OREGON. Health
Oregon Department of
HUMAN SERVICES

Oracle Response to Oregon DHS Request for Additional Information April 29, 2011
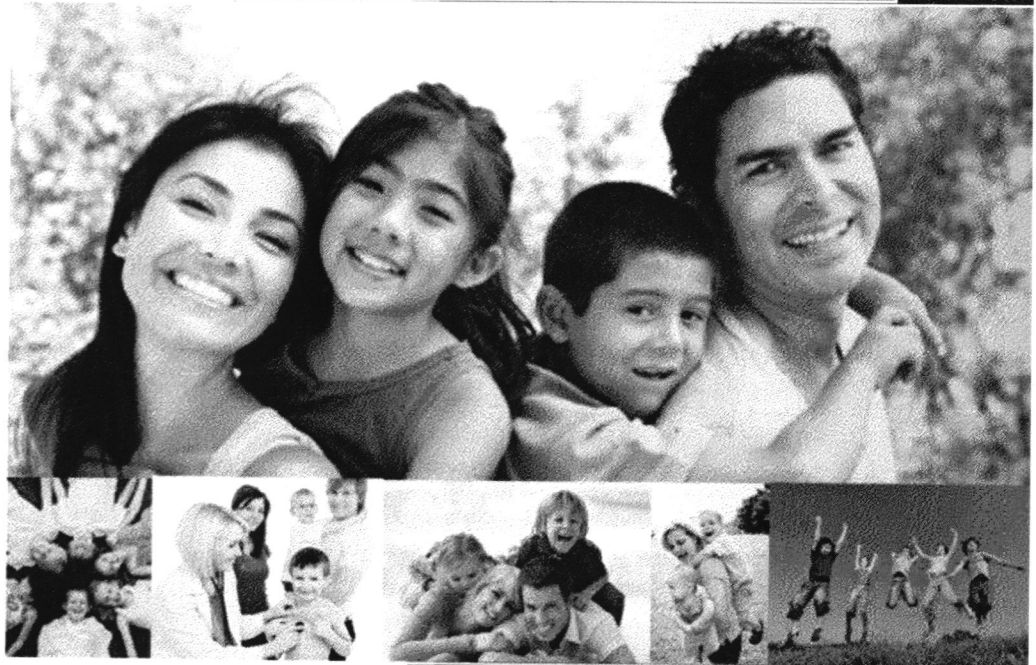
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Business Questions

1. **What industry standard case management screening tools does your solution provide? (e.g., Alcohol & Drug, Mental Health, Disabilities, etc.)**

Oracle Response

Response: Oracle's Siebel Public Sector Enterprise Case Management application contains a native assessments module that allows a business user or administrator with proper access privileges to create, edit, track and modify "assessment templates." These assessment templates are comprised of a series of question/answer/score attributes pertaining to a particular assessment type such as alcohol and drug addiction, job skills, health, risk and safety, mental health and so on. These assessment templates, when deployed to the application, can be completed by a case worker or service provider during an appropriate time in the case lifecycle.

As an example during the service planning process, a TANF case manager may need to identify a client's barriers for securing employment. The case worker selects an appropriate job skills assessment template from the **Case > Assessments** screen and proceeds to answer each question defined in the template. Each question can have one or more possible answers and each answer can be scored with varying weights as defined in the template. Once the questions are completed an overall assessment score is calculated and an out-of-the-box workflow evaluates the assessment's total score. Depending on the overall score, the workflow may create work items for one or more users in the system. For example, if the job skills assessment results in a score over 85%, the agency requires a supervisor to be notified, the case worker must complete standard operating procedure activities X, Y, and Z and a correspondence letter must be automatically sent to the client acknowledging the assessment results.
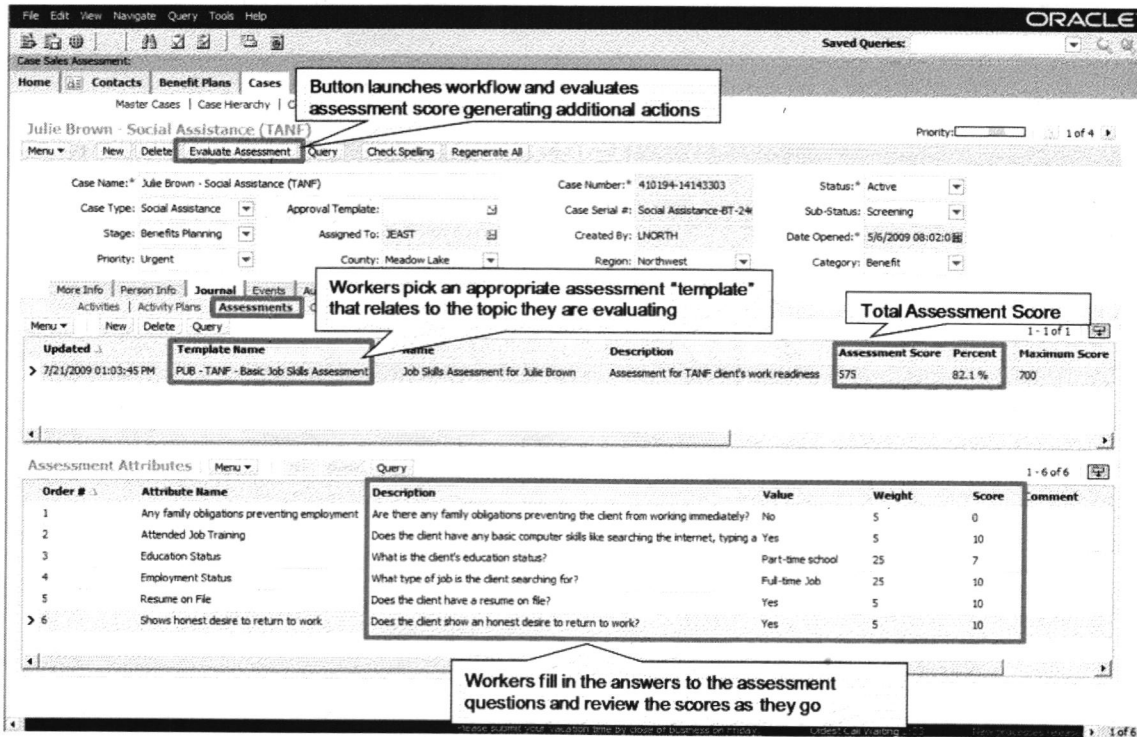
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Saved Queries:

