
Eligibility Verification RFP Guide For Government Agencies

Making smarter eligibility
determinations, faster

Find the approach to eligibility verification that works for your agency. **CITIZ3N** provides this guide as an outline of what to look for in an eligibility technology partner, key areas to focus on, and questions you should ask. **CITIZ3N** helps government agencies implement highly configurable eligibility verification solutions. This enables agencies to better support and address at-risk populations through timely and accurate data verification returns while reducing administrative overhead—all with no major system overhauls required.

As you read through this document, reflect on your pain points and the limitations of your current verification process to better understand the value you need from a technology partner. Vendors offer different advantages and support various implementation processes—from establishing a standalone web portal to customizing a fully-integrated solution.

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1

Prioritize Flexible Integration with Existing Systems

Seek a partner that offers a flexible and customized approach to both data verification and integration with existing systems.

Rip-and-replace solutions can be costly, time consuming, and impractical for government agencies seeking a seamless implementation. As you work to improve your eligibility verification processes, ensure compliance with CMS' Medicaid Information Technology Architecture (MITA) standards requiring composability and modularity.

Consider how you would like the vendor's technology to interact with your existing infrastructure to determine which approach to data transfer best fits your agency's needs. If that question remains uncertain at the beginning of the solicitation process, clearly communicate your pain points and current processes to potential vendors for their recommendations.

Additionally, ensure there will be a smooth transition to the new method of eligibility verification for end users. During your procurement process, require details from bidders regarding training, data migration, and potential risks to confirm vendor competency while preparing yourself for what to expect.

Provided are key questions to ask in your forthcoming procurement.



Question: Describe your recommendation for approaching data transfer for submitting and returning eligibility information. Include all supported methods of data transfer and their applicability to this solicitation.

What Matters in a Response: Standard offerings include a secure web-based portal, batch file transfers, and real-time Application Programming Interfaces (APIs). Understanding the multitude of ways that data can be transferred and their implications on eligibility staff and legacy systems will help determine the best approach for your situation.



Question: Outline the key differentiators that your solution offers when compared to competitors.

What Matters in a Response: Determine the standout features that a proposed solution offers above their competitors. This question serves to assess the true value a vendor offers beyond industry standards. Prioritize solutions that build and enhance your current system rather than a rip-and-replace approach.



Question: Describe the level of support needed from our team or other third-party vendors that may be needed during the implementation phase.

What Matters in a Response: Asking this question will help your team understand the level of involvement needed during the implementation period. Involvement during training, testing, and status meetings are common areas requiring agency participation.



Question: Describe the configurability of the solution proposed to meet our needs.

What Matters in a Response: Determine if the vendor can accommodate agency needs and their ability to modify their technology to seamlessly integrate to your existing platform.



Question: What are the key risks you anticipate during the implementation phase and what are your mitigation strategies?

What Matters in a Response: Experienced vendors should be able to provide insight and lessons learned from previous implementations. Ensure vendors possess the expertise and skillsets needed to identify and mitigate risks effectively to avoid delays during the implementation.



Question: Provide an overview of any customizations anticipated and the level of effort required.

What Matters in a Response: Ensure that potential vendors can accommodate your changing eligibility needs with limited delay or strain to the implementation plan. While being specific in your system requirements helps eliminate risk and results in accurate pricing and timelines, the ability to adapt and customize ensures that your eligibility solutions can grow with you.

2

Invest in Exceptional Data Quality and Fast Returns

Partnering with a vendor with a wide and growing network allows your agency room to expand the verification platform and potentially use the same technology to support sister agencies.

As you work to improve your eligibility verification processes, ensure the ability to continually support increasing member volumes without having to add on additional staff or overhaul your current system. Since not all vendors offer the same level of thoroughness, accountability, and growth when it comes to data returns, you should inquire how potential partners will guarantee both fast and robust returns for a vast variety of data sets.

Provided are key questions to ask in your forthcoming procurement.



Question: Provide a list of the data sources you currently utilize.

What Matters in a Response: You can customize this question to include the types of data sets needed such as employment, income, financial assets, real property, and more. Also include locations needed such as nationwide or regional area data. Ensure the vendor you select has the expansive data network you need.



Question: Describe your method for matching assets and returning results outside of the specified state.

What Matters in a Response: Vendors should have a method to gain results outside of specified states to ensure the identification of all assets. Key items to look for include a customizable search radius and an expansive network of data partners not limited by state lines to ensure your eligibility specialists are provided with the full scope of requested information.



Question: Describe your approach to recruiting data providers into your network.

