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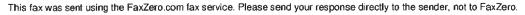
From: Larry Coune
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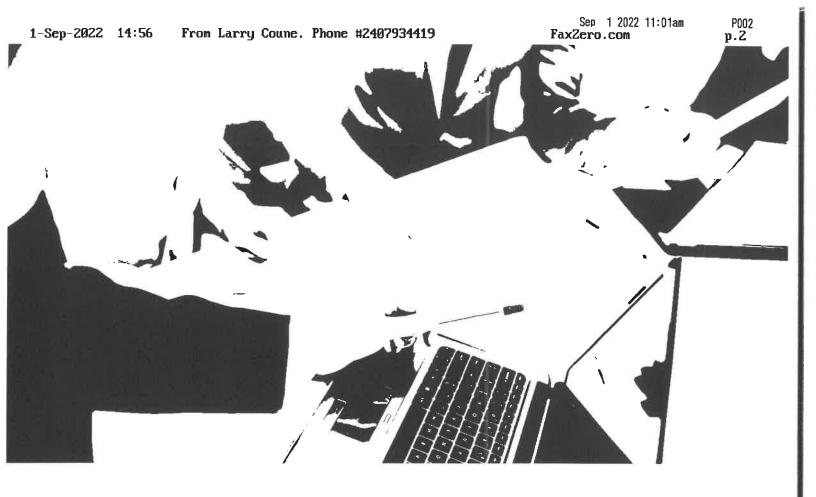
Sent on: Thursday, September 1 2022 at 10:54 AM EDT

Hello,

Please find attached our response to your RFI BMS2300000001.

Larry Coune ServiceNow 240.793.4419 larry.coune@servicenow.com







# servicen w

#### Cask NX LLC response to CRFI 0511 BMS2300000001:

Modern Case Management System and Incident Management System

#### Prepared for:

West Virginia (State) Department of Health and Human Resources (DHHR) Bureau of Medical Services (BMS)

#### Submitted:

September 1, 2022

Cask NX LLC Business Address: 8910 University Center Ln Suite 400, San Diego, CA 92122

### Prepared by:

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]



CASK | WV DHHS BMS CRFI 0511 MODERN CMS AND IMS

603.553.0530

619.379.2041

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CASKREP

No.

53-2021

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## 1) Corporate Overview

Cask NX LLC (Cask) and ServiceNow are pleased to submit the following in response to the West Virginia (State) Department of Health and Human Resources Bureau of Medical Services' (HHS) RFI for a Modern Case Management System and Incident Management System.

Founded in 2004, Cask is a business and technology management consulting firm focused on helping our clients use and unlock the value of technology in more efficient and cost effective ways. We maintain a long-standing strategic partnership with ServiceNow, have now performed thousands of ServiceNow implementations despite having less than three-hundred (300) employees, are the largest and most awarded Pure-Play partner in the ecosystem (we ONLY deliver on ServiceNow technology), and are a certified Elite partner and authorized license reseller. Cask encourages the WV HHS to view our profile on ServiceNow's "Partner Finder" page. We submit this informational proposal to provide Implementation Services, Support, and License-Consulting Services for your upcoming ServiceNow implementation.

ServiceNow is the recognized leader in Service Management. Key accolades and platform differentiators include, but are not limited to:

- Repeated recognition by Gartner, Gartner Peer Insights, Forrester Wave, Constellation Shortlist™
- Highly scalable, state-of-the-art cloud infrastructure
- State-of-the-art application, platform, and physical security
- A single platform, single database, a single user interface that eliminates integration issues
- Easily configurable applications
- Low-code/no-code/pro-code configuration options
- Drag-and-drop graphical workflow
- Redundant and resilient paired data centers with daily backup
- Native mobile interface and mobile applications
- Built-in native reporting

Cask is similarly recognized by both ServiceNow and industry partners for thought leadership and service delivery excellence. Cask began our ServiceNow partnership as a subcontractor to ServiceNow, contracted to facilitate process design working sessions for solution implementation. Today, Cask meets all client delivery needs, however our reputation in the ServiceNow ecosystem was, and continues to be, built upon our focus to client process, governance, continual improvement, and measurable outcomes.

