****

**INVITATION TO NEGOTIATE 2019-200-01**

**for**

**Customer Engagement Center (CEC) Services and**

**Customer Relationship Management (CRM) System Services**

**ADDENDUM 1**

**November 12, 2019**

1. **Overview of Addendum 1**

The Florida Healthy Kids Corporation (FHKC) is amending Invitation to Negotiate 2019-200-01 (“ITN”) to permit Respondents to offer an integrated CEC Services and CRM System Services(“Integrated Model”) **cost** proposal. This Integrated Model cost proposal is optional but will be evaluated if submitted by Respondent.

Attachment 2: Cost Proposal is deleted. Respondent must submit one, two, or three of the following cost proposal attachments based on the Contract for which Respondent is seeking an award:

* Attachment 2A: CEC Services Cost Proposal
* Attachment 2B: CRM System Services Cost Proposal
* Attachment 2C: Integrated Model Cost Proposal

Respondents intending to provide an Integrated Model cost proposal must provide a technical proposal for both CEC Services and CRM System Services, each of which will be evaluated separately. The technical scores for each category will determine which Respondents’ cost proposals will be evaluated for CEC Services only, CRM System Services only, and the Integrated Model (i.e., the categories). FHKC will use the independent results for each cost proposal evaluation to determine which Responsible Respondents are reasonably susceptible of award for each category and eligible for the negotiation phase. If a Respondent is reasonably susceptible of award for a category, Respondent may be selected for negotiations for any category. Revisions to the ITN, detailed instructions, and evaluation methodology related to the Integrated Model are set forth in this Addendum.

In addition, a revised Anticipated Calendar of Events and Deadlines, high-level process flows, and answers to Respondents’ questions are provided in this Addendum.

1. **Addendum 1**

Addendum 1 (“Addendum”) to the ITN is as follows:

# **Section 1.D is amended to add the following definition:**

“Integrated Model” means providing both CEC Services and CRM System Services.

# **The Anticipated Calendar of Events and Deadlines in section 1.F of the ITN is replaced as** **follows:**

| **Event** | **Anticipated Date(s)** | **Time**  (Eastern) |
| --- | --- | --- |
| FHKC releases this ITN | October 11, 2019 |  |
| Respondent deadline to submit Letter of Intent | October 16, 2019 | 3:00 p.m. |
| Respondent deadline to submit questions regarding the ITN via email to the issuing office | October 25, 2019 | 3:00 p.m. |
| FHKC Posts answers to Respondents’ questions at <https://www.healthykids.org/itn> | November 12, 2019 | 5:00 p.m. |
| Respondent deadline to submit second round of questions regarding the ITN via email to the issuing office | November 19, 2019 | noon |
| FHKC Posts answers to Respondents’ second round of questions at <https://www.healthykids.org/itn> | December 2, 2019 | 5:00 p.m. |
| Respondent proposals due to FHKC | December 16, 2019 | 10:00 a.m. |
| Public opening of proposals | December 16, 2019 | 11:00 a.m. |
| Evaluations | December 16, 2019 through January 24, 2020 |  |
| Negotiations | February 3, 2020 through March 2020 |  |
| Notice of Contract Award – Public Meeting | April 2020 | TBD |
| Effective Date of Services | October 1, 2021 | 12:00 a.m. |

# **Section 3.A of the ITN is replaced in its entirety as follows:**

FHKC intends this ITN process to include an evaluation phase and a negotiation phase.

The evaluation phase involves FHKC’s evaluation of proposals. In the first stage of the evaluation phase, FHKC will evaluate Respondent’s technical proposal. In the second stage, FHKC will evaluate Respondent’s cost proposal.

During the first stage of the evaluation, the Responsive technical proposals pertaining to a category will be evaluated and scored pursuant to section 6.A to determine those that fall within the competitive range. Those that are within the competitive range within each category will advance to the second stage of the evaluation.

In the second stage, the cost proposals will be evaluated pursuant to section 6.B to determine those that are within the competitive range reasonably susceptible of award. Responsible Respondents whose proposals are within the competitive range reasonably susceptible of award are eligible for negotiations. If a Respondent is reasonably susceptible of award for a category, Respondent may be selected for negotiations for any category.

The negotiation phase involves FHKC’s negotiations with the Respondents. During the negotiation phase, the negotiation team may invite to negotiations some or all Respondents within the competitive range reasonably susceptible of award and request revised proposals and/or best and final offers based on the negotiations. Final Contract terms will be established with the selected Respondent(s) during the negotiation phase. The negotiation team may cease negotiations with a Respondent at any time during the negotiation phase.

After negotiations, the negotiation team intends to recommend to the FHKC Board of Directors an award of Contract(s), identifying the Respondent(s) that provides the Best Value. The FHKC Board of Directors shall determine the final award of any Contracts, after which the Notice of Contract Award will be Posted.

Respondents that are not Responsive or Responsible, not selected for negotiations, or with whom the negotiation team ceased negotiations will not be formally eliminated from the ITN process until the FHKC Board of Directors issues the final award of any Contracts.

At its option, the negotiation team may recommend the execution of a Contract or Contracts with a selected Respondent or Respondents without any negotiation. Therefore, proposals should be submitted in complete form, and pursuant to all terms and conditions as required in this ITN.

# **Section 4.A of the ITN is replaced in its entirety as follows:**

1. **Overview**

Respondent’s proposal should provide a straightforward, concise description of Respondent’s ability to provide the solution and CEC Services and/or CRM System Services sought by this solicitation. Respondents should thoroughly address all stated components for each designated tab and identify any assumptions upon which the proposal is based. Respondents should consult the ITN and any designated statutes for additional information or guidance on each of the proposal components.

Each proposal must be provided in its entirety. Respondents should clearly identify any sections or responses that are duplicated verbatim from, or integrated with, the other proposal. The Respondent’s proposal may not apply any conditions or exceptions to any mandatory requirements of the solicitation.

Respondent is responsible for ensuring all elements of its proposal are provided in an organized and logical fashion. FHKC is not obligated to interpret any elements not clearly labeled or described.

Respondent must submit one technical proposal per category (i.e., CEC Services or CRM System Services) for which the Respondent seeks a Contract. For Respondents providing an Integrated Model proposal, the CEC Services technical proposal and CRM System Services technical proposal are required; *no separate Integrated Model technical proposal is permitted*.

Respondent must indicate on Revised Attachment 3: Proposal Cover Sheet included with this Addendum the Services for which it is seeking a Contract.

When responding to specific questions, Respondent must copy each question in its entirety in the proposal. Copied questions are counted toward the page limit, if any.

Proposal text must be blue or black and at least 11 pt. Calibri or Times New Roman font.

# **Section 4.C of the ITN is replaced in its entirety as follows:**

**C. Mandatory Responsiveness Requirements**

Proposals or any portions thereof that do not offer required Services, fail to meet the minimum qualifications, do not meet FHKC’s goals, or otherwise fail to meet the submission requirements of this ITN may be considered non-Responsive and disqualified at FHKC’s sole discretion.

Each Respondent must submit its proposal by the date specified in subsection 1.F as follows:

1. (i) One original and five hard copies; (ii) one electronic, non-redacted copy; and (iii) one electronic, redacted copy (if applicable), all in the following format:
   * Tab A – Revised Attachment 3: Proposal Cover Sheet, list of Public Records Request exemptions or statement of no exemptions, table of contents, executive summary, Attachment 6: Certification Regarding Lobbying, and copy of the letter of intent
   * Tab B – each minimum qualification copied and pasted without modification and with a response of “Yes” or “No”
   * Tab C-1: Corporate Profile
   * Tab C-2: Financial Solvency – audited financial statements for the two most recent fiscal years (or two preceding if most recent not available)
   * Tab C-3: Staffing – organizational chart and resumes
   * Tab C-4: Attachment 4: Conflict of Interest Disclosure Form—form completed
   * Tab C-5: References – form completed for five references, each within the last two years
   * Tab C-6: Subcontractors – form completed for each Subcontractor
   * Tab C-7: Attachment 5: Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion—form completed
   * Tab D: Technical Response:
     + Items 1 through 16 for a CEC Services proposal
     + Items 1 through 8 and 17 through 24 for a CRM System Services proposal

The original proposal and all hard copies must be provided in three-ring binders.

1. (i) One electronic, non-redacted copy and (ii) one electronic, redacted copy (if applicable) of Attachment 2A: CEC Services Cost Proposal, Attachment 2B: CRM System Services Cost Proposal, and/or Attachment 2C: Integrated Model Cost Proposal.

Additionally, Respondent may submit (i) one electronic, non-redacted copy and (ii) one electronic, redacted copy (if applicable), of questions, comments, and proposed revisions to Attachment 1: Draft Contract (in track changes).

All copies, hard and electronic, must include the ITN number; Respondent's official and legal name; address; and contact information.

# **In section 4.D of the ITN, the instructions for “Tab B: Minimum Qualifications” are replaced in their entirety as follows:**

**Tab B: Minimum Qualifications**

Respondent must meet the minimum qualifications applicable to Respondent’s proposal identified below.

* For a CEC Services proposal, Respondent must reproduce verbatim both the statements and boxes for items 1 through 11 into its proposal
* For a CRM System Services proposal, Respondent must reproduce verbatim both the statements and boxes for items 1 through 7 and 12 through 14 into its proposal.
* Respondent must select either “Yes” or “No”for all applicable category items.

**Responses of “No,” deviations, and/or caveats to the minimum qualifications** shall result in the rejection of the overall proposal at FHKC’s sole discretion and will not receive further consideration.

**Minimum Qualifications for all Respondents**

1. Respondent agrees to all terms as proposed under this ITN for the Services for which Respondent is providing a proposal.

Yes  No

1. Respondent confirms it will be able to provide all required Services pertaining to its proposal beginning October 1, 2021 in the manner specified in this ITN with no degradation of functionality or Services.

Yes  No

1. Respondent confirms that by providing its cost proposal(s) in Attachment 2A: CEC Services, Attachment 2B: CRM System Services, and/or Attachment 2C: Integrated Model, Respondent is offering firm, fixed pricing for the Services required by this ITN.

Yes  No

1. Respondent confirms its proposal does **not** include any minimum or maximum number of Applicants or Enrollees.

Yes  No

1. Respondent confirms it is registered with the Florida Department of State, Division of Corporations, or will be within seven Calendar Days of Contract award to transact business in the State of Florida. If Respondent is currently registered, Respondent must submit proof of such registration in this Tab, labeled “[Company Name] Minimum Qualification B.5.”

Yes  No

1. Respondent confirms it has not filed for bankruptcy or receivership within the last five years.

☐ Yes ☐ No

1. Respondent confirms that, if awarded this Contract, neither it nor any of its Subcontractors or agents will perform Services or Access, store, or transfer Data outside of the United States.

Yes  No

**Minimum Qualifications for Respondents Proposing CEC Services**

1. Respondent confirms it has at least three years’ experience providing services similar to the CEC Services described in Attachment 1: Draft Contract.

Yes  No

1. Respondent confirms, for the last 24 months, it has collected an average of at least 25,000 documents per month that required scanning, uploading, and attaching to accounts. Such documents also required Respondent to validate information, identify discrepancies or missing information, and determine eligibility or some other conclusive action. Collection of documents may have been electronic (e.g., online or via email) or paper (e.g., by mail or fax).

Yes  No

1. Respondent confirms it is responsible for a customer contact center with at least 500,000 contacts (e.g., incoming calls, incoming emails, outgoing electronic letters or messages, or individual webchats) at one physical location for each of the past two years.

Yes  No

1. Respondent confirms it is responsible for the production and mailing of at least 500,000 printed letters, each containing individualized health, financial, or other confidential information, from one physical location for each of the past two years.

Yes  No

**Minimum Qualifications for Respondents Proposing CRM System Services**

1. Respondent confirms it has at least five years’ experience providing services similar to the CRM System Services described in Attachment 1: Draft Contract.

Yes  No

1. Respondent confirms it serves at least 100,000 unique customers across its book of business, with at least 50,000 unique customers from one large client in either of the last two years.

Yes  No

1. Respondent confirms its CRM System can support a Customer Portal that allows customers to submit applications, upload and retrieve documents, view and update account information, and seek assistance for customer service issues.

