/or services you ordered, except for taxes based on Armedica's income. Fees for services listed in an ordering document are exclusive of taxes. You agree that you have not relied on the future availability of any programs or updates in entering into the payment obligations in your ordering document; however, (a) if you order SULLS for programs, the preceding sentence does not relieve Armedica of its obligation to provide updates under your ordering document, if and when available, in accordance with Armedica's then current technical support policies, and (b) the preceding sentence does not change the rights granted to you for any program licensed under your ordering document, per the terms of your ordering document and this agreement.

K. Nondisclosure

By virtue of this agreement, the parties may have access to information that is confidential to one another ("confidential information"). We each agree to disclose only information that is required for the performance of obligations under this agreement. Confidential information shall be limited to the terms and pricing under this agreement, any DVHA confidential information and all information clearly identified as confidential at the time of disclosure or which a person acting reasonably would understand to be confidential.

A party's confidential information shall not include information that: (a) is or becomes a part of the public domain through no act or omission of the other party; (b) was in the other party's lawful possession prior to the disclosure and had not been obtained by the other party either directly or indirectly from the disclosing party; (c) is lawfully disclosed to the other party by a third party without restriction on the disclosure; or (d) is independently developed by the other party.

We each agree to hold each other's confidential information in confidence. Also, we each agree to disclose confidential information only to in the case of CGI, the DVHA and in the case of both parties, those employees or agents who are subject to binding obligations to protect it against unauthorized disclosure and to use it only for the purposes of, and subject to the restrictions of, this Agreement. Nothing shall prevent either party from disclosing the terms or pricing under this agreement or orders submitted under this agreement in any legal proceeding arising from or in connection with this agreement or disclosing the confidential information to a federal or state governmental entity as required by law.

L. Entire Agreement

You agree that this agreement and the information which is incorporated into this agreement by written reference (including reference to information contained in a URL or referenced policy), together with the applicable ordering document, are the complete agreement for the programs and/or services ordered by you, and that this agreement supersedes all prior or contemporaneous agreements or representations, written or oral, regarding such programs and/or services. If any term of this agreement is found to be invalid or unenforceable, the remaining provisions will remain effective and such term shall be replaced with a term consistent with the purpose and intent of this agreement. It is expressly agreed that the terms of this agreement and any Armedica ordering document shall supersede the terms in any purchase order or other nonArmedica document and no terms included in any such purchase order or other nonArmedica document shall apply to the programs and/or services ordered. This agreement and ordering documents may not be modified and the rights and restrictions may not be altered or waived except in a writing signed by authorized representatives of you and of Armedica. Any notice required under this agreement shall be provided to the other party in writing.

M. Limitation of Liability NEITHER PARTY SHALL BE LIABLE FOR ANY INDIRECT, INCIDENTAL, SPECIAL, PUNITIVE, OR CONSEQUENTIAL DAMAGES, OR ANY LOSS OF PROFITS, REVENUE, DATA, OR DATA USE. ARMEDICA'S MAXIMUM LIABILITY FOR ANY DAMAGES ARISING OUT OF OR RELATED TO THIS AGREEMENT OR YOUR ORDER, WHETHER IN CONTRACT OR TORT, OR OTHERWISE, SHALL BE LIMITED TO THE AMOUNT OF THE FEES PAID TO ARMEDICA UNDER THIS AGREEMENT, AND IF SUCH DAMAGES RESULT FROM YOUR USE OF PROGRAMS OR SERVICES, SUCH LIABILITY SHALL BE LIMITED TO THE FEES YOU PAID ARMEDICA FOR THE DEFICIENT PROGRAM OR SERVICES GIVING RISE TO THE LIABILITY. THE LIMITATIONS OF LIABILITY IN THIS PARAGRAPH SHALL NOT APPLY TO ANY INFRINGEMENT BY A PARTY OF THE OTHER PARTY'S INTELLECTUAL PROPERTY RIGHTS.

N. Export

Export laws and regulations of the United States and any other relevant local export laws and regulations apply to

the programs. You agree that such export control laws govern your use of the programs (including technical data) and any services deliverables provided under this agreement, and you agree to comply with all such export laws and regulations (including "deemed export" and "deemed reexport" regulations). You agree that no data, information, program and/or materials resulting from services (or direct product thereof) will be exported, directly or indirectly, in violation of these laws, or will be used for any purpose prohibited by these laws including, without limitation, nuclear, chemical, or biological weapons proliferation, or development of missile technology.

O. Other

1. This agreement is governed by the substantive and procedural laws of Vermont and you and Armedica agree to submit to the exclusive jurisdiction of, and venue in, the courts in Vermont in any dispute arising out of or relating to this agreement.
2. If you have a dispute with Armedica or if you wish to provide a notice under the Indemnification section of this agreement, or if you become subject to insolvency or other similar legal proceedings, you will promptly send written notice to: Armedica Inc., 800 Boylston Street Suite 3500, Boston, Massachusetts 02199, Attention: PhilipCifarelli,CFO.
3. You may not assign this agreement or give or transfer the programs and/or any services or an interest in them to another individual or entity other than DVHA. If you grant a security interest in the programs and/or any services deliverables, the secured party has no right to use or transfer the programs and/or any services deliverables.
4. Except for actions for nonpayment or breach of Armedica's proprietary rights, no action, regardless of form, arising out of or relating to this agreement may be brought by either party more than two years after the cause of action has accrued.
5. Upon 45 days written notice, Armedica may audit your use of the programs. You agree to cooperate with Armedica's audit and provide reasonable assistance and access to information. Any such audit shall not unreasonably interfere with your normal business operations. As an alternative to an audit, Armedica may request, and you shall provide within 30 days after such request is made, a written certificate of compliance with this Agreement and the Order signed by a responsible officer on your behalf. You agree to pay within 30 days of written notification any fees applicable to your use of the programs in excess of your license rights. If you do not pay, Armedica can end your technical support, licenses and/or this agreement. You agree that Armedica shall not be responsible for any of your costs incurred in cooperating with the audit or providing any certificate of compliance.
6. The Uniform Computer Information Transactions Act does not apply to this agreement or orders placed under it. You understand that Armedica's business partners, including any third party firms retained by you to provide computer consulting services, are independent of Armedica and are not Armedica's agents. Armedica is not liable for nor bound by any acts of any such business partner, unless the business partner is providing services as an Armedica subcontractor on an engagement ordered under this agreement.

P. Force Majeure

Neither of us shall be responsible for failure or delay of performance if caused by: an act of war, hostility, or sabotage; act of God; electrical, internet, or telecommunication outage that is not caused by the obligated party; government restrictions (including the denial or cancellation of any export or other license); other event outside the reasonable control of the obligated party. Additionally, such events shall include action by the State or federal governments including repeal of the ACA, legislation by the State revoking the DVHA's authority to perform the Health Insurance Exchange Implementation Project or rendering the DVHA unable to act to implement the ACA to the extent required under such Project, and refusal by CMS or CCHIO to approve CGI's Agreement with the DVHA for such Project. The events covered in this Section shall be reason for CGI to initiate a termination for convenience. We both will use reasonable efforts to mitigate the effect of a force majeure event. If such event continues for more than 90 days, either of us may cancel unperformed services upon written notice. This section does not excuse either party's obligation to take reasonable steps to follow its normal disaster recovery procedures or your obligation to pay for programs delivered or services provided. In the event of termination or cancellation under this paragraph, any license fees paid remain nonrefundable; you are entitled to a pro rata refund of fees paid for services for the

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undelivered portion of any services.

Q. The Software will be deemed "Obsolete" as of the effective date of an end-of service life announcement from the Armedica. If no such announcement is published, then the Software will be deemed Obsolete as of (i) the date Armedica no longer maintains or supports the product or (ii) as of the date Armedica no longer includes it as part of its product and/or service offerings made generally available to its customers. The Software provided under this Agreement shall not become Obsolete during the first two years of this Agreement. If the Software's end-of-service-life occurs during the period from the date hereof and ending on December 31, 2015 Armedica will replace the Software with like functionally equivalent software that is supported by Armedica without additional cost to Licensee. Notwithstanding the foregoing, in the event Armedica determines the planned obsolescence for the Software Armedica will provide notice to the Licensee.

R. The parties agree that the technology and associated intellectual property rights licensed pursuant to this Agreement constitutes "intellectual property" for the purposes of Section 101 (35A) of Title 11, United States Code (the "Bankruptcy Code"). Armedica acknowledges that if either Armedica, as debtor-in-possession, or a trustee in bankruptcy in a case under the Bankruptcy Code rejects this Agreement, then the Licensee may elect to retain its rights under this Agreement as provided in Section 365(n) of the Bankruptcy Code. Upon written request of the Licensee, Armedica or a trustee in bankruptcy shall not interfere with the rights of Licensee as provided in this Agreement.

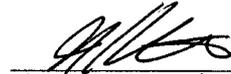
The effective date of this agreement shall be _____, 20____. (to be completed by Armedica)

CGI accepts this agreement and license on its own behalf and on behalf of DVHA, each of which shall be bound by its terms.

CGI Technologies and Solutions Inc.

Authorized Signature: 
Name: Jonathan F Light
Title: Vice President
Signature Date: 3/6/2013

Armedica, Inc.

Authorized Signature: 
Name: JONATHAN KUTCHINS
Title: CEO
Signature Date: 3/5/2013

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ARMEDICA ORDERING DOCUMENT VT HBE-1

Your Name CGI Technologies and Solutions Inc. on behalf of the State of Vermont, Department of Vermont Health Access

Your Location State of Vermont, Department of Vermont Health Access

312 Hurricane Lane

Williston, Vermont 05945

ARMEDICA, INC. CONTRACT INFORMATION

Agreement: Armedica License and Services Agreement # _____

This ordering document incorporates by reference the terms of the agreement specified above ("agreement").

A. Description and Fees for Ordered Programs and Services

Listed below is a summary of net fees due under the ordering document for the license of OneGate™ for HIX (the "Software"). These fees are in US Dollars and are exclusive of any applicable shipping charges or applicable taxes.