Case Sales Assessment:

Home | Contacts | Benefit Plans | Cases | **Button launches workflow and evaluates assessment score generating additional actions**

Master Cases | Case Hierarchy |

Julie Brown - Social Assistance (TANF)   Priority: 1 of 4

Menu ▼   New   Delete   Evaluate Assessment   Query   Check Spelling   Regenerate All

Case Name:* Julie Brown - Social Assistance (TANF)	Case Number:* 410194-14143303	Status:* Active
Case Type: Social Assistance	Approval Template:	Case Serial #: Social Assistance-BT-24	Sub-Status: Screening
Stage: Benefits Planning	Assigned To: JEAST	Created By: LNORTH	Date Opened:* 5/6/2009 08:02:0
Priority: Urgent	County: Meadow Lake	Region: Northwest	Category: Benefit

More Info | Person Info | Journal | Events | A
Activities | Activity Plans | **Assessments** |

Workers pick an appropriate assessment "template" that relates to the topic they are evaluating

Total Assessment Score

Menu ▼   New   Delete   Query   1 - 1 of 1

Updated	Template Name	Name	Description	Assessment Score	Percent	Maximum Score
> 7/21/2009 01:03:45 PM	PUB - TANF - Basic Job Skills Assessment	Job Skills Assessment for Julie Brown	Assessment for TANF client's work readiness	575	82.1 %	700

Assessment Attributes   Menu ▼   Query   1 - 6 of 6

Order #	Attribute Name	Description	Value	Weight	Score	Comment
1	Any family obligations preventing employment	Are there any family obligations preventing the client from working immediately?	No	5	0	
2	Attended Job Training	Does the client have any basic computer skills like searching the internet, typing a	Yes	5	10	
3	Education Status	What is the client's education status?	Part-time school	25	7	
4	Employment Status	What type of job is the client searching for?	Full-time Job	25	10	
5	Resume on File	Does the client have a resume on file?	Yes	5	10	
> 6	Shows honest desire to return to work	Does the client show an honest desire to return to work?	Yes	5	10	

Workers fill in the answers to the assessment questions and review the scores as they go

1 of 6

Figure: Siebel Case > Assessments View

The content (questions, answers and scores) of these assessments would be populated by a State staff system administrator and not by Oracle. Oracle does not provide specific assessment content (although some "seed" assessment templates are offered out-of-the-box). Because each of our customers are unique in their business practices, the assessment content cannot be assumed. In addition, we suggest that this content *should be* populated by our customers because you do not want to have to rely on your application vendor for maintaining updates. This ensures the State will be completely self-sufficient when it comes to creating, editing, modifying or tracking their assessment content.

Oracle's Siebel Assessments module is highly configurable and assessments are administered in the runtime application and require absolutely no procedural source code to be written whatsoever. When a new assessment is required or an existing assessment template needs to be modified, a business user with the appropriate system permissions simply accesses the **Administration – Data > Assessments** screen. Once there, the user may add new assessment templates, define the questions, answers and question/answer weighting methodology.
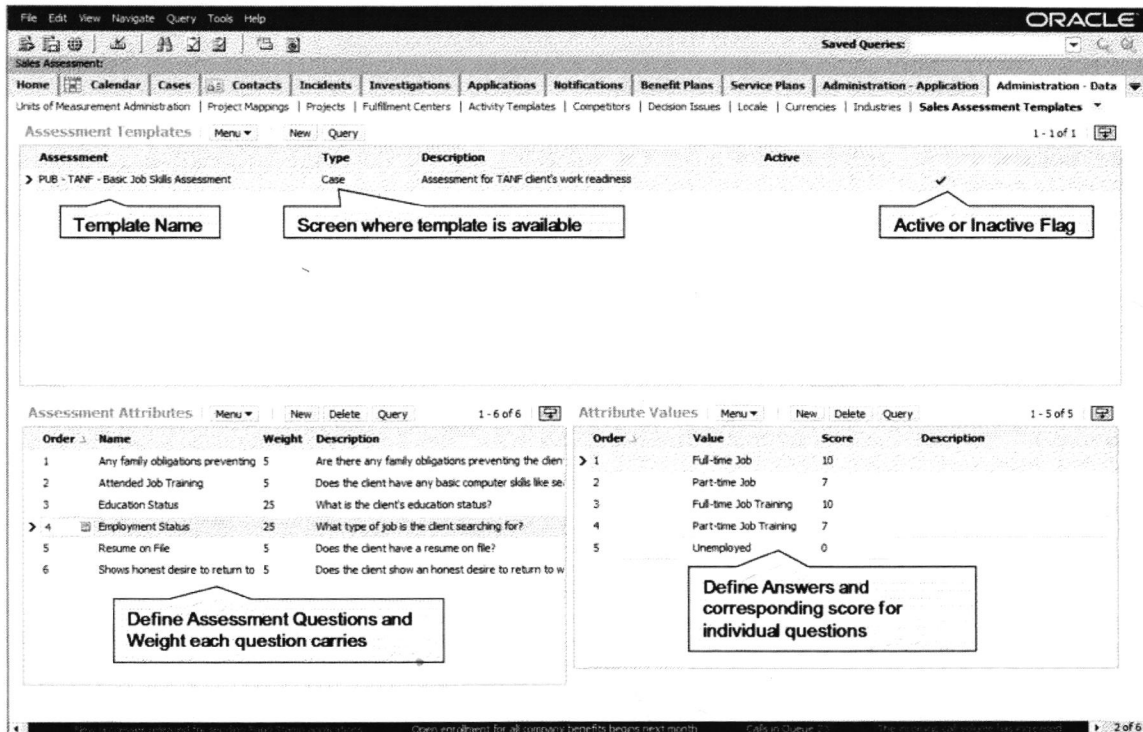
Figure: Siebel Assessment Administration view for creating, editing and deploying assessments.

