



**State of Oklahoma
Office of Management and Enterprise
Services/ ISD Procurement**

Amendment of Solicitation

Date of Issuance: 01/06/2015 Solicitation No. 8300001098
 Requisition No. 8300021861 Amendment No. 003

Hours and date specified for receipt of offers is changed: No Yes, to: _____ CST/CDT

Pursuant to OAC 580:15-4-5©, this document shall serve as official notice of amendment to the Solicitation identified above. Such notice is being provided to all suppliers to which the original solicitation was sent. Suppliers submitting bids or quotations shall acknowledge receipt of this solicitation amendment prior to the hour and date specified in the solicitation as follows:

- (1) Sign and return a copy of this amendment with the solicitation response being submitted; or,
- (2) If the supplier has already submitted a response, this acknowledgement must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date printed clearly on the front of the envelope.

ISSUED BY AND RETURN TO:

Office of Management and Enterprise Services
 ISD Procurement Attn: Hurtisine Franklin
 3115 N. Lincoln Blvd.
 Oklahoma City, OK 73105

Hurtisine Franklin
 Contracting Officer
(405) 521-6419
 Phone Number
Hurtisine.Frankln@omes.ok.gov
 E-Mail Address

Description of Amendment:

a. This is to incorporate the following:

All interested vendors should note the following

The process being used for this specific solicitation will be The Performance Information Procurement Systems (PIPS) –Best Value Process developed by Arizona State University Performance Based Studies Research Group (PBSRG).

The primary distinction between a PIPS project and a traditional request, the vendor defines the scope of work and presents to the client what is in scope and what is out of scope.

b. All other terms and conditions remain unchanged.

 Supplier Company Name (**PRINT**) _____
 Date

 Authorized Representative Name (**PRINT**) Title Authorized Representative Signature



Submitted by Brant Berry

1. **Question**

C.2. Expectations

The solution should have the ability to (page 18):

f) Provide all functionality of the previous WMIS

To avoid confusion and ensure accurate Vendor pricing, please provide an overview of all the functionalities of the previous WMIS that the COTS WMIS should replicate.

1. **Response**

Please see summarized information below- regarding the PIPS process.

2. **Question**

C.2. Expectations (page 19)

The service should provide the following:

d) Online training and on-line support for DHS staff on using the system.

To avoid confusion, is it the intent of the State to limit on-line training and on-line support on the vendor's proposed COTS WMIS solution to only DHS staff using the system? How many DHS staff should the vendor plan on including in its initial and on-going one-line training and on-line support?

Does the State intend that initial training, during COTS WMIS implementation, be expressly limited to only DHS staff using the system? If no, please provide a breakdown of the number of individuals that the Vendor should budget for initial COTS WMIS implementation training. To avoid confusion, is it the intent of the State to limit on-line training and on-line support on the vendor's proposed COTS WMIS solution to only DHS staff using the system? How many DHS staff should the vendor plan on including in its initial and on-going one-line training and on-line support?

Does the State intend that initial training, during COTS WMIS implementation, be expressly limited to only DHS staff using the system? If no, please provide a breakdown of the number of individuals that the Vendor should budget for initial COTS WMIS implementation training.

2. **Response**

The bidder who makes it to the Clarification Phase of the process will discuss and finalized training requirements

3. **Question**

E.8.4. These questions shall be answered directly on the wiki and in the form of an amendment and posted on the OMES website and linked on the wiki.

Is there a specific date that the state will answer questions submitted? What is the time table for the answers to questions to be posted on the OMES website and linked on the wiki?

3. **Response**

01/22/2015 Bids due (Closing Date)

a) Vendor RFP Clarification Question will close 01/02/2015

b) General Questions will close 01/08/2015

Responses to Bidders questions will be posted to the wiki no later than 01/12/2015 by the close of business



4. **Question**

What is the expected timeline if selected for an interview to allow for the facilitation of planning and travel?

4. **Response**

Bidders who may make the short list will be notified when in advance of the interview schedule

5. **Question**

C. SOLICITATION REQUIREMENTS

C.1. Overview

Service delivery is provided through a network of Service providers who are certified as Medicaid qualified by OKDHS/ASD and contracted with the OHCA.