Yes  No

# **Section 5 of the ITN is replaced in its entirety as follows:**

**5. Cost Proposal**

Respondent must use and follow the instructions in Attachment 2A: CEC Services Cost Proposal, Attachment 2B: CRM System Services Cost Proposal, and/or Attachment 2C: Integrated Model Cost Proposal to provide a firm, fixed price for the Services required for each category applicable to Respondent’s proposal as follows:

* A Respondent seeking a Contract to provide CEC Services must submit a completed Attachment 2A: CEC Services Cost Proposal.
* A Respondent seeking a Contract to provide CRM System Services must submit completed Attachment 2B: CRM System Services Cost Proposal.
* A Respondent seeking a Contract to provide an Integrated Model must submit completed Attachment 2C: Integrated Model Cost Proposal for which the costs of CEC Services and/or CRM System Services may be discounted based on the assumption that Respondent is awarded both categories.

Respondent should consider background information provided in section 1 of this ITN and the Services required in Attachment 1: Draft Contract when preparing this cost proposal.

The person identified in the Letter of Intent as having access to the Secure Partner Connect site must upload Respondent’s response(s) to Attachment 2A: CEC Services Cost Proposal, Attachment 2B: CRM System Services Cost Proposal, and/or Attachment 2C: Integrated Model Cost Proposal in Excel format by the time and date reflected on the Anticipated Calendar of Events and Deadlines in subsection 1.F. Respondent may also submit its cost proposal response(s) as a PDF document(s). These attachments should not be printed and included with the hard-copy proposal.

As applicable, Respondent’s response to Attachment 2A: CEC Services Cost Proposal, Attachment 2B: CRM System Services Cost Proposal, and/or Attachment 2C: Integrated Model Cost Proposal will be evaluated as described in section 6.B of this ITN.

Failure to provide all the information required for this cost proposal(s) may result in rejection of Respondent’s proposal for the respective category at FHKC’s sole discretion.

# **Section 6 of the ITN is replaced in its entirety as follows:**

**6. Evaluation of Proposals**

The first phase of this procurement process is the evaluation of Responsive proposals, which will be conducted as described in this section. The technical response will be evaluated as set forth in subsection A below, and the cost proposal will be evaluated independently, as set forth in subsection B below. If Respondent is not providing a proposal for a category (i.e., CEC Services or CRM System Services), those items will not be scored or evaluated and will not count against the Respondent.

1. **Scoring Respondent’s Technical Response**

Stage one of the evaluation phase is the scoring of the technical response. FHKC staff will serve as evaluators of the technical response. As set forth in this subsection, each evaluator will separately score each Respondent’s response to each lettered subpart in section 4, Tab D, as applicable to Respondent’s proposal. Evaluators will score responses using the following scale:

**5 = Superior.** The response exhaustively addresses the item and demonstrates Respondent has extraordinary experience in performing the services related to the request for information. The response indicates Respondent would provide exceptionally enhanced value to FHKC and/or to the Program. The response demonstrates the ability of Respondent to exceed FHKC’s requirement, provide outstanding quality of service levels, provide cost savings or cost avoidance, and/or implement innovative ideas.

**4 = Good.** The response extensively addresses the item and demonstrates exceptional experience in performing the services related to the request for information. The response indicates Respondent would provide enhanced value to FHKC and/or to the Program.

**3 = Adequate.** The response adequately addresses the item and demonstrates Respondent has sufficient experience in performing the services related to the request for information.

**2 = Poor.** The response minimally addresses the item or demonstrates Respondent has nominal experience in performing the services related to the request for information.

**1 = Unsatisfactory.** The response inadequately addresses the item or demonstrates Respondent has very limited experience in performing the services related to the request for information.

**0 = Inadequate.** The response is blank, does not address the item, or demonstrates Respondent has no experience in performing the services related to the request for information.

Numbered items in the table below correspond to the numbered items in section 4, Tab D. Each letter of each numbered item in section 4, Tab D will be scored using the scale above and then summed. This sum by category is Respondent’s technical score for that category.

**Technical Score Categories:**

|  |  |
| --- | --- |
| **CEC Services** | **CRM System Services** |
| 1. Business Model | 1. Business Model |
| 1. Experience | 1. Experience |
| 1. Security Monitoring | 1. Security Monitoring |
| 1. Security Compliance | 1. Security Compliance |
| 1. Reporting | 1. Reporting |
| 1. Quality Assurance | 1. Quality Assurance |
| 1. Recovery and Continuity | 1. Recovery and Continuity |
| 1. Implementation Plan | 1. Implementation Plan |
| 1. Application Processing and Eligibility Determination | *9-16 do not apply*  *to this category* |
| 1. CEC |
| 1. CEC Monitoring |
| 1. CEC Services |
| 1. Voice Connectivity |
| 1. Systems and Technology |
| 1. Fiscal Reconciliation |
| 1. Staffing |
| *17-24 do not apply*  *to this category* | 1. Systems and Technology |
| 1. Customer Relationship Management |
| 1. FHKC Website |
| 1. Secure Portals |
| 1. Staffing |
| 1. Omni-Channel |
| 1. Knowledge Management |
| 1. Outreach |

Respondents that provide a technical response for either CEC Services or CRM System Services will have one technical score for the respective category. Respondents that provide a response for both CEC Services and CRM System Services will have two technical scores, one for each technical response category.

Respondents that are determined to be within the competitive range for either category will be evaluated as set forth in subsection B below. Respondents that are not within the competitive range for both categories will not be further considered.

1. **Evaluating the Cost Proposal**

Stage two of the evaluation phase is the evaluation of Attachment 2A: CEC Services Cost Proposal, Attachment 2B: CRM System Services Cost Proposal, and Attachment 2C: Integrated Model Cost Proposal. Cost proposals for Respondents within the competitive range established pursuant to subsection A above will be independently evaluated in the groups set forth below:

* CEC Services – FHKC will use the “Total Cost of Initial Term” amount provided in Attachment 2A: CEC Services Cost Proposal, CEC Proposal tab, cell D17 to evaluate Respondents that offer a proposal for CEC Services.
* CRM System Services – FHKC will use the “Total Cost of Initial Term” amount provided in Attachment 2B: CRM System Services Cost Proposal, CRM Proposal tab, cell D17 to evaluate Respondents that offer a proposal for CRM System Services.
* Integrated Model – FHKC will use the “Total Cost of Initial Term” amount provided in Attachment 2C: Integrated Model Cost Proposal, Integrated Proposal tab, cell D17 to evaluate Respondents that offer a proposal for an Integrated Model.

1. Determination of Respondents that Advance to Negotiations

Based on the evaluation process specified in subsection B above, FHKC will group the CEC Services cost proposals, group the CRM System Services cost proposals, and group the Integrated Model cost proposals. For each group, FHKC will use each Respondent’s Total Cost of Initial Term to determine those that fall within the competitive range reasonably susceptible of award in each group.

FHKC will select for negotiations one or more Responsible Respondents within the competitive range reasonably susceptible of award. A Respondent whose cost proposal is not within the competitive range reasonably susceptible of award is not eligible for negotiations. A Respondent that proposed to provide both CEC Services and CRM System Services and is within the competitive range reasonably susceptible of award in only one group may be selected for negotiations for any category.

# **Section 7.B of the ITN is modified to add the following:**

14. Request any Respondent that submits a proposal for CEC Services to join with any other Respondent that submits a proposal for CRM Systems Services.

# **The “Process Flow\* of Monthly and Annual Enrollment Cycles for CHIP and Full Pay Accounts” in Appendix C of the ITN is deleted.**

# High-level process flows are provided as a separate file labeled [ITN 2019-200-01 Appendix C Process Flow Charts.](https://www.healthykids.org/news/calendar/procurement/) These flow charts convey the essential processes and their respective relationships anticipated under the Contract for both CHIP and Full-Pay Plan Family Accounts. Other subprocesses, functions, and decision points not reflected in these flow charts will be discussed during the negotiation phase and/or during implementation of the Contract.

Abbreviations used in the process flows are as follows:

CEC – Customer Engagement Center Services vendor

CEP – Continuous eligibility period

CHIP – Children’s Health Insurance Program

CMS – Children’s Medical Services Plan

CRM – Customer Relationship Management System Services vendor

DOP – Date of payment

FHK – Florida Healthy Kids

MK – MediKids

OEP – Open enrollment period

The process flows are color-coded to indicate entity(ies) responsibility as follows:

Blue – CEC

Goldenrod – CRM

Gray – FHKC

Green – CEC and CRM

Orange – Customer

# Purple – Other vendors

# **ITN Attachment 3: Proposal Cover Sheet is replaced in its entirety as follows:**

**Attachment 3: Proposal Cover Sheet**

[Company Logo, optional]

**Proposal for the Florida Healthy Kids Corporation**

**Invitation to Negotiate 2019-200-01**

(As applicable, Respondent must mark one or more of the check box(es), below. If Respondent is seeking to provide an Integrated Model, Respondent must also indicate if Respondent would provide CEC Services only and/or CRM System Services only.)

* CEC Services Only
* CRM System Services Only
* Integrated Model

[Date Submitted]

[Total Number of Pages Including this Page]

[Official Company Name and d/b/a, if applicable]

[FEID Number]

[Type of Business (e.g., corporation, LLC, partnership, etc.)]

[Name of Person Submitting This Proposal]

[Street Address]

[City, State and ZIP Code]

[Phone Number]

[Toll-free Number, if available]

[Email Address]

I attest that, to the best of my knowledge, the Data, documentation, and information provided in [Respondent]’s proposal for ITN 2019-200-01 [As applicable, indicate either CEC Services or CRM System Services] is accurate, complete, and truthful. I acknowledge the receipt of any and all addenda to this ITN.

I certify that this proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a proposal for the same services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this proposal and certify that I am authorized to sign this proposal for Respondent and that Respondent is in compliance with all requirements of the Invitation to Negotiate, including certification requirements.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Individual Authorized to Bind Respondent Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Printed Name Title

I have attached a copy of Respondent’s current org chart and written documentation of delegated authority, if the attestation is signed by anyone other than the CEO or CFO.

STATE OF \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

COUNTY OF \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Sworn to and subscribed before me this \_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_\_\_, by (Officer/Affiant), who is personally known to me or who has produced \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as identification.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

