

**From:** Oregon Health Insurance Marketplace  
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**Sent:** Friday, January 19, 2024 4:30 PM  
**To:** [REDACTED]  
**Subject:** Oregon State-Based Marketplace Project Updates for Jan. 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:



Allows 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.



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## Project Progress Update

The SBM Transition Project team has been diligently working to complete deliverables and secure Enterprise Information Services (EIS) approval of stage gate two requirements, including:

- Change Management Plan
- Communications Management Plan
- Communications Matrix
- Cost Management Plan
- Organizational Management Plan
- Procurement Management Plan
- Project Management Plan
- Quality Management Plan
- Requirements Management Plan
- Resource Management Plan
- Schedule Management Plan
- Stakeholder Management Plan



### Project Requirements

The team held multiple requirements workshop sessions, which helped to shape minimum viable product (MVP) requirements. The

MVP will encompass the same functionality features as the existing HealthCare.gov system, which includes:

- Implementing a marketplace eligibility and enrollment that interfaces with the ONE system and offers various shopping tools (e.g., provider directory) to replace HealthCare.gov.
- Collecting demographic data.
- Migrating Oregon data from HealthCare.gov to the new system.
- Establishing an Oregon consumer assistance center.
- Providing Oregon-specific reports (standard and on-demand) to enhance transparency and accountability for partners and consumers.
- Developing new business processes, such as call center scripts, appeals, records reconciliation, change requests, and report generation.
- Supporting special enrollment periods and Oregon-specific programs.

Future enhancements may include support for the Basic Health Program and additional reports.



## Partner Engagement

January 2024 brings opportunities for Marketplace partners to provide feedback and input on two primary points during listening sessions and an online survey:

- How has your experience been with HealthCare.gov?
- What would you like to see be improved on through the new state-based marketplace?

Insurance carriers, community partner organizations who provide application assistance, and insurance agents/brokers are invited to participate in these listening sessions and to complete the short survey before the end of January. To participate, please email [amy.coven@oha.oregon.gov](mailto:amy.coven@oha.oregon.gov).

## 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 |
|---|------------|-----------|----------------|
| <b>Project initiation</b>                       |            |           |                |
| Business case, charter, planning initialization | 7/6/2023   | 8/29/2023 | Complete       |



|   |            |            |             |
|---|------------|------------|-------------|
| <b>Stage gate 1 endorsement, Initiation complete</b><br>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><br>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   | May 2024   | In Progress |
| <b>RFP completion</b><br>RFP planning and process through contract execution  | Oct. 2023  | March 2025 | In Progress |
| <b>Stage gate 3 endorsement, Implementation planning complete</b><br>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 Assessment</b> 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><br>Executed transition  | Nov. 2026  | Nov. 2026  | Future Task |
| <b>Stage Gate 4, Execution complete and move to operations</b><br>Product/system acceptance, maintenance and operations steady-state begins   | Dec. 2026  | March 2027 | Future Task |

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## For more information

- Visit [orhim.info/SBMtransition](http://orhim.info/SBMtransition)

- Email [marketplace.sbmproject@odhsoha.oregon.gov](mailto:marketplace.sbmproject@odhsoha.oregon.gov)



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