Please provide the number of Service providers in the State's network. Please provide the number of employees within these providers that will require access to the vendor's proposed COTS WMIS solution. Will the State require these employees to be trained by the Vendor?

5. **Response**

Please refer to the summary PIPS process below

6. **Question**

A.16. Award of Contract (page 9)

A.16.1 The State may award the contract to more than one Bidder by awarding the contract(s) by item or groups of items, or may award the contract on an ALL OR NONE basis, whichever is deemed by the State to be in the best interest of the State of Oklahoma.

A.16.4. It is the preference of the State to award to a single vendor. However, the State reserves the right to award to multiple vendors when it has been determined to be in the best interest of the State.

Is it the intent of OMES/OKDHS to award one (1) contract or multiple contracts as a result of this RFP? If multiple contracts may be awarded, please explain how the State intends to manage the coordination of effort?

6. **Response**

Please reference the following section of the RFP:

A. GENERAL PROVISIONS

The following provisions shall apply where applicable to the solicitation.

This is not applicable to this specific RFP

It is the preference of the State to award to a single vendor. **However, the State reserves the right to award to multiple vendors when it has been determined to be in the best interest of the State.**

7. **Question**

Appendix X: 4. Service plan development expectations [Electronic Visit Verification (EVV) of Service Delivery] (page 40)

The EVV system is expected to interoperate with the new WMIS for member and provider enrollment information and service authorizations.

To avoid confusion, is it the intent of the State to modify the EVV system to communicate with the successful system? Or will the successful system be required to accept data transfers from the EVV system? Please specify the intent of the State.

7. **Response**

Please refer to the summary PIPS process below



8. **Question**

Appendix X: 4. Service plan development expectations [Electronic Visit Verification (EVV) of Service Delivery] (page 40)

The EVV system is expected to interoperate with the new WMIS for member and provider enrollment information and service authorizations.

To avoid confusion, is it the intent of the State to modify the EVV system to communicate with the successful system? Or will the successful system be required to accept data transfers from the EVV system? Please specify the intent of the State.

C. SOLICITATION REQUIREMENTS C.1. Overview (page 18)

The second paragraph includes the following sentence: "The AA manages the ADvantage home and community-based waiver with the assistance of contracted Case Management (CM) Service providers across the state."

Please describe and define "AA" as used in this sentence.

8. **Response**

Administrative Agent or ADvantage Administration

9. **Question**

C.2. Expectations the solution should have the ability to: (page 19)

d) **Online training and on-line support for DHS staff on using the system**

Please specify the number of DHS staff that are expected to be trained. Does this requirement also include training of contracted case managers, individuals (AKA members) and other concerned parties? If yes, please specify the number of individuals to be trained. Will on-site training be required during the implementation period?

9. **Response**

Please refer to the PIPS Process summary below

10. **Question**

Appendix X: 2. Current System Environment (page 39)

The fourth paragraph includes the following sentence: "The faxing mode of communication the expectations are for secure web portal functionality that is integrated with WMIS for communication of HIPAA protected documents with providers."

It appears that text is missing from this sentence. Please verify and add any missing text.

The fourth paragraph includes the following sentence: In addition, EDI and/or secure web portal interfaces are expected to exchange data with business contracted business partners

10. **Response**

It is confirmed there is no missing text to this paragraph and the fourth paragraph is correctly stated.

11. **Question**

Appendix X: 2. Current System Environment (page 39)

Please provide a list of **business contracted business partners**, the role/functionality of each **business contracted business partner**, and specify each **business contracted business partner** electronic/computer expertise, experience and capabilities.

11. **Response**

Please refer to the PIPS Process summary below

12. **Question**

Appendix X: 2. Current System Environment (page 39)

The sixth paragraph in this section includes the following sentence: "Support for efficient work-flow for all ADvantage waiver administrative functions is required."



Please provide a detailed and comprehensive list of the **Advantage waiver administrative functions** that are critical to the successful performance of this contract.