NOTARY PUBLIC

My Commission Expires: \_\_\_\_\_\_\_\_\_\_

# **FHKC’s answers to Respondents’ questions are as follows:**

| # | **Document** | **Document Section** | **Page #** | **Question from Respondents** | **FHKC Answers** |
| --- | --- | --- | --- | --- | --- |
| 1 | Draft Contract | 1.2 Definitions | 11 | Please clarify how financial consequences differs from Liquidated Damages. | Liquidated Damages are intended to compensate FHKC for financial losses, while Financial Consequences are intended to apply when Services are not performed in accordance with the Contract. |
| 2 | Draft Contract | 2.11 Renewal Term Price | 19 | This clause seems to be conflicting. The first sentence states that renewal options will be “at the same pricing as those specified in this Contract or lower negotiated pricing.” However, the second sentence states, “In exercising the Renewal provision of this Contract, FHKC’s expectation of Vendor is a price reduction…” Please confirm that reductions are preferred but not required as a condition of Renewal. | Confirmed. Reductions in price are preferred but not required as a condition of Renewal. |
| 3 | Draft Contract | 3.1 Implementation | 20 | Section 3.1 states: “Vendor shall provide to FHKC for approval a comprehensive, specific implementation plan that includes: f) Any potential alternative tasks, with start and end dates, that could be pursued when an identified task is delayed due to dependency”. Will the Corporation remove the language, as potential alternative tasks are unknown during the ITN period? | The draft implementation plan required for the ITN technical proposal to be scored need not reflect potential alternative tasks. The contract language will not be modified for the implementation plan required after Contract award. |
| 4 | Draft Contract | 3.1 Implementation | 20 | The Draft Contract states: “Changes to task due dates require written approval from FHKC.” Would FHKC consider adding a phrase similar to “for those tasks that meet the agreed upon criteria”? The current language does not allow for any reasonable date changes such as an agreement to allow FHKC extra time to approve a deliverable when that approval does not affect the critical path. | Attachment 1: Draft Contract, Section 3.1 has been revised to, “Changes to task due dates that impact the timely completion of key milestones and/or are part of the critical path require written approval from FHKC.” |
| 5 | Draft Contract | 3.1-3.1.4 | 21 | In the event that the CRM System Services and the CEC Services components are awarded separately, would there still be an expectation of support from the CEC vendor for unit/parallel testing and/or data migration? | Yes. |
| 6 | Draft Contract | 3.1.3 Data Migration | 21 | The scope of Data Migration activities is unclear. Is it correct to assume that the transitioning vendors current CRM system is the only data migration source system? If no, what additional data migration source systems need to be considered? | It is anticipated that the current CRM system and application intake system are the Data migration sources. |
| 7 | Draft Contract | 3.3 CRM Services | 23 | How many FHKC staff will need licensees to access each of the systems the CRM Contractor is responsible to provide? | See Attachment 1: Draft Contract, Section 3.3.8.3. |
| 8 | Draft Contract | Section 3.3 CRM System Services | Page# 23 | Is the existing legacy data required to be migrated to the new CRM system? If so, please provide the following information.  a. Please provide the data volume: 1) number of objects/tables, 2) average number of fields per table, 3) average number of records per table, 4) total number of records among all objects, and 5) total number of the attachments, type of attachments, and the average size of an attachment? | Yes, the existing legacy Data is required to be migrated to the new CRM System.  1) number of objects/tables: 64  2) avg number of fields per table: 39  3) avg number of records per table: 31,000,000  4) total number of records among all objects: 2,000,000,000  5) FHKC does not have this information. |
| 9 | Draft Contract | 3.3 CRM Services | 23 | Please confirm that this section includes all of the scope of work for the CRM System Services portion of the work. | Confirmed for purposes of Respondents preparing their initial ITN proposals; however, the scope of work may change during the negotiation phase. |
| 10 | Draft Contract | 3.3.3 Data Imports and Exports | 25 | Please provide details on each of the required interfaces including business purpose and frequency. | See separate attachment labeled [Q&A\_Number\_10](https://www.healthykids.org/news/calendar/procurement/) on the FHKC website. |
| 11 | Draft Contract | Section 3, 3.3.3 Data Imports and Exports | 25 | In the list of interfaces listed, what are the following interfaces, and can you describe their functions.  n. Discrepancy descriptions  o. DFS State Employee Request  p. Florida Department of Economic Opportunity – Export/Import  w. Medicaid Screening  x. Qsource enrollment file | See #10. |
| 12 | Draft Contract | 3.3.3 Data Imports and Exports | 25 | Would FHKC please expand in more detail about the data exchanges detailed in Section 3.3.3? How and when does each transaction take place? What is the purpose of each transaction? What data is exchanged with each transaction | See #10. |
| 13 | Draft Contract | 3.3.3 Data Imports and Exports | 25 | Wil the Contractor need to access or use any systems outside the CRM? If so, please provide details on the system and how bidders will use it. | Presently, the Data exchanges listed in Attachment 1: Draft Contract, Section 3.3.3 and described in #10 are delivered by FTP. The Contract intends to convert these exchanges so that Data can be downloaded from the CRM System by partner agencies or FHKC-approved contractors per scheduler and/or as needed. Therefore, no other systems are needed. The CEC Services vendor will require a direct interface to support the IVR and interactive CRM System updating. |
| 14 | Draft Contract | 3.3.3 Data Imports and Exports | 25 | Please provide all connectivity requirements for each system the CEC contractor will need to access. | The CEC Services vendor must connect to the CRM System in addition to any of its own Systems. |
| 15 | Draft Contract | Section 3, 3.3.5.1 Requests for Change Initiated by FHKC | 27 | The second paragraph states "FHKC shall be allotted [TBD] System enhancement hours annually to be used for RFCs that are not covered under Section 3.3.5. "  How many hours will be allotted by FHKC for system enhancements annually? | The number of system enhancement hours is to be determined during the negotiation phase; however, Respondents may assume 2,000 hours for purposes of preparing their proposals. |
| 16 | Draft Contract | 3.3.5.1 Requests for Change Initiated by FHKC | 27 | Will the Corporation change the system enhancement hours billed at ½ hour for 1 hour of effort to a proper 1:1 ratio? The similar Development level hours are billed 1:1. | This may be addressed during the negotiation phase. |
| 17 | Draft Contract | 3.3.5.3 CRM System Updates and Upgrades | 28 | Is the CRM System Software Update Assessment an annual assessment that can be incorporated into the SOC 2 audit requirement? | Yes. |
| 18 | Draft Contract | 3.3.5.3 CRM System Updates and Upgrades | 28 | Final paragraph of this section refers to a "CRM System Software Update Assessment" described in Appendix A. Appendix A does not detail a report by this name. Should this paragraph refer to a different report in Appendix A or is Appendix A missing the description of this report? | The CRM System Software Update Assessment Report has been added to Appendix A of Attachment 1: Draft Contract. This report is not due during implementation. It is due annually by July 1 with a financial consequence of $1,000. |
| 19 | Draft Contract | 3.3.5.4 Change Review and Approval | 29 | Our understanding is that scoping document and estimation steps are reported separately to avoid completion of estimating exercises based on scope that is not yet approved. Can the Corporation confirm whether they want these two steps in one or two reports? | Two reports are confirmed; however, the vendor’s Change Management Plan approved by FHKC may describe certain circumstances that would permit the reports to be combined (e.g., for fast turnaround, legal need, and known low or no cost). |
| 20 | Draft Contract | 3.3.5.7 Deployment and Verification | 30 | This section mentions that a “Vendor shall have 15 Calendar Days to deploy an FHKC-approved RFC, unless otherwise agreed upon by the Parties.” This seems to imply that the size of the effort or the priority vs other items being worked is not being considered or does the Corporation intend to provide guidance on requested deployment date for each RFC? | FHKC will provide guidance for and prioritize each RFC. |
| 21 | Draft Contract | 3.3.6 Testing Environments | 30 | FHKCs request to have UAT environment access is new and may significantly add to timelines and companion resources necessary to complete UAT. The reference to having an automated UAT environment may need clarification because in addition to inbound and outbound files, there are batch jobs which control system activity.  Can the Corporation estimate how many individuals they would request this access for in the UAT environment? Also can the Corporation please clarify and expand upon what is meant by “automated UAT environment”? | It is anticipated that FHKC would have at least six Users who would routinely be available as testers. Other testers may be needed when specialized changes are being reviewed.  The “fully automated except for inbound/outbound file interfaces” refers to the ability to be linked to all CRM and CEC systems needed at any given time for appropriate-level testing. |
| 22 | Draft Contract | 3.3.8 CRM System Security Requirements | 31 | The ITN documents have not addressed CMS Minimum Acceptable Risk Standards for Exchanges (MARS-E). Is this deliberate? Is there no requirement for MARS-E compliance for the CRM and CEC systems? | The National Institute of Standards and Technology (NIST) Special Publication 800-53 serves as the parent framework for Minimum Acceptable Risk Standards for Exchanges (MARS-E). Certification is required.  Vendor’s system security and security plans are required to align to all applicable NIST controls following the Moderate Baseline. See Sections 3.1.4(d) and 6.7 and Appendix A of Attachment 1: Draft Contract. |
| 23 | Draft Contract | Section 3, 3.3.8.3 User Access Control | 32 | Item j states that "Allow password modification only in the event of a password breach;". Please elaborate this requirement.  Are you saying that users are not allowed to change their passwords unless there is a breach? | Following NIST recommendations, passwords should be set to never expire and require a longer passphrase.  No. Users may change their password at will, but a password change should only be forced in the event of a breach.  Attachment 1: Draft Contract, Section 3.3.8.3(j) has been revised to require password modification only in the event of a password breach. |
| 24 | Draft Contract | 3.3.9 Electronic Information Repository | 34 | Can FHKC Clarify “offshoring”? Is it for development work or for data? | See Attachment 1: Draft Contract, Section 6.10. |
| 25 | Draft Contract | 3.3.9 Electronic Information Repository | 34 | Can a mobile app be the primary source of image capture? | Yes. |
| 26 | Draft Contract | 3.3.9 Electronic Information Repository | 34 | How long do documents need to be retained? | See Attachment 1: Draft Contract, Section 10.27. |
| 27 | Draft Contract | 3.3.9 Electronic Information Repository | 34 | Do documents need to be shared with other parties, aside from the member? | Yes. |
| 28 | Draft Contract | 3.3.9 Electronic Information Repository | 34 | Are there specific Corporation requirements around authentication standards? | See Attachment 1: Draft Contract, Section 3.3.8. |
| 29 | Draft Contract | 3.3.10 FHKC Website | 34 | Can the CRM Vendor make significant changes to the user journey in the website experience? | Yes, with approval by FHKC. |
| 30 | Draft Contract | 3.3.10 FHKC Website | 34 | Can the CRM Vendor change the screens with the household mapping for each individual? | Yes, with approval by FHKC. |
| 31 | Draft Contract | 3.3.10 FHKC Website | 34 | Are there any major compliance (ADA) or security issues with the website today? | The website may contain some compliance issues, but no known security issues exist today. |
| 32 | Draft Contract | 3.3.10 FHKC Website | 34 | Could the non-Spanish translations be staggared past the implementation due date? | Translation to Haitian-Creole by the Effective Date of Services is required. |
| 33 | Draft Contract | 3.3.11 Customer Portal | 34 | Who will set the approval requirements from FHC? | Approval requirements and FHKC staff assignments will be determined as part of implementation planning. |
| 34 | Draft Contract | 3.3.11 Customer Portal | 34 | What is the turnaround time for FHKC review and approval decisions? | The turnaround time for FHKC review and approval will be determined as part of implementation planning. |
| 35 | Draft Contract | 3.3.11 Customer Portal | 34 | Who will be on the FHKC approval committee? Will FHKC agree to mutually agreed upon timeines to approval? | Members of the FHKC approval committee are to be determined. FHKC is committed to meeting mutually agreed upon timelines absent unanticipated events. |
| 36 | Draft Contract | 3.3.11 Customer Portal | 34 | What is the required frequency of the ADA scans? Would the frequency be more than annually? | Change management will include accessibility (ADA, et al) and security testing for each specific change to the Customer Portal. A full review of the Customer Portal is required annually.  Attachment 1: Draft Contract, Sections 3.3.6, 3.3.10, 3.3.11, and Appendix A have been revised accordingly. |
| 37 | Draft Contract | 3.3.12 Knowledge Base | 35 | Please confirm what is envisioned for the knowledge base. The described functionality entails both a KMS system and a publicly accessed web page in one, which is not possible to deliver. For example, customers will not be allowed to see CSR scripts as described. | The publicly available knowledge base should be a subset of the most frequently asked items derived from the internal knowledge base. The internal knowledge base should include resolutions to Customers Inquiries. |
| 38 | Draft Contract | 3.3.11.a Customer Portal | 35 | Do saved applications need to be available for viewing in the Call Center system? | Yes. |
