



**State of West Virginia
Public Employees Insurance Agency**

**Medicare Coordination and Social Security Disability
Advocacy Services**

**Request for Proposal
November 2016**

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This RFP and attachments may be downloaded at our website located at:

<http://www.westvirginia.com/peia/>

Request for Proposal

Medicare Coordination and Social Security Disability Advocacy Services

SECTION 1 – INTRODUCTION

The West Virginia Public Employees Insurance Agency (PEIA) is seeking a vendor for Medicare Coordination and Social Security Disability Advocacy Services.

Background

Public Employees Insurance Agency (PEIA) is an agency of the State of West Virginia which administers benefits for approximately 71,000 active employees and COBRA participants. PEIA also administers benefits for 40,000 retired employees and surviving dependents on behalf of the West Virginia Retiree Health Benefits Trust Fund. There are 179,000 eligible dependents, resulting in approximately 251,000 members being covered by the PEIA health plan.

A comprehensive fee-for-service health benefit plan, the Preferred Provider Benefit (PPB) plan, is offered to all eligible participants statewide (as well as members in other jurisdictions) and is administered by a third party. PEIA also offers a managed care plan option statewide, and currently contracts with a administrator/TPA. Approximately 6,700 policyholders are enrolled in managed care plans and 111,000 Medicare retirees are members of the Medicare Advantage Plan (MAPD).

In the PEIA PPB plan, participants are responsible for cost sharing in the form of an annual medical deductible, coinsurance, and copayments; they also pay a separate prescription drug deductible and copayments.

Eligibility

The following employers are eligible to participate in the PEIA plan:

- State of West Virginia
- West Virginia Legislature
- West Virginia State colleges and universities
- County boards of education to include elected members of the boards of education
- Counties, cities, or towns
- Comprehensive community mental health centers and mental retardation centers authorized pursuant to section one, article two-a, chapter twenty-seven (27-2-1) of the West Virginia Code and which is supported in part by state, county or municipal funds, and
- Other individuals and government bodies specified in the West Virginia Code Chapter 5, Article 16.

Deductible is a combined medical and prescription drug deductible. The prescription drug program is administered by a separate vendor.

Manner of Payment

PEIA shall pay on a project stage basis, as shown on the Pricing Summary Form (Exhibit B), for all Contract Services performed and accepted under this Contract. Vendor shall accept payment in accordance with the payment procedures of the State of West Virginia.

The amount of the bid submitted by each potential vendor shall be only for services to be rendered. Vendor shall be responsible for all mileage and travel costs, including travel time, associated with performance of this Contract. Any anticipated mileage or travel costs should be included in the Vendor's bid, but such costs will not be paid separately by the Agency (See Exhibit B).

Inquiries

Bidders may submit, in writing, any specific questions or clarifications prior to the date shown in the following Time Requirements section. Written questions received later than the date and time shown in the following Time Requirements section, shall not be answered. All questions with responses will be provided to all potential Bidders who are known, on the date and time shown in the following Time Requirements section. The questions may be submitted via fax or email; however, PEIA assumes no liability for assuring accurate/complete FAX/email transmission/receipt and will not acknowledge receipt except by addressing the question.

The issuing agent for this RFP is the PEIA. All communication, inquiries, and final quotations regarding this RFP **must** be submitted in writing to the following individual:

Thomas J. Marchio
Policy Specialist
WV Public Employees Insurance Agency
601 57th St., SE, Suite 2
Charleston, WV 25304-2345
Fax: 304-558-2470
Email: Thomas.J.Marchio@wv.gov

The Vendor, or anyone on the Vendor's behalf, is not permitted to make any contact whatsoever with any member of the evaluation committee. Violations may result in rejection of the bid.

Proposed Timetable

Notification of interest and all questions must be received no later than 4:00 p.m. EST, Wednesday, December 14, 2016. The notification of interest will simply state that the vendor would like the opportunity to submit a bid on this project. Quotes are due no later than 4:00 p.m., EST, Wednesday, February 1, 2017.

In response to this RFP, please submit an all-inclusive quotation of pricing for this project, a detailed timeline for this project, and three references, including company name, contact name, address and

telephone number. These references should be organizations for which you have completed work similar to that described in this RFP. (See Exhibit G.)

Time Table

RFPs Issued	Wednesday	December 7, 2016
Questions Submitted to PEIA	Wednesday	December 21, 2016
Question Answers to Vendor	Wednesday	January 4, 2017
Proposal Due	Wednesday	January 25, 2017
Evaluation of Quotes		February 8, 2017
Award Contract	Wednesday	February 15, 2017
Contract Begins	Wednesday	March 1, 2017

Contract Period

The contract period will begin on April 1, 2017. PEIA's intent is to enter into an initial contract for twelve (12) months, effective April 1, 2017. It is the intent of the PEIA to execute annual contract renewals rather than conduct a new procurement for the subsequent plan years. However, PEIA reserves the right to conduct new procurement in subsequent years.

Confidentiality/Public Record

PEIA requests that all information provided as part of this RFP, as well as all subsequent evaluations and discussions, be used exclusively for purposes of responding to the RFP and any subsequent discussions related thereto.

News releases that pertain to this RFP, or contract resulting therefrom, must not be made without prior approval of the State of West Virginia, and then only in coordination with PEIA.

Ownership of all data, materials and documentation originated and prepared for PEIA pursuant to the RFP shall belong exclusively to the State.

Vendor shall have access to private and confidential data maintained by the participating agencies to the extent required for the Vendor to carry out the duties and responsibilities defined in this contract. Vendor agrees to maintain confidentiality and security of the data made available, shall comply with all applicable confidentiality laws or regulations, including HIPAA, and shall indemnify and hold harmless the State and the participating agencies against any and all claims brought by any party attributed to actions of breach of confidentiality by the Vendor, subcontractors, or individuals permitted access by the Vendor.