Once the assessment template is fully completed, the administrator simply needs to make the template "Active". Once marked active the assessment template is immediately available to users in the application. In contrast, many of our competitor's assessments screens are typically created and administered by writing base java code. In this approach to modify or extend an assessments it requires a developer to write, test and compile application source code.

In addition to using the Siebel Assessments functionality, we have also found that our customers have benefited greatly by using Oracle Policy Automation for highly complex business assessments. In cases where there are underlying business rules or policies for determining the outcome of an assessment and where decision logic must be applied for the scoring and weighting of questions and answers, OPA can be used to automate this process. For example, the government of New South Wales in Australia has implemented OPA as a complex assessment tool for mandated reporters in their Community Services agency. This online assessment tool assists mandated reporters with various scenarios related to child abuse and neglect and provides an easy to use online interview for performing the assessment. To see the site live, please see: http://dr.sdm.community.nsw.gov.au/mrg

Our assessment tools can be configured to allow for the capability of a case manager to adequately and accurately identify barriers to employment which may interfere with the customers' movement from welfare to work. Our assessment tools also allow for more than one assessment to be completed for a single client. We have closely followed the Office of Family Assistance guidance on Online Work Readiness Assessment (OWRA) which created a free tool created for states to identify barriers in

Employment, Education, Job Training, Job Search, Housing, Transportation, Mental and Physical Health, Child Care, Domestic Violence, and Substance Abuse. Complementing our assessment tools, the service plan capability in our case management solution allows case workers to monitor the customer's progress or sanction the customer when they are non-compliant.

In addition to the OWRA assessments, you can quickly configure other assessments tools that Oregon prefers. Our applications are flexible enough to allow Oregon to determine which assessments work best for their clientele. As an example, one county in your state may have a larger issue with substance abuse and decided that they need a more detailed substance abuse assessment than the remainder of the State. Within a short amount of time (less than a day) you can configure the newly-required assessment in Siebel and deploy the new screening application.

Oracle's position is that providing assessment tools that are highly configurable to meet the many needs of citizens across the world is a fundamentally stronger value proposition for our customers, than one in which our customers are dependent upon a vendor for assessment content as well as changes and updates to the assessments.

2. **Can your solution perform probabilistic matching of clients and providers (i.e., physicians)? Source Health Insurance Exchange**

Oracle Response

Yes. Oracle's solution performs probabilistic matching of person records including clients, providers and physicians. For this purpose we have proposed Oracle's Master Data Management suite of products including: Oracle | Siebel Data Quality, Oracle Data Quality Matching Server, Oracle Data Quality Address Validation Server, Oracle Data Quality Profiling Server and Oracle Data Quality Parsing and Standardization Server. For a detailed description how Oracle Master Data Management performs probabilistic matching please refer to our attached Oracle White Paper: *Identity Resolution Explained*.

Technical Questions

1. **Specific to Requirement # T-100:**
   Your solution includes a variety of products and in most cases they are supported on 64-bit platforms. Please specify which products are being developed to incorporate support for 64-bit operating systems in the near future. Also include whether these products would be installed on the desktop vs. at a data center.

Oracle Response

The Siebel Application includes a multi-tier architecture and supports a wide range of operating systems across the tiers and individual components. The software that would be installed in the data center is certified to run on 64-bit operating systems under the binary compatibility program offered by the OS vendors that are supported for the application or based on the supported OS for the individual RDBMS platforms. The Siebel Application is run from a list of supported web browsers that users access the application from so typically does not require installation of software on the desktop of the individual users. However, there are cases where Siebel software is installed on individual workstations/PCs. These include the individual Siebel Developers who will install Siebel Tools which is the toolkit used to configure Siebel and a local client/server installation of the Siebel Application to facilitate local unit testing of the changes made from within Tools. These installations currently are not supported on 64-bit operating systems but are currently going through testing/validation of this support through Oracle Product Management and engineering.

Oracle's technology product stack which includes all Database, Middleware, Business Intelligence and Identity Management products is certified on a wide range of operating systems and processor types that include both 32 and 64-bit installations. These technology products are designed to provide an agile, open and extensible infrastructure that supports mission-critical, enterprise applications like Siebel. Therefore, these products are meant to be installed in the data center where they can be effectively utilized across the enterprise. In cases where desktop client applications are required, such as Oracle JDeveloper, 64-bit installations are available on common customer operating systems.

2. **With the proposed technical architecture for the your solution, please describe the following capabilities and specify the overall approach, tools and techniques that would be used to successfully deploy:**
   - **Support for model driven architecture in order to extend system functionality - like building a new interface to a legacy system.**
   - **Assemble a comprehensive data model for the system in order to analyze the scope for a new data mart.**
   - **Incorporate master data management techniques in order to standardize addresses in the client portal.**

Oracle Response

The data model utilized by the Siebel Application is developed using a structured methodology to ensure its completeness, flexibility, and extensibility. The Siebel Application is based on common, reusable data

structures, using such techniques as convergent modeling, to provide customers with a model that can be rapidly adopted for integrated transaction processing and data warehouse environments.

The Siebel modeling approach encompasses both a logical and a physical data model. The Siebel Logical model is composed of major entities, association entities, relationships, primary and foreign keys, and all other information required to define the physical data structures. The Siebel Physical Model encompasses all of the tables and indexes in Siebel Enterprise Applications and details the physical structure of the database schema implemented in the underlying relational database management system (RDBMS).