| 39 | Draft Contract | 3.3.11.c Customer Portal | 35 | Since email is not a secure HIPAA channel, could this requirement be achieved through a messaging portal that the consumer logs into? The availability of a new message in the portal would trigger a generic message (with no PII/PHI) notifying the customer that a new message is available for view. | Yes. |
| 40 | Draft Contract | 3.3.11.d Customer Portal | 35 | Does the CRM Vendor own and control the single sign on capability, or is it a Corporation system? | The CRM Vendor owns and controls this capability. |
| 41 | Draft Contract | 3.3.14 Florida KidCare Application | 36 | Please provide additional details on the Application Intake functionality required for the CRM system. Is there a single application form? Can it be provided as part of the ITN? Are data field checks required? What is the process when information is missing on the application form? Will the vendor be required to send a notice to request missing information from the applicant? | It is anticipated that during implementation planning the online Florida KidCare Application will be redesigned as part of the Customer Portal redesign. Screen shots of the current online application are provided as a separate attachment on the FHKC website labeled [Q&A\_Number\_41](https://www.healthykids.org/news/calendar/procurement/).  Yes, checks for certain data fields will be required.  Requests for the Applicant to provide missing information and/or documents are required. The CRM System Services vendor is responsible for outbound email; see Section 3.3.17. The CEC Services vendor is responsible for other outbound communications; see Attachment 1: Draft Contract, Sections 3.4.9 and 3.4.15. |
| 42 | Draft Contract | 3.3.15 Eligibility and Enrollment | 36 | Please provide additional details on the Eligibility functionality required of the CRM system. Are there system to system interfaces to gather eligibility verification information? What verification needs to be done for eligibility determination? What process is expected for gathering missing information needed for eligibility determination? What are the rules for defining a MAGI tax household? Will the CRM system interface with a State system for MAGI eligibility determination? What eligibility rules need to be executed within the CRM system? | System to system interfaces gather eligibility verification information for identity, income (based on household size), and citizenship and immigration status.  Automated program calls from other systems are used to gather missing information. Additionally, the CEC Services vendor will handle outreach for missing information.  Refer to sections of 42 CFR Subpart G for the rules defining a MAGI tax household. DCF is responsible for maintaining the latest rules within the eligibility calculator, and the CRM System will interface with this calculator.  Eligibility rules are set forth in the CFR and state plan, and FHKC and the CRM System vendor will jointly define the requirements for the CRM System. |
| 43 | Draft Contract | 3.3.15 Eligibility and Enrollment | 36 | Please provide additional details on the Enrollment functionality required of the CRM system. Will applicants be autoenrolled upon being deemed eligible? Will the CRM system need to do the autoenrollment? What are the autoenrollment rules? What are the business rules around plan changes? Is there a concept of “with cause” plan changes that can occur outside of the open enrollment period? | Enrollment occurs in the CRM System on the first day of the month after a child is assigned to an Insurer, the CMS Plan, or MediKids and payment is received.  Customers are permitted 90 days to change Insurers during their respective annual renewal open enrollment; see Attachment 1: Draft Contract, Section 3.4.16.3. Changes are also permitted during the 12-month continuous eligibility period for good cause reasons as follows:   * The child’s doctor does not, because of moral or religious objections, provide a service the child needs. * The child needs related services to be done at the same time and the child’s primary care provider determines that receiving the services separately would subject the child to unnecessary risk, but not all related services are available in the Insurer’s network. * The child has an active relationship with a health care provider who is not in the Insurer’s network, but who is in the network of another Insurer in the area. * The Insurer is no longer available in the area where the child lives. * The Insurer is required to take action to improve quality of care. * Other reasons as determined by FHKC. |
| 44 | Draft Contract | 3.3.13 Webchat | 36 | Are there data masking requirements for webchat transcript storage? | No, provided the Data is stored on a secured site where encryption is not required. |
| 45 | Draft Contract | 3.3.13 Webchat | 36 | How long do webchat transcripts need to be stored? | See Attachment 1: Draft Contract, Section 10.27. |
| 46 | Draft Contract | 3.3.16 | 36 | Does FHKC’s payment processing vendor support API/web services that the Contract can use to interface through various channels? | Yes. |
| 47 | Draft Contract | 3.3.15 Eligibility and Enrollment | 36 | What is the average processing time (time the agent spends completing the application process) to complete a new application for Enrollment ? | This data is not available. |
| 48 | Draft Contract | 3.3.15 Eligibility and Enrollment | 36 | What percentage of applications are suspended for additional follow-ups? What methods of follow-ups are currently in place today e.g., phone, email, mail, etc.? | On average, 16 percent of Florida KidCare Applications are suspended to request additional information. This percentage is based on Applications that took more than seven days for eligibility to be determined. |
| 49 | Draft Contract | 3.3.15 Eligibility and Enrollment | 36 | What is the current average turnaround time, in days, for Eligibility determination? | The average is five days. |
| 50 | Draft Contract | 3.3.15 Eligibility and Enrollment | 36 | Can FHKC please provide the Enrollment, Renewal, and Maintenance volume for CHIP and full pay plans by month? | Enrollment data is available on the FHKC website in the file labeled [Q&A\_Number\_50.](https://www.healthykids.org/news/calendar/procurement/)  See ITN Appendix C for Renewal data.  Maintenance volume data is not available. |
| 51 | Draft Contract | 3.3.15 Eligibility and Enrollment | 36 | What percentage of Enrollments received are suspended for manual processing? | FHKC does not currently have a process to suspend enrollment. |
| 52 | Draft Contract | 3.3.17 Outbound Campaigns | 37 | Who at FHKC will define the campaign requirements? | The FHKC staff responsible for defining campaign requirements will vary depending on the type of campaign. It is anticipated that the FHKC communications team and operations team will be the primary owners of outbound campaigns. |
| 53 | Draft Contract | 3.3.17 Outbound Campaigns | 37 | What will the process be to define campaign requirements? | The process to define campaign requirements will vary depending on the type of campaign. Generally, FHKC anticipates identifying the goal(s) of the campaign, determining the best delivery method(s), and using data analytics to identify the audience and monitor success. |
| 54 | Draft Contract | 3.3.16 Fiscal Administration | 36 & 37 | What is the number of payments received per month? Of this number of payments received, what percentage of payments are suspended for manual processing? | The payment processing vendor averages receipt of 154,960 payments per month.  Approximately 5 payments per month are suspended for manual processing. |
| 55 | Draft Contract | 3.4 Florida KidCare CEC Services | 38 | Please confirm that this section includes all of the scope of work for the CEC Services portion of the work. | Confirmed for purposes of Respondents preparing their initial ITN proposals; however, the scope of work may change during the negotiation phase. |
| 56 | Draft Contract | 3.4 Florida KidCare CEC Services | 38 | There are numerous references to systems needed to support these contact center operational requirements. Please confirm that, other than the telephony IVR system, all the references to the systems to support the contact center are covered by the CRM system. What about the document management system? | Confirmed, see Attachment 1: Draft Contract, Section 3.3.1. However, Respondents may include their preferred system in their proposals. The imaging retrieval system is the responsibility of the CRM vendor. |
| 57 | Draft Contract | 3.4.3 Languages | 38 | What is the percentage split of calls in English, Spanish, Haitian Creole, other languages? | This information is not available.  Approximately 10-15 percent of all letters are printed in Spanish and less than 2 percent are printed in Creole. |
| 58 | Draft Contract | 3.4.6 Interactive Voice Response | 40 | In reference to "The IVR shall provide automatic caller identification,” does that mean ANI (caller ID) or an automated IVR solution that verifies the caller’s identity? | Preferably, the IVR would verify the caller’s identity to reduce the amount of live talk time. |
| 59 | Draft Contract | 3.4.8.1 Inbound Calls | 42 | Can FHKC please provide the monthly call volume by call type and average handle time for inbound calls? In addition, can FHKC please account for the remaining approximately 925K calls. Please distinguish between calls that are self-served in the IVR vs abandoned calls per month. | See #211 for the volume by call type, average handle time for inbound calls, self-service calls, and abandoned calls.  FHKC does not understand the reference to 925K calls. |
| 60 | Draft Contract | 3.4.8.3 | 43 | Many of the issues/inquires that are posted in social media may be inappropriate for the contractor to answer. How will the contractor know what inquiries they can address and chat inquiries FHKC should address? How will this process be coordinated? | A matrix will be created to delineate responsibility for answering questions among the pertinent parties. Questions regarding eligibility criteria, application processing time, referrals, income verifications, and the like are anticipated to become the responsibility of the selected CEC Services vendor. |
| 61 | Draft Contract | 3.4.8.3 | 43 | If there are social media inquiries that are not the responsibility of the Contractor, will these been removed from the calculation of the associated SLA? | Yes. |
| 62 | Draft Contract | 3.4.8.3 | 43 | How many social media inquiries were posted each day that required a response? | Social media questions come in via all Florida KidCare social media platforms: Facebook, Instagram, and Twitter. An average of three to five Inquiries come in per day. Larger numbers occur when programmatic changes roll out. |
| 63 | Draft Contract | 3.4.9 Outbound Calls | 43 | What should the vendor assume for average outbound call volume per month? | In 2017, approximately 67,000 outbound calls were placed per month. Calls are placed for numerous reasons, such as requesting missing information, missed payments, cancellations, special campaigns, etc. |
| 64 | Draft Contract | 3.4.8.3 Email, Social Media, and Webchat Management | 43 | What is the monthly volume of Inquires that come through email, fax, correspondence, webchat, and through Social Media (if applicable)? | Including Inquiries made directly to FHKC, the rough average or range volume for a typical month in 2019 is as follows:   1. Email – 5,000 to 6,000 2. Fax – 3,000 to 5,000 separate sends 3. Correspondence/mailed letters – 2,000 to 4,000 4. Webchat – Not offered at this time 5. Social Media – 90 per month |
| 65 | Draft Contract | 3.4.9.1 Welcome Calls | 43 | Would an interactive outbound dialer and/or survey tools be acceptable for fulfilling the Welcome Call or other customer outreach requirements? | An automated outbound dialer could be utilized in conjunction with a “warm” connection for the actual call, but a live call is preferred. |
| 66 | Draft Contract | 3.4.8.3 Email, Social Media, and Webchat Management | 43 | What is the expected SLA for responding to social media posts? | See Attachment 1: Draft Contract, Appendix B.8. Standard B.8.2 has been revised as follows: “Greater than or equal to 95 percent social media posts answered within 30 business minutes.” |
| 67 | Draft Contract | 3.4.8.3 Email, Social Media, and Webchat Management | 43 | FHKC has asked for the right to the website to make updates.  Will FHKC indemnify the CRM Vendor for any adverse actions caused by FHKC employees resulting from any of these updates? | This may be discussed during the negotiation phase. |
| 68 | Draft Contract | 3.4.10 Outbound Customer Campaigns | 44 | Can the Corporation define what is envisioned for online webforms? | Webforms could consist of event sign-ups, surveys, and depending on the design, the application. |
| 69 | Draft Contract | 3.4.13 Call Recordings | 45 | How many FHKC employees will need access to call recordings? | Up to five. |
| 70 | Draft Contract | 3.4.14.1 Florida KidCare Applications | 46 | How long must the original paper KidCare Applications as well as all other paper notices be retained after they have been successfully uploaded into the document management system? | Paper documents must be retained in accordance with FHKC record retention schedule. |
| 71 | Draft Contract | Section 3, 3.4.16.2 Eligibility Review | 48 | The second paragraph states "Vendor shall follow business rules codified in a business rules engine to screen for potential Medicaid eligibility and determine eligibility for the Program."  Is the Eligibility Determination function to be supported in the CRM solution? | The CRM System solution is required to collect inputs necessary to utilize the rules engine managed and maintained by DCF. |
| 72 | Draft Contract | 3.4.16 | 48 | Please provide the eligibility determination workflow referenced in this section. | See Addendum 1 to the ITN. |
| 73 | Draft Contract | 3.4.16 | 48 | This section for Eligibility Determinations is listed as a responsibility for the CEC vendor. Our expectation is that the CRM vendor will provide the tool that calculates eligibility and CEC staff will use this tool to process eligibility. Would FHKC indicate if our understanding is correct and, if it is not correct, please clarify which vendor is responsible for bringing the eligibility determination tool. | The CRM System Services vendor is responsible for the tool and the CEC Services vendor uses the tool to process eligibility. |
| 74 | Draft Contract | 3.4.16 | 48 | How does DCF calculate eligibility? Does DCF use the same calculations for MAGI-related eligibility as FHK? If not, please explain how these entities each calculate eligibility and how potential discrepancies are resolved. | Currently, after collecting required information, FHKC uses the same eligibility calculator as DCF, but rules are slightly different. Overrides and provisional coverage are used for children not covered by Medicaid; discrepancies are then manually resolved between FHKC and DCF. FHKC intends to use the implementation of this Contract to address discrepancies as permitted by the rules that govern the Program. |