We have since completed over 1,000 ServiceNow implementations to date. Further:

- We stand atop the ServiceNow partner ecosystem as a certified Elite Partner
- Service Now awarded Cask the 2020 Americas Elite Partner of the Year
- Service Now awarded Cask the 2020 Global Elite Partner of the Year
- Service Now awarded Cask the 2021 Americas Creator Workflow Partner of the Year
- Gartner Market Guide for ServiceNow ITSM Consulting, Implementation & Managed Services, featured service provider
- Forrester Wave North American ITSM Implementation Service Providers, ITSM Leader
- Everest Group Peak Matrix, highest rated Non-Global ServiceNow partner

CASK CONFIDENTIAL REP NO. 53-2021 PG. 1 of 47



- ISG Provider Lens, ServiceNow Implementation and Integrations Services Leader, and ServiceNow Consulting Services Leader
- Inc. Magazine 5000, selected 4 times for fastest growing private companies
- Consulting Magazine, Fastest Growing Firms recipient 3 times
- San Diego Business Journal, Top 100 Fastest Growing Private Companies recipient 7 fimes including 2011, 2012, 2013, 2014, 2015, 2016, 2017
- We hold nearly every technical accreditation that ServiceNow offers

Due to our combined capabilities and client results, ServiceNow continually selects Cask to launch new products and offerings, building world class transformative solutions for our client partners as well as ServiceNow's own team. Not only this, but we also partner with ServiceNow on State and Local Government specific ServiceNow User Group (SNUG) customer conferences every year, so that our SLG customers have the opportunity to meet, hear each other present, and share best practices.

A subject matter expert systems integrator, Cask is one of only four partners globally to have full Product Line Certifications across nine out of ten potential ServiceNow modules: IT Operations Management, Customer (Citizen) Service Management and Public Sector Digital Services (PSDS), Security & Risk, IT Service Management, HR Service Delivery, Strategic Portfolio Management, and much more.

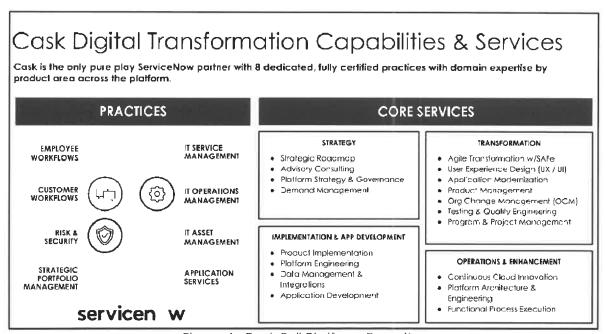


Figure 1: Cask Full Platform Expertise

With Cask, the WV HHS aligns with a ServiceNow partner that delivers the right team with the right credentials. We maintain a 4.6 out of 5 customer satisfaction rating with a long track record of proven innovation, well-earned trust, and partnership success across the State & Local vertical.

Additionally, ServiceNow has positioned itself as one of the leading Enterprise Automation Platforms serving the Medicaid and Medicare community.

RFP No. 53-2021 CASK CONFIDENTIAL ₽0.20=47



# 5 ways ServiceNow can deliver immediate value

The Now Platform from ServiceNow is an intelligent and intuitive cloud platform. It offers modern, digital workflows to enable the Centers for Medicare & Medicaid Services to help beneficiaries achieve their highest level of health and eliminate disparities in quality and access to care. Here are the top five ways the innovative platform can help CMS:



#### #1 Advance health equity.

Inturition, the harmonic for matrixing beauty in response. The sequence operated in the The New Program when in down was form eather than the provider of interesting properties of the other and the control of the sequence of the following of the theory of the theory of the sequence of the following of the sequence of the following of the sequence of the following of the sequence of the sequence

#### #2 improve access to care.

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#### #3 Ensure program integrity.

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#### #4 Create aptimal autcomes.

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#### #5 Accelerate integration and interoperability.

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## 2) Questions (Section 4.2 in RFI)

4.2.1 Please describe your CMS and/or IMS solution functionality, including:

- a. What modules are available?
- b. What features are standard? What features are available at an additional cost?
- c. Please describe how your solutions facilitate each stage in the HCBS Continuum of Care, including:
  - i. Intake



- ii. Screenina
- iii. Assessment
  - A. What is your approach for supporting assessments, which may vary by populations served under Medicaid HCBS
  - B. Does your solution support gathering of assessment information on mobile devices? Please explain.
- iv. Clinical eligibility determination
- v. Enrollment
- vi. Care Planning
- vii. Service Authorization
- viii. Service Delivery
- ix. Billing/Claiming
- x. Reassessments
- xi. Re-enrollment
- xii. Quality Assurance
- d. Please describe your standard reporting features. Can users create their own custom reports? How does your solution support measuring outcomes?
- e. What type of on-screen user help is included?
- f. Please provide your support structure (e.g., hours of operation, methodology including email, support, online ticketing system, etc.)