12. Response

Please refer to the PIPS Process summary below

13. Question

Appendix X: 1. Expectations (page 39)

The second paragraph includes the following sentence: The new solution is expected to alleviate the current issues, as well as handle new requirements due to legislative changes and waiver changes.

Please provide a priority listing of the current issues. Please provide a comprehensive listing of new requirements that are expected from legislative and/or waiver changes. Please be as complete as possible to support pricing analysis for contract years beyond year 1.

13. Response

Please refer to the PIPS Process summary below

14. Question

Appendix X: 4. Service plan development expectations [Member Service Plan Development Process] (age 40)

The new WMIS is expected to maintain web based service plans accessible to the provider, OKDHS, OHCA and the member or their representative.

Are all entities listed in this sentence expected to have full access, including read, write and edit of the Member Service Plan? Or will only certain entities have full access, while others will have, as an example, read only access?

14. Response

Please refer to the PIPS Process summary below

15. Question

Please clarify Attachment A (RFP page 26), that requires we submit several Attachment H segments, specifically: **Segment 1:** Review and Complete PPI Information, Reference List, & Surveys; plus **Segment 2:** Email a "Reference List" for each critical component; plus **Segment 3:** Compile and submit surveys for each critical component. In addition, the RFP references two (2) Attachments as Attachment G (Reference 1: Value Added Information and Plan) and Attachment G (Reference 2: Past Performance Information Guide).

15. Response

The State amends this requirement as follows:

Form H is not required as part of the Bidders submission for this specific RFP

Clarification-

1. Form A is the required cover page for the six page submittal
 - a) Name of Critical Individual 1. Should be the Technical Engineer/Design-
 - b) Name of Critical Individual 2. Should be the Project Manager
 - c) These two individuals should be the personnel who will be assigned to the project for the duration of the project

*****Bidders should note the personnel identified as the Critical Individuals will be the persons required to interview.

2. Bidders should complete forms A-B-C-E-F- & G
3. Bidders may not make additional copies
4. All responses and submittals must consist of the six (6) page submittal requirement (no exceptions)

16. Question



To avoid confusion and ensure we submit a responsive proposal, please clarify where we may locate Attachments H, I and G as identified in RFP Section 6.5.1 (RFP page 21).

16. **Response**

Attachment H – is not required for this specific RFP

Attachment G- can be found on page 33 in the RFP

Attachment I can be found on page 34 in the RFP (Overview or the Clarification/Pre-Award Phase Guide)

Response- PIPS Process Summary

The primary distinction between a PIPS project and a traditional request, the vendor defines the scope of work and presents to the client what is in scope and what is out of scope.

The Selection Criteria for this project is as follows:

- **Project Capability Submission:**
 - **Project Capability (PC)**
 - **Risk Assessment Plan (RA)**
 - **Value Added (VA)**
- **Interviews**
- **Price / Cost**

Procurement's correspondence and registration records indicate that FOCoS Innovations Corp did not respond to the Sources Sought Notice and did not participated the Vendor Pre-Education meeting/training. However, FOCoS did participate in the Pre-bid Conference via telephone conference. A copy of the Power Point Presentation used for both meetings/trainings was sent to each e-mail address provided with the Pre-bid Conference registration.

As explained in the Vendor Pre- education meeting and the Pre –bid conference, the Procurement Information Performance System (PIPS) process seeks to identify the expert. The expert is expected to provide the best possible solution.

The process being used for this specific RFP seeks to identify the expert, this process is not cost driven, and the RFP provides the expectations of a proposed solution. Appendix X provides additional expectations and the Current System Environment. Bidders are required to complete a six page pre-formatted response to the initial RFP. These forms are located in the RFP, the initial evaluation will be conducted based upon the responses to the six page submittal (see Selection Criteria), a dominance check is performed based upon the evaluation scoring, and the information provided, and short listing will likely occur, followed by scheduled interviews with the vendor or vendors that make the list, in some cases short listing may not occur and all responding bidders may be contacted for interviews.