| 75 | Draft Contract | 3.4.16 | 48 | The Draft Contract suggests that the methodology to calculate eligibility is a responsibility of the CEC Contractor. Please confirm if this is correct, and if so, explain how the CEC Contractor can control the methodology if the CRM Contractor provides the eligibility calculation tool. | See #73. |
| 76 | Draft Contract | 3.4.16 | 48 | Can the Contractor leverage the DCF eligibility tool/processes? If so, please explain how this coordination can work. | Yes, through the use of a web service. |
| 77 | Draft Contract | 3.4.16.3 Annual Renewals | 48 | Please provide an overview of how the current manual renewal process is executed? | At the start of the eleventh month for a child who should remain eligible, the system requests income information through agency data calls. If income does not match income reflected on the Family Account or self-employed income is present, the incumbent third party administrator manually reviews the renewal and the Customer must provide income documentation. The incumbent then conducts a new review and eligibility determination. |
| 78 | Draft Contract | Section 3, 3.4.17 Enrollment | 49 | For the enrollment and disenrollment of insurance coverage, does FHKC envision that the CEC vendor utilize the CRM system and its interfaces with the insurers? | The CRM System interfaces with Insurers, AHCA, and DOH. |
| 79 | Draft Contract | Section 3, 3.4.18 Disputes and Grievances | 49 | For the Disputes and Grievances functions, does FHKC envision that the CRM system to have functions to support and administer the necessary processes? | The CRM System must allow FHKC to research all Family Account activities and notate the dispute actions taken, including posting documents. This would be part of the Case Inquiry process. |
| 80 | Draft Contract | 3.4.19.1 Lockbox Services | 49 | What are the estimated monthly charges for Lockbox Services? Can the State please provide the monthly transactions and associated fees per month for the last 12 months? | Estimated monthly charges for lockbox services range between $1,200 - $1,500 per month based on transaction volume.  Approximately 8,800 transactions per month are processed through lockbox services. |
| 81 | Draft Contract | Section 3, 3.4.19 Fiscal Administration | 50 | Does FHKC envision that for CEC vendor to perform the responsibilities under 3.4.19.2, 3.4.19.3, 3.4.19.4, 3.4.19.5, the CRM system to have functions to support those activities? | Yes. |
| 82 | Draft Contract | Section 3, 3.4.20 Discrepancy Reports | 51 | Does FHKC envision that for CEC vendor to perform the responsibilities under 3.4.20, the CRM system should have a discrepancy report interface with insurance companies and functions to generate discrepancy reports? | Yes, or another solution to be proposed by Respondent. |
| 83 | Draft Contract | 3.4.21.2 Training | 52 | Can the Corporation clarify what is meant by “In-bound call training shall focus on ‘in-call’ instead of ‘pre-call’”? | For “in-call” training, CSRs should be highly trained on soft skills and the knowledge base to easily access pertinent information while simultaneously assisting the Customer. |
| 84 | Draft Contract | Section 3, 3.4.22.1 New Customer Survey | 53 | Is FHKC envisioning to use the CRM solution to store survey results even in cases where the survey is not initiated through the CRM solution? | All Customer-related information and Data will be stored in the CRM. |
| 85 | Draft Contract | Section 3, 3.4.22.2 New Customer Survey | 53 | Is FHKC envisioning to use the CRM solution to initiate customer satisfaction surveys and store the results? | Yes. |
| 86 | Draft Contract | Section 3, 3.4.22 Customer Satisfaction Survey | 53 | Is FHKC expecting functionality to report survey results in the CRM system? | Yes. |
| 87 | Draft Contract | 3.4.25 Readiness Assessment | 54 | Can the Corporation define when within the 45 calendar days prior to the effective date of services that they will provide the results of the readiness review? Program quality and effectiveness can be ensured by defining a response and remedy period. | Vendor should include this period and its preferred deadline in its implementation plan. Details as to how vendor and FHKC will perform readiness and vendor’s expectations of FHKC should also be considered in this plan. |
| 88 | Draft Contract | 4.5.2.f and 4.12 Subcontractor Subcontraccts | 60 | These sections note that FHKC can visit work sites without notice and, “at any time, inspect the premises, physical facilities, and equipment where and on which work related to this Contract is conducted.” This may not be feasible with larger national vendors that operate out of high security offices, such as those performing hosting services, etc. Please confirm that these provisions are meant to apply only to certain types of services performed under the Contract and that FKHC will provide reasonable notice prior to inspection. | This may be discussed during the negotiation phase. |
| 89 | Draft Contract | 4.8 | 63 | Please provide any instances and details when a vendor was required to pay a provider for unpaid claims. | Within the last three years, records show five instances of required payment as follows:   * New Family Account was not activated in the month following the first payment due to system error ($477) * Family Account was not granted grace period of 30 days during renewal process ($5,940) * CSR incorrectly advised Customer that transition from CHIP to Full-pay would occur after the next month, but transition occurred in the next month when child was already enrolled in Full-pay and underwent unapproved surgery (three bills totaling $3,077.85) * Child lost coverage for one month after renewal due to prolonged period to process income documents (one bill for $490) * Child's coverage was terminated on mistaken belief child was on Medicaid (two bills totaling $729.00) |
| 90 | Draft Contract | 4.10 Ownership of Work Product | 65 | Capitalized terms in these questions have the meaning ascribed in the ITN. Please confirm that Intellectual Property owned by Vendor prior to the ITN award and resulting contract does not constitute Work Product. Specifically, please confirm that the CRM System does not constitute Work Product. | Generally, it is not FHKC’s intention to own the CRM System, but rather the business rules and Data used in the operation of the Program. The specific terms may be discussed during the negotiation phase. |
| 91 | Draft Contract | 5.7 Fidelity Bond | 74 | This section requires a “fidelity bond.” Please confirm that this is outdated language and that a commercial crime insurance policy meets this requirement. | Not confirmed. A fidelity bond is required. |
| 92 | Draft Contract | 5.6 | 74 | Please consider removing the payment bond requirement as this seems more applicable for other types of contracts. | A payment bond is required. Attachment 1: Draft Contract is revised to permit Vendor to furnish a payment bond in the amount of $7,500,000 or the total annual costs of all subcontracts, whichever is less. |
| 93 | Draft Contract | Section 8: Transition | 91 | For all the in-scope functions, do training materials and job aids exist for policy that the vendor can leverage? | The intent of this contract is to build a new eligibility and enrollment process. Training materials and job aids will be developed for the new process; therefore, it is unlikely the existing materials and aids can be leveraged. |
| 94 | Draft Contract | 10.35 Financial Consequences, Liquidated Damages, and Invoice Credits | 110 | The Contract defines “Financial Consequences” as not including liquidated damages. The Contract states, “Notwithstanding anything in the Contract to the contrary, the total of any and all Financial Consequences shall not exceed [CEC $250,000] [CRM $50,000] or 15 percent of the monthly invoice, whichever is greater, for any calendar month.” Please clarify whether items noted in the Contract as “liquidated damages” are also subject to the above-noted cap on Financial Consequences or a separate limit. | No. |
| 95 | Draft Contract | Appendix A | 127 | The introductory sentence states “following CRM system services.” Please confirm the selected CEC vendor will not need to generate or produce CRM reports. | Confirmed. Attachment 1: Draft Contract has been corrected. |
| 96 | Draft Contract | Appendix B: B.5 Timeliness of Email Answered | 146 | Is the expectation that the vendor develop and send email responses directly to the parent/families? This requirement could create a higher risk of HIPAA/PHI incidents. | See #39. |
| 97 | Draft Contract | Appendix B: B.5 Timeliness of Email Answered | 146 | Please confirm that a formal answer to an email inquiry within 2 hours could mean that the vendor responds with a personal response to the customer. If a resolution to the inquiry could not be completed within 2 hours (e.g., more research is required), the formal response would include a time when the Vendor will respond back to the consumer with a resolution. | Confirmed. |
| 98 | Draft Contract | Appendix B: B.5 Timeliness of Email Answered | 146 | Please confirm that in its email response to the customer, the Vendor shall not transmit data that contains HIPAA or PHI related data. | Confirmed. |
| 99 | Draft Contract | Appendix B: B.6 Timeliness of Voicemails Answered | 147 | Is the expectation that all Voicemails received in the 12 hours between 7:30 pm an 7:30 AM are resolved and retuned by 7:45 AM daily, and is the expectation that all voicemails received from 7:30 pm on Friday Night till 7:30 am Monday morning are returned and resolved by 7:45 AM Monday morning? | See Attachment 1: Draft Contract, Appendix B.6. |
| 100 | Draft Contract | Appendix B: B.6 Timeliness of Voicemails Answered | 147 | Please confirm that a formal answer to a voicemail inquiry could mean that the CEC Vendor responds with a personal response to the customer. If a resolution to the inquiry could not be completed before 11 a.m. ET next business day (e.g., more research is required), the formal response would include a time when the CEC Vendor will respond back to the consumer with a resolution. | Confirmed. |
| 101 | Draft Contract | Section 3, Appendix E FHKC Materials | 166 | Can FHKC publish the current CRM system Architecture Diagrams, and File Interface specifications? | See the process flowcharts in this Addendum and #10. |
| 102 | Draft Contract | Appendix A | N/A | The Reports and Other Documents that are due during implementation have dates in the ‘due dates’ column that do not match the parameters listed in the ‘during implementation’ column in relation to the Effective Date of Services in Sections 1.E and 1.F on page 7 and 8 of the ITN. For example, the Affidavit of Compliance is due at least 15 calendar days before EDS; however, the due date listed is December 15. If EDS is October 1, 2021, then 15 days prior, should be September 16, 2021. Will FHKC please clarify the dates in Appendix A of the Draft Contract? | Dates in Appendix A are currently placeholders and will be adjusted to align with the Contract or as the result of negotiations. |
| 103 | Draft Contract | General |  | Please provide the current FTEs by function. Please segment between agent and support staff headcount separately for the Eligibility & Enrollment processes, Premium Payments, Financial support, Enrollment Payment data, and the Customer Engagement Center Services. | FHKC does not have this information. |
| 104 | General | N/A | N/A | The release of answers for contracts of this size and complexity, frequently generates additional questions. Would FHKC consider including a second round of questions to assist bidders with fully aligning their solutions with FHKC’s vision? | See the Anticipated Calendar of Events and Deadlines in this Addendum. |
| 105 | General | N/A | N/A | Does FHKC have any expectations regarding membership? How much growth is expected each year for the next 5 years? | See #200. |
| 106 | General | N/A | N/A | Does FHKC also have a presumptive eligibility process for which the Contractor will have some level of responsibility? If so, please describe. | No. |
| 107 | General | N/A | N/A | Is there a data matching process to check for duplicate enrollees in Medicaid? If so, please explain how and how often it is conducted? | See #12. |
| 108 | General | N/A | N/A | Please provide the specific dates for open enrollment when members can change their Plans? | There is no annual Program-wide open enrollment period. See #43 for when Enrollees may change plans. For Applicants, enrollment is year round. |
| 109 | General | N/A | N/A | Please provide the current contractors staffing levels, including FTEs by position. | See #103. |
| 110 | General | N/A | N/A | What specific interfaces need to be in place with the Federal Services Data Hub? | FHKC leverages DCF’s connection to the Federal Services Data Hub. Technical specifications will be provided during implementation planning. |
| 111 | General | N/A | N/A | Please explain how children who are eligible for CHIP are referred from the Federal Hub. | Children referred from the Federal Marketplace are passed through DCF following normal account transfer protocols. |
| 112 | General | N/A | N/A | Please provide monthly volumes of outbound calls for the last year. | This specific information is not available. See #63. |
| 113 | General | N/A | N/A | On average, how many pages are associated with each document? | The question is unclear. |
| 114 | General | - | - | Budget Question:  1.      What is the estimated budget for CEC and CRM service components? | Funding is established annually by the Florida Legislature as provided in the General Appropriations Act (i.e., the state budget) resulting from the Social Services Estimating Conference process and through legislative budget requests FHKC and its agency partners submit from time to time. |
| 115 | ITN | Section 1. Introduction, C. Background and Program Overview | 4 | There are two websites we are seeing, Healthkids.org and FloridaKidcare.Org. Are they both official websites of FHKC? They both seem to have functionality for customers split among them. Is there an intent to combine these websites into one integrated site? | Both websites are currently official websites of FHKC. It is intended that the Florida KidCare and FHKC websites be combined into one flexible, mobile-friendly, content-driven website. All functionality from both websites must be maintained and/or enhanced, including full Customer journey mapping for both Applicants and Enrollees. |
