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.

State-Based Marketplace Transition
Project Progress Update

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

- Selection of Independent Quality Management Services (iQMS)
- Market Analysis
- Requirements and Gap Analysis

On April 11, 2024, the project was approved by the Department of Administrative Services Enterprise Information Services to pass through Stage Gate 2.

Market Analysis

The project team finalized the "Vendor Introduction" document and sent it to 7 solution vendors, inviting them to participate in the informational interviews for the market analysis. These informational interviews took place the first and second weeks of January.

The research has confirmed that the overall scope of the Marketplace's needs and requirements can be met by the features of the software as a service (SaaS) solutions currently in use by other states, including the successful transitions and migrations that have already occurred in Nevada, New Mexico, New Jersey, Pennsylvania, Maine, and Kentucky. These solutions are offered by vendors as fully hosted and maintained repeatable SaaS solutions that are configured for a state's individual needs. The baseline requirements can be summarized as, "replicate all current functionality that HealthCare.gov performs for Marketplace plan application, eligibility, and enrollment", and vendors have confirmed meeting that criteria.

Anything the Marketplace has so far discussed as an "improvement or innovation" to the current HealthCare.gov business model has been discussed by the vendors as a standard "feature" of their systems – existing functionality can be configured for a wide range of business rules that may vary between states, but the business rules are already in place and well understood by vendors.

Partner Engagement

Partner engagement activities took off in Jan. 2024 with a partner survey and listening sessions to gather feedback on requirements. A report of results (orhim.info/49aZFkC) has been posted to the SBM Transition Project website.

Insurance carriers, community partner organizations who provide application assistance, and insurance agents/brokers have been invited to participate in quarterly listening sessions. These sessions are scheduled to take place in Jan.,

April, July, and Oct. through Jan. 2027 and will be used as a place to gather feedback throughout the project lifecycle.

Additionally, the quarterly SBM Transition Project newsletter kicked off in Jan. 2024 (orhim.info/3ILls7R). The Marketplace is encouraging all interested individuals to register for the newsletter at orhim.info/sbmupdates.

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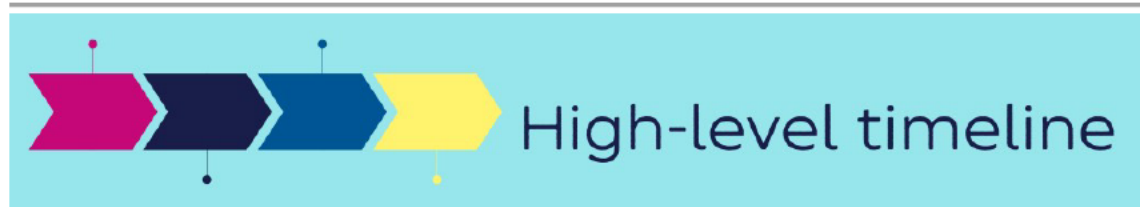
The table below contains a comprehensive list of deliverables and milestones, along with their corresponding start dates, due dates, and current status.

Deliverable/Milestone	Start Date	End Date	Current Status
Project initiation Business case, charter, planning initialization	7/6/2023	8/29/2023	Complete
Stage gate 1 endorsement, Initiation complete Approved conditionally, contingent on independent quality management services (IQMS) vendor acquisition	7/6/2023	9/20/2023	Complete
Stage gate 2 endorsement, Resource & solution analysis and planning complete 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
RFP completion RFP planning and process through contract execution	Oct. 2023	April 2025	In Progress
Stage gate 3 endorsement, Implementation planning complete	March 2025	April 2025	Future Task

Includes detailed budget and schedule, baseline project plan based on executed contract, approved LFO readiness assessment and execution funds			
Go/No-go for November 2026 go-live 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
Go-live for new system Executed transition	Nov. 2026	Nov. 2026	Future Task
Stage Gate 4, Execution complete and move to operations Product/system acceptance, maintenance and operations steady-state begins	Dec. 2026	March 2027	Future Task

For more information

- Visit orhim.info/SBMtransition
- Email marketplace.sbmproject@odhsoha.oregon.gov

Want to know more? Follow us!

OregonHealthCare.gov
855-268-3767 (toll-free)

Everyone has a right to know about and use Oregon Health Authority programs and services. Some examples of the free help we can provide include sign language and spoken language interpreters, written materials in other languages, Braille, large print, audio, and other formats. If you need help or have questions, please [contact us](#).