Oregon
Tina Kotek, Governor

Enterprise Information Services

Project Portfolio Performance

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MEMORANDUM

To: Terrence Woods, State Chief Information Officer (State CIO)

From: Alicia Miller, Oversight Analyst

Date: August 4, 2025

Subject: Oregon Health Authority (OHA) State Based Marketplace (SBM) Project, Level 3 Stage Gate 3 Conditional Approval

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BACKGROUND

In 2010, President Obama signed the Affordable Care Act (ACA) into law. Under the ACA, if a state does not administer its own health insurance exchange (Marketplace), the federal government will do so through its front-end enrollment technology, HealthCare.gov. States like Oregon that rely on the technology and call center provided by the federal Centers for Medicare and Medicaid Services (CMS) are known as state-based marketplaces on the Federal Platform (SBM-FPs). Oregonians enroll in Qualified Health Plans (QHP) through HealthCare.gov and are provided customer service through the CMS Consumer Assistance Center (CAC) staffed by federal employees who help the public with eligibility, plan enrollment and related support over the phone.

In 2018, Oregon began analyses of rising costs (in 2020 Oregonians paid $22.4 Million in user fees) and possible alternatives to Healthcare.gov. Becoming a SBM requires that a state acquire and implement its own SBM technology and accompanying CAC to provide support for enrollees. After initial analyses showed a likely improvement to Marketplace effectiveness, benefit to the services received by Oregonians and savings, the Oregon Health Insurance Marketplace Advisory Committee (HIMAC) ultimately recommended that Oregon procure a state-based enrollment technology.

The project has worked with the Department of Administrative Services, State Procurement Services (DAS SPS) and the Department of Justice (DOJ) to complete a competitive solicitation and has since finalized negotiations with its successful Proposer, GetInsured. The Project intends to implement GetInsured's SaaS solution as Oregon's health insurance marketplace for plan eligibility, shopping of and enrolling in qualifying health insurance plans. Additionally, the project intends to implement GetInsured's accompanying CAC platform to provide over-the-phone support for enrollees.

DISCUSSION

The SBM Project is subject to Level 3 oversight and has submitted the required artifacts for Stage 3 as indicated in the Required Artifacts Form. These artifacts include:

- Monthly Project Status Reports
- Detailed Project Risk and Issue Log
- Independent QA/QC Deliverables
- RFP documents and Contractor Statements of Work
- Baseline Project Management Plan
- Benefits Management Plan
- +/- 10% Budget
- +/- 10% Schedule

The Project has received approval by the Cyber Security Services (CSS) Business Security Advisor (BSA) (uploaded to PPM) for all security readiness activities that have been completed up to this point in the project.

The SBM Project will employ a hybrid approach, leveraging aspects of agile (sprint planning, demonstrations, retrospectives) along with more predictive software development methods. Incremental releases will be deployed into a sandbox environment for functional testing by the state until the state enters a single User Acceptance Testing (UAT) period at the completion of the final release prior to deploying the full configured solution into production. The project anticipates it will go-live with the SaaS solution on November 3, 2026, with closeout complete by March 31, 2027, after the 90-day warranty period concludes.

The total estimated project cost is $22,530,858. As part of Contract negotiations, the project has an agreement with GetInsured to defer $9,985,641 of this cost into operations and maintenance and payable after collection of per-member monthly fees. This leaves $12,545,217 remaining to be paid during Execution.

RECOMMENDATION

Approve the OHA SBM Project through Stage Gate 3, allowing the project to proceed to execution with the following conditions:

1) Agency must submit required project artifacts for each stage from the project's Required Artifacts Form for EIS-P3 review and approval using the PPM collaboration tool (with the exception of the System Security Plan which should be submitted per CSS-BSA instructions),
2) Agency must submit monthly project status reports in the PPM tool,
3) If the budget or schedule changes by +/- 10%, or if the project's scope changes substantially, Agency must notify EIS and may need to re-submit supporting documentation for review and approval,
4) Agency must maintain project information within the PPM tool per the Project Manager PPM Update Guide,

5) The project must continue to engage with the assigned EIS-CSS BSA to ensure compliance with Statewide Information and Cyber Security Standards and Policy towards the completion of security readiness activities,
6) The project must maintain IQMS per policy 107-004-030,
7) The project must invite EIS for sprint planning sessions, demonstrations, and retrospectives,
8) Prior to any planned release into production, the project must meet with EIS to review project artifacts and discuss go-live readiness,
9) The project must continue to meet with the assigned EIS Oversight Analyst monthly.

Analysis prepared by: Alicia Miller Date: August 4, 2025

Analysis approved by: Date: August 4, 2025