The Siebel Data Model is designed to be very flexible, and able to optimize performance for both online users and server processes. For example, although the as delivered Siebel Sales Enterprise product is largely opportunity-centric, many Siebel customers have implemented the application without any reference to opportunity at all, and without a single change to the data model. The Siebel Client and server applications can be adapted easily to other business models and their attendant data structures, allowing the business environment—not the data model—to dictate the data requirements. The Siebel Data Model includes thousands of tables out of the box and includes available extensions of columns and tables for utilization by customers to accommodate any additional requirements. All of the Data Model can be modified/configured and visualized with the Siebel Tools toolkit.

The Siebel Data Model is designed to allow businesses to decide which data elements are required, with the unused elements simply left blank. For example, in order to create a new contact, some systems require a valid telephone number. Siebel Enterprise Applications support multiple telephone numbers per contact and allow the numbers to be configured as required fields, but also allow users to create contacts without supplying a telephone number. All business logic that enforces such rules is implemented in the Siebel Business Components and Business Objects.

Oracle's Java/J2EE and Web Services technology platform provides a rich set of tools and standards-based technologies that allow customers to architect for service reuse and effectively implement a Model Driven Architecture by providing the tools and technology to develop effective solutions that meet the requirements of the business. Support is built in for the use of industry standards such as Service Component Architecture (SCA), BPEL and BPMN for modeling enterprise components and user interaction which is central to MDA. Specifically, the SOA and Business Process Management platform allows for an easy, declarative and intuitive development environment for modeling business processes, workflows, user interaction and system integration. This platform makes applying changes such as adding new integration points or modifying workflows quick and seamless allowing for a robust development lifecycle.

Master Data Management

Oracle Data Quality (ODQ) Address Validation Server, using a OEM license for IIR from Informatica, is the part of the master data management solution used for data cleansing address information. Data cleansing, as it relates to addressed consists of the following functions:

- **Automatic population of fields in addresses**. If a user enters valid values for Zip Code, City, and Country, data quality automatically supplies a State field value. Likewise, if a user enters valid values for City, State, and Country, data quality automatically supplies a Zip Code value.

- **Address correction**. Data quality stores street address, city, state, and postal code information in a uniform and consistent format, as mandated by U.S. postal requirements. For recognized U.S. addresses, address correction provides ZIP+4 data correction and stores the data in certified U.S. Postal Service format. For example, 100 South Main Street, San Mateo, CA 94401 becomes 100 S. Main St., San Mateo, CA 94401-3256.

- **Capitalization**. Based on configuration, data quality converts fields for account, contact, prospect, and address to mixed case, all lowercase, or all uppercase.

- **Standardization**. Data quality ensures account, contact, and prospect information is stored in a uniform and consistent format. For example, IBM Corporation becomes IBM Corp.

Data cleansing is supported for numerous fields within the Oracle Customer Hub. In addition, there are many fields within the business components that may be configured to be used in data cleansing. While OCH utilizes third-party data quality tools to manage the cleansing and matching processes, Oracle Customer Hub provides its own intelligent merge/unmerge capabilities based on Oracle's data-driven survivorship rules engine.

3. It is our understanding that you have proposed Siebel to provide the E-Commerce functionality required for Oregon's Health Insurance Exchange. Please provide documentation that addresses the impact of replacing Seibel with ATG to deliver this functionality. In your response, please take into consideration the following elements:
   - Key Functionality Differentiators between the Siebel eCommerce and the ATG eCommerce as it relates to the Health Insurance Exchange
   - Scope - what is the scope of work required to integrate ATG with the Siebel Solution as it relates to the Health Insurance Exchange?
   - Schedule - what is the schedule impact a client should expect to see if the ATG eCommerce solution was used instead of the Siebel functionality
   - Budget - how does the ATG solution impact the pricing proposal?
   - Risks - what risks to see you with the overall solution proposal with using ATG over eCommerce.

Oracle Response

While Oracle did not propose ATG in our 3/29/11 response for several reasons, the ATG solution is one of two other plausible alternatives that we evaluated internally which could be used for the E-Commerce functionality required for Oregon's Health Insurance Exchange instead Siebel E-Commerce. The considerations you listed above are the some of the same key factors that we evaluated and which drove us to lead with the Siebel E-Commerce solution. The all-Siebel approach delivers an architectural value proposition that meets the functional requirements, minimizes integration, streamlines the implementation schedule, and lowers the software costs. Given the fast track required to deliver Oregon's Health Insurance Exchange, the solution that required the least integration and provided the

greatest functionality and capability out of the box was determined to be the Siebel E-Commerce module enriched with the Oracle Policy Automation Web Determinations eligibility User Interface. To further mitigate risk, the Siebel solution contains a pre-built and pre-integrated user interface (UI) for the E-Commerce front-end. Or, if you determine that a richer custom UI better meets your needs, it can be built using the proposed Oracle WebCenter portal framework that still leverages the Siebel E-Commerce catalog and order capture infrastructure.

ATG is clearly the state of the art for E-Commerce, and has rich merchandising functionality that has led them to become the market leader in retail, telecommunications, financial services, and several other consumer industries. It powers some of the most impressive and large scale websites on the Internet today such as Best Buy.com, Nike.com, AT&T.com, etc. However, many of the robust capabilities that make it the top choice for leading commercial companies such as merchandising, search integration – also known as "searchandising", personalization, micro-targeted e-marketing, cross-selling, social media integration, etc. do not all directly and fully apply to Health Insurance Exchange as defined by Oregon's requirements. The Siebel E-Commerce capability, on the other hand, provides the basic infrastructure to offer insurance products, compare features and pricing, and select a plan. It includes pre-built portals for the classic B2C (business to consumer) flows as well as the B2B (business-to-business) model as required by the SHOP exchange. The Health Insurance Exchange does have some unique elements and nuances that are not part of the classic E-Commerce functionality set that will require some additional configuration or could be deployed via the portal, but ATG does not provide any better fit or out of the box capabilities in these areas.