| 116 | ITN | Section 1. Introduction, C. Background and Program Overview | 4 | Who operates the Kiosk systems for payment across the state? | The payment processing vendor currently contracts with Fidelity for these services but intends to change to InComm in quarter 1 of 2020. |
| 117 | ITN | Section 1 Introduction, C. Background and Program Overview | 4 | “The TPA provides premium payment coupons, which families send with checks, money orders, and cashier’s checks to a lockbox. Families may also pay premiums using cash at kiosks around the state. The payment-processing vendor accepts these payment types and submits a file to the TPA for posting to the respective family’s account” <copied from the ITN>  Question: How many premium payments are received per month? Can we obtain a break up of those by mode of payment such as Check, Credit Card, ACH (Automated Clearing House) | The payment processing vendor averages receipt of 154,960 payments per month as follows: lockbox 8,773 and electronic: 146,187. |
| 118 | ITN | C. Background and Program overview | 5 | What is meant by “Florida Healthy Kids skin”? | "Florida Healthy Kids skin" means the look and feel - design - of the of the FHKC website. |
| 119 | ITN | C. Background and Program overview | 5 | Please describe the decision tree functionality included in the KidCare Application portal that is included and how this functionality contributes to a streamlined application process. | The current Florida KidCare Application uses logic by eliminating unnecessary questions and minimizing the time needed to complete the application. |
| 120 | ITN | C. Background and Program overview | 5 | Please explain how the “interactive files between the TPA and the web services vendor” are conducted. Is this exchanged through a nightly batch file? Real-time API calls? | FHKC expects all functionality to be handled by the CRM System. |
| 121 | ITN | C. Background and Program overview | 5 | Is the renewal/determination process distributed evenly across the year? If not, please specify volumes throughout the year. | No, every month or quarter can differ. See ITN Appendix C: Renewals. |
| 122 | ITN | C. Background and Program overview | 5 | Please clarify the difference between renewal and redetermination. | Renewals occur on a twelve-month cycle. Redeterminations can be made at any time at the request of the family. See Attachment 1: Draft Contract, Sections 3.4.16.2 and 3.4.16.3. |
| 123 | ITN | Section 1: Introduction, C. Background and Program Overview | 5 | “Enrollees are required to renew their coverage once every 12 months based on the month of their initial enrollment in the Program or the last renewal completion date.” <copied from the ITN>  Question:  1. What system(s) are currently utilized to support enrollment, provider, and claims? 2. Will the CEC analysts be provided with read-only access to FKHC systems in order to perform their customer support and services? | The CRM System includes the enrollment Data; provider and claims data are handled through Insurers and not maintained by FHKC. See #149. |
| 124 | ITN | Section 1: Introduction, C. Background and Program Overview | 5 | “Enrollees are required to renew their coverage once every 12 months based on the month of their initial enrollment in the Program or the last renewal completion date.” <copied from the ITN>  Question:  1.What are the types of systems used? Are they product solutions? If so, please provide the name and version of the products?  2. What is the frequency of update and/or upgrade of the products/systems used? | Conducting renewals is part of the CRM process. The current hardware and use case processing are proprietary. Updates and upgrades are conducted every two to four weeks, on average. |
| 125 | ITN | Section 1: Introduction, C. Background and Program Overview | 5 | “Enrollees are required to renew their coverage once every 12 months based on the month of their initial enrollment in the Program or the last renewal completion date.” <copied from the ITN>  Question: Do you have separate websites for each of your products or support multi-tenant? | No. |
| 126 | ITN | Section 1 Introduction | 6 | “Appendix C: Historical Statistics and Other Information reports the volume of key services provided under FHKC’s current TPA contract” <copied from the ITN>  Question: Will you continue to contract with TPA payment processing vendor and web services vendor supporting corporate websites? | This may be discussed during the negotiation phase. |
| 127 | ITN | Section 1. Introduction, F. Calendar of Events | 7 | Is FHKC planning to have Orals presentations by vendors prior to the beginning of Negotiations? | No. |
| 128 | ITN | Section 1. Introduction, F. Calendar of Events | 7 | Is FHKC planning to have Orals presentations and solution demonstrations by vendors during the negotiation phase? | Yes. |
| 129 | ITN | A. Scope | 9 | If the same vendor is selected for CRM and CEC services, will FHKC enter into one contract or two? | It is anticipated that one contract will be awarded if a single Respondent is recommended to provide both CEC Services and CRM System Services. |
| 130 | ITN | A. Scope | 9 | What is the average number of documents that are linked to a | [The assumption about this question is that Respondent would like to know the average number of documents linked to a Family Account.] The average is six documents per Family Account based on inbound documents. |
| 131 | ITN | A. Scope | 9 | Are all outbound correspondences generated through the CRM? If not, please specify additional correspondences that will need to be developed and issued. | Outbound correspondence is generated by CRM System rules and by CEC manual orders. Correspondence is stored for the CEC Services vendor to generate paper and/or electronic correspondence. |
| 132 | ITN | A. Scope | 9 | If additional outbound correspondences are needed that are not generated through the CRM, will these be the responsibility of the CEC or CRM vendor? | FHKC anticipates coordinated efforts between the CEC Services vendor and the CRM System Services vendor for all outbound correspondence. |
| 133 | ITN | A. Scope | 9 | Will the contractor need to develop additional outbound correspondence/materials? If so, please specify. | The need for any additional system letters will be determined during the implementation phase. FHKC intends to streamline current outbound correspondence with this Contract. For any other development of materials, FHKC will work with the vendor. |
| 134 | ITN | A. Scope | 9 | How many RFCs have occurred throughout the past year? | Twenty RFCs were created and completed in 2018. Activity in 2019 suggests similar numbers. |
| 135 | ITN | A. Scope | 9 | Please provide an example of a RFC during the past year. | FHKC, working in partnership with AHCA, DOH, and Insurers, is adding fields to the 834 (enrollment) file so additional data can be provided to Insurers, AHCA, and DOH. |
| 136 | ITN | Section 2: Scope and Goals | Page# 9 | Based on our preliminary research, we understand that FHKC has multiple service providers/vendors (Maximus, Automated Health Systems, Cognizant, Cynergy, CMA, Bill2Pay, Jellybean, etc.) providing the current CEC and CRM services.   1. Would you please give details on the services each of these vendors providing? 2. b. Would any one or several of these vendors be engaged in the new solution? If so, please provide the details on the vendor(s) and the service(s) they would provide? | Currently, Maximus provides both CRM system and CEC-equivalent services, although Jellybean contracts for website services (including the online application, the Customer Portal, and the insurer portal that interface with Maximus) and Bill2Pay is the payment processing vendor. FHKC does not have contracts with the other vendors listed.  One of the goals of this ITN is to “Determine whether consolidating the operating model using a single service provider or multiple service providers ensures Best Value to FHKC,” which will be determined during the negotiation phase.  The Services are described in the Attachment 1: Draft Contract. |
| 137 | ITN | Section 2: Scope and Goals | Page# 9 | Technology Infrastructure: Applications, software, and hardware:  a. What CRM, Telephony, IVR and other applications, software, and hardware assets are currently being used to receive and respond to Citizen inquiries?  b. Is the current Technology Infrastructure procured by the FHKC? If so, does FHKC expects the new vendor(s) to use the same technology infrastructure to deliver the new CEC and CRM services? | 1. The incumbent third party administrator uses proprietary hardware and software; the incumbent’s call center is primarily used to handle Inquiries except for a small percentage of letters, email, texts, and phone calls. 2. The current systems are incumbent-owned and operated; Respondent should describe its optimal solution in its proposal. |
| 138 | ITN | Section 2: Scope and Goals | Page# 9 | Does FHKC own the data and satisfied with the current data management aspects such as data collection, data quality, data security, data reporting and data analytics? If so, would FHKC provide the cleansed data for the importing purposes? | Yes, FHKC owns the Data and will discuss during the negotiation phase any opportunities to improve Data management, quality, security, reporting, and analytics.  The Incumbent and recommended Awardee for CRM Services will coordinate the transfer of Data. |
| 139 | ITN | Section 2: Scope and Goals | Page# 9 | Is there a preference for the applications and the system of records to be on-premise, on-cloud, and/or hybrid? | No preference |
| 140 | ITN | Section 2: Scope and Goals | Page# 9 | Where is the existing customer engagement center (CEC) located? How many CSRs (Customer Service Representatives) are there in the CEC? Are all CSRs located in the same location? Are there any CSRs who are working from home? | The existing CEC is located in Ft. Pierce, Florida.  The number of CSRs is considered proprietary by the incumbent third party administrator.  Generally, all CSRs are located in the same location. Work from home may be permitted under certain circumstances. |
| 141 | ITN | Section 2: Scope and Goals | Page# 9 | Is there an overflow CEC center? If so, where is it located? How any agents are located at this location? How many transactions are processed from this location? | The overflow CEC is currently located in Virginia, which is used when emergency situations, such as hurricanes, close or impact the Florida location.  The number of agents is proprietary.  Except during emergencies, transactions are processed at the Florida location. |
| 142 | ITN | 2.A Scope | 9 | It is unclear whether if there is a systems component in the CEC services portion of the scope. A system will be needed to perform many of the contact center actions identified, but that “system” appears to be scoped into the CRM Systems Services portion of the work. Please clarify. | See #56. |
| 143 | ITN | 2.A Scope | 9 | Under which scope of work (CEC or CRM) is the document management system included? | The CRM vendor is responsible for the imaging retrieval system and the CEC vendor is responsible for utilizing the imaging retrieval system to attach and retrieve documents. |
| 144 | ITN | Section 2: Scope and Goals, A. Scope, | 10 | “Establish interfaces to other vendors, partners, and software” <copied from the ITN>  Question: Could you please share us the list of vendors and partners that is currently being used? | See #10. |
| 145 | ITN | Section 2: Scope and Goals, A. Scope, | 10 | “Establish interfaces to other vendors, partners, and software” <copied from the ITN>  Question: Please share us the current Technology Stack being used for the below:   1. Core infrastructure 2. Data Center 3. Type (virtual, cloud, physical) 4. Phone System | This information is considered proprietary by the incumbent third party administrator. |
| 146 | ITN | Section 2: Scope and Goals, A. Scope, | 10 | “Establish interfaces to other vendors, partners, and software” <copied from the ITN>  Question:  Development Stack:   1. Do you have an Enterprise Service Bus? 2. Is there a single integrated bus or several? 3. If available, are those based-on any application or Platform? | No, the CRM System Services vendor would provide interoperability in accord with its proposed model. Enterprise Service Bus decisions should be based on the most efficient outcome given available interface information. |
| 147 | ITN | Section 2: Scope and Goals, A. Scope, | 10 | “Establish interfaces to other vendors, partners, and software” <copied from the ITN> Question:  Third Party System: Please provide details on the third party vendor and/or systems we need to integrate with? | See #10. |
| 148 | ITN | Section 2: Scope and Goals, A. Scope, | 10 | “Establish interfaces to other vendors, partners, and software” <copied from the ITN>  Question: Third Party System: Will the integration need to be real-time? | Yes. |
| 149 | ITN | Section 2: Scope and Goals, C. Goals of the ITN | 10 | “Determine whether consolidating the operating model using a single service provider or multiple service providers ensures Best Value to FHKC;” <copied from the ITN>  Question: What is the mode of connecting to your clinical network? (ex: Local HIE networks /Local Hospitals, Labs, EMRs) | FHKC contracts with Insurers that manage their respective clinical networks. FHKC does not contract with health care providers or manage clinical networks. |
| 150 | ITN | 3.A Process Overview | 11 | What are all the activities that vendors will be required to participate in during the Negotiation period? | Responsible Respondents eligible for negotiations may be required to conduct any or all of the following: deliver presentations, answer questions, hold site visits, propose solutions, attend meetings in Tallahassee, prepare materials, provide best and final offers, and complete other activities as determined by the negotiations team that will assist the team in determining Best Value. |
| 151 | ITN | Section 3: General Instructions to Respondents | 12 | The ITN states the following: **“E. Letter of Intent Respondents intending to submit proposals must email a Letter of Intent to TPAIssuingOffice@healthykids.org by the time and date indicated in subsection 1.F, Calendar of Events and Deadlines. The Letter of Intent must: • State the category(ies) of Services (i.e., CEC Services and/or CRM System Services) for which the Respondent intends to provide a proposal. 2) Will the client allow a vendor to bid on both portions of this ITN if initially, the vendor’s LOI noted the vendor would only bid on one of the two** of the ITN? | No. |