Vendor agrees to the terms of the West Virginia State Government Covered Entity HIPAA Business Associate Agreement Addendum. (See Exhibit D)

Information Privacy and Security

The vendor must have policies and procedures in place consistent with the Privacy and Security Rule(s) of the Health Insurance Portability and Accountability Act of 1996 (HIPAA). Such standards for privacy and security of protected health information must include administrative, physical and technical safeguards for protecting the privacy, security, confidentiality, and integrity of personally identifiable information (PII) and protected health information (PHI) including electronic protected health information (ePHI), and meet any other applicable state or Federal law related to the privacy or security of information.

The vendor must sign a Business Associate Agreement with PEIA and enforce any and/or all terms and conditions of said Business Associate Agreement with any and/or all subcontractors who may provide any direct and/or indirect services as part of this contract award. Direct and/or indirect services would include, but not necessarily be limited to: information technology services, member communications, member consultation/counseling, and/or other services. The successful bidder shall be responsible for conducting any and/or all vendor assurances on any and/or all subcontractors assigned work on this contract.

The successful bidder must be fully compliant with the Health Information Technology for Economic and Clinical Health Act (HITECH) of 2009 and the Interim Breach Notification Rule(s) as enacted by the 2009 American Reinvestment and Reauthorization Act (ARRA) of 2009. The successful bidder must be willing to guarantee the privacy, security, and integrity of any and/or all PEIA member data. File transfers must occur via secure tested ftp type sites using recognized security standards such as NIST and/or ISO 27001.

Submissions Are Public Record

All documents submitted that are related to purchase orders or contracts are considered public records. All bids, proposals, or offers submitted by bidders shall become public information and are available for inspection during official, normal business hours in the PEIA offices.

Written Release of Information

All public information may be released with or without a Freedom of Information Act request; however, only a written request will be acted upon with duplication fees paid in advance. Duplication fees shall apply to all requests for copies of any document. Currently the fees are \$1.00 per page, or a minimum of \$10.00 per request, whichever is greater.

Risk of Disclosure

The only exemptions from disclosure of information are listed in West Virginia Code §29B-1-4. Primarily, trade secrets as submitted by a bidder are the only exemption from public disclosure. The submission of any information to the State by a vendor puts the risk of disclosure on the vendor. The State will notify the vendor if PEIA receives an FOIA request for material the vendor has labeled as trade secret or proprietary so that the vendor can seek a Court Order prohibiting disclosure. Absent an Order from a Court of Competent Jurisdiction to the contrary,

PEIA will release the materials. The State does not guarantee non-disclosure of any information to the public. Designation of an entire proposal or excessive portions of the proposal as “proprietary” is not considered to be in good faith and will be disregarded.

Status as Registered Vendor

All vendors must be registered with the State of West Virginia **prior** to the award of an actual purchase order or contract. The vendor must complete a Vendor Registration and Disclosure Statement, Form WV-1, and remit the required annual registration fee. Please go to the State of West Virginia’s Purchasing Division website at <http://www.state.wv.us/admin/purchase/> for complete information and related form.

Vendors must also be registered with the West Virginia Secretary of State (SOS) to do business in West Virginia. Please contact the SOS at 304-558-6000 for further details.

Terms of Contract

The performance of the contract awarded pursuant to this document is contingent upon adequate funding being appropriated by the West Virginia Legislature for such purposes. In the event the Legislature fails to appropriate sufficient funds for the continuation of the contract, then the contract will be canceled without penalty.

The terms of the contract must be consistent with the following:

- *Acceleration* – Any references to acceleration of payments in the event of default or non-funding is unacceptable.
- *Amendments* – All amendments, modifications, alterations or changes to the agreement shall be in writing and signed by the parties.
- *Arbitration* – Any references to arbitration contained in the agreement are unacceptable. The vendor shall present disputes arising out of the agreement to the West Virginia Court of Claims.
- *Assignment* – Notwithstanding any clause to the contrary, the participating agencies reserve the right to assign the agreement to another State of West Virginia agency, board or commission upon thirty (30) days written notice to the vendor and vendor shall obtain the written consent of the participating agencies prior to assigning the agreement.
- *Attorney Fees* – The participating agencies recognize an obligation to pay attorney’s fees or costs only when assessed by a court of competent jurisdiction. Any other provision is invalid and considered null and void.
- *Bidder* – a person or organization who submitted an offer in response to this RFP.

- *Bid/Amount* – Bids **cannot** be negotiated, amended, and/or revised after the bid is received by PEIA.
- *Bid/Alteration* – Any interlineation, alteration, or erasure made before opening time must be initialed by the signer of the bid, guaranteeing authenticity. The PEIA reserves the right to accept, negotiate, amend or reject any/all of the bids as it deems to be in the best interest of the members of PEIA.
- *Bid award* – The PEIA reserves the right to award any combination or not to award the contract discussed in this RFP.
- *Bid/Late* – Bids received after submission deadline will be considered void and unacceptable. PEIA is not responsible for lateness or non-delivery of mail, carrier, etc., and the PEIA mail department date/time stamp shall be the official time of receipt.
- *Breach* – means the acquisition, access, use or disclosure of PHI in a manner not permitted by the Privacy Rule that comprises the security or privacy of the PHI as defined under *Business Associate*.
- *Business Associate* - The prospective vendor will be performing an Administrative Function on behalf of PEIA, a Health Plan and a Covered Entity as defined by §45 CFR 160.103, and will be considered a Business Associate of PEIA. The prospective vendor shall be fully compliant with any and/or all provisions of the Privacy and Security Rule(s) of the Health Insurance Portability and Accountability Act of 1996 (HIPAA), including the provisions of the Health Information Technology for Economic and Clinical Health Act (HITECH) as adopted as part of the American Reinvestment and Reauthorization Act of 2009 (ARRA) and the Omnibus Rule(s) that went into effect September 23, 2013. The prospective vendor will be required to sign the West Virginia Executive Branch Business Associate Agreement prior to beginning any work under this proposed contract.
- *Contract* – is a legal and binding agreement between two or more competent parties, in consideration for the procurement of services as described in this RFP.
- *Contractor* – a person or organization who is a successful bidder as a result of an RFP and/or who enters into a contract or any subcontract of a successful bidder.
- *Governing Law* – The agreement shall be governed by the laws of the State of West Virginia.
- *Hold Harmless* – Any clause requiring the participating agencies to indemnify or hold harmless any party is unacceptable. The vendor must hold harmless the participating agencies from any liability arising from the vendor's performance of services.

