



## Board of Directors Meeting

November 14, 2013

### Approve One-e-App Contract Amendments with Social Interest Solutions, Inc.

#### Item III.A.

**Recommended Action:** Approve One-e-App Contract Amendments with Social Interest Solutions, Inc.

**Budget Impact:** Expend \$102,240 from the Non-Operating Technology FY 2013/2014 Budget

**Strategic Plan**

**Key Result Area:** Funding for Results through Programs and Services

Background:

Pinellas residents complete multiple applications to determine eligibility for public benefits. In most cases, each individual application requires the same information.

Since 2012, JWB has been leading the development and implementation of One-e-App, a web-based system for connecting Pinellas families to benefits. It provides a single electronic application to guide Pinellas residents through a series of questions to determine eligibility for family benefits. The system is currently being used by four Pinellas agencies, but planned upgrades will allow any Pinellas resident to access One-e-App from any location with computers and Internet connectivity.

One-e-App submits electronic applications through the Florida's Department of Children and Families Interface for the following programs: Medicaid, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance to Needy Families (TANF), Simplified Eligibility for Pregnant Women (SEPW) and others. One-e-App creates paper applications for Florida KidCare. It also provides high level screening, information and links to websites, and in some cases transfers the data, by offering referrals for the following programs: Women, Infants and Children (WIC), Earned Income Tax Credit (EITC), Child Tax Credit (CTC) and Presumptive Medicaid Eligibility for Pregnant Women (PEPW).

The next steps in the project are:

1. Implement a self-service website for the Pinellas One-e-App system so Pinellas residents can access an application at their convenience. The current website is limited to users with pre-established accounts. The annual maintenance fee for this upgrade is \$27,000.

Cost: \$60,000	Reported time to implement: 14 weeks
<u>\$27,000</u>	Maintenance fee
\$87,000	Total

2. Provide functionality on the self-service website to allow Pinellas residents to continue the application that they previously started with the One-e-App partner agency. The annual maintenance fee for this upgrade is \$3,240.

Cost: \$12,000	Reported time to implement: 14 weeks
<u>\$ 3,240</u>	Maintenance
\$15,240	Total

The funds for this project are allocated in the FY 2013/2014 budget.

Attorney Colleen Flynn has reviewed the attached two amendments to the original contract that was signed on July 23, 2012.

Board authorization is needed for Dr. Biddleman to sign the amendments to the contract.

Staff Resource: Joanna J. Maniscalco



**Social Interest Solutions, Inc.**

1333 Broadway, Suite 1020  
Oakland, CA 94612

**AMENDMENT NO. 1**

**This Amendment modifies the original contract, dated July 23, 2012. All the terms and conditions in the July 23, 2012 govern this Amendment.**

**Business Requirement:**

One-e-App is used in Pinellas County, Florida for a range of public and private benefits for families with low or no income. One-e-App provides a single universal online application for applying for these programs. One-e-App also delivers application data electronically to the State's eligibility system for Medicaid, SNAP and TANF programs. For the other programs, One-e-App generates pre filled application forms. The Juvenile Welfare Board of Pinellas County has decided to enhance and expand their version of One-e-App with the following:

1. Allow consumers in Pinellas County to use the self-service version of One-e-App

**Proposed System Changes**

The following system changes will be implemented in One-e-App for each of the items listed above:

**1. *Allow consumers in Pinellas County to use the self-service version of One-e-App***

One-e-App supports multiple ways for the consumers to apply for benefits. One such way is a self-service module. The self service module in One-e-App allows the consumers to create their own user accounts in One-e-App and apply for themselves and their families. The self-service version provides extensive online help and guidance to the consumers to use the system. It also allows the consumers to electronically route their incomplete applications to other community agencies who can help them in completing the process.

In order to enable the self service module for the consumers in Pinellas County, SIS will configure the CORE One-e-App self service module for Pinellas. No customization will be a part of this configuration. The CORE self service module will provide the following high level features:

- o Allow the consumers to create their own user accounts
- o Allow the consumers to use One-e-App to apply for ALL the benefit programs that are currently available in the Pinellas version of One-e-App

- Allow consumers to submit their supporting documents electronically using fax, upload scanned documents or email
- Allow consumers to electronically submit their applications to the State for Medicaid, SNAP, TANF, Simplified Eligibility for Pregnant Women (SEPW), Nursing Home, HCBS/Waivers, Hospice and Medicare Savings programs
- Allow consumers to generate pre filled paper applications for the programs that have this feature in Pinellas
- Allow consumers to search for assistor agencies online using the CORE One-e-App Google Map feature
- Allow consumers to electronically route their applications to the agency selected
- Allow the selected agency to pick up the consumer applications in One-e-App and help them complete the process
- Allow the Client agency to have access to the self-service workload for tracking the self-service applications
- Allow the Juvenile Welfare Board of Pinellas County to generate ad-hoc reports using the CORE One-e-App data mart for self service applications