While this is a license-only proposal, we did confer with Oracle's consulting delivery architects to get their input on the implementation related elements as outlined above. If they were doing the project in such a short timeframe, they felt that introducing another product with replicated data schemas for products, pricing, and customer data, and the additional product skills sets required would definitely add risk as well as cost due to integration. They also concurred that Siebel and OPA could handle the requirements as detailed by Oregon. Due to limited time, we were not able to confer with all of our implementation partners, so this guidance could vary depending on skill sets and other factors of the implementation team. So while we cannot provide specific order of magnitude differences in the implementation costs and timeframes as a license organization, we can only advise that the architectural value of a single platform is the strength of our proposed solution, and reduced complexity and moving parts has been a key to successful customer implementations.

This concept also applies to the other alternative to Siebel E-Commerce we evaluated. We also looked at the eHealth offering and did preliminary technical due diligence to determine if it was a viable option. We had limited time to scope out all the integration interfaces provided by eHealth before our proposal was due, and that technical discovery is ongoing with eHealth. However, we did find there was a good fit functionally with their E-Commerce front-end and our eligibility (OPA) and CRM pieces. In fact, they indicated that they have customers who have done the integration to Oracle's CRM before. Again, the integration, multiple companies, support organizations, and skill sets required to implement a multi-vendor solution will always inevitably add risk to an implementation. None the less, we continue to

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have business and technical discussions with eHealth to further understand their synergy with our offering.

Over time, Oracle will begin to provide productized integration between the Siebel and ATG products as combining these two components brings together the best of breed E-Commerce with the best of breed CRM, Call Center, Service, and Case Management. Additionally, Oracle will rationalize the ATG infrastructure with technology pieces from the Fusion Middleware stack and provide productized integration with all the FMW components including security, content management, and business intelligence. It should be noted that while this added complexity, cost, and risk is not what we would propose initially to get Oregon's Health Insurance Exchange going in the short time period required, there are companies who are doing this today and have integrated ATG to many CRM and ERP systems including Siebel and Peoplesoft.

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Self-Rating

1. **Specific to the statement routine configuration includes, but is not limited to:**
   - **Modification and extension of existing applets, views, screens, business components and underlying tables**
   - **Creation or modification of workflows involving existing business components and business services creation or modification of OPA business rules involving existing Siebel business components**
   - **Report creation/extension involving creation of new metrics, data sets, report elements derived from out-of-the-box data models provided with the Siebel, PeopleSoft, and Oracle BI Applications.**

Please filter all #4 responses in your 3/29/11 response to EA Project Vendor Questionnaire and dispose of as follows:

- **Anything that requires based code modification in your solution should be changed in the vendor response column to #2.**
- **Anything that requires modification of script please note this clearly in your response.**
- **Anything that is out of box need not be changed.**

Oracle Response

Applying the guidance that you have given us regarding self-rating, (i.e., change all 4's to 2's if they involve changes to base code) in fact will leave all of our responses unchanged. Our position is that *configuration* excludes changes to base code, and as I'll detail out a bit below, our recommended approach to *customization* excludes changes to base code as well. Oracle does not ship "source code" with our applications in part because any change to base code of the Oracle products could interfere with our ability to support the applications and with your ability to take new releases and upgrade downstream. Under no circumstances will we recommend this approach, and did not do so in our original response.

Wherever we have indicated *customization* in responding to your requirements, the approach generally would involve introducing new functionality via Siebel VB/eScript through the Siebel Tools environment and associating the script with business objects and services within the development repository in order to achieve new application behaviors. Note that Siebel VB/eScript is **not** base application code. This approach helps you to preserve your ability to upgrade should you decide to do so downstream by isolating your customizations. The distinction in PeopleSoft is the same should you decide to incorporate Financials components that we've proposed as part of the overall solution. And the concept also applies generally (although differing slightly in the specifics) to the other products we have proposed.

Lastly, we understand that it could well be very meaningful for you to be able to distinguish between requirements that are met through light configuration (configuration achieved through administrative screens in the run-time application environment), in-depth configuration (configuration achieved

through the Siebel Tools environment), customization (introduced through Siebel VB/eScript), and strictly out-of-the-box capability. It is worth noting, that an application behavior that is achievable through light configuration is generally preferable to hard-wired out-of-the-box behaviors that are not changeable through configuration. This actually reduces your reliance on the software vendor, as it gives you the ability to easily tailor the application to your needs without having to wait for a new product release, or having to resort to customizing the product yourselves in a way that interferes with on-going supportability or the ability to upgrade later.

Submitted respectfully for your consideration, a classification scheme that is not specific to Oracle could be laid out as follows:

- Out-of-the-box – application provides the desired ability with only routine application install and set-up.
- Light configuration – application provides the desired capability through configuration by way of the browser-based run-time application. Such configurations should automatically survive a product upgrade without scrutiny.
- In-depth configuration – application provides the desired capability through configuration within the Tools environment specifically designed for application configuration, maintenance, and deployment. Such configurations can be done in a way that will survive product upgrades.
- Customization – application can be customized to provide the desired capability but does not involve changes to base code. Such customizations are generally introduced through Siebel VB/eScript and can be isolated during an upgrade.

These represent four qualitatively and quantitatively different levels of effort to deploy and maintain application functionality, and apply broadly to modern, enterprise-class applications. These distinctions bear upon the skill sets and cost to deploy application functionality in the first place, and also upon the supportability, maintainability and total cost of ownership of the solution. If at some point you determine that it would be useful for vendors to reassess requirements in light of these classifications we would be pleased to do that. In the mean time, we have not resubmitted the Vendor Questionnaire responses as they have not changed, per the notes above.

