

**From:** Oregon Health Insurance Marketplace  
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**Sent:** Thursday, July 18, 2024 1:32 PM  
**To:** [REDACTED]  
**Subject:** Oregon State-Based Marketplace Project Updates for July 2024



## Background

[Senate Bill 972 \(2023\)](#) requires the Oregon Health Authority (OHA) to transition the Marketplace from a state-based marketplace using the federal platform (SBM-FP) to a state-based marketplace (SBM) using its own technology in time for open enrollment for plan year 2027. Specifically, OHA is required to procure and administer an information technology platform or service and call center, separate from the federal platform and call center, to provide electronic access to the health insurance exchange in this state by November 1, 2026. The Oregon Health Insurance Marketplace helps people in Oregon access affordable, high-quality health insurance through enrollment in private health insurance and federal subsidies during annual open enrollment and special enrollment periods. A state-based marketplace will give us more flexibility to make open enrollment fit the unique needs and budgets of people across Oregon. Transitioning to a state-based marketplace model will allow us to incorporate more meaningful community input into process and procedure changes.

The Oregon Health Authority is also dedicated to our 2030 goal of eliminating health inequities in Oregon by 2030. Below you will find some ways this change to the Oregon Health Insurance Marketplace will better serve communities harmed by inequities in Oregon:

- Establishment of access to data and evidence to tailor outreach and be more intentional about efforts to enroll disproportionately uninsured people, including people of color and rural residents.

- Collection of data, particularly on race and ethnicity, will facilitate our understanding of enrollment disparities.
- Additional and more reliable data will allow Oregon to refine its outreach and communication strategies, both overall and in real time to reach targeted communities.

Immigrants and non-native English speakers may be more likely to enroll if additional translation and interpretation services are available to help them complete the application or to communicate effectively with navigators, agents and brokers, or the call center.

## State-Based Marketplace Transition Project Progress Update

Since the last update in April 2024, the SBM Project team has been diligently working to complete deliverables including:

- Executed contract with Bluecrane for Independent Quality Management Services (iQMS) services;
- Finalized Equity-Focused Health Impact Analysis;
- Received Stage Gate 2 endorsement by the Department of Administrative Services Enterprise Information Services; and
- Released request for proposals for SBM platform and consumer assistance center.



### Partner Engagement

Since January 2024, Insurance carriers, community partner organizations who provide application assistance, and insurance agents/brokers have been invited to participate in quarterly listening sessions. Partner engagement activities continued in April and a [report of results \(orhim.info/3wFBJZF\)](https://orhim.info/3wFBJZF) is available in the SBM Project website.

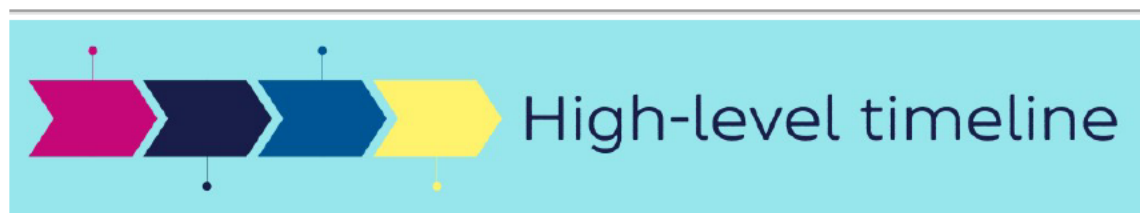
Additionally, the quarterly SBM Transition Project newsletter kicked off in [Jan. 2024 \(orhim.info/3ILIs7R\)](https://orhim.info/3ILIs7R), with a second edition distributed in [April 2024 \(orhim.info/3U9Lals\)](https://orhim.info/3U9Lals). The Marketplace encourages all interested individuals to register for the newsletter at [orhim.info/sbmupdates](https://orhim.info/sbmupdates).