You have ordered the program licenses and 12 months of technical support services described below,

OneGate for HIX Software

The Software will be delivered in an initial baseline release concurrent with the execution of this Order. The Software, upon delivery of the release described in subsection "A" below, will meet the requirements set forth in the Business and Technical Requirements Matrix dated August 13, 2012 submitted to CGI by Armedica (attached hereto as Exhibits A and B) that were marked by Armedica as "S" in the "OneGate Pricing Conditions" column of the Matrix (the "Matrix Requirements"), and also those requirements attached as Exhibit C hereto marked as "S" in the Conditions column, all subject to the pricing assumptions listed in such Exhibit C and the Business and Technical Requirements Matrix, and accordingly Armedica agrees to deliver additional product releases as follows:

- A. Armedica will use best efforts to deliver a product release which meets the Business and Technical Matrix Requirements marked as "F" in the OneGate Pricing Conditions as agreed by the parties on or before April 16, 2013, and those marked as "F" in Exhibit C Conditions column, all subject to the pricing assumptions listed in such Exhibit C and the Business and Technical Requirements Matrix.

CGI will notify Armedica, within thirty (30) days after software delivery for the items above marked "S" delivered as part of initial software delivery and within sixty (60) days of the April delivery, if CGI believes that any Matrix Requirements applicable to that delivery have not been met, and in such event Armedica will have the right to cure

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the deficiency and to re-submit the Armedica Software to CGI. Except as set forth herein and in the program documentation as updated to reflect the Matrix Requirements, Armedica is not required to meet any other criteria of CGI or DHS with respect to performance or functionality of the Armedica Software.

Program Documentation

Updated program documentation reflecting inclusion of the Matrix Requirements as described above shall be delivered by Armedica concurrent with each additional product release beginning with the release described above planned for April 16, 2013.

Armedica will also deliver the following as part of the software delivery (including documenting items from Exhibit C which are included in the software delivery):

- Final Business Rules (for licensed rules) in machine readable format.
- Final OneGate for HIX Data Model
- Final OneGate for HIX System Flow Diagrams
- Final OneGate for HIX Workflow Mapping for Workflows delivered as licensed software
- OneGate for HIX Database Design Document
- Final System Documentation for OneGate for HIX product as delivered
- Known Issues Report
- OneGate Installation, Setup and Configuration, Documentation (Detailed step-by-step from start to finish)

Fees

<u>Product Description/License Type</u>	<u>Quantity</u>	<u>Net Fee</u>
OneGate™ for HIX	[1]	
License		\$4,900,000.00
Payment for Initial Delivery \$4,410,000		
Payment for Delivery of Matrix Requirement (B) and Exhibit C Requirements \$490,000		
1 Year Software Update License & Support		\$1,078,000.00
Total Fees		\$5,978,000.00

B. General Terms

1. License and Use of Programs

All the program licenses acquired are limited use programs. These programs may be used by DVHA solely for the internal business operations of DVHA in support of the DVHA's Health Benefit Exchange which includes MAGI eligibility determinations as reflected in Exhibit C hereto, subject to the terms of this Order Document and the Armedica License and Technical Support Services Agreement. These software programs are not licensed to support government programs other than the Health Benefit Exchange and Magi eligibility as described herein.

These programs may be used by CGI solely for the purposes of performance of the Prime Contract and subject to the terms of this Order Document and the Armedica License and Technical Support Services Agreement.

Provided that the scope of use remains as provided in the preceding paragraphs, DVHA may transfer or assign this agreement to a successor agency in the event of a government reorganization. DVHA shall promptly notify Armedica of any such reorganization identifying the successor agency.

2. Commencement Date

All program licenses and the period of performance for all services are effective upon shipment of tangible media or upon the effective date of this ordering document if shipment of tangible media is not required.

3. Fees, Invoicing, and Payment Obligation

a. All fees due under this ordering document shall be non-cancellable and the sums paid nonrefundable, except as provided in the Agreement.

b. License and services fees are invoiced as of the commencement date. Service fees are invoiced in advance of the service performance; specifically, technical support fees are invoiced annually in advance.

c. In entering into payment obligations under this ordering document, you agree and acknowledge that you have not relied on the future availability of any program or updates. However, (a) if you order technical support for programs licensed under this ordering document, the preceding sentence does not relieve Armedica of its obligation to provide such technical support under this ordering document, if-and-when available, in accordance with Armedica's then current technical support policies, and (b) the preceding sentence does not change the rights granted to you for any program licensed under this ordering document, per the terms of this ordering document and the agreement.

d. The parties acknowledge that DVHA is tax exempt.

4. Delivery and Installation

- a. You shall be responsible for installation of the software.

5. Source Code

Armedica may deliver Armedica Software in source code as part of its standard delivery for the programs included in Section A above; all source code delivered by Armedica is subject to the terms of the agreement, ordering document, program documentation and source code nondisclosure agreements with CGI and the DVHA. With respect to Armedica Software not delivered in source code, Armedica will enter into an escrow agreement to be negotiated in good faith with CGI which provides for the release of the source code to CGI subject to release conditions consisting of: (i) material and unremedied failure of Armedica to support the program as required by this Agreement or (ii) Armedica insolvency or going out of business, in a situation where Armedica's support obligations have not been assigned to a third party who has the skills and experience to provide such support.

6. Segmentation

The program licenses provided in this ordering document are offered separately from any other proposal for consulting services you may receive or have received from Armedica and do not require you to purchase Armedica consulting services.

7. Order of Precedence

In the event of any inconsistencies between the agreement and this ordering document, this ordering document shall take precedence.

8. Territory

The program licenses and services described in section A are for use in the U.S.

9. Third Party Software

Oracle: Operation of the Armedica Software requires various Oracle technical and application products, which you must license separately from Oracle:

LifeRay: You must obtain a commercial license to LifeRay software.

Open Source Software: Certain components in the Armedica Software are copyrighted and licensed by third parties ("Third Party Contributors") under open source software licenses, as described in the NOTICE.txt file included with the Armedica Software ("Third Party Licenses"). Such Third Party Contributors make no warranty, express or implied, as to their respective components, including without limitation warranties of title and non-infringement, and disclaim all liability for damages, including direct, indirect, special, incidental and consequential damages, such as lost profits. Any provisions herein or in any Third Party License Agreement

that are inconsistent with any other Third Party License Agreement are offered by the applicable licensor alone and not by any other party. Source code for certain components is available online, as notified by Armedica in writing from time to time.

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C. Other

The offer is valid through 14 March 2013 and shall become binding upon execution by you and acceptance by Armedica.

CGI accepts this Order on its own behalf and on behalf of DVHA, each of which shall be bound by its terms.

CGI
Technologies
and
Solutions
Inc.

ARMEDICA,
INC.

Signature

Jonathan F Light

Signature

[Signature]

Name

Jonathan F Light

Name

JONATHAN KUTCHINS

Title

Vice President

Title

CEO

Signature

Date

3/6/2013

Signature Date

3/5/2013

Effective
Date

(to be completed by Armedica)

EXHIBIT A - Individual Eligibility Requirements Traceability Matrix

	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Conditions (S, W, M, F, C)	Exeter Pricing Assumptions
ELM-1	Eligibility and Enrollment	Pre-Screening	OneGate	Provide the option for anonymous completion of MAGI eligibility related questions	S	Agreed.
ELM-2	Eligibility and Enrollment	Pre-Screening	OneGate	The following MAGI related data items should be requested in the pre-screening: financial, residency, person specific (age, gender, pregnant, disability, tribal affiliation) relationships to other household members	S	Agreed.
ELM-3	Eligibility and Enrollment	Individual Application & Submit Update	OneGate	Provide a more detailed / specific application to be completed for MAGI MAGI QHP eligibility (incl. APTC, CSR).	S	Agreed.
ELM-4	Eligibility and Enrollment	Individual Application & Submit Update	OneGate	As part of the application process, collect State residence information in accordance with the Federal and State regulations and necessary to establish MAGI QHP eligibility (incl. APTC, CSR).	S	Agreed as to online application and application record. Interfaces are CGI function.
ELM-5	Eligibility and Enrollment	Individual Application & Submit Update	OneGate	As part of the application process, collect citizenship / immigration status information as necessary to establish MAGI QHP eligibility (incl. APTC, CSR).	S	Agreed as to online application and application record. Interfaces are CGI function.
ELM-6	Eligibility and Enrollment	Individual Application & Submit Update	OneGate	As part of the application process, collect household and income information to determine if the household is under 100% FPL.	S	Agreed as to online application and application record. Interfaces are CGI function.
ELM-7	Eligibility and Enrollment	Individual Application & Submit Update	OneGate	As part of the application process, support collecting additional household information and income information as necessary to establish MAGI QHP eligibility (incl. APTC, CSR).	S	Agreed as to online application and application record. Interfaces are CGI function.

EXHIBIT A - Individual Eligibility Requirements Traceability Matrix

	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Conditions (S, W, M, F, C)	Exeter Pricing Assumptions
ELM-8	Eligibility and Enrollment	Change Management	OneGate	Store changed information along with the date the information was changed.	S	Agreed as to information changed through OneGate change of circumstance.
ELM-9	Eligibility and Enrollment	Change Management	OneGate	Support prompting users / consumers to renew their application on an annual basis.	S	Agreed as to online prompting (e.g., self service). Other Noticing (letter, email) a CGI responsibility.
ELM-11	Eligibility and Enrollment	Program Policy	OneGate	Provide a method to identify persons who are eligible for services.	S	Agreed.
ELM-13	Eligibility and Enrollment	Program Policy	OneGate	Allow individuals in a household to be eligible under different categories and receive different benefits related to MAGI QHP/APTC/CSR based upon individual information.	S	Agreed.
ELM-14	Eligibility and Enrollment	Application Process	OneGate	Provide an [anonymous] screening tool that is compatible with the HBE and allows an applicant to answer an initial basic set of questions to quickly identify potential eligibility for MAGI QHP (incl. APTC, CSR).	S	Agreed
ELM-15	Eligibility and Enrollment	Application Process	OneGate	Provide customized local office information, through public-facing front-end (i.e. physical location of nearest local office and name, email and phone number).	S	OneGate portal will provide a hyperlink to a static page of local office information.
ELM-16	Eligibility and Enrollment	Application Process	OneGate	Provide interactive questions that can lead to appropriate next questions, to include identification of an ABD-applicant, in need for a supplemental form(s), based on responses and other existing data necessary to establish MAGI QHP eligibility (incl. APTC, CSR). .	S	Agreed for 2-4 additional questions that would screen for ABD applicants.
ELM-17	Eligibility and Enrollment	Application Process	OneGate	Provide a mechanism to define required and optional fields, including default data values as applicable, based on the MAGI QHP eligibility (incl. APTC, CSR). program rules.	S	Agreed.