The interviews play a major role in identifying the expert, the persons interviewed will be the bidder's Technical Engineer and Project Manager, who have been identified in the required six page submittal and the personnel for the duration of the project. Following the interviews and the expert has be identified, One vendor will be selected to continue on to the clarification phase. It is in this phase of the process the following takes place

Clarification Phase Deliverables

Scope of Work (what is "in" and "out")

Executive Summary of project

Detailed project schedule

Detailed cost schedule

Weekly Risk Report

Risk activities



Performance measurements
Risk mitigation plan
Milestone Schedule

The details of the questions you have submitted will be addressed during the clarification phase of the process. Additional education will be provided should your organization advance to the Clarification Phase. The deliverables described above are required for the second phase of the process, which is the Clarification Phase.

The final agreed upon Deliverables will be included as a part of the final contract agreement.

Submitted by Deirdre Pender

Question 1

1. How many internal users will there be of this new system?

Response 1

See RFP Overview for budget information

2. Regarding data interchange in item C.2.b):
 1. Please provide a description of the data to be interchanged with each listed business partner, indicating if it is real time or in batch, frequency, type of data being interchanged and which direction the data is being sent.
3. Regarding C2.c):
 1. Are you requesting the integration with a document management system? If so, do you have one currently that you would like to integrate with, or do you wish us to provide a solution specifically for this project?
4. Regarding item C2.d):
 1. What is the volume of data for conversion, and will it include active records only, or historical data too?
 2. How clean is the current data?
 3. Is all the current data housed in one system? Please describe the database it is housed in – is it relational? type of database, size, number of tables, data elements
 4. Is the data to be migrated from one system only?
 5. How many data tables and/or elements will be expected to be migrated?

Question 5

5. Regarding C2e):
 1. Please identify the specific federal, state and DHS regulations and requirements you are referring to so that we can review them and provide responses to each

Response 5

See Appendix Y - Appendix Y Enhanced Funding Requirements: Seven Conditions and Standards – as listed on the solicitation on <http://www.ok.gov/cio/Procurement/Solicitations/#open>



Regarding C2.f:

2. Please provide a list or description of the specific functionality in the previous WMIS so that we can compare that to our system. Please include major business functionality, data elements, business rules, number and complexity of reports, exports, imports
3. Do you have Visio diagrams of your As Is or To Be business processes that you can share now?
4. Do you have business scenarios you can share now?

Question -9

6. Do you have a budget for this project? How much is it?

Response -9

See RFP Overview for budget information

7. Do you have an expected timeline or externally driven deadline within which you must be live with this project?
8. Do you wish for providers to have a portal to access to the system for the sending and receipt of information?
9. Do you wish consumers to have a portal for communicating with users of the system?

Response- PIPS Process Summary

See response below to questions 2-3- 4- 6- 7- 8 -10 & 12 – See response to Question 1-5 & 9 below the item number.

C.1. Overview

The Office of Management and Enterprise Services (OMES)/ ISD Procurement on behalf of the Oklahoma Department of Human Services (OKDHS) is seeking procurement and implementation of a successfully implemented Web-accessible Medicaid (HCBS Waiver) Information Management - COTS solutions in support of 1915(c) home and community-based waiver programs and complying with all Federal and State rules, regulations, laws, statutes, polices and/or procedures including those applicable to specific CMS approved 1915(c) HCBS Waivers.

Service delivery is provided through a network of Service providers who are certified as Medicaid qualified by OKDHS/ASD and contracted with the OHCA. The AA manages the ADvantage home and community-based waiver with the assistance of contracted Case Management (CM) Service providers across the state. Approximately 800 CMs based in 70 CM agency offices across the state provide CM services to ADvantage members. The provision of ADvantage services are authorized by OKDHS through the approval of individualized service plans developed by the ADvantage member their CM and others on the service planning interdisciplinary team. The ADvantage program serves approximately 17,500 individuals daily and over 21,000 annually. **The budget for this service is \$1.3M.**

For informational purposes please see Appendix X "" for Current Environment and Technical Expectations and Appendix Y for required Federal Conditions



The process being used for this specific solicitation will be The Performance Information Procurement Systems (PIPS) –Best Value Process developed by Arizona State University Performance Based Studies Research Group (PBSRG).

