

Table 32: Firm Reference Form

FIRM REFERENCE FORM	
CONTRACTOR NAME: INTERNATIONAL BUSINESS MACHINES (IBM)	
PART 1 – REFERENCE'S INFORMATION	
THIS INFORMATION SHOULD MATCH THE INFORMATION PROVIDED IN ATTACHMENT 8 – FIRM MANDATORY QUALIFICATIONS .	
Customer/Client Reference Name:	Doug Vincent
Customer/Client Reference Title:	Chief, Vendor Management Section Branch
Agency, Department, Organization or Company where staff member performed:	Department of Healthcare, Services, State of CA
Project Title on which staff member performed:	CAMMIS (California Medicaid Management Information System)
Reference Phone Number:	916-208-5265
Reference E-mail Address:	Doug.Vincent@dhcs.ca.gov

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: The Medi-Cal program serves approximately 15 million beneficiaries, including over 900,000 fee-for-service recipients. Central to its operations is the CA-MMIS system, which supports more than 140,000 healthcare providers and processes roughly 200 million claims annually. CA-MMIS is a complex platform comprising over 25 interconnected subsystems and applications,	

designed to ensure the timely processing, adjudication, and reporting of healthcare claims.

As the system integrator for CA-MMIS, IBM has led multiple initiatives, including the development of a cloud-based provider portal to replace the existing application. These efforts have streamlined claim processing, reduced administrative burdens for providers, and accelerated access to care.

IBM's services for CA-MMIS encompass annual enhancements totaling more than 270,000 hours, rigorous Quality Assurance—covering functional, integration, and performance testing—and comprehensive infrastructure management, including capacity planning, system monitoring, and robust security and privacy measures.

This long-standing partnership reflects IBM's commitment to delivering advanced technological solutions that enhance the efficiency and effectiveness of healthcare service delivery across California.

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

Yes, as part of the Provider Portal program, the Contractor has successfully developed and transitioned multiple applications from legacy systems to the cloud platform—most notably the high-traffic Eligibility application, which averages over 11 million transactions per month. Recognizing its critical role in provider operations, the Contractor ensured exceptional application availability and optimal response times, resulting in negligible downtime. All Eligibility modules—including Single Subscriber Inquiry, Share of Cost, and Multi Subscriber Inquiry—were implemented with best-in-class performance and delivered in a record timeframe of nine months.

Leveraging the SAFe (Scaled Agile Framework) methodology, the Contractor organized development into small, specialized squads, enabling concurrent yet independent delivery of business-critical EPICs. Through disciplined Program Increment Planning, synchronized release schedules, and Continuous Integration/Continuous Deployment practices, the Contractor consistently met business priorities and delivered high-quality Minimum Viable Products aligned with stakeholder needs.

This disciplined approach and proven execution meant that every deliverable review not only met all project specifications but also aligned with—and often exceeded—the agency's expectations for quality, timeliness, and operational impact. The result was a seamless transition to modernized cloud-based applications that advanced the agency's business roadmap with exceptional efficiency and reliability.

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, the Contractor consistently demonstrated the ability to adapt to project changes and resolve issues at every stage of the project lifecycle. By leveraging the SAFe (Scaled Agile Framework) methodology, the Program and Technical teams maintained exceptional flexibility to embrace evolving requirements. Program Increments were groomed and prioritized based on shifting business priorities, objectives, and user needs. Each two-week sprint encompassed design, development, testing, and delivery-readiness, with continuous integration enabling immediate deployment. When changes arose—whether due to revised business objectives, policy updates, or technical specification shifts—the team could reprioritize sprint goals and incorporate new direction within a week, ensuring minimal disruption to delivery timelines.

A clear example of this adaptability was the Justice Involved application project. Initially deployed to selected counties, user feedback revealed adoption challenges and usability issues. In response, the Contractor pivoted quickly from delivery mode to a design-thinking and research-centric approach, employing the Human-Centric Design (HCD) framework. Skilled subject matter experts collaborated directly with county personnel to identify and analyze pain points, translating them into actionable solutions. Within a week, the program was

conceptualized, and in just 8–10 weeks, enhancements were designed, reviewed, approved, and implemented—significantly improving user experience and meeting the revised business requirements.

This responsiveness, combined with structured agile practices and collaborative problem-solving, ensured the Contractor could adapt to change seamlessly, work through issues efficiently, and deliver solutions that met both immediate needs and long-term objectives.

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

Yes. The Contractor's delivery methodology fosters consistent, transparent, and collaborative communication across all teams and stakeholders. Daily stand-up meetings, held at the same time each day, provide a forum to review progress, surface impediments, and ensure immediate attention to issues. Weekly backlog refinement sessions bring product owners and delivery teams together to prioritize work in alignment with evolving business objectives, enabling responsiveness to changing demands.

Every two weeks, the Contractor conducts structured "Playbacks," showcasing completed product features through live demonstrations and reviewing accomplishments to secure stakeholder concurrence. In addition, a regular Scrum-of-Scrums cadence brings together squad leads and Product Management teams to address cross-team dependencies, identify risks, and make timely decisions that accelerate delivery.

Through this disciplined communication framework—spanning daily, weekly, and bi-weekly touchpoints—the Contractor ensures alignment, rapid issue resolution, and a shared understanding of priorities, resulting in efficient, coordinated progress toward project goals.

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, the contractor has employed a subcontractor (Kyndrl) to provide services for infrastructure implementation and delivery.

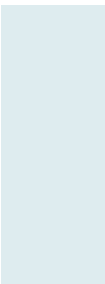
6. Was the Project a success?

The Provider Portal's newly developed features—including single sign-on and shared cost applications—were successfully deployed and made accessible to all active provider organizations. This initiative onboarded over 30,000 providers, significantly improving service turnaround for the provider and submitter communities. For example, Personal Identification Numbers (PINs) can now be reset in real time, compared to the previous 30-day process.

The project also introduced enhanced capabilities, such as CA-MMIS organization and user management, electronic migration of paper records, and scalable frameworks—all supported by a highly available and efficient system.

The CA-MMIS Provider Portal demonstrated the tangible benefits of cloud technology, including accelerated time-to-market and streamlined deployment. It strengthened the state's confidence in cloud solutions and showcased the success of collaborative co-creation between the Department of Health Care Services (DHCS) and IBM. The initiative further underscored IBM's ability to deliver innovative, transformative solutions—ultimately inspiring the state to explore migrating its entire CA-MMIS application suite to the cloud, supported by IBM's cloud consulting expertise.

7. Would you rehire/recommend this Contractor? If not, why not? Yes, they have demonstrated capable of dealing with large and complex demands while remaining professional and available.
8. Optional Comments: (if any, please add)
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?
9.5 (nobody is perfect 😊)



By signing this form, the Reference is certifying that all information provided on this form is correct.

Doug Vincent	Department of Healthcare Services, State of CA
_____ Name of Reference (print)	_____ Name of Company Reference (print)

_____ Signature of Reference	_____ Date
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