#### Answer to 4.2.1

#### ServiceNow's Customer Service Management (CSM) Application

ServiceNow Customer Service Management (CSM) goes beyond traditional solutions by harnessing the power of the whole organization to serve customers. CSM helps State of West Virginia solve citizen problems by bringing front, middle, and back offices together, proactively addressing citizen issues, and enabling more self-service through automation. The results: increased customer satisfaction and reduced case volume and costs.

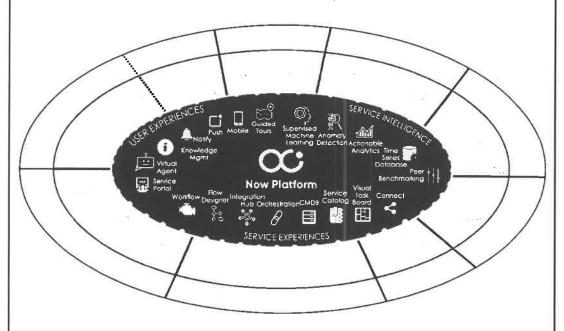
ServiceNow's success is due to its transformational impact in the way people work. A service-centric approach to the activities, tasks, and processes that make up day-to-day work helps the modern enterprise operate faster and scale more effectively than ever before. Customers use ServiceNow's enterprise service management model to define, structure, and automate the flow of work, remove dependencies on email and spreadsheets, and transform the delivery and management of services across the enterprise.

One of ServiceNow's greatest strengths is its modular nature. ServiceNow provides an array of applications that share a common, core platform. In the graphic below, the outer circle represents discrete applications (i.e., CSM), which each contain a host of process-oriented functionalities. The core platform capabilities, represented by the inner circle, come with any application licensing. ServiceNow can support varying customer maturity by leveraging this modularity - clients can pick and choose the capabilities they feel are best suited to their maturity and prioritized business needs. When combined, clients leverage



the power of the platform with select capabilities working together to provide a more complete enterprise service management solution.

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The ServiceNow "Universe"

The following represent some of the out of box ServiceNow CSM capabilities align directly with State needs, including the anticipated needs of the State of West Virginia:

- Service Portal: CSM includes two primary service portal experiences, depending on the entity or individual authenticated and using the portal. A Customer Service Portal will meet the needs of the State's businesses, who need to interact with the State for licensing, tax, and other applicable services. A Consumer, or Citizen, Service Portal is the direct interface by which citizens navigate the State's available services and publicly available information. Service Portals are designed to accommodate Role Based Access, meaning only those users who can see certain information(i.e., case service requests, knowledge articles, announcements, and more) will. Both Service Portal experiences are compatible with a wide array of mobile devices.
  - Walk Up Experience: In addition to the web-based Service Portal experience, the State can also leverage CSM's available Walk Up Experience. This feature is useful for Departmental offices which permit walk ins,



monitor and manage queues, and other features. Customers can even book an appointment through the Service Portal and check in when they arrive on location using the integrated capabilities of the platform.