Reference

1. **Where specifically has your solution been used for a social services Eligibility Modernization initiative where eligibility determination was automated?**
   - **What clients?**
   - **How long have they been in production?**

Oracle Response

Oracle has been committed to Public Sector organizations for over 30 years. During this time, Oracle has served as a key strategic partner with Health and Human Services organizations to provide mission critical functionality. In today's tough fiscal environment, Oracle's financial stability, subject matter resources, and experience in similar organizations has enabled our team to support eligibility modernization initiatives or initiatives where benefit determination is based on adherence to policies, legislation or program rules. Examples of these customers include:

- **Kansas Social and Rehabilitation Services**
- **British Columbia Ministries of Children and Families and Housing and Social Development (Formally MEIA), British Columbia, Canada**

Kansas Department of Social and Rehabilitation Services (SRS)

Oracle is engaged as the Prime implementer to implement a Customer and Provider Portal for the Kansas SRS CAPP (Customer and Provider Portal) Project. The program specific focus of the project is Child Care, TANF, SNAP and Refugee Assistance. Oracle is working with Kansas SRS to deliver a modern enterprise architecture for a customer-centered approach for case workers, clients and providers for screening and provider placement. Oracle is providing the agency with a componentized COTS offering built to address the needs of Social Services Agencies. This solution is upgradable into the future, ensuring the agency maintains technical currency through the life of the application. The primary business objective is "to implement a public facing Web portal which provides customers and providers a user friendly tool to access benefits and other services and initiate a holistic provider management process."

The objectives of the Customer and Provider Portal are to support the agency in being customer-centered and enhance workforce efficiency. The attainment of this objective will result in:
- Increased customer/provider satisfaction.
- Improved service in the form of more effective processing of customer and provider information.
- Readiness for implementation of assisted self-service and increased community partnerships.
- Increased customer/provider self-sufficiency by helping them become comfortable with using technology in their everyday lives.
- Easier access to benefit and provider applications for the public.
- Improved access and tracking of professional development of Providers.
- Informed decision-making to increase the quality of early care and education experiences for young children in Kansas.

Before providers onboard new hires, agency staff will be able to view a single record on the candidate, gaining a complete view of the candidate's background, credentials and incidents, empowering caseworkers with the information they need to allow child safety and support the provider in delivering quality child care. Provider information is centralized under a single view; as a result agency staff views the results of investigations, evaluations and outcomes of child placements in a clear, consolidated fashion, empowering caseworkers to establish the right course of action in supporting providers to increase the quality of early child care and educations experiences. Staff has access to information they need to make informed decisions and establish and track clear action plans.

The Oracle solution takes the guessing game out of which services an individual should apply for by guiding the client through a set of questions geared toward their situation and automatically generating those applications on the backend that the agency needs to process requests. The agency will quickly begin to see a decrease in application times by relying on the self-service application to only ask clients and providers those questions the agency needs to process eligibility and certifications. The Oracle approach will provide self-service to end-users to perform tasks without agency interference. As providers become confident in using the implemented products, they will increasingly rely on the provider portal on a daily basis to update availability, review referrals, track payments and manage all aspects of licensing compliance. By driving clients and providers to the self-service environment, the Oracle approach will dramatically reduce the amount of administrative work SRS staff have to perform on a regular basis, freeing them up to proactively work with clients and providers to allow early child care excellence across the state.

To promote administrative efficiency, the Oracle Social Services approach is built to remove the need for Kansas SRS staff to rekey information from the self-service portals into legacy applications. The Oracle approach provides SRS the ability to synchronize data from the self-service and case management offering to the back-end legacy applications, ensuring all applications across the agency are consistent without reliance on agency staff to manage consistency through duplicate entries. SRS has invested in a platform that can serve as the foundation for other self-service initiatives. Based on Oracle's integrated architecture, the agency will obtain insights into the operations of individual providers, and the relative success of various policies and incentives.

Rollout of the project is expected from July, 2011 – September, 2011 with project completion in September, 2011.

British Columbia Ministries of Children and Families and Housing and Social Development (Formally MEIA), British Columbia, Canada

In an environment of complex programs, interfaces, service requirements and with more than 100 interfaces, British Columbia selected Oracle's Social Services solution in 2008 to provide robust, role-based, single source, multi channel access, data and workflow capability internally and with partners.

The goal of the initiative was to integrate delivery of social services in support of the Province's 5 Great Goals. Improved ability to share information across the social sector, streamline citizen interactions with the Province, improve capability for decision making at multiple level, better performance management and resource allocation and increased capability to respond quickly to emergency situations are core project objectives identified by the Ministries.

The Ministries of Children and Family and Housing and Social Development business systems were increasingly fragile, used outdated technologies, based on proprietary systems and were difficult to adapt to legislative changes. These business systems were based on technology dating back to the 1970s and were originally designed to support Ministry focus areas no longer relevant

The Ministries sought a new COTS system to:

- Support better Integrated Case Management and Contract and Supplier Management;

- Provide timely and quality information for decision-making;

- Measure and monitor outcomes;

- Allow communication and electronic transactions with Service Delivery Providers;

- Make administrative tasks much more streamlined and relevant for staff;

- Allow more people to participate electronically, as appropriate, in Integrated Case Management;

- Enable world-class research; and

- Protect privacy through comprehensive safeguards.

The solution provides full case management functionality including Intake, Pre-Screening, Referrals, Employer Management, Benefit Determination, Case Management, and Outcome Management for complex programs. There are 5 Project Phases: Basic Case Management, Client Management Foundation, Collaborative Case Management, Payment, Providers & Contracts, and Self-Service, Analytics, Document Management.

British Columbia selected a Enterprise License Agreement that will allow it provide new functionality to 5,500 case workers, 20,000 provider licenses and also the option to expand the initiative across the government as it chooses.

The project is being rolled out in phases and has been in production for ~1 year.