- *Indemnification* – The vendor agrees to indemnify, defend and hold harmless the State and the participating agencies, its officers and employees from and against any and all claims arising from the vendors acts or failure to act, including but not limited to: (1) Any claims or losses for services rendered by any subcontractor, person or firm performing or supplying services, materials or supplies in connection with the performance of the contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the Vendor, its officers, employees, or subcontractors by the publication, translation, reproduction, delivery, performance, use or disposition of any data used under the contract in a manner not authorized by the contract, or by Federal or State statutes or regulations; (3) Any failure of the Vendor, its officers, employees or subcontractors to observe State and federal laws, including but not limited to labor and wage laws.
- *Insurance* – Any provision requiring the participating agencies to insure equipment or property of any kind and name the vendor as beneficiary or as an additional insured is unacceptable.
- *Interest* – Should the agreement include a provision for interest on late payments, the participating agencies agree to pay the maximum legal rate under West Virginia law. All other references to interest or late charges are unacceptable.
- *Limitation of Liability* – The participating agencies, as State entities, cannot agree to assume the potential liability of a vendor. Accordingly, any provision limiting the Vendor’s liability for direct damages or limiting the vendor’s liability under a warranty to a certain dollar amount or to the amount of the agreement is unacceptable. In addition, any limitation is unacceptable to the extent that it precludes any action for injury to persons or for damages to personal property.
- *May* – means that a certain feature, component, or action is permissible, but not required.
- *Member* – any person covered as either a subscriber or a dependent in accordance with the terms and conditions of the Plan.
- *Must* – means that a certain feature, component, or action is a mandatory condition. Failure to provide or comply may result in a proposal being considered non-responsive.
- *PHI* – means Protected Health Information, as defined in HIPAA.
- *Payment* – Any references to prepayment are unacceptable. Payment will be in arrears.
- *Recoupment* – Any language in the agreement waiving the participating agencies’ rights to set-off, counterclaim, recoupment, or other defense is unacceptable.

- *Renewal* – Any reference to automatic renewal is unacceptable. The agreement may be renewed only upon mutual written agreement of the parties.
- *Respondent* – any party responding in any way to this RFP.
- *Right to Notice* – Any provision for repossession of equipment without notice is unacceptable. However, the participating agencies do recognize a right of repossession with notice.
- *Right to Terminate* – The participating agencies shall have the right to terminate the agreement upon thirty (30) days written notice to the vendor.
- *Shall* – has the same meaning as the word must.
- *Should* – means that certain feature, component and/or action is desirable but not mandatory.
- *Similar Services* – Any provisions limiting the participating agencies’ rights to obtain similar services or equipment in the event of default or non-funding during the term of the agreement are unacceptable.
- *Statute of Limitation* – Any clauses limiting the time in which the participating agencies may bring suit against the vendor, lessor, individual, or any other party are unacceptable.
- *Taxes* – Provisions in the agreement requiring the participating agencies to pay taxes are unacceptable. As State entities, the participating agencies are exempt from federal, state, and local taxes and will not pay taxes for any vendor, including individuals, and will not file any tax returns or reports on behalf of vendor or any other party.
- *Termination Charges* – Any provision requiring the participating agencies to pay a fixed amount or liquidated damages upon termination of the agreement is unacceptable. The participating agencies may only agree to reimburse a vendor for actual costs incurred or losses sustained during the current fiscal year due to wrongful termination by the participating agencies prior to the end of any current agreement term.

Right to Reject

The State reserves the right to reject any and all proposals submitted and to request additional information from all bidders or to withdraw the RFP if in the best interest of the participating agencies.

Quotation Included as Part of Agreement

PEIA anticipates making this RFP and bidder's quotation part of the actual contractual agreement by reference.

Proposal Included as Part of Agreement

PEIA anticipates making this RFP and bidder's quotation part of the actual contractual agreement by reference.

SECTION 2 – REQUIREMENTS

Scope of Work - Clarification of Procurement Offering

In order to save health care and pension dollars, we are looking to maximize the utilization and coordination of Social Security and Medicare benefits within our pre-65 health care covered participants.

We are looking for a vendor who will use the Voluntary Data Sharing Agreement with Medicare to gain Medicare eligibility dates. Identify active and pre-65 members who are eligible for Medicare, but have not been previously identified. Identify associated claim overpayments and assist in recovery to the health plan.

In addition, we desire a vendor who will identify individuals who are disabled and assist them in securing Social Security Disability awards. The identification should focus on our pre-65 members and dependents along with active members with ESRD.

Minimum Requirements

THESE ARE ABSOLUTE REQUIREMENTS. FAILURE TO MEET ANY ONE OF THE REQUIREMENTS LISTED BELOW SHALL RESULT IN DISQUALIFICATION FROM FURTHER CONSIDERATION IN THIS BID PROCESS.

Evaluation of the Quotation will be awarded to the Vendor that meets the minimum requirements specified below for the lowest overall total cost as shown on the Pricing Page.

1. An introductory section should be included in the quote which includes the name, address, and telephone number of the firm, the name and telephone number of the contact person with the firm, and the date of submission of the proposal
2. The vendor must meet all requirements imposed by West Virginia and other local laws, rules, and regulations, including not having a delinquent tax liability of any nature with the State of West Virginia. Vendors must submit with the proposal a "Purchasing Affidavit" (See Exhibit E).