| 152 | ITN | Section 4: Submission Requirements | 19 | **The ITN states the following: “When responding to specific questions, Respondent must copy each question in its entirety in the proposal. Copied questions are counted toward the page limit, if any.” 1) Will the client consider increasing the page count since each question must be re-stated prior to a response and also counts towards the page count of the proposal response?** | No. |
| 153 | ITN | 4.B Submittal of Proposals | 19-20 | The Submission Requirements section does not mention hard copies must be double-sided, but references to page count through the remainder of the section are measured in both single- and two-sided pages. Can FHKC confirm whether double-sided production of hard copy proposals is required? | Either a single-sided proposal or a two-sided proposal is acceptable. |
| 154 | ITN | Tab A | 22 | Please confirm that other than Attachment 3, there are no specific page limits for this section. | Attachment 3 is the Proposal Cover Sheet, the revised template for which is located in this Addendum.  ITN Section 4.D Tab A has no page limits; however, Respondents should be mindful that item 4 is an Executive Summary, which should be succinct. |
| 155 | ITN | Tab C-1 | 25 | Would FHKC increase the page limits in this section to 18 pages (equal to 36 single sided pages) in order to allow bidders to more fully explain their experience? | No. The page limit applies only to items 1 through 6. |
| 156 | ITN | Section 4: Submission Requirements, Tab C-1: Corporate Profile | 25 | “List other clients for whom Respondent has performed similar activities within the last five years” <copied from the ITN>  Question: Can these be same as references? | Yes. |
| 157 | ITN | Section 4: Submission Requirements, Tab C-1: Corporate Profile | 26 | “Provide Information regarding the location(s) where services will be provided if respondent is awarded a contract” <copied from the ITN>  Question: Is offshoring allowed? Does client has any location preference? | See #24.  Florida is the preferred location for the provision of any Services. |
| 158 | ITN | 4.D - Tab C-1 #8 | 26 | Would a SOC 2 audit or FedRAMP authorization of the computing environment suffice instead of the security risk assessment? | Yes. |
| 159 | ITN | 4.D - Tab C-1 #8 | 26 | Would a 3rd party risk assessment of the application for systems relative to the project work if completed after we win? | Respondent must provide a security risk assessment as required by this section for systems that provide similar services. If no such systems are in place, Respondent should so indicate and provide a security risk assessment for systems that best align with the requirements of this ITN. |
| 160 | ITN | 4.D - Tab C-5 | 28 | Please confirm the bidding vendor can use references from other parent company entities. | Confirmed, but subject to FHKC review. |
| 161 | ITN | 4.D.C-5 References & 4.D.C-6 Subcontractors | 28 & 29 | The first row in both the reference and subcontractor form says “Category.” Should the Vendor enter CEC or CRM services here or did FHKC intend for something else to be filled in here? | Enter, as applicable, "CEC Services" or "CRM System Services". |
| 162 | ITN | Tab D: Technical Response | 30 | Would FHKC increase the page limits in this section to no more than 45 double-sided pages (equal to 90 single sided pages) in order to allow bidders to more fully explain their solution? | No. |
| 163 | ITN |  | 30 | The significant increase in applications received in 2017 and 2018 does not seem to result in proportionate increases in other statistics (renewals, phone calls, mail volume, etc.). Please explain. | Looking at year-over-year changes, phone calls and mail volume experienced a substantial increase from 2017 Q4 to 2018 Q2. Moreover, the growth of applications was higher than other metrics as the result of Medicaid referrals. |
| 164 | ITN | 2. Experience, b | 31 | Do CEC bidders need to respond to this item? If so, in what manner and context? | Yes. CEC Services Respondents should have user access standards and security parameters for any system or graphical user interface (GUI) in place. If such systems or GUIs are not available, Respondent should so indicate and describe how it will ensure compliance with the security requirements of Attachment 1: Draft Contract. |
| 165 | ITN | 8. Implementation Plan | 33 | May bidders also provide a narrative of their implementation approach? If so, will this narrative count against the page counts. | Respondents may provide a narrative not to exceed 150 words of their implementation approach with the implementation plan. Such narrative will not be evaluated. |
| 166 | ITN | 4.D - Tab D, Paragraph 8.a | 33 | The ITN states: “The implementation plan should also identify the type and length of any support tasks that would continue past the Effective Date of Services.” Would FHKC confirm that the phrase “past the Effective Date of Services” refers to the Stabilization period after the Effective Date of Services and not the entire term of the contract? | The implementation plan is specifically for implementation and should reflect any activities or tasks related to implementation that would continue beyond the Effective Date of Services. |
| 167 | ITN | 10. CEC | 34 | Please clarify what is meant by “rollover calls.” | Depending on the CEC vendor’s model, when the call volume at the primary CEC site exceeds the site’s ability to handle calls within the performance standard, the calls roll over to another site. |
| 168 | ITN | Section 4. Submission Requirements, Tab D. Information for Respondents proposing CEC Services | 35 | Item 12 reads “**CEC Services**. Describe how Respondent manages services provided by the CEC center, including:   1. Languages customer service unit can support (other than English) and how that support is provided (i.e., language line or Respondent call center representatives); 2. Online chatting, email capabilities, and other electronic access capabilities; 3. Interactive voice response System self-service options and ability to select a live representative option; 4. Intake, scanning, and attaching documents to accounts, including include e-mail correspondence and electronic correspondence such as web chats, social media, and text messaging; and 5. Printing, mailing, and electronic correspondence services to families, with integration of correspondence between customer accounts and Program Systems, email campaigns, and outbound telephone services." |  |
| Question on sub item a. Is FHKC expecting the scope of the CRM system functionality to support Online Chatting, Email Capabilities and other electronic access capabilities? | Yes. See Attachment 1: Draft Contract, Section 3.3. |
| Question on sub item e. Is FHKC expecting the scope of the CRM system to have functionality to generate correspondence documents that need to be printed or emailed to the customer about application, eligibility or enrollment decisions? | Yes. See Attachment 1: Draft Contract, Section 3.3. |
| 169 | ITN | Section 4: Submission Requirements, 12. CEC Services | 35 | “Interactive voice response System self-service options and ability to select a live representative option;” <copied from the ITN>  Question: What member self-service capabilities do you offer today? | Current IVR self-service options are Customer’s ability to make a payment and access recorded general information. |
| 170 | ITN | Section 4: Submission Requirements, 12. CEC Services | 35 | “Interactive voice response System self-service options and ability to select a live representative option;” <copied from the ITN>  Question: What are the adoption rates of the self-service capabilities? | The adoption rate for IVR self-service is approximately 27 percent on average for calls to information only messaging.  Seventeen percent of payments are made through the IVR. |
| 171 | ITN | Section 4: Submission Requirements, 12. CEC Services | 35 | “Interactive voice response System self-service options and ability to select a live representative option;” <copied from the ITN>  Question:  1. What are your desired enhancements of the self-service capabilities?  2.How many changes, enhancement hours are anticipated annually based on historical utilization? | Customers should be able to navigate the IVR in the most efficient, user-friendly manner possible to reach precise options. Current high-level menus are for Family Account information, making payments, informational messages, and CSR contact. Enhancements may include improving top level menus, improving/adding sub-levels, and dynamic access of knowledge base information by phone.  At this time, most IVR changes are banner messaging that do not require enhancement hours. |
| 172 | ITN | Section 4. Submission Requirements, Tab D. Information for Respondents proposing CEC Services | 36 | Item 13 reads "**Call Management**. Describe how Respondent manages calls received, including:  a. The IVR System, including types of information accessible to callers, options available to callers, on hold messaging functionality, types of Data captured, reporting of Data, integration with the software and hardware platforms, and FHKC’s ability to customize options, messages, and make future changes"  Does FHKC expect the scope of the CRM system to have interfaces with the CEC IVR system to obtain information about applications, cases, enrollments, etc. from the CRM database? | Yes. |
| 173 | ITN | Section 4. Submission Requirements, Tab D. Information for Respondents proposing CEC Services | 37 | Item 15 reads "**Fiscal Reconciliation**. Describe Respondent’s strategies, including double entry accounting practices, for fiscal reconciliation regarding:  a. Posting payments to accounts;  b. Generating refunds;  c. Reconciling payment Data and payment reports;  d. Monitoring and reporting aging payments;  e. Managing stale accounts over 60 months old (unclaimed property); and  f. Performing cash to accrual-based reconciliations"  Does FHKC expect the scope of the CRM system to have functions to support the five items listed above? | Yes. See Attachment 1: Draft Contract, Section 3.3.16. |
| 174 | ITN | Section 4 Submission Requirements  # 18. Customer Relationship Management | 38 | “Maintaining Customer accounts, including case management” <copied from the ITN>  Question: Do you have a current Care Management Platform or is that to be included in CRM proposal? | The CRM System must have case management functionality. |
|  | Other Questions for CRM system |  |
| 1.       Who will need access into CRM (internal, third parties)? | See #7. |
| 2.       What are the roles that will have access? | See #7. |
| 3.       Will the CRM system need to be a system of record for any data elements? | See Attachment 1: Draft Contract, Section 3.3.1. |
| 4.       For changes will the core system(s) allow real-time writes/updates? | Yes, updates for pre-defined fields. |
| 5.       Will the CRM system be used as a ticketing system or will there be a separate system? | The vendor has certain intellectual design control on the model proposed. FHKC does not currently envision a ticketing system on the Data described in Attachment 1: Draft Contract, Section 3.3.1 except when advantageous, such as Section 3.3.1(d). |
| 6.       What workflows will the CRM system support? | See high-level process flows in this Addendum that map CRM System responsibilities from application through eligibility and enrollment. Other workflows supporting these primary workflows are required throughout Attachment 1: Draft Contract, Section 3.3. |
| 7.       Are there geographic limitations to access to CRM system (US Based)? | See #24. |
| 8.       Any issue with cloud-based solutions? | See #139. |
| 175 | ITN | 4.D - Section 20 | 39 | If a mobile app is required, should it replicate some or all functionality listed for the web portal? | At a minimum, the mobile application would be able to replicate key components of the Customer Portal functionality, such as viewing account information, uploading documents, and making payments. |
| 176 | ITN | 4.D - Section 20 | 39 | Is a mobile app required for the proposal? | Responses to questions about a mobile application are required. |
| 177 | ITN | 4.D - Section 20 | 39 | "Describe Respondent’s ability to design, deploy, and maintain a public-facing website"  Does FHKC own the code in use by the website? If so, would FHKC be willing to provide that code to the CEC vendor? | Yes, FHKC owns the website code, but intends to overhaul the websites. See #115. |
| 178 | ITN | 4.D - Section 20 | 39 | Please confirm that responding bidders need to propose a mobile responsive website and a mobile application | FHKC is investigating both a mobile application and a mobile responsive website through this ITN. |
| 179 | ITN | 4.D - Section 20 | 39 | Will the CRM Vendor run all aspects of Social Media, including full account control, governance and platform management? | No. It is the intent that the CRM system utilize its knowledge base to provide rapid response functionality to Customers on social media platforms. Social media Inquiries should be recorded and used to inform the knowledge base and subsequent training materials. Inquiries should be attached to Family Accounts to preserve a complete record of the correspondence.  It is not intended that the Vendor will assume full account control. See #60. |
| 180 | ITN | Section 4. Submission Requirements, Tab D. Information for Respondents proposing CRM System Services | 39 | Item 19 subitem b ask to provide anticipated timeline and steps required to completely redesign and deploy the current at healthykids.org. However, there seems to be another website with URL https://www.floridakidcare.org and it appears that some of the functions are supported at this site as well. Is FHKC planning to keep both sites going forward or consolidating to one site? | See #115. |
| 181 | ITN | 19. FHKC Website | 39 | Please clarify if FHKC is seeking a new website that is completely redesigned, or if FHKC is seeking for the successful contractor to produce a mirror copy of the current website. | See #115. |
| 182 | ITN | Section 4: Submission Requirements, 19.FHKC Website, 20.Customer Portal, 22.Omni-Channel | 39 | “Ability to communicate via mobile application” <copied from the ITN>  Question: What is your mobile strategy? | The goal is to offer a mirrored experience between the mobile device and the website. |
| 183 | ITN | Section 4: Submission Requirements, 19.FHKC Website, 20.Customer Portal, 22.Omni-Channel | 39 | “Ability to communicate via mobile application” <copied from the ITN>  Question: Is there a strategy for wearable technology integration? | Not at this time. |
| 184 | ITN | Section 4. Submission Requirements, Tab D. Information for Respondents proposing CRM System Services | 40 | Item 22 Omni-Channel, sub-item g asks for the ability to communicate via mobile application. Is FHKC looking to add a native Mobile App that runs on IOS and Android devices? Or a Mobile Responsive Web Application? Or both? | See #178. |