### **Assumptions:**

1. It will be the responsibility of Juvenile Welfare Board of Pinellas County to conduct the User Acceptance Testing (UAT) of this feature. The Juvenile Welfare Board of Pinellas County will have seven (7) business days to test the system. All issues identified will be recorded as part of this testing and will be due to SIS within three business day of the conclusion of testing. SIS will categorize the issues identified as High (Priority 1), Medium (Priority 2), Low (Priority 3 or 4) or Change Order (requirements not identified in the list of requirements set forth in this Amendment) based on previously established criteria which will be consistent with the criteria set forth in Appendix B, included in the original contract, dated July 23, 2012. All High and Medium issues will be corrected prior to moving the change to Production. The timing for completion of these changes will be based on the test findings and discussed with Juvenile Welfare Board of Pinellas County to determine the appropriate time frame for completion. The Low priority items will be scheduled as part of regular production releases. No new issues that were not previously identified as part of the testing will be considered prior to moving the change to Production, unless otherwise agreed to by the parties. Otherwise, any new items identified during the revalidation period will be considered for future builds.
2. The Juvenile Welfare Board of Pinellas County will have three (3) business days of revalidation testing after SIS fixes the issues identified during the UAT. The timing for completion of these changes will be based on the test findings and discussed with Juvenile Welfare Board of Pinellas County to determine the appropriate time frame for completion.
3. The cost presented in this document includes configuring the CORE One-e-App self service module for Pinellas without ANY customization
4. The Juvenile Welfare Board of Pinellas County will provide Application Support for the Pinellas County users of the One-E-App system. SIS will provide support to Juvenile Welfare Board of Pinellas County staff or representatives designated by the Juvenile Welfare Board of Pinellas County, which is considered Tier 2 Help Desk or Application Support..
5. SIS will not be responsible for training the consumers or ongoing training for the Juvenile Welfare Board of Pinellas County users. SIS will provide four hours of training on the new functionality to Juvenile Welfare Board of Pinellas County staff and representatives designated by the Juvenile Welfare Board of Pinellas County via web conference.
6. The Juvenile Welfare Board of Pinellas County will continue to be responsible for updating and maintaining the Page and Question Level Help Text for the consumers using the One-e-App help text management tool.

7. The Juvenile Welfare Board of Pinellas County will be responsible for updating and maintaining other online information for the consumers using the One-e-App "Learn More" management tool.
8. The self-service module being implemented, does not include small device (mobile) support.
9. Any changes to the requirements specified herein will require an additional Amendment.
10. SIS will schedule the development once an executed copy of the Amendment received by SIS. All development, testing, training and approval shall be completed within fourteen (14) weeks of the Juvenile Welfare Board of Pinellas County's delivery of an executed copy of this Amendment.
11. Cost estimates are contingent on timely review, testing and feedback on changes. If any of these do not occur, additional costs may be incurred and an update to this Amendment will be required to reflect these additional costs. If SIS believes that a timely review, testing and feedback is not occurring then it must inform the Juvenile Welfare Board of Pinellas County, in writing, that such work is not taking place. The Juvenile Welfare Board of Pinellas County will then have three (3) business days to respond with the review, testing and feedback. After the three business, the Juvenile Welfare Board of Pinellas County shall be considered non-compliant and be subject to a review of costs.

Any change in scope will be discussed with the Juvenile Welfare Board of Pinellas County and an estimated impact on resources along with a cost estimate of the change in scope will be mutually agreed upon, before any additional work is initiated.

### Cost Estimates

Based on the changes described above and the proposed solution we have provided the costs to develop, test, implement and maintain the described features.

<b><i>Allow consumers in Pinellas County to use the self-service version of One-e-App</i></b>	<b>\$60,000</b>
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Payments for work completed will be made available at the following points during development:

- Project Start-Up \$25,000
- Start of UAT \$25,000
- Go-live \$10,000

The above payments can be invoiced to the Juvenile Welfare Board of Pinellas County and paid on their payables schedule, attached.

Go live will be no more than two (2) weeks after the Juvenile Welfare Board of Pinellas County has completed its testing.

In addition to these implementation costs, the annual maintenance costs will be increased by \$25,000. Maintenance will start at the go-live date whether the consumers are actively using this feature in production or not. Maintenance is due on the first day of the month of go-live and the annual maintenance amount will be pro-rated based on the remainder of the contract year. The annual maintenance thereafter (July 23, 2014), will be \$25,000 and subject to the 8% annual increase.

**Timeline**

Based on the responsibilities and assumptions set forth, SIS will have this feature ready for Juvenile Welfare Board of Pinellas County testing ten (10) weeks from the date this Amendment is executed and received by SIS. It is anticipated that this feature will be in productive use within fourteen (14) weeks of the date this Amendment is executed.

**COUNTERPARTS.** The Amendment may be executed in any number of counterparts, each of which shall be an original, but all of which together shall constitute one instrument. This Amendment may be executed by facsimile transmission, and any such facsimile transmission shall have the same force and effect as an original counterpart hereof.