- Case Management: Each inbound citizen request is a "case," which can be generated
  directly by a citizen or on their behalf by a State employee. Cases are the "unit of
  measure" to identify a customer question or issue, as well as track the activities
  related to resolving that issue. Cases are also used to track all of the communication
  to and from the customer, including the communication channels being used.
  - Service Catalog: The State has the opportunity to create common case requests into a Service Catalog, in which predefined information fields and backend workflow ensure that citizen needs are routed to the appropriate service group to quickly resolve the underlying need.
- Knowledge Management: A platform feature that supports both your employees and citizen-customers, Knowledge Management is the sharing of approved information, or Knowledge Articles, with users with appropriate role based access. The State can create dozens and dozens of unique Knowledge Bases, which contain articles specific to a certain user community, business need, or more. For example, the OST can have an internal knowledge base that provides service policies and guided steps to redress common inquiries to help employees respond to frequent submitted cases. Simultaneous, you can also maintain a citizen facing business facing knowledge base that contains self-service articles to support your customers by answering FAQs, providing step by step instructions to redress common inquiries, and more
  - Communities: Communities is a "Reddit-like" feature included in ServiceNow CSM which allows citizens to submit questions and respond to questions, moderated by the State.
- Chat Virtual Agent: CSM provides the State with live chat and virtual agent capabilities to directly communicate with citizen-customers and or enable Tier 0 support, directly your end users to applicable knowledge articles or service catalog items that meet their needs. Chat provides users the opportunity to connect directly with available personnel, while Virtual Agent uses predefined chatbot conversations and integrated natural language understanding to analyze, understand, and navigate users to the right topic based on the inferred intent to analyze, understand, and navigate the user to the right topic based on the inferred intent.
- Surveys: Survey Management is a core platform feature with which the State can
  create, send, and collect responses for basic surveys. If installed, you can also use the
  Survey widget to set up a survey within Service Portal. Surveys can be configured
  to send automatically after a specific trigger in a workflow, like when a case is



closed; customers can also set a probability for the system to send a survey at random when a condition is met.

- Agent Workspace: A configurable service desk application available for authenticated State users available via web browser, Agent Workspace consolidates the tools that employees will need to assist citizen inquiries. Case agents can track all communication to and from the customer - agent, phone, email; customer information (name, email, phone, case history) is consolidated; embedded "playbooks" ensure that structured tasks are consistently followed for standardized responses to submitted needs; integrated knowledge is available for both internal knowledge sharing and externally available articles that can be sent to customers to self-address their submitted requests; and, Service Level Agreements can be set for the duration of the case, specific case tasks, and more for the State to track operational efficiencies.
- Service Level Agreements: A service level agreement (SLA) is a record that specifies the time within which service must be provided. CSM natively integrates with this core platform capability and can be configured to start, pause, and stop based on any customer service case attributes.

The platform's CSM application is backed by a unique Industry Data Model that was designed to respond to the particular needs of ServiceNow's public sector customers. Individual employees are assigned roles that are associated with these fields and therefore only granted access to the cases, knowledge, and other data in that platform that is specific to their work. In this way, ServiceNow accommodates internal "segmentation" and data protection without domain separation, enabling leadership to still achieve a "single pane of glass" into and across your environment.

The data model also accommodates an array of external customer relationships and needs. Citizens can set up individual accounts as well as business accounts. Business accounts accommodate multiple authorized contacts who are granted access to submit requests on behalf of the business. For individual citizens, the data model can accommodate both households as well as individuals. A household is an entity that represents a group of consumers that usually share a common address and use services as a group. Relationships between household members can be identified, with the capability for a household member to manage cases on behalf of another.

This critical capability grants the State the flexibility and security needed to support business organizations, families, and individuals with an out of box structured data model designed with government needs in mind.

b. What features are standard? What features are available at an



	additional cost?
	ServiceNow Customer Service Management (CSM): <a href="https://www.servicenow.com/products/customer-service-management/what-is-csm.html">https://www.servicenow.com/products/customer-service-management/what-is-csm.html</a>
	ServiceNow Public Sector Digital Services (PSDS): <a href="https://docs.servicenow.com/en-US/bundle/sandiego-government-industry/page/use/application-content-packs/concept/psds-content-pack.html">https://docs.servicenow.com/en-US/bundle/sandiego-government-industry/page/use/application-content-packs/concept/psds-content-pack.html</a> pack.html
4.2.2	Please describe your CMS and/or IMS solution configurability, including:
	a. Is your CMS and/or IMS designed for any particular client, business, or program contexts? Please describe.
	b. If your solution is not designed specifically for Medicaid HCBS waivers, what configurations and customizations are needed to adapt the product for use by State Medicaid HCBS waiver programs?
	c. Can any aspects of your system be configured by an appropriately trained state user? If so, please provide some specific examples, preferably from a real implementation scenario.
	d. What are some of the more challenging use cases to configure? What are some examples of use cases that require customization?
Answer to 4.2.2	<ul> <li>a. ServiceNow's Public Sector Digital Services (PSDS) is designed for our Public Sector customers.</li> <li>b. ServiceNow is an industry leading workflow and automation platform, and partners like Cask have configured the platforms to meet the needs of even more specific industries, like Medicare/Medicaid.</li> <li>c. Yes. Cask's implementations are structured around "teaching the customer to fish" and enabling you to successfully maintain the solution after the project. We include various trainings, knowledge transfer sessions, classes, and materials.</li> <li>d. Cask makes every effort to follow platform best practices and stay away from any customizations. We will advise you of all implications if WV requests something that would be a customization.</li> </ul>
4.2.3	Please describe how your system manages user access to member data. Different user types will need different levels of access. Please also describe how your system allows for member transfers from one CMA or service provider to another CMA or service provider, and how it manages user data access when a member is transferred.
Answer to 4.2.3	https://docs.servicenow.com/en-US/bundle/tokyo-platform-administration/page/administer/roles/concept/c_Roles.html