PEIA will waive the litigation bond if the bidder submits in writing on a form acceptable to PEIA a complete waiver of any rights to challenge this RFP/award in any jurisdiction or venue. The only acceptable alternative to the litigation bond is the submission of a signed Waiver of Legal Challenge

3. The vendor must agree to comply with all "Terms of Contract" Section.
4. The vendor must have work experience, similar to that described in the Scope of Work section, with three (3) different clients during the past five years. A brief description of the completed or ongoing work and each client's company name, size of contract, contact name, address and telephone number must be submitted as a reference (Exhibit G).
5. The vendor must include copies of all the attached forms. (Exhibit A if planning on bidding, Exhibits B, C, D, E, F, G, and H with your bid)
6. The project plan shall consider the staging of deliverables outlined in the Section titled Scope of Work and address such activities as implementing data transfers, executing confidentiality agreements, system access requirements, business system training requirements, applying knowledge of federal and state requirements, and other activities relevant to demonstrating Vendor's ability to provide the requested services timely.
7. Proposing company must submit proposals for each individual RFP as follows:
Technical and cost proposals must be prepared as separate documents and submitted under separate cover. Please provide three (3) bound copies of each proposal, one (1) unbound original and one electronic copy of both.

Litigation Bond

Each bidder responding to this RFP is required to submit a litigation bond in the amount of 5% of submitted bid made payable to the State of West Virginia Public Employees Insurance Agency. A surety company licensed to do business in the State of West Virginia with the West Virginia Insurance Commission, on a form acceptable to the State, and countersigned by a West

Virginia Resident Agent must issue this bond. The only acceptable alternate forms of the bond are (1) company certified check (not an individual), and (2) a cashier's check.

The purpose of the litigation bond is to discourage unwarranted or frivolous lawsuits pertaining to the award of a contract from this RFP. Secondly, the bond provides a mechanism for the State of West Virginia, the participating agencies, and its officers, employees, or agents thereof to recover damages, including (but not limited to) attorney fees, loss of revenue, loss of grants or portions thereof, penalties imposed by the federal government and travel expenses which may result from any such litigation. A claim against the bond will be made if the bidder contests the award in a court of competent jurisdiction and the grounds are found to be unwarranted or frivolous based on the facts of the award or applicable law as determined by the court. The bond or alternate form must remain in effect for two years from the proposal submission date. After six (6) months, each bidder may request, and the State anticipates granting, a release of the litigation bond. However, the bidder will be required to provide a release (signed and notarized in a form that is acceptable to the State) prior to release of the bond which states that the bidder will not sue.

The PEIA will waive the litigation bond if the bidder submits in writing on a form acceptable to the PEIA a complete waiver of any rights to challenge the bidder award in any jurisdiction or venue. The only acceptable alternative to the litigation bond is the submission of this signed "Bidder's Total Waiver of Legal Challenge" form included with the vendor's bid. (See Exhibit C)

Failure to submit an appropriate bond, alternate bond, or signed waiver form with the proposal at the time of bid opening will result in automatic disqualification of the vendor's proposal and the proposal will be considered non-responsive.

Purchasing Affidavit

It is required that all vendors submit a Purchasing Affidavit which certifies that there are no outstanding obligations or debts owed to the State of West Virginia. The Purchasing Affidavit **must** be completed, signed and returned *with* the vendor's proposal. (See Exhibit E)

Insurance Requirements

The vendor must possess and maintain Professional Liability Insurance in a form acceptable to the participating agencies, which shall cover the vendor, its officers, employees, and agents for any actual or alleged breach of duty, neglect, error, misstatement, misleading statement, or omission committed by the vendor in the performance of its duties and responsibilities as the administrator under this contract, including any hold harmless and/or indemnification agreement. The Professional Liability Insurance shall be maintained from the inception of the vendor's service under the contract until at least three (3) years after completion of all services required under the contract.

Specific Instructions for Responding to This RFP

In order to simplify the review process and to obtain maximum comparability, the quotes should be organized in the manner specified below:

- a. An introductory section should include the subject, name, address, and telephone and fax numbers of the firm; name, telephone number and e-mail address of the contact person; and the date of submission of the proposal. Your quotation must be signed by an individual who is capable of legally binding your firm.
- b. Please answer all the questions in the same order they are asked. The answers should be as concise as possible. If you would like to provide additional information beyond what is asked, please provide that at the end of your proposal.
- c. An affirmative statement should be included, which states that the work will be performed within the time specified.
- d. **technical and cost proposals must be prepared as separate documents and submitted under separate cover.**

Failure on the part of the vendor to respond to specific requirements detailed in the RFP may be a basis for disqualification of the proposal.

Contract Award

This is a service contract and all bids should include an all-inclusive price. The fees quoted must be firm for the duration of the resulting agreement.

In providing pricing information, please be very clear as to what assumptions you are making in regards to PEIA's supply of resources for both people and hardware.

You are required to complete the Pricing Summary Form, (Exhibit B) by inputting the respective pricing information. Vendor should complete the Pricing Page in full as failure to complete the Pricing Page in its entirety may result in Vendor's bid being disqualified.

Vendor should type or electronically enter the information into the Pricing Summary Form to prevent errors in the evaluation.

Time Requirements

The above material is required to be received by 4:00 p.m., EST, Wednesday, January 25, 2017, for a proposing firm to be considered.

Firms that do not meet these time frames will be disqualified.

Proposal Withdrawal

Prior to the proposal due date, a Bidder may withdraw their proposal by submitting a written request for its withdrawal signed by the Bidder's authorized agent. The written withdrawal request will be directed to the Contact and the address listed in **Inquiries** Section.