EXHIBIT A - Individual Eligibility Requirements Traceability Matrix

	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Conditions (S, W, M, F, C)	Exeter Pricing Assumptions
ELM-18	Eligibility and Enrollment	Application Process	OneGate	Identify and display verifications required for the applicant based on program rules.	S	Agreed.
ELM-19	Eligibility and Enrollment	Application Process	OneGate	Produce a customized listing of verification documents for an eligibility criteria required to complete eligibility determination.	S	Agreed.
ELM-20	Eligibility and Enrollment	Application Process	OneGate	Allow the worker/applicant to upload and attach source documents to support eligibility determination.	S	Agreed.
ELM-21	Eligibility and Enrollment	Application Process	OneGate	Present the applicant with a summary view of the information entered prior to submission.	S	Agreed.
ELM-22	Eligibility and Enrollment	Application Process	OneGate	Allow applicants to print /save a copy of electronic copy for their records.	S	Agreed.
ELM-23	Eligibility and Enrollment	Application Process	OneGate	Allow an applicant or applicant's authorized representative to review the current application before and after formal submission.	F	Applicant functionality - agreed. Authorized representative functionality - roadmap.
ELM-24	Eligibility and Enrollment	Application Process	OneGate	Allow an applicant or applicant's representative to amend an application as long as a determination has not been made.	S	Agreed.
ELM-25	Eligibility and Enrollment	Application Process	OneGate	Allow the applicant or applicant's authorized representative to save and amend the application or renewal for up to 30 days in order to gather additional information prior to submittal.	S	Agreed.

EXHIBIT A - Individual Eligibility Requirements Traceability Matrix

	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Conditions (S, W, M, F, C)	Exeter Pricing Assumptions
ELM-26	Eligibility and Enrollment	Application Process	OneGate	Allow and record an applicant's request to withdraw an application.	F	Agreed.
ELM-28	Eligibility and Enrollment	Application Process	OneGate	Provide an automated or guided application process to enable the applicant/worker to easily enter required information.	S	Agreed.
ELM-29	Eligibility and Enrollment	Application Process	OneGate	Provide system-generated date and time stamp for receipt of electronic applications to be used in monitoring standards of promptness by program.	S	Agreed.
ELM-31	Eligibility and Enrollment	Application Process	OneGate	Provide a mechanism to begin benefits on a date different than the application date and system-generated date.	S	Agreed as to basic eligibility rules. Situation specific workflows are not priced.
ELM-32	Eligibility and Enrollment	Application Process	OneGate	Capture and display date that a disposition was made on an application/renewal.	S	Agreed.
ELM-33	Eligibility and Enrollment	Application Process	OneGate	Provide the capability for an applicant to indicate various types of potential exemptions through the single, integrated application process.	F	Exemption rules expansion on roadmap.
ELM-35	Eligibility and Enrollment	Application Process		Display to the applicant discrepant information between the new application and information stored in the existing household.	F	Comparison of ACCESS data to new application not priced within OneGate.
ELM-37	Eligibility and Enrollment	Application Process	OneGate	Provide a mechanism to indicate which verification documents have already been provided.	S	Agreed.

EXHIBIT A - Individual Eligibility Requirements Traceability Matrix

	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Conditions (S, W, M, F, C)	Exeter Pricing Assumptions
ELM-42	Eligibility and Enrollment	Application Process	OneGate	Provide the ability to allow applicants to view, confirm, dispute and submit corrections to verification results.	F	On roadmap.
ELM-45	Eligibility and Enrollment	Application Process	OneGate	Assure consistency in eligibility determination processing when applicants attempt to access services through different entry points.	S	Agreed.
ELM-47	Eligibility and Enrollment	Application Process	OneGate	Display the eligibility results in a manner that is comprehensive and easy to understand.	S	Agreed.
ELM-48	Eligibility and Enrollment	Household Maintenance	OneGate	Provide the capability to create and maintain an electronic household file of all applicants and families requesting MAGI QHP/APTC/CSR from the time that they first make an entry to the system.	F	Agreed as to the ability to track applicants and families relative to their interactions with OneGate. Automated spend-down is not priced.
ELM-51	Eligibility and Enrollment	Household Maintenance	OneGate	Allow authorized users to search online household files using key fields such as name, SSN, ID, date of birth, etc.	S	Agreed, as limited by Siebel standard search functions.
ELM-52	Eligibility and Enrollment	Household Maintenance	OneGate	Provide a mechanism for authorized users to access beneficiary/household summary from any screen.	S	Agreed as to access of summary information from self-service and case-worker main screens.
ELM-55	Eligibility and Enrollment	Household Maintenance	OneGate	Provide a mechanism to indicate relationships between all members of a household.	S	Agreed.
ELM-56	Eligibility and Enrollment	Household Maintenance	OneGate	Provide a mechanism to automatically create the inverse family relationships (e.g., parent – child, child – parent, etc.).	S	Agreed.

EXHIBIT A - Individual Eligibility Requirements Traceability Matrix

	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Conditions (S, W, M, F, C)	Exeter Pricing Assumptions
ELM-62	Eligibility and Enrollment	Household Maintenance	OneGate	Provide the capability to view the new determination of eligibility after the change in information.	S	Agreed.
ELM-67	Eligibility and Enrollment	Household Maintenance	OneGate	Change the status of any individual in a household without terminating eligible household members.	S	Agreed.
ELM-68	Eligibility and Enrollment	Household Maintenance	OneGate	Provide web-based functionality to allow the applicant to renew eligibility online.	S	Agreed.
ELM-74	Eligibility and Enrollment	Household Maintenance	OneGate	Renew eligibility based on Federal and State statutes and regulations as necessary to establish MAGI QHP eligibility (incl. APTC, CSR).	S	Agreed as to application of eligibility rules. CGI responsible for interfacing. Situation-specific workflows are not priced.
ELM-75	Eligibility and Enrollment	Household Maintenance	OneGate	Recalculate and redetermine eligibility when a change in circumstance occurs (e.g., household composition changes, child turning 19).	S	Agreed. Situation-specific workflows are not priced.
ELM-78	Eligibility and Enrollment	Household Maintenance	OneGate	Assure renewal forms meet the same accessibility standards as application.	S	Agreed as to online renewal.
ELM-VT	Eligibility and Enrollment	Premium Payment Status	OneGate	Include a field to record premium payment status.	F	On roadmap.

Individual Eligibility Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
EL-21	Eligibility and Enrollment	Individual Application & Submit Update		Send notifications to the Individuals, Exchange Staff, Brokers, and Navigators of changes to Individuals' applications.			W	F	Workflows in Siebel can be configured to trigger notifications, but no configuration effort beyond OneGate base functionality is priced. CGI is responsible for notification delivery.
EL-31	Eligibility and Enrollment	Individual Application & Submit Update		Provide the capability to identify Navigators and Brokers if they are completing applications on behalf of an Individual.			S	F	OneGate pricing is limited to a flag set based on the account type of the application filer.
EL-43	Eligibility and Enrollment	Individual Eligibility Determination-Verification		Ask knowledge-based ID questions based on data gathered from external data sources to facilitate authentication of identity.			S	F	CGI will be responsible for interfaces to external data sources and for identity management.
EL-61	Eligibility and Enrollment	Individual Eligibility Determination-Verification		Support checks for Medicaid eligibility that can not be serviced real-time. Responses should be accepted later, and user shall be permitted to negotiate enrollment in a QHP while waiting for a response.			F	F	
EL-62	Eligibility and Enrollment	Individual Eligibility Determination-Verification		Provide the capability to accept notifications from Medicaid/CHIP regarding loss of coverage, and should evaluate those individuals for QHP subsidized coverage.			F	F	
EL-63	Eligibility and Enrollment	Individual Eligibility Determination-Verification		Provide individuals the ability to have a reasonable opportunity (90-day period under PPACA) to address inconsistencies reported by external entities (i.e. income, citizenship, etc.)			F	F	CGI will be responsible for the interfaces to the external entities that will report this information and will provide structured data from that interface to Exeter.
EL-64	Eligibility and Enrollment	Individual Eligibility Determination-Verification		Provide the capability for an Individual to indicate or attest to affiliation with recognized Native American tribe during the application process, request verification and update the individual account with verified information.			F	F	CGI will be responsible for verification interfaces. Exeter will provide baseline OneGate functions to allow individuals to attest to being a Native American.
EL-68	Eligibility and Enrollment	Change Management		Provide users the ability to choose new health plans after the re-determination process based on the new circumstances.			S	F	Agreed.
EL-70	Eligibility and Enrollment	Case Inquiry		Allow Exchange Staff, customers, call center staff and Navigators to view a customer's household information and composition.			S	F	Function is limited to the information available in the My Profile section of the OneGate self-service portal.
EL-71	Eligibility and Enrollment	Case Inquiry		Allow Exchange Staff, customers, call center staff and Navigators to add, update, modify and delete household composition information.			S	F	Agreed.

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-6	SHOP	Plan Selection		Provide the capability to calculate an estimate as to whether a premium might exceed the affordability scale for a given employee income, so that the employer may know the likelihood of receiving a tax penalty for offering unaffordable insurance.			S	F	Agreed
SH-13	SHOP	Plan Selection		Provide capability for an employer to select QHP(s), or a tier, and initiate the participation process.			S	F	Agreed
SH-18	SHOP	Plan Selection		Provide an online calculator for an employer to estimate potential eligibility as well as potential tax credit under the 4 tiers of qualified health plan benefits.			S	F	Agreed
SH-19	SHOP	Employer/Employee Application		Provide capability to accept paper documents for SHOP, such as employer / employee applications and verifications.			S	F	CGI is responsible for content management.
SH-23	SHOP	Employer Application		Provide the capability to differentiate / track full-time employees versus part-time/hourly employees in the employee roster.			S	F	Agreed
SH-29	SHOP	Employer Application		Prior to the creation of a new employer account, the Exchange shall determine if an existing user account is present based on matching criteria provided in the application (e.g. EIN, name)			S	F	Agreed
SH-32	SHOP	Employer Application		Allow employer-authorized broker/assister to submit all or select data for Employer Application			S	F	Agreed
SH-33	SHOP	Employer Application		Capture broker/assister of record in the employer and account information			S	F	Agreed
SH-41	SHOP	Verify Employer Data on Eligibility Application		Provide the capability to initiate a manual verification process when additional verification of employer size is required. (e.g. using EIN, HBI, actual payroll, Master Business License Application, income tax documents, etc.)			F	F	Agreed
SH-44	SHOP	Verify Employer Data on Eligibility Application		Track status of employer size verification based on the following: - Verified - Not verified - Pending Review			S	F	Agreed
SH-46	SHOP	Verify Employer Data on Eligibility Application		When additional verification is required, provide on-screen notification to employer to supply additional verifications through the Exchange.			S	F	Agreed
SH-51	SHOP	Verify Employer Data on Eligibility Application		Provide capability to electronically store documents submitted for Business Address or Worksite verification.			S	F	Agreed