4.2.4	Please describe your CMS and/or IMS implementation experience, including:
	a. How long has the solution has been in use? b. How many implementations of your CMS and/or IMS have you conducted? How many of those were for state agency Medicaid HCBS waiver programs? c. What Medicaid HCBS waiver programs has your solution been used for? d. Have you implemented your solution to manage multiple Medicaid HCBS waiver programs? If so, please provide examples. e. Some of West Virginia's waiver programs include a "self-directed care" option. Have any of your implementations included this type of program? Explain how your solution aligns with self-directed care concepts f. Have states used your system for Money Follows the Person (MFP) programs? If so, explain how your solution aligns with MFP concepts.
4.2.5	Please describe your typical System Development Life Cycle (SDLC) approach.
Answer to 4.2.5	Cask offers our own Implementation Methodology that was crafted using ServiceNow's NOW methodology, and our best practices/experience taken into account. We are happy to dive deeper into this if contacted by WV.
4.2.6	Please describe your solution's hosting environment, levels of service, and alignment with federal standards for privacy, security, and hosting. Are any browser add-ons or plug-ins required for end users?
4.2.7	What is your experience implementing your CMS and/or IMS in a modular MES environment?
	a. Has your solution been implemented in a context that requires Centers for Medicare and Medicaid Services certification? If so, was certification obtained? If not, why?  b. If not, are there any known obstacles or risks to implementing your CMS and/or IMS in a modular MES environment that will require Centers for Medicare and Medicaid Services certification?
Answer to 4.2.7	a.Yes
4.2.8	What is your experience with interoperability?
	a. Does your solution align with FHIR interoperability standards, including use of standardized application programming interfaces (APIs)? Please explain and elaborate. b. What is your experience integrating your solution with the following, and using what methods [i.e., API; custom interface; extract, transform, load (ETL); etc.) i. Another vendor's or the state's IMS



Answer to 4.2.8	iv. Individual providers  V. ASO systems  vi. Managed care organization (MCO) systems  c. What challenges have you encountered integrating or interfacing with other systems?  ServiceNow as the State's Platform of Platforms  ServiceNow is intentionally designed so all customers can obtain additional value by integrating with third-party systems of record, systems of action, and/or systems of engagement. Integrations increase operational efficiency, reduce total cost, and increase quality. Intentionally designed to serve as a platform of platforms, ServiceNow provides customers with myriad options to integrate with third-party systems. A variety of techniques can be used, including but not limited to:  Scripted APIs: Define your service endpoints, query parameters, and headers for a scripted web service API that follows the REST architecture  API Explorer: Discover and interacts easily with REST APIs on your ServiceNow instance  JSON: Support accessing your JSON data from either a post parameter or the HTTP request content  SOAP XML: Support SOAP messages and XML data to exchange structured information between ServiceNow and your other systems  REST: Support your REST-based architecture with ServiceNow application resources (APIs)  Integration Hub: Easily create reusable, codeless REST actions to provide links between Flow Designer and third-party systems  MID Server: Facilitate communication and movement of your data between ServiceNow and external resources using an agent that can be deployed on-premises or in another cloud  Import & Export: Simplify exporting your data and importing structured data (such as JSON, XML) to an instance in bulk
4.2.9	What is a typical implementation timeline? Please include key phases, milestones, drivers, and assumptions. What variables impact the implementation timeline, and how, for instance, number of HCBS waiver programs, number of providers, number of named users?  a. IMS only b. CMS only C. IMS and CMS
Answer	a. Can range anywhere from 2-4 months based on complexity