SECTION 3 – EVALUATION OF PROPOSALS

Evaluation Process:

The following process will be used to evaluate vendor proposals:

- A. Responses received within the time frame and in the form specified by the guidelines will first be evaluated to confirm that all proposal sections, as detailed, have been provided in the bid response. Any vendor failing to provide all required information, **three (3) bound copies of each proposal, one (1) unbound original and one electronic copy**, will be eliminated from further consideration.
- B. The proposals will be evaluated by a committee of three (3) or more individuals against the established criteria with points deducted for deficiencies. Members of the review committee will evaluate and collectively score each proposal. The Vendor who demonstrates that they meet all of the mandatory specifications required; and has appropriately presented within their written response their understanding in meeting the goals and objectives of the project; and attains the highest overall point score of all Vendors shall be awarded the contract. The selection of the successful Vendor will be made by a consensus of the evaluation committee.
- C. Each proposal will be reviewed and points awarded to all items indicated on the **PROPOSAL EVALUATION FORM**. Any proposal component may be awarded points not to exceed the maximum specified on the **PROPOSAL EVALUATION FORM**. The total score available is 100 points, (technical 70 points and cost 30 points) made up of the following:

Understand of Work to be Performed	20 points
Approach and Methodology	20 points
Experience (like clients and work)	20 points
References	10 points
Cost	30 points
Total Points	100 points
- D. Bidders failing to obtain a minimum technical score of 50 points will be disqualified.
- D. All points awarded for each proposal component will be summed to obtain a total figure. The Vendor who meets all the mandatory specifications and attains the highest point score of all Vendors shall be awarded the contract. The successful Vendor will be made by a consensus of the evaluation committee.
- E. Vendor proposals which include more than one cost scenario will be evaluated as separate proposals to obtain total points for the proposal under each pricing plan.
- F. PEIA, at its option, may elect to conduct interviews with the top rated bidder(s). There are no points specifically assigned to the interview. The purpose is to confirm and/or clarify responses to the RFP.

State's Rights

Vendors should note the State reserves the right to modify this evaluation structure if it is deemed necessary, or request additional information from vendors. It is the intention of the State to select the most qualified and cost-effective proposal based on the evaluation of the vendor's responses to this RFP. However, the State reserves the right to accept or reject any or all of these proposals, in whole or part. The State reserves the right to ask vendors for additional information and/or an oral presentation to clarify their proposals.

The sum of the scores for each of criteria A through E will constitute 70% of the overall evaluation criteria, based on a total available score of 100 points. Each proposal will be independently evaluated on criteria A through E by three or more qualified individuals. Their raw scores will be averaged to obtain a composite score. Any proposal with less than 50 of the potential 70 points for technical ability will be disqualified.

The price criteria (F) will be evaluated in terms of absolute dollars and will constitute 30% of the overall evaluation criteria.

SECTION 4 - CONTRACTUAL SERVICES TERMS AND CONDITIONS

Contract Period

The contract period will be for the duration of the audit discussed in this bid proposal. All options will be negotiated at a later date to the mutual agreement of the parties.

Contract Administrator

Upon approval of a Contract, the PEIA shall direct the Bidder to administer the Contract during the term of the Contract. However, administration of any Contract resulting from this Request implies no authority to change, modify, clarify, amend, or otherwise alter the prices, terms, conditions, and specifications of such Contract. That authority is retained by the PEIA and other authorized representatives and these appointees are subject to change.

Cost Liability

The PEIA assumes no responsibility or liability for costs incurred by the successful Bidder prior to the signing of any Contract resulting from this RFP. The PEIA's responsibility and liability is limited to the terms and conditions of any Contract resulting from this RFP.

Bidder Responsibilities

The Bidder shall be required to assume responsibility for all contractual activities offered in this proposal whether or not that Bidder performs them. PEIA shall consider the Primary Bidder to be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the anticipated Contract. If any part of the work is to be subcontracted, responses to this RFP should include a list of subcontractors, including firm name and address, contact person, complete description of work to be subcontracted, and descriptive information concerning subcontractor's organizational abilities. The PEIA reserves the right to approve subcontractors for this project and to require the Primary Bidder to replace subcontractors found to be unacceptable. The Bidder is totally responsible for adherence by the subcontractors to all provisions of the Contract.

The Bidder and any subcontractors must commit to the entire contract period stated within this RFP, unless the PEIA specifically agrees to a change of subcontractors. The Agreement between the Bidder and PEIA will not be assignable to another party without prior written permission from the PEIA. The Bidder shall provide advance notice to the PEIA on any intended sale of the contracting entity. The PEIA will have the option of terminating the Contract with the Bidder upon the sale of the contracting entity.

Freedom of Information/Disclosure

All documents in this RFP process are subject to West Virginia's Freedom of Information Act (FOIA) and may be disclosed upon request. The Bidder must clearly identify which data are considered proprietary. If the PEIA receives a FOIA request for data, labeled by the Bidder as proprietary, the PEIA will notify the Bidder, in writing, of the request to allow the Bidder time to obtain the appropriate court order to prevent the release of the information. Otherwise, the PEIA will be compelled by state law to release such information.

HIPAA Compliance

Bidder must agree to become a business associate of the PEIA, it must have policies and procedures in place consistent with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) standards for privacy and security of protected health information (45 CFR Parts 160 and 164) and any other applicable state or Federal law related to the privacy or security of information. The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, is available online at the Purchasing Division's website (<http://www.wv.us/admin/purchase/vrc/hipaa.htm>) is hereby made part of the agreement.

Data Sales

Data sales are strictly prohibited under the contract between the successful Bidder and the PEIA.

Independent Price Determination

1. By submission of a proposal, the Bidder certifies, that in connection with this proposal:
 - a. The prices in the proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition as to any matter relating to these prices with any other Bidder or with any competitor; and

- b. Unless otherwise required by law, the prices which have been quoted in the proposal have not been knowingly disclosed by the Bidder and shall not knowingly be disclosed by the Bidder prior to award directly or indirectly to any other Bidder or to any competitor; and
 - c. No attempt has been made or shall be made by the Bidder to induce any other person or firm to submit or not submit a proposal for the purpose of restricting competition.
2. Each person signing the proposal certifies that she/he:
 - a. Is the person in the Bidder's organization responsible within that organization for the decision as to the prices being offered in the proposal and has not participated (and shall not participate) in any action contrary to 1.a., b., and c. above; or
 - b. Is not the person in the Bidder's organization responsible within that organization for the decision as to the prices being offered in the proposal but has been authorized to act as agent for the persons responsible for such decision in certifying that they and such persons have not participated (and shall not participate) in any action contrary to 1.a., b., and c. above.
3. Should a Bidder be awarded a Contract resulting from this RFP, and be found to have failed to abide by the provisions set forth in this Section, said acts shall be in default of the Contract. Consequences may include cancellation of the Contract.