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-52	SHOP	Verify Employer Data on Eligibility Application		Track status of verification separately for employer size, business address, coverage and number of full time employees based on the following: - Verified - Not verified - Pending Review			S	F	Agreed
SH-54	SHOP	Verify Employer Data on Eligibility Application		When additional verification is required, provide on-screen notification to employer to supply additional verifications through the Exchange.			S	F	Agreed
SH-68	SHOP	Employer Contribution		When plan costs to the employer are finalized, the SHOP Exchange shall provide the flexibility for the Employer to review and compare alternative plans.			S	F	Agreed
SH-69	SHOP	Employer Contribution		Allow configuration for setting up different types of employer contributions such as percentage of the cost, a dollar value, metal levels, or other options			S	F	Agreed
SH-70	SHOP	Employer Contribution		Provide decision support tools, including an online calculator that supports 'what if' scenarios			S	F	Agreed
SH-71	SHOP	Employer Contribution		Recognize future coverage, and manage the effective date based on future coverage information			M	F	Recognizing future coverage and managing the effective date based on future coverage would require additional modifications that is not included in the pricing.
SH-72	SHOP	Employer Contribution		Allow employer contribution to be based on multiple employee choice models, including choice within a tier, choice within a carrier, or full employee choice			S	F	Agreed
SH-73	SHOP	Employer Contribution		Allow employers to provide a contribution for employees to select a plan on the Individual Exchange			F	F	Allowing employers to provide a contribution for employees to select a plan on the Individual Exchange requires additional customization that is not included in the pricing.
SH-74	SHOP	Employer Contribution		Allow employers to use wage information to compare coverage options to alternatives available to their employees in the Individual Exchange			F	F	Early delivery would require additional customization that is not included in the pricing.
SH-77	SHOP	Employer / Employee Termination		Allow SHOP Employers to identify/manage the employees within the Exchange			S	F	Agreed
SH-80	SHOP	Employer Termination		Provide the capability for an employer to request a voluntary termination from QHP(s) at any time.			S	F	Agreed

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-96	SHOP	Renewal		Provide capability for employers to submit changes to key eligibility factors for the purpose of annual eligibility / participation renewal. Supported methods of reporting changes include written forms and web-based responses through the Exchange.			S	F	Agreed
SH-97	SHOP	Renewal		Process employer responses to renew eligibility and initiate eligibility determination process if necessary. The Exchange shall review employer Exchange eligibility and shall have the capability to review small business tax credit eligibility. The Exchange will also have the capability to adjudicate mandatory / optionally reported changes and the resultant changes to eligibility and participation.			S	F	Agreed
SH-99	SHOP	Employer Renewal		Based on the availability of QHP(s), determine availability of an employer's current plan for the purposes of participation renewal.			S	F	Agreed
SH-100	SHOP	Employer Renewal		If the employer's current plan(s) are no longer available, provide capability to automatically suggest employer participation for a default health plan(s) for a geographic area.			F	F	Early delivery would require additional customizations that are not included in the pricing.
SH-101	SHOP	Update Employer Eligibility Application		Provide capability for employers to submit changes to SHOP plan participation (selected plan(s), selected tier (optional), covered employers, etc.). Supported methods of enrollment changes include written forms and web-based responses through the Exchange.			S	F	OneGate pricing includes support for web-based changes to plan participation, tiers, and covered employees. No other changes are priced. OneGate pricing does not include keyed entry of written forms. No other workflows are priced.
SH-102	SHOP	Renewal, Employee Enrollment		Based on an employer's responses to enrollment renewal, assess responses for need to initiate enrollment into a new QHP or additional employers into an existing QHP.			S	F	Agreed
SH-103	SHOP	Renewal, Employee Enrollment		Based on an employer's responses to enrollment renewal, process enrollment selections if possible.			S	F	Interfaces to issuers and notice generation not included in pricing.
SH-104	SHOP	Renewal, Employee Enrollment		Process notification notifying employer of coverage for employees. Also, communicate any next steps required by the employer.			S	F	Notifications not included in pricing.

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-105	SHOP	Employer Renewal		Process employer renewal in a method very similar to the initial employer application, allowing for the submission of an updated employee roster, processing plan selection options based on preferences, and submitting notifications to the employer.			S	F	Agreed
SH-106	SHOP	Update Employer Eligibility Application		Based on employer status, determine eligibility for SHOP participation renewal (e.g. annual renewal).			S	F	Agreed
SH-109	SHOP	Employer Renewal		Present opportunity for employer to log-in to initiate their renewal.			S	F	Agreed
SH-114	SHOP	Appeal SHOP Eligibility Decision		Provide the capability for an employer to request an appeal to the employer eligibility decision.			S	F	Agreed
SH-116	SHOP	Appeal SHOP Eligibility Decision		Provide the capability to capture, track, and disposition appeals in the Exchange (including status, assignments, and relevant case notes).			S	F	Support is limited to OneGate out-of-the-box functionality
SH-119	SHOP	Appeal SHOP Eligibility Decision		Provide the capability to record the detailed results and supporting documentation that result from or support an appeals decision.			?	F	Support is limited to OneGate out-of-the-box functionality
SH-120	SHOP	Appeal SHOP Eligibility Decision		Generate a formal written notice informing an employer of the details of an appeal decision.			?	F	OneGate pricing includes an unconfigured trigger on appeal decision. Document generation is not priced.
SH-124	SHOP	Change Reporting		Provide the capability for employers to submit changes to the employee rosters, using multiple methods (i.e. submission of files, completion of data fields, etc.)			S	F	OneGate pricing includes web-form and Excel/CSV upload for roster changes. Other methods are not priced.
SH-125	SHOP	Renew / Redetermine Employer Participation		Upon reporting changes in offers of coverage to all Full Time Employees re-evaluate eligibility for participation in SHOP.			S	F	Agreed
SH-128	SHOP	Change Reporting/Periodic Reporting		Provide capability to prepare and send information-only communication to the employer regarding potential changes to their Tax Credit Eligibility due to a change in the employee roster. Provide a link to IRS website for additional information regarding the Small Business Tax Credit.			S	F	OneGate pricing includes an unconfigured trigger when roster changes. Document production and sending is not included in pricing.
SH-134	SHOP	Renew / Redetermine Employer Participation		Provide the capability for employers to submit changes about the employer's principal business address or primary worksite location.			S	F	OneGate pricing includes the ability to change business address or primary worksite information through web forms.
SH-137		Renew / Redetermine Employer Participation		Provide an immediate message to the employer warning about likely termination if they provide a primary worksite location or principal business address that is outside of the state.			S	F	Agreed

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-140	SHOP	Renew / Redetermine Employer Participation		Prepare and send communication to the employer regarding changes to the Employer's worksite locations.			S	F	OneGate pricing includes an unconfigured trigger when contact information is changed. Document production and sending are not included in pricing.
SH-141	SHOP	Renew/Redetermine Employer Participation		Brokers / Employer Agents shall have the ability to enter information and be provided services in a manner identical or very similar to that of the employer's.			S	F	Agreed
SH-148	SHOP	Determine Employee Eligibility		Update user /employee account status based on updated employee coverage results			F	F	Agreed
SH-149	SHOP	Determine Employee Eligibility		Provide the capability to track the response / status of employees who have been offered employer-sponsored coverage. Key statuses to track include waiver of coverage / elected for coverage / non-participation.			S	F	Agreed
SH-150	SHOP	Determine Employee Eligibility		Inform employees that may be eligible for subsidized coverage at a lower premium and allow for an individual eligibility determination.			S	F	Agreed
SH-152	SHOP	Prepare Employee Application		Provide the capability to use the model single employee application provided by HHS.			S	F	OneGate pricing includes data elements in the model single employee application. This assumes timely release of the application by HHS. Processing of paper forms is not included in pricing.
SH-158	SHOP	Prepare Employee Application		If an application is initiated by a Navigator, the Exchange shall have the capability for the employee to attest that the information provided by the Navigator is accurate.			S	F	OneGate pricing includes an attestation message, and text field to confirm.
SH-159	SHOP	Prepare Employee Application		Provide the capability to identify Navigators (or Brokers, etc.) if they are completing applications on behalf of an employee.			S	F	Agreed
SH-171	SHOP	Employee Selects QHP		Generate a request to initiate the employee selection of qualified health plan after eligibility determination is verified or if employee participation is allowed pending verification of eligibility information.			S	F	OneGate pricing includes plan presentation and selection after OneGate eligibility determination. Other workflows are not included in pricing.

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-173	SHOP	Employee Selects QHP		Allow employee to enter information about employee dependents, if employers are choosing to provide coverage to employees' dependents. Dependent information gathered will include, but is not limited to the following: - Name - Date of Birth - Address - Phone Number - Gender - Smoking Status - Indian Status			S	F	Inclusion of additional fields not listed is not included in pricing.
SH-181	SHOP	Employee Selects QHP		Grant access to an updated provider directory for employee plan selection. This directory should be current at the point in time in which the employer accesses the directory.			S	F	OneGate must be provided a provider data nightly, by plan by issuer, with all other relevant data provided in a format specified by OneGate.
SH-183	SHOP	Employee Selects QHP		Provide information and provide capability to allow employees determine if their premium costs are such that the costs make the employee eligible for purchasing insurance through the individual market or allow the employee to be exempt from the individual mandate, due to federal law. If either is scenario is likely, invite employee to explore these options further at the Individual Exchange.			S	F	Agreed
SH-199	SHOP	Disenroll Employee in QHP		Provide the capability for an employee to request a voluntary disenrollment from QHP(s).			S	F	OneGate pricing includes the storage of the request, and an unconfigured trigger. Interface to issuer is not included in pricing.
SH-202	SHOP	Disenroll Employee in QHP		Provide capability to initiate the disenrollment process.			S	F	Agreed.
SH-203	SHOP	Disenroll Employee in QHP		Provide capability to update user accounts based on disenrollment notification from issuers			S	F	CGI will be responsible for interfaces to issuers and will provide structured data from that interface to Exeter. Exeter will update user accounts.
SH-204	SHOP	Disenroll Employee in QHP		Update user accounts based on disenrollment notification from disenrollment initiated by the Exchange.			S	F	
SH-216	SHOP	Update Employee Application / Renew Employee QHP Participation		Based on employee status, determine eligibility for SHOP Exchange participation renewal.			S	F	Agreed.