2. **For what benefit programs has your solution successfully automated the eligibility determination of?**
   - **Medicaid**
   - **SNAP**
   - **TANF**
   - **CHIP**
   - **Others**
   - **For what clients?**
   - **How long have they been in production?**

Oracle Response

Oracle's Social Services Solution for TANF, SNAP and Medicaid is a commercial of the shelf (COTS) solution designed to both support all of the key eligibility features regardless of the type of assistance the client needs while administering the unique aspects of individual programs.

Oracle's solution provides a single view of the client across programs and agencies to facilitate agency collaboration and provider referrals. The solution includes a unique natural-language eligibility rules engine designed to allow subject matter experts to manage program rules. Program staff can develop rules directly from complex legislative text, policy documents, and regulations using Microsoft Word, Excel, and Visio. This engine includes patented temporal reasoning, making it possible to easily manage both personal circumstances and policy rule changes over time.

Using Commercial of the Shelf Software for Medicaid, SNAP, TANF, and CHIP in the United States is a recent paradigm shift as organizations now recognize the benefits of configurable solutions as opposed to custom built offerings. Outside of the United States, Social Services organizations around the globe have seen demonstrable results with their Oracle implementations for functionality similar to those listed in the question. While called by a different program name, the business processes are very similar. The functionality in the programs listed above translate to Health, Food Assistance, Income Assistance, Child Protection/Health and Labor. These organizations have life-cycle eligibility processes that align very well to the programs in the United States. Example customers include:

- **National Intrepid Center of Excellence (NICoE) – United States Federal Government**
- **Imerso, Madrid, Spain**
- **UWV Work (Employee Insurance Implementing Organization) –Amsterdam, The Netherlands**

National Intrepid Center of Excellence (NICoE), United States Federal Government

The National Intrepid Center of Excellence (NICoE) selected Oracle to achieve their mission of providing our injured veterans with assessment, diagnosis, treatment planning, and long-term follow-up for Traumatic Brain Injury and Psychological Health to the service members. The Oracle solution standardizes NICoE business processes across the five key directorates:

- Support Services
- Clinical Operations
- Research
- Training and Education
- Administration

The NICoE solution leverages the full Oracle Social Services application and technology stack which includes Siebel Public Sector, Oracle Policy Automation, Oracle SOA Suite, Oracle Identity Management, Oracle Business Intelligence Enterprise Edition (OBIEE), Primavera and Oracle Application Testing Suite. Siebel is used to implement Support Services including Notifications, Patient Admission, Patient Scheduling (in combination with NICoE's iPlan scheduling engine), Discharge, & Consent forms. OBIEE is used for Metrics and Dashboards for internal/legislative oversight. Oracle SOA Suite is leveraged to implement various integrations to legacy systems for authentication and provisioning. Oracle Policy Automation is utilized to support Clinical Operations through follow-up assessments. Oracle Healthcare

Transaction Base HTB is utilized to capture longitudinal electronic health records during the evaluation and treatment process.

The solution is being rolled out in phases and has been in production for ~ one month.

IMERSO, Institute for the Elderly and Social Services, Madrid, Spain

The Institute for the Elderly and Social Services (IMERSO) is a public organization the Spanish Ministry for Education, Social Policy, and Sports. The Law for Dependent People passed in 2006 recognizes the right of citizens unable to look after themselves (the elderly and disabled) to receive government services and grants. IMERSO introduced the "System for Autonomy and Care for Dependent People" (SAAD) to enable regional governments to manage their internal processes related to the Law for Dependent People.

The Oracle solution was implemented to manage the processes and benefit determination processes established in the Law for Dependent People. It also achieved the following benefits:

- Incorporated additional features ranging from evaluator mobility to the definition of more than 150 indicators used in dependency level assessment
- Enabled the creation of a single profile for each dependent person and allowed dynamic management of the catalog of services and their costs
- Allowed IMSERO's 2000 mobile evaluation agents equipped with tablet PCs to manage more than 380,0000 cases at the SAAD in one year
- Enabled regional governments to incorporate their specific requirements and integrate their management systems with the new Oracle solution

The project is being rolled out in phases and has been in production for ~2 years.

UWV Work (Employee Insurance Implementing Organization) –Amsterdam, The Netherlands

UWV manages the administration of employee insurance benefits, including providing temporary income when it is impossible for citizens to work. It delivers benefits to more than 480,000 citizens each year. In addition, more than 1,200 reintegration coaches at UWV Work help job seekers gain the skills they need to secure employment. It serves approximately 750,000 citizens a year through more than 130 offices

UWV Work is focused on work before income. Its first priority is to help citizens find work before relying on unemployment benefits. It was imperative for UWV Work to manage user information and efficiently route and share it with potential employers and other partners. In 2003, the agency determined that its legacy customer management system could no longer support its goals because it did not extend to partners, required the use of slow and inefficient manual processes, and was increasingly costly to upgrade and maintain processes with electronic ones and enabling the agency to ensure a customer focus. It delivers a single, up-to-date and accurate customer record across the work and income chain—a key to prompt, effective, and personalized service.

For example, UWV Work deployed Oracle's solution to replace a paper-based process of gathering job seeker information. UWV Work advisors, working in 130 branch offices, interviewed job seekers to gather information about their employment needs and skills using the Oracle solution. With the new functionality, the advisors efficiently gather comprehensive information about job seekers. This helps them assess each job seeker's competencies and match them with vacancies more effectively.

Further, UWV Work uses Oracle's solution to gain insight into the success of its programs. Initial findings show that approximately 35% of job matches generated with through the new system lead to employment, compared to a 20% percent success rate with matches performed through a separate Web channel.

The overall project is being rolled out in phases and Oracle's solution has been in production for ~5 years.