Gratuities or Kickbacks

By submission of a proposal, the Bidder represents that it has not retained any person, agency, or entity to solicit or secure a PEIA contract upon an agreement or understanding for a commission or a percentage, brokerage, or contingent fee. The PEIA will not pay any brokerage fees for securing or executing any of the services outlined in this RFP. Therefore, all proposed fees must be net of commissions and percentage, contingent, brokerage, service, or finder's fees.

Miscellaneous Provisions

The following provisions will be incorporated into any agreement entered into between PEIA and the successful bidder. The successful bidder will be asked to sign a form accepting the provisions described below.

Arbitration

Any references to arbitration contained in the agreement are hereby deleted. Claims against the PEIA or the State of West Virginia arising out of the agreement shall be presented to the West Virginia Court of Claims.

Hold Harmless

Any clause requiring the Agency to indemnify or hold harmless any party is hereby deleted in its entirety. The successful bidder must indemnify and hold harmless the State of West Virginia and PEIA for its acts or omissions arising out of the contract.

Governing Law

The agreement shall be governed by the laws of the State of West Virginia. This provision replaces any references to any other State's governing law.

Taxes

Provisions in the agreement requiring PEIA to pay taxes are deleted. As a State entity, PEIA is exempt from Federal, State, and local taxes and will not pay taxes for any Vendor including individuals, nor will the Agency file any tax returns or reports on behalf of Vendor or any other party.

Payment

Any references to prepayment are deleted. Payment will be in arrears. As per West Virginia State Law, PEIA will pay all uncontested invoices within sixty days of receipt at the PEIA offices.

Interest

Should the agreement include a provision for interest on late payments, PEIA agrees to pay the maximum legal rate under West Virginia law. All other references to interest or late charges are deleted.

Recoupment

Any language in the agreement waiving the Agency's right to set-off, counterclaim, recoupment, or other defense is hereby deleted.

Fiscal Year Funding

Service performed under the agreement may be continued in succeeding fiscal years for the term of the agreement, contingent upon funds being appropriated by the Legislature or otherwise being available for this service. In the event funds are not appropriated or otherwise available for this service. The agreement shall terminate without penalty. After that date, the agreement becomes of no effect and is null and void. However, the Agency agrees to use its best efforts to have the amounts contemplated under the agreement included in its budget. Non-appropriation or non-funding shall not be considered an event of default.

Statute of Limitations

Any clauses limiting the time in which the Agency may bring suit against the Vendor, lessor, individual, or any other party are deleted.

Similar Services

Any provisions limiting the Agency's right to obtain similar services or equipment in the event of default or non-funding during the term of the agreement are hereby deleted.

Attorney Fees

The Agency recognizes an obligation to pay attorney's fees or costs only when assessed by a court of competent jurisdiction. Any other provision is invalid and considered null and void.

Assignment

Notwithstanding any clause to the contrary, the Agency reserves the right to assign the agreement to another State of West Virginia agency, board or commission upon thirty (30) days written notice to the Vendor and Vendor shall obtain the written consent of Agency prior to assigning the agreement.

Limitation of Liability

The Agency, as a State entity, cannot agree to assume the potential liability of a Vendor. Accordingly, any provision limiting the Vendor's liability for direct damages or limiting the Vendor's liability under a warranty to a certain dollar amount or to the amount of the agreement is hereby deleted. In addition, any limitation is null and void to the extent that it precludes any action for injury to persons or for damages to personal property.

Right to Terminate

Agency shall have the right to terminate the agreement upon Ninety (90) written notice to Vendor.

Termination Charges

Any provision requiring the Agency to pay a fixed amount or liquidated damages upon termination of the agreement is hereby deleted. PEIA may only agree to reimburse a Vendor for actual costs incurred or losses sustained during the current fiscal year due to wrongful termination by PEIA prior to the end of any current agreement term. Upon termination of this agreement, or any extension thereto, the Bidder has the duty to continue to provide any reports required by the agreement or any law or regulation.

Renewal

Any reference to automatic renewal is hereby deleted. The agreement may be renewed only upon mutual written agreement of the parties.

Insurance

Any provision requiring PEIA to insure equipment or property of any kind and name the Vendor as beneficiary or as an additional insured is hereby deleted.

Right to Notice

Any provision for repossession of equipment without notice is hereby deleted. However, PEIA does recognize a right of repossession with notice.

Acceleration

Any reference to acceleration of payments in the event of default or non-funding is hereby deleted.

Amendments

All amendments, modifications, alterations or changes to the agreement shall be in writing and signed by both parties.

Exhibit A

NOTIFICATION OF INTEREST

Due December 14, 2016

Firms interested in submitting a proposal must return this Notification of Interest by December 14, 2016.

To: Thomas J. Marchio
Policy Specialist
WV Public Employees Insurance Agency
601 57th St., SE, Suite 2
Charleston, WV 25304-2345
Fax: 304-558-2470
Email: Thomas..Marchio@wv.gov

From:			
	FIRM		
	MAILING ADDRESS		
	CITY	STATE	ZIP
	NAME AND TITLE OF INDIVIDUAL		
	TELEPHONE NUMBER		
	FAX NUMBER		

Please consider this Notification of Interest intent to submit a proposal to the RFP issued by the Public Employees Insurance Agency for Medicare Coordination and Social Security Disability Advocacy Services.