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-221	SHOP	Update Employee Application		Provide capability for employees to submit changes to key eligibility factors for the purpose of annual eligibility / enrollment renewal. Supported methods of reporting changes include written forms and web-based responses through the Exchange.			S	F	Exeter will make web-based change forms available through the Exchange. CGI will be responsible for processing written forms and passing the data from those forms to the account management system.
SH-222	SHOP	Update Employee Application		Process employee response to renew eligibility and initiate eligibility determination process if necessary. Review employee Exchange eligibility. Have the capability to adjudicate mandatory / optionally reported changes and the resultant changes to eligibility and enrollment.			S	F	Agreed.
SH-223	SHOP	Renew Employee QHP Participation		Provide the capability to calculate a year-to-date average for premiums paid for display to the employee at time of renewal.			S	F	OneGate will call a CGI interface in order to display this data to employees. Data is assumed to be held in Healthation
SH-224	SHOP	Update Employee Application		If reported changes do not qualify an employee for a special enrollment, store the eligibility / household changes for use during the next available open enrollment period.			S	F	Agreed.
SH-225	SHOP	Renew Employee QHP Participation		If the employee's current plan(s) are no longer available, automatically suggest employee participation for a default health plan(s) for a geographic area.			S	F	Exeter will provide for a single default health plan for each ZIP code or county, with no overlaps.
SH-226	SHOP	Renew Employee QHP Participation		Based on the availability of QHP(s), determine availability of an employee's current plan for the purposes of enrollment renewal.			S	F	CGI will be responsible for a single interface which identifies available QHP's by issuer.
SH-227	SHOP	Update Employee Application		Provide capability for employees to submit changes to SHOP plan participation (selected plan(s), selected tier (optional), covered dependents, etc.). Supported methods of enrollment changes include written forms and web-based responses through the Exchange.			S	F	Exeter will make web-based change forms available through the Exchange. CGI will be responsible for processing written forms and passing the data from those forms to the account management system.
SH-228	SHOP	Renew Employee QHP Participation		Based on an employee's responses to enrollment renewal, assess responses for need to initiate enrollment into a new QHP or additional employees (or employers) into an existing QHP.			S	F	Agreed.
SH-230	SHOP	Determine Employee Eligibility		Provide the functionality to determine if an update to an employee account is categorized as a Qualifying Event.			S	F	Federal definition supported.

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-231	SHOP	Update Employee Application		Provide capability for employees to submit changes to employee plan (add / remove dependents) in between redeterminations / renewals and due to qualifying events.			S	F	Agreed.
SH-234	SHOP	Change Reporting		Initiate enrollment or disenrollment process for employee or the employee's dependents, depending on the nature of the Qualifying Event.			S	F	Eligibility determination is displayed as the initiation for the caseworker or client to continue.

Web Portal UX Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
WP-1	Web Portal	Design		Design based on Enrollment 2014 UX project	S			F	OneGate pricing includes a theme based on, but not an exact match of the Enrollment UX 2014 prototype. State specific updates are not included in pricing.
WP-7	Web Portal	General		Display and provide browsing capabilities on the various health options and plans available to users without requiring a login.	S			F	employer specific shop plans are not included. Employees will need to log on to determine the plans available to them and then made available to them by their employer.
WP-9	Web Portal	General		Provide capability for users to search for Navigators using a variety of criteria without requiring a login.	M			F	OneGate pricing includes search capability based on ZIP or county. Distance based search is not included in pricing.
WP-18	Web Portal	Identity		Provide verified Exchange web portal login/accounts with appropriate system access according to system assigned role (e.g. consumer, Navigator, Issuer, etc.) - Verified accounts are those for whom the individual identity has been	S			F	Agreed
WP-20	Web Portal	Enrollment		Enable individual users to compare plans based on factors such as: - Price/premium payment - Deductible - Medal Rating (bronze, silver, gold, platinum) - Quality assessment	S			F	OneGate pricing includes the ability to compare for the factors listed. Additional factors are not included in pricing. All data for comparison is expected to be provided by Plan Management.
WP-22	Web Portal	Enrollment		Enable users to look up the providers that are affiliated with specific plans and affiliation type (i.e. Tiered PPO model).	F			F	Provided that Plans provide up-to-date provider directories, and all changes on a timely basis. OneGate pricing for process to populate provider directories is not included.
WP-23	Web Portal	Enrollment		Provide ability for Issuers to upload supporting documentation to the plan selection tool	F			F	OneGate pricing includes a web service interface for uploading a link to content stored in the document management system. Receiving content from issuers is not included in pricing.
WP-34	Web Portal	Enrollment		Enable individual users to reenroll (renew) in a plan which they have selected	S			F	Interfaces to issuers is not included in pricing.

Web Portal UX Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
WP-40	Web Portal	SHOP		Enable Employees to enroll or unenroll in SHOP plan	S			F	Interface to issuers is not included in pricing.
WP-49	Web Portal	User Customization		Provide customizable portal views and functionality based on user role for "super users" (e.g. Navigator, Broker, caseworker, etc.)	S			F	Agreed
WP-53	Web Portal	User Customization		Allow SHOP employees to access a custom portal where they can view and select among their plans options, enroll their family and manage changes in circumstances.	S			F	Agreed

Consumer Assistance - General Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
CAG-18	Consumer Assistance	Complaints / Appeals		The system shall provide notifications to the appropriate parties upon the following key events in the complaint/appeal process: - Receipt of complaint/appeal - Status Change - Resolution	W			F	Pricing is limited to calling a trigger in Siebel. CGI is responsible for notification delivery.

Navigator Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
CAN-1	Consumer Assistance	Navigators		Provide consumers with general information regarding Navigator Program, including information regarding certification of Navigators and relationship to Exchange, Issuers, Providers and Brokers	S			F	Exeter will provide an area for this information on the OneGate portal. Configuration will be required to create and insert HTML formatted text.
CAN-2	Consumer Assistance	Navigators		Allow certified Navigators to enter the portal through a distinct login.	S			F	OneGate's baseline functions will be expanded to provide a Navigator portal role. CGI is responsible for identity management.
CAN-3	Consumer Assistance	Navigators		Allow Navigators to create an account with the Exchange.	S			F	OneGate's baseline functions will be expanded to provide a Navigator portal role. CGI is responsible for identity management.
CAN-4	Consumer Assistance	Navigators		Require Navigators to provide credentials and certification information to establish an account.	S			F	OneGate's baseline functions will be expanded to provide a Navigator application feature, where Navigators who wish to establish accounts will be required to upload credential and certification documents via the web portal. CGI is responsible for content management.
CAN-5	Consumer Assistance	Navigators		Allow consumers to see the Navigator's credentials and certification information and select a Navigator based on them. It will also flag Management if Navigator information is not up to date, or on probation for misconduct.	W			F	OneGate's baseline functions will be expanded to provide a Navigator selection feature for consumers. Interfaces to determine when Navigators are on probation are the responsibility of CGI. Nightly batch processes will determine when Navigator information is out of date and will trigger workflows, which will require creation as part of configuration, that will flag Management when this occurs. The same workflows will be triggered when the CGI interface provides information to Siebel about probation. No additional configurations or workflows are priced.

Navigator Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
CAN-7	Consumer Assistance	Navigators		Create an account for the Navigator and assign a unique ID that will be maintained in the Navigator account.	S			F	OneGate baseline account management features will be extended to include a navigator role that will all users with this role to perform navigator functions within OneGate. Additional identity management features outside of OneGate is not included in the pricing and will be handled by CGI.

Individual Eligibility Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
EL-1	Eligibility and Enrollment	General	OneGate	Provide role-based access control to allow users to perform certain operations assigned to specific roles (e.g., Exchange Staff, Individuals, Brokers, and Navigators).			S	S	Role-based access control will be included for Exchange Staff, Navigators, Individuals and Brokers. No configuration effort is priced. Support is limited to out-of-the-box Oracle and Liferay functions.
EL-6	Eligibility and Enrollment	Pre-Screening		Present a more detailed level of screening questions to be addressed at the option of the Individual.			S	S	OneGate pricing is limited to HIX programs, i.e., premium tax credits, cost-sharing reductions, CHIP, and MAGI-based Medicaid.
EL-11	Eligibility and Enrollment	Individual Application & Submit Update		Provide Individuals with the option to accept a lower Advance Premium Tax Credit.			S	S	Agreed.
EL-14	Eligibility and Enrollment	Individual Application & Submit Update		Provide individuals with the ability to acknowledge an eligibility determination.			S	S	Agreed.
EL-15	Eligibility and Enrollment	Individual Application & Submit Update		Allow Exchange Staff to submit case information for eligibility determination outside of the standard workflow.			S	S	Agreed.
EL-17	Eligibility and Enrollment	Individual Application & Submit Update		Provide the ability to generate online and written notification of the result of an Individual's eligibility determination, including the basis for denial if denied coverage.			S	S	Workflows in Siebel can be configured to trigger notifications, but no configuration effort beyond OneGate base functionality is priced. CGI is responsible for notification delivery.
EL-19	Eligibility and Enrollment	Individual Application & Submit Update		Send notifications to the Individuals, alerting them to submit required eligibility or verification information.			S	S	Workflows in Siebel can be configured to trigger notifications, but no configuration effort beyond OneGate base functionality is priced. CGI is responsible for notification delivery.
EL-22	Eligibility and Enrollment	Individual Application & Submit Update		Send notifications to the Individuals regarding the enrollment process and the status of their application.			S	S	Workflows in Siebel can be configured to trigger notifications, but no configuration effort beyond OneGate base functionality is priced. CGI is responsible for notification delivery.
EL-24	Eligibility and Enrollment	Individual Application & Submit Update		Provide for the management of the Individual's application intake process, including viewing, updating and displaying the Individual's and household's eligibility history to authorized users.			S	S	OneGate base functionality allows authorized users to view, update, and display individual and household data. Eligibility history is stored in OneGate as part of the individual and household data. Additional configurations are not priced.
EL-27	Eligibility and Enrollment	Individual Application & Submit Update		Intake applicant information, including attachments, required to determine eligibility for publically subsidized health coverage programs offered through the Exchange.			S	S	OneGate pricing is limited to out-of-the-box functionality for a consolidated online application for Exchange programs (i.e., APTC, CSR, CHIP, and MAGI-based Medicaid) and for document upload, as well as routing attachments to document management. CGI is responsible for document management.
EL-33	Eligibility and Enrollment	Individual Application & Submit Update		Allow continuance of the application process for Individuals without an SSN (e.g. newborns and undocumented Individuals).			S	S	Agreed.