What Matters in a Response: Potential vendors should have the constant drive to expand their current data partner offerings. Never settle for a stagnant list of data partners and ensure your vendor is actively continuing to grow their network.



Question: Provide a list of specific data elements returned.

What Matters in a Response: Ensure vendors can supply all required information so eligibility specialists can make informed decisions. Determine internally the list of data elements that need to be included on returns to guarantee that the vendor you select can meet your needs.



Question: Describe the system's ability to provide near-real-time results.

What Matters in a Response: Vendors should be able to return requested information in a timely basis to expedite the verification process. Smaller downstream data partners may require longer return times to access information, but the selected vendor should be a partner who also strives for near-real-time returns. Include in your Service Level Agreement (SLA) metrics for return times expected and ask for confirmation they can meet the times provided.



Question: Describe the process for ensuring accurate returns.

What Matters in a Response: Ensure that you are partnering with a vendor that you can trust. Vendors should detail the process needed to match identifying information provided by eligibility specialists to assets maintained by data partners.



Question: Describe your solution's customizable search parameters, including any configurable search radius available from an applicant's home address and any look-back periods.

What Matters in a Response: Ensure potential vendors have the capability to adjust their results to fit the needs of your agency. Configurable search parameters can help narrow down verification returns to only pertinent information so that eligibility specialists only gain the results that matter.



Require Tools to Support Your Eligibility Specialists

Potential vendors should optimize the efficiency of your current resources, including the eligibility specialists that verifications depend on. Optimizing staff performance saves agency resources without seeing a decline in personnel.

Seek a vendor that appeals to the end user and keeps the aid of eligibility specialists at the core of the verification solution.

Ask about specifications regarding the user workflow to gain a comprehensive understanding of the verification process, starting with eligibility specialists.

Provided are some key questions to ask in your forthcoming procurement.



Question: Provide examples of the online user interface eligibility specialists would utilize to send and receive data requests. Include screenshots of your solution.

What Matters in a Response: An innovative and user-friendly interface is critical to your eligibility specialists' success. Difficult to use and antiquated portals can result in confusing, complex training followed by constant troubleshooting. The vendor's solution should assist eligibility specialists with user-friendly, easy to use support tools with a simplified, streamlined process.



Question: Describe how eligibility specialists can modify submitted requests.

What Matters in a Response: Ensure your eligibility specialists have control over the verification process at every step. Having the ability for end users to modify a workflow demonstrates system flexibility.



Question: Describe the support provided to eligibility specialists.

What Matters in a Response: Give vendors the opportunity to demonstrate how their standard solutions provide additional value to verification efforts beyond data transfer. Robust reporting capabilities and the organization of returned data can provide additional insight while streamlining verifications.



Question: Provide the maximum number of concurrent users and verification volumes.

What Matters in a Response: Ensure your chosen vendor can scale with the growing and changing needs of your eligibility specialists. Requesting details regarding the load capabilities of their current system will ensure your ability to scale without worrying if the new technology will quickly grow obsolete.



Question: Describe the system's approach to role-based access control (RBAC) or other controls to define and limit user access.

What Matters in a Response: Prioritize security without increasing strain placed on eligibility specialists. Functions such as role-based access help to narrow the view of eligibility specialists, so they can focus on the relevant information they need to perform their job function.

4

Request Impactful Reporting to Help At-Risk Populations

Ensure vendors have the reporting prowess necessary to provide your government agency with actionable insights that have the potential to consistently improve the verification solution. Easy access to verification trends and individual metrics will provide valuable insights to support your day-to-day operations.

Provided are some key questions to ask in your forthcoming procurement.



Question: Describe any AVS reporting capabilities available.

What Matters in a Response: Pose a general, open-ended question to receive a holistic response that provides an overview of everything a vendor has to offer regarding reporting.



Question: Describe any reports that detail inquiries attempted and verifications completed.

What Matters in a Response: The vendor should be able to provide a monthly report of inquiries attempted and verifications completed, including the name, location, date and time of the search, and other associated details.



Question: Describe how the reporting solution accommodates non-technical users, including any intuitive, modern tools available.

What Matters in a Response: Prioritize reporting tools designed to provide actionable insights with built-in flexibility to support various types of end users. Customized queries, display options, and data filtering should be available to all users without having to rely on the vendor for simple modifications. Tools available to eligibility specialists and other non-technical users should have an inherent ease of use.



Question: How will cost savings be defined and measured?

What Matters in a Response: Ensure a return on investment by reviewing vendors' cost saving strategies proven by data reporting. Experienced vendors should provide details regarding past implementations and their correlated cost savings for further insight into the value of their solution.

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