Vendors who responded to the Sources Sought Notice and participated in the Vendor Pre-education meeting can visit the PBSRG web site for an overview of The Best Value Business Model Overview @ <http://pbsrg.com/best-value-model/>

The primary distinction between a PIPS project and a traditional request, the vendor defines the scope of work and presents to the client what is in scope and what is out of scope.

The Selection Criteria for this project is as follows:

- **Project Capability Submission:**
 - **Project Capability (PC)**
 - **Risk Assessment Plan (RA)**
 - **Value Added (VA)**
- **Price / Cost**
- **Interviews**

Procurement's correspondence and registration records indicate that CareWorks did not respond to the Sources Sought Notice and did not participated in either the Vendor Pre-Education meeting/training or the Pre-bid Conference. A copy of the Power Point Presentation used for both meetings/trainings have been sent to the e-mail address provided with the wiki inquiry.

As explained in the Vendor Pre- education meeting and the Pre –bid conference, the Procurement Information Performance System (PIPS) process seeks to identify the expert. The expert is expected to provide the best possible solution.

The process being used for this specific RFP seeks to identify **the expert**, this process is not cost driven, and the RFP provides the expectations of a proposed solution. Appendix X provides additional expectations and the Current System Environment.

Bidders are required to complete a six page pre-formatted response to the initial RFP. These forms are located in the RFP, the initial evaluation will be conducted based upon the responses to the six page submittal (see Selection Criteria), a dominance check is performed based upon the evaluation scoring, and the information provided, and short listing will likely occur, followed by scheduled interviews with the vendor or vendors that make the list, in some cases short listing may not occur and all responding bidders may be contacted for interviews.

The interviews play a major role in identifying the expert, the persons interviewed will be the bidder's Technical Engineer and Project Manager, who have been identified in the required six page submittal and the personnel for the duration of the project. Following the interviews and the expert has be identified, **One** vendor will be selected to continue on to the clarification phase. It is in this phase of the process the following takes place

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The details of the questions you have submitted will be addressed during the clarification phase of the process. Additional education will be provided should your organization advance to the Clarification Phase. The deliverables described above are required for the second phase of the process, which is the Clarification Phase.

The final agreed upon Deliverables will be included as a part of the final contract agreement.

Submitted By Thomas Hogan

1. **Question**

Section C.1 (Overview) states "The budget for this service is \$1.3M". Can you provide some additional information on this amount? Is this the budget allocated for year 1 or for all years of the contract assuming annual renewals over the 5 year period.

In that same section, following "The service should provide the following", can you provide some additional information on "a) All necessary hardware...."? Would the State be open to a subscription based or Software-As-A-Service (SAAS) solution?

2. **Response**

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The primary distinction between a PIPS project and a traditional request, the vendor defines the scope of work and presents to the client what is in scope and what is out of scope.

The Selection Criteria for this project is as follows:

- **Project Capability Submission:**
 - **Project Capability (PC)**
 - **Risk Assessment Plan (RA)**
 - **Value Added (VA)**
- **Price / Cost**
- **Interviews**

Procurement's correspondence and registration records indicate that MediSked, LLC did not respond to the Sources Sought Notice and did not participated in either the Vendor Pre-Education meeting/training or the Pre-bid Conference. A copy of the Power Point Presentation used for both meetings/trainings have been sent to the e-mail address provided with the wiki inquiry.

As explained in the Vendor Pre- education meeting and the Pre –bid conference, the Procurement Information Performance System (PIPS) process seeks to **identify the expert. The expert is expected to provide the best possible solution.**

The process being used for this specific RFP seeks to identify **the expert**, this process is not cost driven, and the RFP provides the expectations of a proposed solution. Appendix X provides additional expectations and the Current System Environment.

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The interviews play a major role in identifying the expert, the persons interviewed will be the bidder's Technical Engineer and Project Manager, who have been identified in the required six page submittal and the personnel for the duration of the project. Following the interviews and the expert has be identified, One vendor will be selected to continue on to the clarification phase. It is in this phase of the process the following takes place

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The final agreed upon Deliverables will be included as a part of the final contract agreement.