The Marketplace held a hybrid Equity Tabletop Discussion with attendees from several state agencies participating. Participants included:

- Division of Financial Regulation, Department of Consumer and Business Services

- Director’s Office, Department of Consumer and Business Services
- Medicaid Policy, Oregon Department of Human Services
- Senior Health Insurance Benefits Assistance (SHIBA), Aging and Disability Services, Oregon Department of Human Services
- Office of Equity and Inclusion, Oregon Health Authority
- Government Relations, Oregon Health Authority
- Medicaid Policy, Oregon Health Authority
- Tribal Affairs, Oregon Health Authority
- Oregon Health Insurance Marketplace, Oregon Health Authority

This robust work session, along with information gathered from Marketplace staff and April partner listening sessions helped project staff finalize the first iteration of the [Equity-Focused Health Impact Assessment \(orhim.info/3VOPzkN\)](http://orhim.info/3VOPzkN). This is a dynamic document that will be updated throughout the duration of the project.



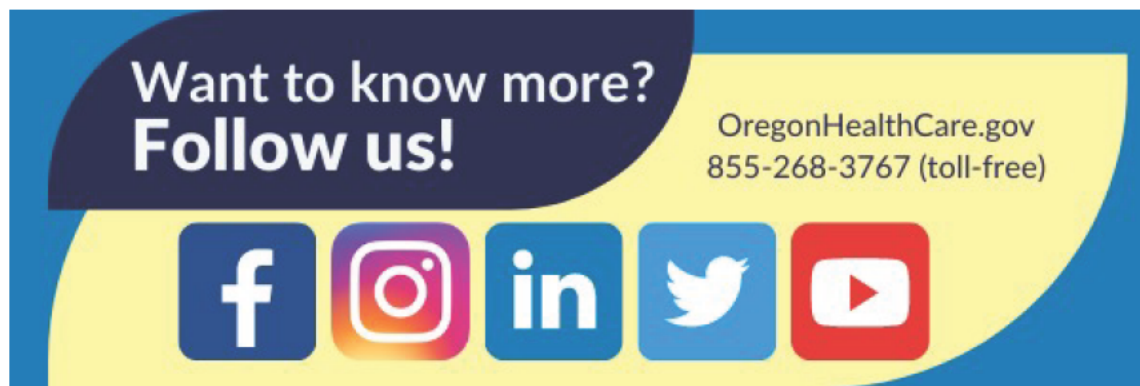
The table below contains a comprehensive list of deliverables and milestones, along with their corresponding start dates, due dates, and current status.

Deliverable/Milestone	Start Date	End Date	Current Status
<b>Project initiation</b> Business case, charter, planning initialization	7/6/2023	8/29/2023	Complete
<b>Stage gate 1 endorsement, Initiation complete</b> Approved conditionally, contingent on independent quality management services (IQMS) vendor acquisition	7/6/2023	9/20/2023	Complete
<b>Stage gate 2 endorsement, Resource &amp; solution analysis and planning complete</b> Resource and solution analysis and planning, includes cloud workbook, requirements collection, Quality Assurance vendor acquisition, start of RFP planning, 50% accuracy scope, schedule, and budget	9/7/2023	4/11/2024	Complete

<b>Solution vendor procurement</b> RFP planning and process through contract execution	Oct. 2023	April 2025	In Progress
<b>Stage gate 3 endorsement, Implementation planning complete</b> Includes detailed budget and schedule, baseline project plan based on executed contract, approved LFO readiness assessment and execution funds	March 2025	April 2025	Future Task
<b>Go/No-go for November 2026 go-live</b> Assessment to determine system readiness for target date. Marks point of no return for transition completion by Nov. 2026	Feb. 2026	Nov. 2026	Future Task
<b>Go-live for new system</b> Executed transition	Nov. 2026	Nov. 2026	Future Task
<b>Stage Gate 4, Execution complete and move to operations</b> Product/system acceptance, maintenance and operations steady-state begins	Dec. 2026	March 2027	Future Task



- Visit [info/SBMtransition](https://info/SBMtransition)
- Email [sbmproject@odhsoha.oregon.gov](mailto:sbmproject@odhsoha.oregon.gov)



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