Individual Eligibility Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
EL-45	Eligibility and Enrollment	Individual Eligibility Determination-Verification		Validate Individual application information for completeness of data and prompt the Individual for additional information, if applicable.			S	S	Agreed.
EL-48	Eligibility and Enrollment	Individual Eligibility Determination-Verification		Allow for a manual verification process when the federal hub verification service is not available through the business rules engine.			S	S	Agreed.
EL-49	Eligibility and Enrollment	Individual Eligibility Determination-Verification		Support a dispute process.			S	S	Exeter will store the submission of disputes and will track the dispute in Siebel. CGI will be responsible for notifications, content management, and interfaces.
EL-52	Eligibility and Enrollment	Individual Eligibility Determination-Verification		Update individual accounts with the verification results as appropriate.			S	S	Pricing includes updating individual accounts for verification status, source, method, and date.
EL-53	Eligibility and Enrollment	Individual Eligibility Determination-Verification		Provide the capability for an Individual to confirm income data from external sources.			S	S	CGI will gather income data as part of the single interface that will be accessed during the application process. Priced OneGate baseline functionality allows individuals to confirm income data gathered from external sources when the information from the sources has been provided in a structured format to OneGate.
EL-55	Eligibility and Enrollment	Individual Eligibility Determination-Verification		Provide the ability for Individuals to submit images of documents required for eligibility verification.			S	S	Exeter will provide OneGate portal functionality to allow users to upload documents online. CGI will be responsible for content management functions.
EL-58	Eligibility and Enrollment	Individual Eligibility Determination-Verification		Provide the capability to allow designated users to confirm, notate and mark active/non-active status of verification documents and verification results.			S	S	Agreed.
EL-67	Eligibility and Enrollment	Change Management		Provide consumers the ability to view the new determination of eligibility after the change in circumstances.			S	S	Agreed.

Individual Enrollment Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
EN-1	Eligibility and Enrollment	Plan Selection		Prepare an enrollment questionnaire to gather individual preferences and help refine choices of plan to be displayed.			S	S	Agreed
EN-2	Eligibility and Enrollment	Plan Selection		Store enrollment questionnaire responses and display plan choices based on questionnaire / filtering criteria.			S	S	Agreed
EN-3	Eligibility and Enrollment	Plan Selection		Based on issuer and plan information gathered, display plan cost and availability.			S	S	Agreed
EN-6	Eligibility and Enrollment	Plan Selection		If applicable, display an adjusted plan cost based on reduced cost sharing or tax credit advance eligibility.			S	S	Agreed
EN-7	Eligibility and Enrollment	Plan Selection		Provide an individual the capability to apply the Tax Credit Advance (if eligible) to his / her monthly premium payment or decline the advance, allowing individuals the ability to alternatively claim tax credits at time of annual income tax filing.			S	S	Agreed
EN-9	Eligibility and Enrollment	Plan Selection		Generate on-screen notification to individuals who select at Tax Credit Advance of the possibility of tax penalties / liabilities at time of tax filing should their annual income increase.			S	S	Agreed
EN-10	Eligibility and Enrollment	Plan Selection		Provide capability to display a detailed comparison of available health plans based on individual preferences.			S	S	Individual preferences and detailed comparison are limited to OneGate out-of-the-box functionality. No additional configuration effort is priced.
EN-11	Eligibility and Enrollment	Plan Selection		Provide capability for individuals to adjust individual preferences and update display / comparison of available qualified health plans. This capability includes the ability to further refine or constrain filtering criteria to either display a greater or lesser number of plan choices.			S	S	Individual preferences and detailed comparison are limited to OneGate out-of-the-box functionality. No additional configuration effort is priced.
EN-13	Eligibility and Enrollment	Plan Selection		Provide capability for an individual to select a QHP and initiate the enrollment process.			S	S	Agreed
EN-16	Eligibility and Enrollment	Plan Selection		Update an individuals account to reflect plan selection and the effective plan-year.			S	S	OneGate provides the capability with the updated plan and effective plan-year with the out-of-the-box information. No additional fields are included in pricing.
EN-20	Eligibility and Enrollment	Enrollment		Record and store current plan enrollment information for all individuals registered on the Exchange.			S	S	OneGate provides the mechanism to store current plan enrollment information. OneGate out-of-the-box fields will be used to store this information such as plan name, plan effective date, enrollees. Additional fields are not captured in pricing.

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-5	SHOP	Plan Selection/ Employer Application		Generate a request to initiate the employer selection of qualified health plan during the application process.			S	S	Agreed
SH-7	SHOP	Plan Selection		Based on carrier and plan information gathered, display plan cost and availability based on initial questionnaire completed by the employer.			S	S	Agreed
SH-10	SHOP	Plan Selection		Provide capability to display a detailed comparison of available health plans based on employer preferences, including product categories.			S	S	Agreed
SH-12	SHOP	Plan Selection		Provide capability for employers to adjust employer preferences and update display / comparison of available qualified health plans. This capability includes the ability to further refine or constrain filtering criteria to either display a greater or lesser number of plan choices, and the ability to view all available plans based on a specified tier.			S	S	Agreed
SH-14	SHOP	Plan Selection		Provide functionality to have a small business tax calculator available to small employers.			S	S	OneGate pricing only includes the out-of-the-box small business tax calculator.
SH-16	SHOP	Plan Selection		If applicable, display an adjusted plan final cost based on small business tax credit eligibility, enumerating the costs prior to the small business tax credit, the projected savings for the employer from the small business tax credit and the final costs to the employer expected with the small business tax credit.			S	S	Agreed
SH-20	SHOP	Employer Application		Allow verified individuals to complete employer applications on behalf of the employer (i.e. an administration or finance department/personnel, etc.)			S	S	Agreed
SH-22	SHOP	Employer Application		During the Application Process, prompt the Employer to enter the exact business name associated with the EIN.			S	S	Agreed
SH-24	SHOP	Employer Application		Validate field-level information for correct data format and completeness			S	S	Agreed
SH-27	SHOP	Employer/E employee Application		Within the employer and employee application, the Exchange shall validate field-level information for format and completeness			S	S	Agreed
SH-28	SHOP	Employer Application		Provide capability to utilize / create a single client identifier for the Exchange and use that identifier to locate the employer at the point of application / account creation / renewals, etc., as applicable.			S	S	Agreed

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-35	SHOP	Employer/ Employee Application		During the application process, user accounts shall be created that include the following: - User unique identifier - User demographic information - Application status - Participation status - Existing program eligibility (Small Business Tax Credit (For Profit or Tax Exempt), SHOP Eligibility)			S	S	Agreed
SH-36	SHOP	Employer/ Employee Application		Support the creation of a user account for both employers and employees that defines a user-defined, user name and password.			S	S	Agreed
SH-37	SHOP	Plan Selection		Update an employer's account to reflect plan selection and the effective projected plan-year.			S	S	Agreed
SH-43	SHOP	Verify Employer Data on Eligibility Application		Provide capability to electronically store documents submitted for verification of employer size, business address, coverage, and number of full-time employees.			S	S	Agreed
SH-58	SHOP	Determine Employer Eligibility		Generate a request to determine whether an employer meets size, location and employee coverage requirements to utilize the SHOP Exchange			S	S	Agreed
SH-59	SHOP	Determine Employer Eligibility		Conduct an eligibility determination as to whether an employer meets size, location and employee coverage requirements to utilize the SHOP Exchange			S	S	Agreed
SH-60	SHOP	Determine Employer Eligibility		Based on size, location and employee coverage, determine whether an employer is eligible to select and participate in a QHP through the SHOP Exchange.			S	S	Agreed
SH-61	SHOP	Determine Employer Eligibility		Generate written and on-screen notification of the result of an employer's eligibility determination			S	S	Agreed
SH-65	SHOP	Employer Contribution		Provide the capability to determine participation rates of an employer's employees. Provide the capability to share this information with issuers.			S	S	Agreed
SH-67	SHOP	Employer Contribution		Following the enrollment of an employer's employees selecting plan(s) for themselves and any dependents, the employer shall have the capability to view and confirm the costs imparted upon the employer.			S	S	Agreed
SH-111	SHOP	Appeal SHOP Eligibility Decision		Provide the capability to capture information and details of a Employer complaint.			S	S	Agreed

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-112	SHOP	Appeal SHOP Eligibility Decision		Allow employers to review record of participation in the SHOP Exchange.			S	S	Agreed
SH-115	SHOP	Appeal SHOP Eligibility Decision		Provide the capability to differentiate between appeals and complaints; default requests to complaints when received by employers unless specifically indicated as an appeal.			S	S	Agreed
SH-118	SHOP	Appeal SHOP Eligibility Decision		Provide capability for an employer to view key employer account information (includes employer details as well as key eligibility factors used to determine eligibility).			S	S	Agreed
SH-123	SHOP	Renew / Redetermine Employer Participation		Provide capability for employers to submit changes to employee roster (add / remove employees) in between redeterminations / renewals.			S	S	Agreed
SH-127	SHOP	Change Reporting/Periodic Reporting		Provide capability for employers to check the status of employee QHP enrollment through the web portal.			S	S	Interfaces to issuers not priced.
SH-129	SHOP	Change Reporting/Periodic Reporting		Provide the capability to recalculate the employer's total cost based on reported changes to the employee roster.			S	S	Agreed
SH-130	SHOP	Update Employee Application		Provide the capability for employers to submit changes to the employer contact information.			S	S	OneGate pricing includes the ability to change contact information through web forms.
SH-143	SHOP	Prepare Employee Application		To confirm SHOP eligibility, first request that employee log-in with user name and password.			S	S	Agreed
SH-146	SHOP	Verify Employee Application Data		Provide capability to verify if employee exists on employee roster in order to verify an employee's coverage through an employer.			S	S	Agreed
SH-147	SHOP	Verify Employee Application Data		Display the result of the verification process.			S	S	Support is limited to OneGate out-of-the-box functionality
SH-151	SHOP	Prepare Employee Application		Present an initial set of screening questions in the initial employee application process to identify the following applicant characteristics: - Employee name - Employee Address - Social security number - Other Employee Contact Information - Employer Name - Worksite Address			S	S	Agreed
SH-153	SHOP	Prepare Employee Application		Provide additional language support in accordance with Exchange language support guidelines.			S	S	OneGate pricing includes the framework for supporting multiple languages. Translation and configuration of languages are not included in pricing.