**IN WITNESS WHEREOF**, the parties hereto have caused this Amendment to be executed by their duly authorized representatives as of the Effective Date of XXXXXXXXXXXXXXXX.

The Center to Promote HealthCare  
Access, Inc. dba Social Interest  
Solutions (SIS)

Juvenile Welfare Board of Pinellas  
County

By: _____	By: _____
Printed Name: _____	Printed Name: _____
Title: _____	Title: _____
Date: _____	Date: _____

<b>Juvenile Welfare Board</b>		
<b>FY 2013-2014</b>		
<b>ACCOUNTS PAYABLE SCHEDULE</b>		
<b>Pay#</b>	<b>Submission Due Date</b>	<b>Reimbursement Date</b>
1	10/04/13	10/11/13
2	10/18/13	10/25/13
3	11/01/13	11/08/13
4	11/15/13	11/22/13
5	11/29/13	12/06/13
6	12/13/13	12/20/13
7	12/27/13	01/03/14
8	01/10/14	01/17/14
9	01/24/14	01/31/14
10	02/07/14	02/14/14
11	02/21/14	02/28/14
12	03/07/14	03/14/14
13	03/21/14	03/28/14
14	04/04/14	04/11/14
15	04/18/14	04/25/14
16	05/02/14	05/09/14
17	05/16/14	05/23/14
18	05/30/14	06/06/14
19	06/13/14	06/20/14
20	06/27/14	07/04/14
21	07/11/14	07/18/14
22	07/25/14	08/01/14
23	08/08/14	08/15/14
24	08/22/14	08/29/14
25	09/05/14	09/12/14
26	09/19/14	09/26/14
1	10/03/14	10/10/14
2	10/17/14	10/24/14



## **Social Interest Solutions, Inc.**

1333 Broadway, Suite 1020  
Oakland, CA 94612

## AMENDMENT NO. 2

**This Amendment modifies the original contract, dated July 23, 2012. All the terms and conditions in the July 23, 2012 govern this Amendment.**

### **Business Requirement:**

One-e-App is used in Pinellas County, Florida for a range of public and private benefits for families with low or no income. One-e-App provides a single universal online application for applying for these programs. One-e-App also delivers application data electronically to the State's eligibility system for Medicaid, SNAP and TANF programs. For the other programs, One-e-App generates pre filled application forms. The Juvenile Welfare Board of Pinellas County has decided to enhance and expand their version of One-e-App to allow consumers to claim their applications that have been created by service providers or community assistors.

### **Proposed System Changes**

Changes will be implemented in One-e-App to allow consumers to claim their applications that have been created by service providers or community assistors. Currently, if a consumer creates an application in One-e-App then he or she remains the owner of the application. However, there are circumstances where the consumer may have had an application created by an assistor or a service provider in the past and the consumer now choses to create their own account in One-e-App. The Juvenile Welfare Board of Pinellas County wants a way for One-e-App to allow the consumers to claim their own application and not be required to be assisted by an assistor or service provider.

The following changes will be implemented in the system for the above mentioned enhancement:

- One-e-App will provide an option for the consumers to search for previous applications that may have been created for them by an assistor or service provider
- The search will ask the consumer certain information that could be known to only the consumer (TBD)
- Upon successful matching of the information and ONLY if there is one record in the search results, then the system will allow the consumer to claim that record



- If multiple records found, then ONLY users who are authorized by the Juvenile Welfare Board of Pinellas County can help identify the existing applications for the consumer and associate the application with the consumer's account

### **Assumptions:**

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Any change in scope will be discussed with the Juvenile Welfare Board of Pinellas County and an estimated impact on resources along with a cost estimate of the change in scope will be mutually agreed upon, before any additional work is initiated.

**Cost Estimates**

Based on the changes described above and the proposed solution, the costs to develop, test, implement and maintain the described features include:

<i><b>Allow consumers to claim their applications that have been created by service providers or community assistors</b></i>	\$12,000
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Payments for work completed will be made available at the following points during development:

- o Project Start-Up \$5,000
- o Start of UAT \$5,000
- o Go-live \$2,000

The above payments can be invoiced to the Juvenile Welfare Board of Pinellas County and paid on their payables schedule, attached.

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**Timeline**

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**IN WITNESS WHEREOF**, the parties hereto have caused this Amendment to be executed by their duly authorized representatives as of the Effective Date of this Amendment, xxxxxxxxxxxxxxxx

The Center to Promote HealthCare  
Access, Inc. dba Social Interest  
Solutions (SIS)

Juvenile Welfare Board of Pinellas  
County

By: _____	By: _____
Printed Name: _____	Printed Name: _____
Title: _____	Title: _____
Date: _____	Date: _____

<b>Juvenile Welfare Board</b>		
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11	02/21/14	02/28/14
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19	06/13/14	06/20/14
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21	07/11/14	07/18/14
22	07/25/14	08/01/14
23	08/08/14	08/15/14
24	08/22/14	08/29/14
25	09/05/14	09/12/14
26	09/19/14	09/26/14
1	10/03/14	10/10/14
2	10/17/14	10/24/14