to 4.2.9	b. Can range anywhere from 2-4 months based on complexity c. Can range anywhere from 3-7 months based on complexity
4.2.10	What conditions create a favorable environment for a successful implementation? What conditions add risk to implementations?
Answer to 4.2.10	Favorable: Partially dedicated customer team to support implementation, at least one fully allocated resource for information sharing with Cask, established governance and decision making structure, processes documented (even if manual).
	Adds risk: Non-dedicated project team, lack of governance and decision making structure, no clear vision of desired end state, unestablished project hierarchy, unresponsiveness.
4.2.11	What training and organizational change management support does your company provide?
Answer to 4.2.11	Cask provides several categories of ServiceNow training post-implementation including role-based, train-the-trainer, and classroom style. We also have an Organization Change Management Team that works with some our top clients every day, they are nationally renowned, and we'd love to introduce them to the HHS.
4.2.12	Please describe your CMS and/or IMS pricing model, and what features, products, services, licenses, etc. are included for each:
	a. For implementation (one-time and recurring, if applicable); what variables impact costs? b. For on-going post-implementation (one-time and recurring); what variables impact costs? c. Can system operations and maintenance be assumed by BMS or another vendor?
Answer to 4.2.12	<ul> <li>a. Amount of hours needed by Cask (data migrations, difficult integrations, complex workflows, customizations)</li> <li>b. These are typically subscription costs that do not change</li> <li>c. Cask offers system operations and maintenance support</li> </ul>
4.2.13	In order to secure federal funding for this project, BMS must provide the Centers for Medicare and Medicaid Services with estimated implementation and on-going costs. We understand there are many variables that impact your pricing. Your assistance completing the table below is most appreciated. Please identify the nature of the cost for each line item, and add rows as needed. If more tables are needed, please include a supplemental file with your response. Assume four waiver programs with the self-directed option plus the state's Money Follows the Person program and State Plan Personal Care Program are in scope; and up to 2000 users. It is not necessary to maintain this table format in your response. Please indicate where hosting in a secure cloud environment is included.



Answer to 4.2.13	Cask and ServiceNow have chosen to not provide pricing due to this information becoming public.
4.2.14	What information do you need from BMS in future solicitations to create the most accurate and cost-effective pricing?
Answer to 4.2.14	Exact user counts, detailed workflow graphics/explanations, necessary integrations, accurate "desired end state", number of case types needed, if you can accept Time and Materials or if Firm-Fixed pricing is needed.
4.2.15	What types of solicitation requirements would prevent you from bidding?
4.2.16	Describe the major trends in the Medicaid HCBS waiver CMS and IMS solution space that you believe BMS should be aware of, including any product or approach changes that you believe will come to market within the next 12-24 months. How do your solution roadmaps stay current with such trends? If possible, please be specific regarding how these trends affect Medicaid, including WVCHIP, or healthcare IT in West Virginia.
4.2.17	In the states where you have implemented your CMS and/or IMS, what have been some of the notable program outcomes? What performance metrics were you able to provide to substantiate this success?
Answer to 4.2.17	Increased automation, less time spent on redundant tasks and repetitive requests, decreased MTTR (Mean Time To Resolution) for tickets and cases, increased employee experience and employee satisfaction, as well as customer/patient satisfaction.
4.2.18	If BMS released an RFP that allowed vendors to bid on IMS only, CMS only, or CMS and IMS, which systems would you bid on and why? Please share any comments on this potential RFP structure in terms of how it would impact your interest in bidding.
Answer to 4.2.18	Both. Cask and ServiceNow recommend keeping both of these systems on one platform for WV to receive ultimate automation and data sharing capabilities.
4.2.19	Do you have a short demonstration of your solution that you would like to present to BMS? If BMS wishes to take part in a demonstration, BMS will reach out to the Respondent for further information,
Answer to 4.2.19	Yes
4.2.20	Is there additional information you would like to share with BMS related to the topics addressed in this RFI?



CASK | WV DHHS BMS CRFI 0511 Modern CMS and IMS

We would welcome the opportunity to meet with you in person and share how we can be of benefit to your program.

# Request for Information CRFI BMS2300000001

(West Virginia Bureau for Medical Services)

By signing below, I certify that I have reviewed this Request for Information in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this response for review and consideration on behalf of my organization.

(Company)								
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