

FIRM REFERENCE FORM	
CONTRACTOR NAME:	
PART 1 – REFERENCE’S INFORMATION	
THIS INFORMATION SHOULD MATCH THE INFORMATION PROVIDED IN ATTACHMENT 8 – FIRM MANDATORY QUALIFICATIONS .	
Customer/Client Reference Name:	Lisa Gauthier
Customer/Client Reference Title:	CalHEERS Director of Technology (formerly, retired)
Agency, Department, Organization or Company where staff member performed:	Office of Technology and Solutions Integration (OTSI), California Healthcare Eligibility, Enrollment and Retention System (CalHEERS) Project
Project Title on which staff member performed:	CalSAWS Business Analysis and Support Services (BASS)
Reference Phone Number:	(916) 206-0636
Reference E-mail Address:	luvcalisun@gmail.com

Instruction for References: The Contractor staff above has listed you as a reference and is requesting for you to complete this Firm Reference Form. Please provide your comments and the appropriate rating based on your experience with the proposed staff.

- Step 1:** Complete Columns 1-2 in Part 2 by marking “yes” or “no” and providing an explanation if needed.
- Step 2:** Complete Part 3 and provide your performance ratings.
- Step 3:** At the bottom of the page, print your name, your company’s name, then sign and date.
- Step 4:** Return the completed, signed Staff Reference Form to Contractor.

PART 2 – THE REFERENCE MUST COMPLETE THIS TABLE.	
COLUMN 1	COLUMN 2
Did the Contractor provide you with a copy of the completed Attachment 8 – Firm Mandatory Qualifications ?	Did this Firm perform the services described in Attachment 8 – Firm Mandatory Qualifications , including the functions as described and the time period provided on the project(s) that lists you as a contact?
☒ Yes ☐ No	☒ Yes ☐ No (If “No” checked, explain here.)
PART 3 – THE REFERENCE MUST COMPLETE THIS TABLE.	
THE REFERENCE SHALL COMPLETE PERFORMANCE AND ABILITIES STATEMENTS FOR THE PROPOSED FIRM AND OVERALL PERFORMANCE RATING.	
Performance and Ability Statements	
1. Describe the services provided: ClearBest provided Business Analysis and Support Services for CalHEERS, which included analyzing policy and system functionality to support applicable ACA programs, including California Medi-Cal program. The ClearBest team supported the CalHEERS project’s Business Analysts, UAT, and Operational Readiness teams and worked with DHCS, Covered California, SAWS, MEDS, insurance carriers, and project teams during the ongoing development and operations of CalHEERS. The ClearBest team facilitated discussions around policy and resultant new/updated functionality;	

reviewed and provided feedback on design documents; supported the UAT and Operational Readiness teams to understand the changes; reviewed county communications, job aids, and release notes; and reviewed and managed the resolution of defects. ClearBest worked with teams through the Agile and UCD/UX processes for the development of new features. They also helped the State meet federal mandates and supported the State through audits, ensuring accurate information was provided. ClearBest also supported the State through the transition of the CalHEERS insurance enrollment module and vendor (Primary Care Access Program (PCAP) Admin Portal), which involved multiple contractors, the State sponsors, and program partners.

2. Did the Contractor produce deliverable reviews that met both the project specifications and the agency's expectations? Please describe briefly.

Yes. ClearBest reviewed all the Final Design Deliverables and communications such as CRFIs. In addition to their own reviews and comments, we requested the ClearBest team to collect and consolidate all reviewers' comments and submit comments and findings by Change Request. The reviews were in the format needed and requested and met our expectations.

3. If there were changes in the project, did the Contractor adapt to those changes and work through issues during all stages of the Project?

Yes. CalHEERS is a continually evolving project, and changes happen often. The ClearBest BASS team fully supported and worked with all teams to handle changes, work through any issues, and get everyone to a better solution.

4. Was communication between the Contractor and your organization's staff open, timely, complete and effective? Please briefly summarize.

Yes. Karen Roach and her team were in continual communication with me and my supervisors. We had open and timely conversations to address plans, issues, and actions needed. Our conversations were always complete and effective.

5. Were any subcontractors used by this Contractor? If so, for what purpose/major tasks? How well did the Contractor manage its subcontractors and did your organization ever have to mediate?

Yes. ClearBest had a couple of subcontractors from IFG. Everyone on the ClearBest team worked cohesively and without issue. All staff supported Change Requests (CRs), discussions, reviews, and cross-team efforts. We had no issue with ClearBest or its subcontractors and never needed to mediate any issues.

6. Was the Project a success? Yes. CalHEERS has and continues to be a success. We could not have accomplished all we did without the support of the ClearBest team.
7. Would you rehire/recommend this Contractor? If not, why not? Yes. I would definitely hire ClearBest again.
8. Optional Comments:
On a scale of 1-10, with 1 being the lowest and 10 being the highest, how would you rate this Contractor's overall performance?
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By signing this form, the Reference is certifying that all information provided on this form is correct.

<u>Lisa Gauthier</u>	<u>CalHEERS (formerly, retired)</u>
Name of Reference (print)	Name of Company Reference (print)
DocuSigned by:	
<u><i>Lisa Gauthier</i></u>	<u>9/18/2025 9:27 AM PDT</u>
Signature of Reference	Date