SIGNED	DATE
--------	------

Exhibit B

Cost Proposal Bid Form

Vendor Name: _____

Vendor Contact Information

Address: _____

Phone Number: _____

E-mail: _____

Cost to Provide the Medicare Coordination and Social Security Disability Advocacy Services to PEIA	
1. Cost to administer contract	\$ _____
2. Percent of savings	

The signature below binds the Vendor to the pricing submitted for the scope of work to be performed under this RFP.

Vendor Signature: _____

Title: _____

Date: _____

Exhibit C

BIDDERS LITIGATION WAIVER FORM

_____, hereinafter "Bidder," wishes to submit a Proposal in response to the Request For Proposal for Medicare Coordination and Social Security Disability Advocacy Services. The Bidder acknowledges that a mandatory requirement of the RFP is that the Bidder submit a litigation bond or waiver with its proposal.

In consideration of the waiver of said litigation bond requirement by the PEIA, and in lieu of such bond, the Bidder agrees:

That the Bidder completely waives and foregoes any and all legal right or ability it may now have, or in the future acquire, to initiate any sort of challenge to or against the selection of a Bidder and/or the ultimate award of a contract or contracts pursuant to the RFP. This Waiver is entered voluntarily by a representative authorized to legally bind the Bidder and shall be binding on the Bidder, its successors, assigns, heirs and any others claiming under the legal rights of the Bidder. This Waiver shall apply to any and all types of action, in challenge to or seeking to attack, in any way, the RFP selection process, or the subsequent award of contract(s) to the successful Bidder, including but not limited to, administrative, judicial, or collateral actions.

Legal Name of Bidder

By:		
	Authorized Signature	Date

Title:	
	Title of Authorized Signature

Approved:

Public Employees Insurance Agency for the State of West Virginia

By:		
	Authorized Signature	Date

Exhibit D

Business Associate Agreement

Appendix A

Name of Associate:

Name of Agency: The West Virginia Public Employees Insurance Agency

Describe the PHI. If not applicable please indicate the same.

Per 45 CFR, Part 160.103

Health information means any information, whether oral or recorded in any form or medium, that:

- (1) Is created or received by a health care provider, health plan, public health authority, employer, life insurer, school or university, or health care clearinghouse; and
- (2) Relates to the past, present, or future physical or mental health or condition of an individual; the provision of health care to an individual; or the past, present, or future payment for the provision of health care to an individual.

Individually identifiable health information is information that is a subset of health information, including demographic information collected from an individual, and:

- (1) Is created or received by a health care provider, health plan, employer, or health care clearinghouse; and
- (2) Relates to the past, present, or future physical or mental health or condition of an individual; the provision of health care to an individual; or the past, present, or future payment for the provision of health care to an individual; and
 - (i) That identifies the individual; or
 - (ii) With respect to which there is a reasonable basis to believe the information can be used to identify the individual.

Protected health information means individually identifiable health information:

- (1) Except as provided in paragraph (2) of this definition, that is:
 - (i) Transmitted by electronic media;
 - (ii) Maintained in electronic media; or
 - (iii) Transmitted or maintained in any other form or medium.

In this agreement this shall specifically include, but not be limited to:

- (1) Prescription claim information, and
- (2) Underlying medical treatment and diagnosis information

Specifically, the data to be released to the Associate will include, but not necessarily be limited to name(s), date(s) of birth, addresses, social security number(s), and/or other identifiers that can be used to identify and/or delineate PEIA members who may be receiving disability benefits and/or Medicare and/or Medicaid. It shall be the responsibility of the Associate to inform PEIA of what specific data elements are needed in order to fulfill the scope under this Agreement. Accordingly, the following terms and/or conditions shall apply to this Business Associate Agreement and Addendum:

- 1) Only the minimum necessary data allowing for the vendor to perform the scope of work as defined in the Agreement shall be released from PEIA to the Associate.
- 2) Any and/or all data exchange(s) shall occur using secure data transfer through the PEIA FTP site(s).
- 3) The Associate agrees to comply with any and/or all applicable provisions of the Privacy and Security Rule(s) of the Health Insurance Portability and Accountability Act of 1996 (HIPAA), including the Omnibus Security Rule and the Health Information Technology for Economic and Clinical Health Act (HITECH).
- 4) This Agreement may involve data sharing between PEIA, the Associate, and other Business Associates of PEIA.
- 5) The PHI covered by this DUA may not be used by the Associate for any purpose other than the proper management and administration of the scope of work administered by the Associate with regard to its Agreement with PEIA. No other use(s), release(s), and/or further disclosure(s) is/are permissible under this agreement. The Associate is expressly prohibited from using PEIA member data and/or PHI for any other contract(s), agreements, research projects, purposes, and/or service agreement(s) with any other entity other than PEIA.
- 6) The Associate will report to PEIA, in writing, any breach, unauthorized use or disclosure of the PHI not provided for by this Agreement of which it becomes aware with one (1) business day.
- 7) Upon completion of the scope of work of the Agreement, the Associate shall, at the direction of PEIA, dispose of the data provided to the Associate by PEIA in a mode, means, and/or manner consistent with the provision(s) of the Security Rule(s) of HIPAA
- 8) Nothing in this agreement shall convey ownership rights and/or privileges for the data shared by PEIA to the Associate. Ownership rights and privileges to the data covered in this Agreement shall solely reside with the West Virginia Public Employees Insurance Agency.
- 9) The interpretation of this Agreement shall be made under the law(s) of the State of West Virginia.

Authorized Representative

Date

Ted Cheatham, Director, PEIA

Date

Exhibit E

STATE OF WEST VIRGINIA PURCHASING AFFIDAVIT

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, Limited Liability Company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

EXCEPTION: The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

Under penalty of law for false swearing (*West Virginia Code §61-5-3*), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

WITNESS THE FOLLOWING SIGNATURE

Vendor's Name:

Authorized Signature: _____ Date: _____

State of _____

County of _____, to-wit:

Taken, subscribed, and sworn to before me this ____ day of _____, 20__.