3. **Where specifically has your solution been used for presenting and selling insurance related-products (e.g., insurance policies) or similar products in an on-line shopping environment?**
   - **What clients?**
   - **How long have they been in production?**
   - **How are plans presented for sale "certified" and/or monitored for quality?**
   - **If used for other than insurance products, please explain how this application is a valid surrogate for health insurance.**

Oracle Response

Oracle solutions have used in many industries and government organizations where presenting and selling insurance related-products within an on-line shopping environment were key functions. As a result of Oracle's cross industry leadership, Public Sector organizations and Private Sector organizations have benefited from best practices in eCommerce. Some examples are listed here:

- **The Netherlands**
- **Blue Cross/Blue Shield of North Carolina**
- **The Hartford**

Netherlands/SVB

SVB (Sociale Verzekeringsbank) is the organization that implements national insurance schemes in the Netherlands. SVB makes sure that you, your children or your parents receive child benefit, pension or any survivor benefit correctly and on time. Some 4.9 million citizens rely on SVB.
SVB initiated a large Customer Program called "Ten for Service" with three key business drivers:
• Enhance Customer Service with one integral customer view
• Improve efficiency (reduction of 700 FTE out of 3.000 FTE) by less administrative paperwork
• Become more adaptive and agile by centralizing social service policies into one business rule engine

In 2009, SVB selected Oracle as part of this modernization program. SVB is initially implementing a nationwide database for all Dutch Citizens to assist with future 'Life Events' notifications (change of address, birth of new child etc). This is part of the 'No wrong door' initiative in the Netherlands.

We would also point you to the attached power-point where we provide you with a number of references to review. In addition, Oracle has a wide-range of customers across a number of different domains where we provide e-Commerce solutions. If Oregon is interested we would be happy to provide additional references in those areas.

4. **Where specifically has your solution been used for automated billing, collection and claims processing?**
   - **What clients?**
   - **What types of claims?**
   - **How long have they been in production?**

Oracle Response

Oracle solutions have used in many industries and government organizations where automated billing, collection and claims processing were key functions. As a result of Oracle's cross industry leadership, Public Sector organizations have benefited from best practices in billing as well as claims processing. Some examples are listed here:

- **Center for Work and Income – The Netherlands**
- **Imerso, Madrid, Spain**
- **Department of Work and Pensions – United Kingdom**
- **Agefiph, Disability Agency - France**

Center for Work and Income – The Netherlands

CWI, or the Centrum voor Werk en Inkomen (the Center for Work and Income), is the Netherlands' gatekeeper to social services and a trusted advisor for people seeking employment. 'Work before income' summarizes the remit given by the Ministry of Social Affairs and Employment on which CWI bases the design of its services. CWI matches jobseekers with prospective employers, distributes work permits, and helps its customers apply for unemployment or other benefits.

CWI forms part of the 'chain for work and income', together with the Employers' Insurance Implementing Organization (UWV) and the municipal Social Services Departments. CWI realizes the concept of 'work before income' in close co-operation with these chain partners. CWI is the first link in the chain: every job seeker first reports to CWI, for work and, if necessary, for income. It serves around 750,000 customers a year through 6 districts and more than 120 offices.

The Oracle solution was successfully implemented and has achieved the goals established by the CWI team. The Solution has achieved a number of benefits including:

- Improved job-matching by 60%; also improved performance—around 35% of job matches generated by new system lead to employment, compared to 20% using a separate Web channel

- Delivers integrated support for personalized consulting, including built-in service scenario and streamlined customer registration and intake
- Improved reporting, speeded service delivery, and reduced administration through automatic data capture and intelligent routing of records
- Provides integration with diverse government and partner systems and portals; offers potential to extend across the Dutch Social Security system

The solution has been in production for ~ 5 years.

Department of Work and Pensions – United Kingdom

As an integrated service agency created to "promote opportunity and independence for all", the Department of Work and Pensions (DWP) is undergoing a significant modernization initiative. Steadily increasing caseloads and rising costs require extensive collaboration among stakeholders as well as integrated service delivery.

The DWP selected Oracle's solution to drive a major business transformation in its Pensions department. With several projects planned and underway, the Pensions Project has been successfully implemented with clear, measurable benefits of reduced case processing and increased automated processing—ultimately, delivering more integrated and proactive services to citizens as well as employers. The Department of Work and Pensions has an enterprise license of 63,000.

By changing the business model, integrating the customer data, and "front-ending" the complex IT environment, DWP customers are able to more easily engage Pension Services. The Transformation project has resulted in:

- Improved operations efficiency with the ability to reduce staff headcount
- Increased benefit use by the UK's most needy citizens
- Improved customer experience by reducing duplicate requests of customer information and more responsive service delivery to the aging population
- Less time to process claims. In 45% of cases, the application can be initiated and completed in a single 20 minute call as opposed to 2 hours or more over 80 elapsed days
- A simplified customer process with the ability to process claims without paper
- On line self service capabilities to provide faster and more cost effective pension applications

The overall project is being rolled out in phases and Oracle's solution has been in production for ~5 years.

Agefiph, Private Disability Organization – France

Agefiph is a private organization that provides the disabled with access to private sector employment. Through its agreement with the French government, Agefiph provides 200,000 disabled individuals and 85,000 companies with assistance (in particular, subsidies), advise, and it provides service providers with network support.

Oracle's solution was selected for its configurability to support Agefiph's subsidy grant-control rules as well as the following:

- Standardized administrative claims management, approval, and follow-up processes throughout 19 regional agencies
- Rolled out the solution 190 assistants, researchers and regional representatives
- Accelerated payment of simple claims 71%
- Notified beneficiaries approximately seven days earlier than before by validating 80% of decisions in one to two days
- Enabled junior staff to assume select claims instruction and interpretation responsibilities— freeing executives to focus on other strategic activities

The overall project is being rolled out in phases and Oracle's solution has been in production for ~5 years.

Additional information regarding Oracle implementations may be found in the attached powerpoint. In particular, please note Oracle recent wins.

Oracle is particularly pleased to be the most selected commercial off the shelf solution in the last 18 months.