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-154	SHOP	Prepare Employee Application		Provide field level help for each application data element that includes description and required data format.			S	S	OneGate pricing includes the framework and default messages for field level help. State specific edits to messages are not included in pricing.
SH-155	SHOP	Prepare Employee Application		Provide capability for employees to access in-depth online help during the application process.			S	S	Support is limited to OneGate out-of-the-box functionality
SH-157	SHOP	Prepare Employee Application		During the Application Process, prompt the Employee to enter the exact name associated with the SSN.			S	S	Agreed
SH-160	SHOP	Prepare Employee Application		Accept paper documents for SHOP, including employee applications.			S	S	OneGate pricing includes a web form based application. OneGate pricing does not include keyed entry of written forms.
SH-161	SHOP	Prepare Employee Application		Validate field-level information for correct data format and completeness.			S	S	Field level validation is included for fields provided out of the box. Additional validation for additional fields is not priced.
SH-164	SHOP	Prepare Employee Application		For employees who do not have a SSN, allow the application process to proceed.			S	S	
SH-165	SHOP	Prepare Employee Application		Within the QHP application, the Exchange shall validate field-level information for format and completeness.			S	S	
SH-166	SHOP	Prepare Employee Application		During the application process, user accounts shall be created that include the following, and will be linked to the following information in the Employee Roster: - Employee Names and Employee SSN - Employer EIN			S	S	Agreed
SH-167	SHOP	Prepare Employee Application		Save application information to user account after account creation.			S	S	Agreed
SH-170	SHOP	Prepare Employee Application		During the application process, user accounts shall allow for the inclusion of the following: - User unique identifier - User demographic information - Application status - Enrollment status			S	S	Support is limited to OneGate out-of-the-box functionality.
SH-172	SHOP	Employee Selects QHP		Produce a real-time electronic request to the employee to determine employee preferences for qualified health plan(s).			S	S	Support is limited to OneGate out-of-the-box functionality. OneGate out-of-the-box provides employee preferences for provider and facilities as well as plan preference options (plan type, provider included, etc.). Additional fields are out of scope for this requirement.
SH-175	SHOP	Plan Selection		Based on carrier and plan information gathered, display plan cost and availability.			S	S	Agreed
SH-176	SHOP	Employee Selects QHP		As a default, only display health plans that have been selected by the employer, are certified by the Exchange, are open to additional enrollment, and are available in the employee's geographic area.			S	S	OneGate pricing includes display filtering based on the data held within OneGate. Integration with external systems is not included in pricing.

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-177	SHOP	Employee Selects QHP		Display projected actual plan cost (net premium) based on employer groups and applicable rating factors (consumers covered, age, geography, quality ratings, etc.) to the employee during the application process.			S	S	OneGate pricing includes rating factors of consumers covered, age, geography, quality ratings. Additional rating factors are not included in pricing.
SH-178	SHOP	Employee Selects QHP		Provide capability to display a detailed comparison of available employer-selected health plans based on employee preferences			S	S	Support is limited to OneGate out-of-the-box functionality
SH-179	SHOP	Employee Selects QHP		Store enrollment questionnaire responses and display plan choices based on application / filtering criteria.			S	S	Support is limited to OneGate out-of-the-box functionality
SH-180	SHOP	Employee Selects QHP		Provide capability to view and select plan(s) for employee dependents, if covered by employer			S	S	OneGate pricing includes the ability to select a single plan for the employee and dependents.
SH-182	SHOP	Employee Selects QHP		Provide capability for employees to adjust employee preferences and update display / comparison of available qualified health plans. This capability includes the ability to further refine or constrain filtering criteria to either display a greater or lesser number of plan choices, and the ability to view all available plans based on a specified tier based on employer selection.			S	S	Agreed
SH-184	SHOP	Employee Selects QHP		Allow employees to have a choice of Exchange's competing plans, based on employer selections and (given the employer contribution) see what their contribution requirement would be for each choice			S	S	Agreed
SH-185	SHOP	Employee Selects QHP		Provide capability for an employee to select QHP(s) and initiate the enrollment process.			S	S	Interface to issuers is not included in pricing.
SH-186	SHOP	Employee Selects QHP		Update an employee's account to reflect plan selection and the effective projected plan-year.			S	S	Agreed
SH-189	SHOP	Employee Selects QHP		After acknowledgement of the receipt of the plan selection, display the calculation of the final cost (net premium) to employee			S	S	CGI to provide data in an interface to OneGate.
SH-192	SHOP	Employee Selects QHP		Provide the capability to verify and acknowledge the receipt of the plan selection.			S	S	CGI to provide an interface.
SH-198	SHOP	Update Employee Eligibility Application		Allow employees to enroll in QHP during a qualifying event.			S	S	Agreed
SH-215	SHOP	Renew Employee QHP Participation		Track annual renewal date for employers.			S	S	Agreed.

SHOP Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
SH-218	SHOP	Update Employee Application / Renew Employee QHP Participation		Provide capability for employees to look up or reset login credentials.			S	S	CGI will be responsible for security and identity management. Exeter will provide the ability for users to look up or reset their login credentials through the web portal.
SH-235	Contact Info	Change Reporting		Provide the capability for employees to submit changes to the employee contact information.			S	S	Agreed.

Technical Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
TC-1	General	Non-functional		Be designed to be scalable and flexible in order to accommodate and be easily adaptable to changes required by state and/or federal statute, mandate, decision, or policy.	S			S	OneGate base price does not include changes that are required by state and/or federal statute, mandate, decision, or policy.
TC-2	General	Non-functional		Be designed, built and deployed with enterprise architecture best practices including substantial reliance on highly configurable SOA components.	S			S	Agreed
TC-3	General	Non-functional		Provide a business rules engine as specified by 42 CFR Part 433 and Section 1561 guidance to support state, federal rules, Exchange policy and be easily configurable by a trained business analyst.	S			S	Oracle OPA
TC-4	General	Non-functional		Provide a workflow engine to support the routing of work items, work queues, etc.	S			S	Agreed
TC-24	General	Solution		The solution shall provide the ability to integrate with state systems and databases to allow interoperability as appropriate with health informatino exchanges and agencies	S			S	OneGate provides the ability to integrate with state systems and databases. However, the effort involved to build this integration is not included in OneGate pricing.
TC-25	General	Solution		The solution shall support multiple industry standard operation systems.	S			S	Required OneGate applications run on multiple standard operating systems. Some recommended applications require specific operating systems to run.
TC-27	General	Solution		The solution shall comply with Centers for Medicaid and Medicare Services (CMS) requirements to establish a framework of enabling technologies and processes that support improved administration of the Medicaid program, in accordance with the MITA 3.0 framework.	S			S	Agreed
TC-28	General	Solution		The solution shall offer a modular, flexible approach to systems development using MITA 3.0 guidelines and SOA component-oriented design principles.	S			S	Agreed
TC-29	General	Solution		The solution shall allow for the alignment with and increasing advancement of Medicaid Information Technology Architecture (MITA) maturity for business, architecture, and data in all systems development efforts.	S			S	Agreed
TC-52	Identity Management and Authentication	Solution		The solution will be able to establish family or household linkages between individual accounts.	O			S	OneGate provides in household linkages within Siebel. Additional federation of data to MDM or IdM is not included in pricing.

Technical Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
TC-56	Identity Management and Authentication	Solution		The solution shall support user account authentication procedures with configurable parameters (time, cipher strength, logon attempts, etc.).	S			S	Support is limited to out-of-the-box Siebel and Liferay functions
TC-68	Interfaces	Solution		Provide flexibility to interface using industry standard protocols (e.g. XML, 5010, etc.)	S			S	OneGate will communicate via SOAP based web services.
TC-71	Maintenance and Operations	Contractor		Conduct testing on any changes, upgrades to hardware or patches applied to ensure backward compatibility of its solution and integration within and outside the Exchange	S			S	OneGate pricing includes testing of base product updates. Support for Code modifications to the base product is not included in pricing.
TC-72	Maintenance and Operations	Contractor		The contractor shall work with the Exchange team in advance of any release or changes to allow the Exchange team to adequately test, verify and train to support the smooth operation of the Exchange and its solutions	S			S	Exeter can provide support to CGI for items related to OneGate.
TC-81	Security	Solution		The solution shall manage user profiles including defining access to data types and security credentials.	S			S	Support is limited to out-of-the-box Siebel and Liferay functions
TC-84	Security	Solution		The solution shall restrict access to user, provider, or organizational data to authorized users.	S			S	Agreed
TC-89	Security	Solution		The solution shall provide the ability for web service providers and service consumers to interact via the solution.	S			S	Agreed
TC-90	Security	Solution		The solution shall provide the ability to implement security for transport and messaging via web services.	S			S	Agreed

Web Portal UX Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
WP-8	Web Portal	General		Provide robust search capability for information contained on the portal without requiring a login.	S			S	Limited to out-of-the-box features of OneGate and Liferay.
WP-11	Web Portal	General		Provide users (including authorized representatives) the option to complete a pre-screening of potential eligibility for state health and human services programs via a configurable module.	S			S	Support is limited to OneGate out-of-the-box functionality. Integration with other systems is not included in pricing.
WP-12	Web Portal	General		Provide an expedited expert level pre-screening function to Navigators, brokers, call center staff, and caseworkers.	S			S	Support is limited to OneGate out-of-the-box functionality. Based on OPA, only the questions that are needed for a determination are asked. Integration with other systems is not included in pricing.
WP-13	Web Portal	General		Accept input from Navigators, caseworkers, Call Center staff and customers necessary for pre-screening.	S			S	Agreed
WP-14	Web Portal	General		Display the results of the pre-screening assessment of eligibility to Navigators, caseworkers, call center staff, and customers.	S			S	Support is limited to OneGate out-of-the-box functionality. Integration with other systems is not included in pricing.
WP-17	Web Portal	Identity		Provide unverified exchange web portal login/accounts - Enable user to save information and return to the site without giving 'official' identity verification data (e.g. SSN, name, etc)	S			S	Agreed
WP-19	Web Portal	Enrollment		Enable individual users to self declare income information for use in plan comparison. Persist this information for later sessions if the user has created an Exchange Web Portal account	S			S	Agreed
WP-24	Web Portal	Enrollment		Provide a plan selection recommendation engine or wizard that can filter initial results based upon additional user preference and input.	S			S	OneGate plan selection provides filters on Monthly Cost/Premium/Max OOP Expense, Carrier, Plan Type, Preferred Provider/Facility, and Quality Rating. Other factors are not included in pricing.