My Commission expires _____, 20__.

AFFIX SEAL HERE

NOTARY PUBLIC _____

Exhibit F

AGREEMENT ADDENDUM

In the event of conflict between this addendum and the agreement, this addendum shall control:

1. **DISPUTES** - Any references in the agreement to arbitration or to the jurisdiction of any court are hereby deleted. Disputes arising out of the agreement shall be presented to the West Virginia Court of Claims.
2. **HOLD HARMLESS** - Any clause requiring the Agency to indemnify or hold harmless any party is hereby deleted in its entirety.
3. **GOVERNING LAW** - The agreement shall be governed by the laws of the State of West Virginia. This provision replaces any references to any other State's governing law.
4. **TAXES** - Provisions in the agreement requiring the Agency to pay taxes are deleted. As a State entity, the Agency is exempt from Federal, State, and local taxes and will not pay taxes for any Vendor including individuals, nor will the Agency file any tax returns or reports on behalf of Vendor or any other party.
5. **PAYMENT** - Any references to prepayment are deleted. Payment will be in arrears.
6. **INTEREST** - Should the agreement include a provision for interest on late payments, the Agency agrees to pay the maximum legal rate under West Virginia law. All other references to interest or late charges are deleted.
7. **RECOUPMENT** - Any language in the agreement waiving the Agency's right to set-off, counterclaim, recoupment, or other defense is hereby deleted.
8. **FISCAL YEAR FUNDING** - Service performed under the agreement may be continued in succeeding fiscal years for the term of the agreement, contingent upon funds being appropriated by the Legislature or otherwise being available for this service. In the event funds are not appropriated or otherwise available for this service, the agreement shall terminate without penalty on June 30. After that date, the agreement becomes of no effect and is null and void. However, the Agency agrees to use its best efforts to have the amounts contemplated under the agreement included in its budget. Non-appropriation or non-funding shall not be considered an event of default.
9. **STATUTE OF LIMITATION** - Any clauses limiting the time in which the Agency may bring suit against the Vendor, lessor, individual, or any other party are deleted.
10. **SIMILAR SERVICES** - Any provisions limiting the Agency's right to obtain similar services or equipment in the event of default or non-funding during the term of the agreement are hereby deleted.
11. **ATTORNEY FEES** - The Agency recognizes an obligation to pay attorney's fees or costs only when assessed by a court of competent jurisdiction. Any other provision is invalid and considered null and void.
12. **ASSIGNMENT** - Notwithstanding any clause to the contrary, the Agency reserves the right to assign the agreement to another State of West Virginia agency, board or commission upon thirty (30) days written notice to the Vendor and Vendor shall obtain the written consent of Agency prior to assigning the agreement.
13. **LIMITATION OF LIABILITY** - The Agency, as a State entity, cannot agree to assume the potential liability of a Vendor. Accordingly, any provision limiting the Vendor's liability for direct damages to a certain dollar amount or to the amount of the agreement is hereby deleted. Limitations on special, incidental or consequential damages are acceptable. In addition, any limitation is null and void to the extent that it precludes any action for injury to persons or for damages to personal property.
14. **RIGHT TO TERMINATE** - Agency shall have the right to terminate the agreement upon thirty (30) days written notice to Vendor. Agency agrees to pay Vendor for services rendered or goods received prior to the effective date of termination.
15. **TERMINATION CHARGES** - Any provision requiring the Agency to pay a fixed amount or liquidated damages upon termination of the agreement is hereby deleted. The Agency may only agree to reimburse a Vendor for actual costs incurred or losses sustained during the current fiscal year due to wrongful termination by the Agency prior to the end of any current agreement term.
16. **RENEWAL** - Any reference to automatic renewal is hereby deleted. The agreement may be renewed only upon mutual written agreement of the parties.
17. **INSURANCE** - Any provision requiring the Agency to insure equipment or property of any kind and name the Vendor as beneficiary or as an additional insured is hereby deleted.

18. **RIGHT TO NOTICE** - Any provision for repossession of equipment without notice is hereby deleted. However, the Agency does recognize a right of repossession with notice.

19. **ACCELERATION** - Any reference to acceleration of payments in the event of default or non-funding is hereby deleted.

20. **CONFIDENTIALITY** -Any provision regarding confidentiality of the terms and conditions of the agreement is hereby deleted. State contracts are public records under the West Virginia Freedom of Information Act.

21. **AMENDMENTS** - All amendments, modifications, alterations or changes to the agreement shall be in writing and signed by both parties. No amendment, modification, alteration or change may be made to this addendum without the express written approval of the West Virginia Public Employees Insurance Agency.

**ACCEPTED BY:
STATE OF WEST VIRGINIA VENDOR**

Company Name: _____

Public Employees Insurance Agency

Signed: _____

Signed: _____

Title: _____

Title: _____

Date: _____

Date: _____

Exhibit G

Vendor Experience Reference Information

Reference #1 Name of Client/Group	
Contact Person	
Position	
Address	
City, State, Zip	
Telephone Number	
Email Address	
Initial Offering Date	
Number of Participants	
Personnel Assigned	
Reference #2 Name of Client/Group	
Contact Person	
Position	
Address	
City, State, Zip	
Telephone Number	
Email Address	
Initial Offering Date	
Number of Participants	
Personnel Assigned	
Reference #3 Name of Client/Group	
Contact Person	
Position	
Address	
City, State, Zip	
Telephone Number	
Email Address	
Initial Offering Date	
Number of Participants	
Personnel Assigned	



Exhibit H

Vendor Personnel Resume

Vendor Personnel Resume	
Name	
Title	
Relevant Experience	
Relevant Certifications	
Education	

Vendor Personnel Resume	
Name	
Title	
Relevant Experience	
Relevant Certifications	
Education	

Vendor Personnel Resume	
Name	
Title	
Relevant Experience	
Relevant Certifications	
Education	