| 185 | ITN | Section 4. Submission Requirements, | 40 | Item 23(b) states “Ability to facilitate community support forums;”  Are the community support forums mentioned in Item 23(b) intended to support customers, CSRs, or users? | The forums are intended to support Customers. |
| 186 | ITN | Section 4, Submission Requirements, | 40 | Item 23(b) states “Ability to facilitate community support forums;”  Do community support forums currently exist today? If so, please provide a brief description of the participants, structure and tools used for the forums. | No, community support forums do not exist in a formal environment today. |
| 187 | ITN | 23, Knowledge Management | 40 | Please explain what is meant by “community support forums” and what the Contractor’s responsibilities are for community support forums. | Community support forums means giving Customers the ability to interact with one another, seeking help in troubleshooting various aspects of the Program. |
| 188 | ITN | 4.D - Section 23. Knowledge Management | 40 | Please confirm that the community support forum is for internal users of the knowledge base and not for customers or other entities that would not use the knowledge base. | See #185. |
| 189 | ITN | 4.D - Section 23 | 41 | Will the Corporation remove the following requirement: “Utilization of machine learning to generate just-in-time delivery of appropriate knowledge to front-line CSRs.” Machine learning capabilities will add significantly to any vendor’s cost | This may be discussed during the negotiation phase. |
| 190 | ITN | 4.D - Section 24 | 41 | We understand that the Corporation has a marketing firm that currently assists with outreach and materials development. Please clarify whether the winning bidder or the marketing firm are responsible for the work in Section 24. | It is anticipated that the CRM System vendor would support FHKC and/or its marketing firm in Customer outreach initiatives. |
| 191 | ITN | Section 4, Submission Requirements,  Tab D, Item#24 | 41 | Item 24 reads “**Outreach**. Describe Respondent’s ability to support outreach initiatives, including:  a. Approach to identifying the Customer population and determining best method of delivery based upon audience and campaign requirements;  b. Creation of campaign materials, including FHKC’s ability to create outreach campaigns;  c. Monitoring Customer response and making any needed adjustments to the campaign to improve response rates/call to action compliance; and  d. How FHKC would be able to monitor Customer response and adjust the campaign if needed.”  Are there any restrictions (e.g., legal, privacy, policy) on use of customer data for FHKC outreach purposes? | See Attachment 1: Draft Contract, Section 6.12. |
| 192 | ITN | Section 4, Submission Requirements, | 41 | What are the goals of the outreach efforts described in Number 24? | To effectively share and collect information with Customers using the most effective platform (call, text, email, etc.) to generate the highest open/response rate. Real-time, two-way monitoring must afford the opportunity of adjusting messaging and/or delivery method as necessary to accomplish the task. |
| 193 | ITN | 24. Outreach | 41 | The Outreach Section is listed as a CRM response. What type of campaign materials would a CRM contractor be expected to develop? We anticipate that the CRM contractor is not required to develop outreach posters/flyers. Please clarify. | The CRM System vendor would support email campaigns, surveys, outbound call campaigns, landing pages, etc. A CRM System vendor would not develop posters or fliers. |
| 194 | ITN | 24. Outreach | 41 | Please clarify what is meant by “FHKC’s ability to create outreach campaigns.” Is FHKC’s expectation to be able to use the CRM contractor’s technology to develop these campaigns? Or, is FHKC’s expectation to develop their campaigns and have the CRM Contractor manage all associated programming within their technical platform? | See #190 and #193. |
| 195 | ITN | Section 4: Submission Requirements, Proposed Revisions to Draft Contract | 41 | “Final Contract terms will be established with the selected Respondents during the negotiation process; however, FHKC may make, at its sole discretion, an award or awards with no revisions to Attachment 1: Draft Contract” <copied from the ITN>  Question: What are the list of non-negotiable clauses? | No list of non-negotiable clauses exists. |
| 196 | ITN | 5 Cost Proposal | 42 | This section requires the cost proposal to be submitted in excel. May we submit an additional PDF? | Yes. |
| 197 | ITN | A. Scoring Respondent’s Technical Response | 44 | Is each of the items in Tab D weighted equally? If not, please provide weights for each of the different items. | Yes. See revised ITN section 6A in this Addendum. |
| 198 | ITN | Attachment 6: Certification Regarding Lobbying | 57 | The Certification Regarding Lobbying is not mentioned as a form to be filled out and submitted with the proposal. Can FHKC confirm whether the form was included in the ITN for the Vendor’s reference or if the form was intended to be completed and submitted with the proposal? If the latter, in which section of the proposal would FHKC like the form to be submitted? | Respondents must complete and include Attachment 6: Certification Regarding Lobbying in Tab A as required in this Addendum. |
| 199 | ITN | 8. Attachment 6: Certification Regarding Lobbying | 57 | Please provide guidance as to the location within the bid for Attachment 6. | See #198. |
| 200 | ITN | 9. Appendix C: Historical Statistics and Other Information | 71 | Does the Corporation anticipate a year-over-year increase in eligible population that will affect volume and other tasks? If so, what percentage growth should CEC Vendors use for each operation year of the contract? This factor is crucial in ensuring comparable cost proposals across bidders. | Yes. See the [Social Services Estimating Conference Kidcare Caseload dated July 17, 2019](http://edr.state.fl.us/Content/conferences/kidcare/index.cfm) for enrollment projections. |
| 201 | ITN | Appendix C | 71 | Were there specific events that triggered the increase in applications in 2018? | From Q4 2017 to Q3 2018, FHKC experienced a significant increase of Medicaid referrals, which triggered the increase in applications for 2018. |
| 202 | ITN | Appendix C | 71 | Please provide the actual number applications processed for each period. | The number of applications received from the Appendix C table represents the actual number of applications processed. |
| 203 | ITN | Appendix C | 71 | Given SLAs surrounding application processing, please provide the highest level of detail available surrounding application submissions (by day, by week, etc.). | See file posted on the FHKC website labeled [Q&A\_Number\_203](https://www.healthykids.org/news/calendar/procurement/). |
| 204 | ITN | Appendix C | 71 | Please provide the percentage of applications that are submitted by channel (by phone, on-line, through FFM, on paper, etc.). | See #203. |
| 205 | ITN | Appendix C | 72 | Please provide the breakdown of inbound and outbound documents by type of document. | See #203 |
| 206 | ITN | Appendix C | 72 | Are paper applications included in both applications received (page 71) and inbound correspondence (page 72)? | No. |
| 207 | ITN | Appendix C | 72 | Please provide the number of pages that corresponds to the number of documents provided. | FHKC does not have this information. Generally, letters are one to four pages long each. Drop-ins for customization and varying numbers of children in the household may cause the number of pages to differ even for the same letter. See #133. |
| 208 | ITN | Appendix C | 73 | Are each of the system-generated letters produced and mailed on a standard letter size and standard business envelop? If not, please specify. | It is anticipated that all letters will be printed on 8.5x11 and mailed in #10 sized envelopes (4.125x9.5) with occasional need to use 6x9.5-sized envelopes. |
| 209 | ITN | Appendix C | 73 | Are there any letters that are not system generated? If so, please specify. | Currently, all letters are automated. CSRs have the ability to order certain letters when Customers request them. FHKC expects the CRM System to provide flexibility for the preparation of ad-hoc letters if needed. |
| 210 | ITN | Appendix C | 73 | How many of each type of system-generated letters are sent. | See #205. |
| 211 | ITN | Appendix C | 74 | Given the daily SLA requirements, it is important to have greater detail on call arrival patterns. Please provide call volume to the highest level of detail available (by day, by week, etc.) | See file on FHKC website labeled [Q&A\_Number\_211](https://www.healthykids.org/news/calendar/procurement/). |
| 212 | ITN | Appendix C | 74 | Please provide the number of calls actually handled by CSRs in this chart. | See #211. The field is called “Total Calls Answered in Queue.” |
| 213 | ITN | Appendix C | 74 | Does average handle time reflect live answer calls only or all calls. If all calls, please provide AHT for live answer calls only. | The handle time only reflects calls answered representing talk time + hold time + after call time. See #211. |
| 214 | ITN | 9. Appendix C: Historical Statistics and Other Information | 75 | Where does the Monthly and Annual Enrollment Cycles process flow start? | See the revised process flow in this Addendum. |
| 215 | Cost Proposal | Tab B-Line Items | Cell B8 | Instructions indicate Total System License cost in cell C28 are to equal row 38 on Tab B-CRM Proposal. Row 38 on Tab B-CRM Proposal is part of Renewal year costs. Did the State intend for C28 to reference line 41 on Tab B-CRM Proposal? | Attachment 2: Cost Proposal is deleted.  See, as applicable, Attachment 2A: CEC Services Cost Proposal, Attachment 2B: CRM System Services Cost Proposal, and/or Attachment 2C: Integrated Model Cost Proposal. |
| 216 | Cost Proposal | Tab A-CEC Proposal & Tab B-CRM Proposal | N/A | Section 1 requests entry for the annual Cost Recoupment Percentage. Please clarify the purpose of this calculation as any entry seems not to modify the ultimate scored cost proposal. | See #215. |
| 217 | Cost Proposal | Tab A-CEC Proposal & Tab B-CRM Proposal | N/A | It is unclear what the actual payment elements are for each category (CEC & CRM). Would the Corporation please provide an outline of all elements that a vendor would invoice for, what triggers a payment, and how those relate to the cost proposal? | See #215. These cost proposals are for evaluation purposes only and not for structuring payment invoices, which may be discussed during the negotiation phase. |
| 218 | Cost Proposal | Tab A-CEC Proposal | N/A | Section 2 requests processing fees for specific events. Please clarify if the successful vendor will in fact be paid a per event fee or if these fees are blended into a single PMPM rate. | See #215 and #217. |
| 219 | Cost Proposal | Tab A-CEC Proposal | N/A | Section 5 states Application and Renewal fees as “PMPM Fees”. Are these in fact PMPM fees or per event unit rates? | See #215. |
| 220 | Cost Proposal | Tab A-Line Items | N/A | What is the purpose of the rate table in Section 4? Will these rates be used for any future billing purpose, or are they strictly informational? | See #215.  One of the goals in the ITN states, “Increase visibility around true operating model costs through service provider transparency.” At this time, position rates are considered informational. |
| 221 | Cost Proposal | Tab B-Line Items | Cell B31 | Instructions indicate Total System License cost in cell C51 are to equal row 72 on Tab B-CRM Proposal. Row 72 on Tab B-CRM Proposal is part of Renewal year costs. Did the State intend for C28 to reference line 77 on Tab B-CRM Proposal? | See #215. |
| 222 | Cost Proposal | Tab B-CRM Proposal | N/A | In Sections 1 & 2, please clarify the purpose of the Value in Future Years calculation as these values appear not to impact the ultimate scored cost proposal. | See #215. |
| 223 | Cost Proposal | Tab B-CRM Proposal | N/A | How will Additional Anticipated System Costs (Section 5) be handled? How will these Amounts be invoiced and under what scenarios? | See #215 and #217. |
| 224 | Cost Proposal | Tab B-Line Items | N/A | What is the purpose of the rate table in Section 6? Will these rates be used for any future billing purpose, or are they strictly informational? | See #215. |
| 225 | Cost Proposal | Tab C & D Innovative Cost Proposal |  | In order to present the innovative cost proposal in tabs C and D, we ask that FHKC unlock these tabs to be able to complete as instructed. Also, please advise if these cost components should be broken out by calendar year. | See #215 and #217. |
| 226 | Cost Proposal | Tab B-CRM Proposal Item 2 System License Costs and Item 4 Annual HW and SW Maintenance Costs |  | Item 2 System License Costs asks for Fixed Cost Recoupment and Annual License and Maintenance Fees. Item 4 Annual Hardware and Software Maintenance Costs asks for Annual Maintenance Cost. The values in Item 2 and Item 4 are added to compute the scored Total CRM System Cost. Will FHKC clarify the difference between the solution components that should be included in Item 2 versus Item 4 so vendors can clearly provide the requested costs and not duplicate costed components? | See #215.  The System License Costs cost driver is intended to only capture licenses that must be purchased from other vendors to support the operations of the CRM System. |
| 227 | Key Statistics Handout Vendor Forum Final | Mail | 1 | Apart from the 1,461 Mail-in applications, can FHKC please provide the different types of inbound mails and the monthly volumes for each type? | See #211. |

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# **All references in the ITN to “Attachment 2: Cost Proposal” are hereby modified, as applicable, to “Attachment 2A: CEC Services Cost Proposal,” “Attachment 2B: CRM System Services Cost Proposal,” and “Attachment 2C: Integrated Model Cost Proposal.”**

# **To the extent this Addendum conflicts with any previous written or oral ITN specifications, instructions, or information provided by FHKC, this Addendum shall control.**

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**Any party that has standing to challenge an FHKC Intended Decision must file a written notice of intent to protest, formal written protest, and any required bond or other security as set forth in Appendix B of the Invitation to Negotiate. Failure to timely file a notice of intent to protest, formal written protest, or any required bond or other security shall constitute a waiver of proceedings.**

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