Web Portal UX Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
WP-25	Web Portal	Enrollment		Provide capability for users to download additional supporting plan documentation as provided by the Issuer	S			S	Agreed
WP-26	Web Portal	Enrollment		Provide calculator functionality for individuals to estimate their premiums including potential premium tax credit subsidies and cost sharing reductions	S			S	Agreed
WP-27	Web Portal	Eligibility		Provide a dynamic application entry engine to collect information required to determine eligibility for health and human service programs. The system shall tailor the application process based upon user response to	S			S	Agreed
WP-28	Web Portal	Eligibility		Provide a progress bar to show users where they are in the application process	s			S	Agreed
WP-29	Web Portal	Eligibility		Enable individual users to submit information for eligibility, for example: - SSN - Address - Date of birth - Name - Household income	S			S	Agreed
WP-33	Web Portal	Enrollment		Enable individual users to enroll in a plan which they have selected	S			S	Interfaces to issuers is not included in pricing.
WP-38	Web Portal	SHOP		Enable Employer to set up SHOP plan selection(s)	S			S	Agreed
WP-39	Web Portal	SHOP		Enable Employees to compare available SHOP plans	S			S	Agreed

Web Portal UX Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
WP-42	Mobile Web Portal	Enrollment, Financial Management		Enable users of all plans to view their enrollment and payment status, plan details, and notification history	S			S	Users of the portal will be able to access OneGate through mobile browsers. However, responsive layouts for mobile web browsers is not included in pricing.
WP-43	Mobile Web Portal	Eligibility		Enable users to upload eligibility documents using their camera equipped mobile device	S			S	Only users using mobile browsers that support HTML file upload will be supported. Additional methods of file upload are not included in pricing.
WP-44	Support Intranet	Security		Provide role based access to Exchange Portal content	S			S	Agreed
WP-45	Web Portal	Administration		Provide role based portal administration function	S			S	Support is limited to Liferay out-of-the-box functionality.
WP-52	Web Portal	User Customization		Allow SHOP owners access to the Exchange through a custom portal and add or manage health plan options for their employees.	S			S	Agreed

Consumer Assistance - General Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
CAG-1	Consumer Assistance	Complaints / Appeals		The system must support the complaints/appeals process.	W			S	Exeter will provide OneGate baseline functionality for complaints and appeals. No other configuration is priced for complaints and appeals other than that specifically priced for other requirements.
CAG-2	Consumer Assistance	Complaints / Appeals		The system shall allow customer support representative to log customer complaints and appeals.	S			S	Agreed.
CAG-3	Consumer Assistance	Complaints / Appeals		The system shall allow staff to attach relevant documents to complaint or appeal.	S			S	Agreed.
CAG-6	Consumer Assistance	Complaints / Appeals		The system will track time frames and deadlines for responding to complaints and appeals.	W			S	Priced support is limited to Siebel's built-in Activity functions. No configuration effort is priced.
CAG-8	Consumer Assistance	Complaints / Appeals		The system shall track complaint or appeal throughout process so that specified Complaints/Appeals staff can view status, see where it is in process and report back to consumer at any time.	W			S	Priced support is limited to a OneGate/Siebel out-of-the-box service request status field. No configuration effort is priced.

Consumer Assistance - General Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
CAG-10	Consumer Assistance	Complaints / Appeals		The system shall allow enrollment, coverage, and tax credits to be changed as a result of a complaint/appeal decision.	S			S	Pricing is limited to manual changes. Situation-specific workflows are not priced.
CAG-15	Consumer Assistance	Complaints / Appeals		The system shall have the ability to be used by multiple agencies for appeals/complaints, including at a minimum the Exchange, Medicaid, and the Department of Human Services.	O			S	One Gate Pricing is limited to the ability for Hawaii to create user accounts in Siebel. The scope of the Oracle Licenses will need to cover these agencies.
CAG-16	Consumer Assistance	Complaints / Appeals		The system shall have the ability to assign a priority, or level to the appeal/complaint.	S			S	Support is limited to a OneGate/Siebel out-of-the-box priority field.

Consumer Assistance - General Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
CAG-20	Consumer Assistance	Outreach / Education		The system shall ask and store consumers' preferred method of communication.	S			S	Agreed.
CAG-23	Consumer Assistance	Outreach / Education		The system shall support multi-lingual communication in at least the languages specified by the Exchange, and must be able to support additional language (including languages that use non-Western scripts).	W			S	Multi-lingual capabilities are supported in the customer portal, but configuration of text for each language is not priced. CGI is responsible for translation of notices and correspondence.
CAG-32	Consumer Assistance	Workflow		The system shall improve collaboration and workflow driven processes among staff by integrating CRM with workflow, document management and document imaging technology	W			S	Out-of-the-box, Siebel CRM is integrated with workflow. CGI is responsible for document management and document imaging, and will provide URLs of documents in the content management system to Exeter so those URLs can be stored in Siebel. No configuration effort related to documents is priced other than that specifically priced for other requirements.

Consumer Assistance - General Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
CAG-40	Consumer Assistance	Contact Tracking		The system shall assign a unique number to identify each instance of a contact.	S			S	Pricing is limited to Siebel out-of-the-box activity functions, which include identifiers for each activity (including instances of contact). Situation-specific workflows and configuration are not priced.
CAG-41	Consumer Assistance	Contact Tracking		The system shall accommodate the receipt and tracking of requests or inquiries via telephone, letter, fax, walk in, email, web, or any other channel used by the consumers.	S			S	Pricing is limited to Siebel and OneGate out-of-the-box activity tracking functions. No configuration or situation-specific workflows are priced.

Consumer Assistance - Case Management Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
CACM-1	Consumer Assistance	Case Management		Provide the ability to add multiple dated narratives to a case and track and maintain changes over time via the narratives.	W			S	Pricing only includes the out-of-the-box Siebel Notes features that can be used to capture narratives.
CACM-2	Consumer Assistance	Case Management		Maintain a history of notices that have been sent to a individual, employer, Navigator, Broker.	W			S	Pricing includes the tracking of notices that have been triggered to send out using Siebel workflows. The history of the actual notices that are sent out is tracked in CGI's notification system and is not included in OneGate pricing.
CACM-3	Consumer Assistance	Case Management		Maintain and a history of a individual's eligibility status over time.	S			S	Agreed
CACM-4	Consumer Assistance	Case Management		Allow Caseworkers and Customer Support staff to modify the eligibility/enrollment record to indicate beginning and ending dates of coverage and specify the program or product for which the individual is eligible.	S			S	Agreed
CACM-5	Consumer Assistance	Case Management		Allow Caseworkers and Customer Support staff to deactivate a particular customer's case.	S			S	Agreed
CACM-6	Consumer Assistance	Case Management		Allow Caseworkers and Customer Support staff shall to reactivate a client's case based on new information, new application or redetermination.	S			S	Agreed
CACM-9	Consumer Assistance	Case Management		Allow Caseworkers and Customer Support staff to mark a case duplicate, but remain unmerged.	S			S	Agreed
CACM-10	Consumer Assistance	Case Management		Allow Caseworkers and customer support staff the ability to search for a specific individuals's information.	S			S	OneGate includes various out-of-the-box search tools which are included in the pricing. Any other searching mechanism outside these out-of-the-box tools are not included in the pricing.
CACM-11	Consumer Assistance	Case Management		Allow Caseworkers and Customer Support staff to view individual information.	S			S	Agreed
CACM-12	Consumer Assistance	Case Management		Allow Caseworkers and Customer Support Staff to add to a individual's information.	S			S	Agreed
CACM-13	Consumer Assistance	Case Management		Allow Caseworkers and Customer Support Staff to change or modify an individual's information.	S			S	Agreed

Consumer Assistance - Case Management Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
CACM-14	Consumer Assistance	Customer Application Intake Process		Allow Caseworkers and Customer Support staff to search for the individual's eligibility details.	S			S	OneGate includes various out-of-the-box search tools which are included in the pricing. Any other searching mechanism outside these out-of-the-box tools are not included in the pricing.
CACM-15	Consumer Assistance	Customer Application Intake Process		Allow Caseworkers and Customer Support Staff to view the individual's eligibility details (e.g., income sources, citizenship, immigration status, etc.).	S			S	Agreed
CACM-16	Consumer Assistance	Customer Application Intake Process		Allow Caseworkers and Customer Support staff to add new data into the individual's eligibility details (income sources, citizenship, immigration status, etc.).	S			S	Agreed
CACM-17	Consumer Assistance	Case Management--Administration		Provide a mechanism for role-based access control for any changes to the rules or parameters in the rules engine.	S			S	Agreed
CACM-20	Consumer Assistance	Case Management--System Access		Allow supervisors to enter the system through a customized portal to view and manage all the cases of the caseworkers under their jurisdiction.	S			S	All users enter the system using the out-of-the-box Siebel homepage. Links for supervisors to this out-of-the-box homepage originating from a customized portal can be provided but not included in the pricing. However, additional changes to this homepage is not included in the pricing.

Mandatory Optional Requirements Traceability Matrix

Hawaii RTM Categories									Exeter Workspace
Ref Code	Category	Sub Category	Application or Module	Requirement Description "The system shall..."	Bidder Response Narrative Section Reference	Comments/ Clarifications	Client-Facing Conditions	OneGate Pricing Conditions	Exeter Assumptions
MO-5	Consumer Assistance	CRM/Call Center Functionality		The system shall have the ability to store the caller's preferred method of communication, including need for deaf or other language interpretation.	S			S	Support is limited to OneGate out-of-the-box functionality.
MO-8	Consumer Assistance	CRM/Call Center Functionality		The system shall maintain a record of inquiry and correspondence data online, with periodic backups managed by the CRM system administrator. The call center shall be able to store record of recordings of assisted calls, in a time frame specified by the Exchange.	O			S	CGI responsibility
MO-9	Consumer Assistance	CRM/Call Center Functionality		The system shall provide functionality that is capable of integrating with other systems, such as Enrollment/Eligibility, the web portal, the security platform of the Case Management and the Exchange.	O			S	CGI responsibility
MO-24	Enrollment	Medicaid Plan Enrollment		Allow Medicaid-eligible individuals to view available plans in the plan selection module with the same level of functionality offered to individuals shopping in the commercial market	S			S	Agreed.
MO-25	Enrollment	Medicaid Plan Enrollment		Provide a mechanism to determine plan assignment, defined by the DHS, if an individual fails to select a plan within the required timeframe.	W			S	Siebel workflow and batch processing can be used to implement this requirement, but situation-specific workflows are not included in pricing.