

State Term Schedule

INVITATION FOR PROPOSALS

IFP NUMBER: STSJFS1002

DATE ISSUED: March 12, 2007

The Ohio Department of Job & Family Services is requesting proposals for:

Benefits Eligibility Network (BEN) Policy Crosswalks Project

PROPOSAL DUE DATE AND TIME: March 30, 2007 at 5:00 p.m.

Send Proposals to: Ohio Department of Job and Family Services
Office of Contracts and Acquisitions
30 E. Broad Street, 31st Floor
Columbus, OH 43215
Attn: IFP/RLB Unit

INQUIRY PERIOD BEGINS: March 12, 2007

INQUIRY PERIOD ENDS: March 22, 2007

Estimated Project Start Date: April 30, 2007

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PART ONE: PURPOSE, RESTRICTIONS, EVALUATION AND SCOPE OF WORK

Purpose

The Ohio Department of Job & Family Services (ODJFS), through a partnership of the Services to Families Division (comprised of the Offices for Children & Families, Family Stability, Ohio Health Plans and Research, Assessment & Accountability) and the Office of Management Information Services, is soliciting proposals from offerors with approved State Term Schedules (STS). The STS must be approved prior to the proposal due date and time.

This IFP is for services to provide:

- A) Project Management;
- B) Policy Crosswalks and Business Rules Repository Development;
- C) Federal Policy and Ohio Policy Business Rule Extraction;
- D) Federal to Ohio Policy Crosswalks; and
- E) Program to Program Business Rule Crosswalks.

The contract will be valid from award until June 30, 2007. The scope of this work must be completed within 22 to 26 weeks from the start work date, which includes a SFY 2008 renewal period of approximately July 1, 2007 through approximately mid-November. The actual SFY 2008 renewal period start date will be dependent upon the date of approval of necessary purchase orders, and the actual work end date will be dependent upon the dates of approvals of the original SFY2007 purchase order and the SFY 2008 renewal period purchase order.

Background

The Ohio Department of Job & Family Services (ODJFS or the Department) administers the State's health care and public assistance programs to help Ohioans improve the quality of their lives. Currently, ODJFS uses the Client Registry Information System – Enhanced (CRIS-E), a 20 year old legacy system used by 20,000 caseworkers and administrators, to assist with eligibility determination and information retention for the following programs:

- Prevention, Retention and Contingency (PRC);
- Food Stamps (FS);
- Temporary Assistance for Needy Families (TANF)/ Ohio Works First (OWF);
- 209(b) State Medical Assistance for all covered groups of Medicaid and Medicaid expansion State Children's Health Insurance Program (SCHIP);
- State supported and administered programs or covered groups (e.g. Disability Medical, Breast and Cervical Cancer Program);
- Disability Financial Cash Assistance (DFA);
- Refugee Assistance; and
- Medicare Premium Assistance program benefits.

Approximately 500,000 Food Stamp assistance groups, nearly 86,000 TANF/OWF cases, over 100,000 children receiving child care services and more than 1.7 million individuals receiving Medicaid coverage are served each month. Medicaid is the fastest growing program and accounts for nearly 40 percent of state spending. In the ever changing landscape of welfare and health care reform, the CRIS-E system has been unable to keep pace with policy and eligibility changes. More information about ODJFS can be found at <http://jfs.ohio.gov>.

Overview

ODJFS has a business and technology vision to develop a web-based, enterprise architecture that is flexible and scalable allowing the Department to develop efficient outreach processes and provide the highest level of customer service. A new system must be flexible to meet the latest legislative changes, be able to identify patterns in detecting potential program abuse and ensure quality control. The central business goals and business processes that need to be supported by a new eligibility system are to:

- Increase accountability of the Department's sub-recipients and local governments and provide reasonable assurance for state and federal funding of programs administered by ODJFS;
- Improve health care outcomes and access for consumers;
- Promote consumer choice of cost efficient long-term care services;
- Lead through innovation, flexibility, and teamwork;
- Provide customer-focused products and services to maximize the independence and productivity of Ohio's vulnerable citizens;
- Engage in evidence-based continuous improvement and employ effective technologies throughout our service-delivery system;
- Enhance access to regulated services for families eligible and in need of child care
- Provide immediate access to information; and
- Expedite the eligibility and enrollment process so that the Department is able to make a preliminary eligibility determination and communicate to the applicant within 24 hours of receipt of the application.

Ultimately, this system should automate program administration to improve effectiveness. Additionally, it should automate case maintenance to allow workers to spend the bulk of their time on qualitative customer care. At a minimum, this includes:

- Providing increased assistance to applicants with limited English skills;
- Individualized assistance with the screening and application process;
- Supporting the consumer's ability to select health care benefits for which they want to apply; and
- Providing education on covered benefits and service delivery.

The Policy and Program Crosswalks are being performed to provide accurate and comprehensive documentation for current policies and the interdependencies of those policies in relationship with one another before BEN Requirements Definition work begins. The results of the Crosswalks and Business Rules Extraction will be stored in an electronic repository. The contents of the electronic repository will be used by the BEN Project Team during JAD sessions to define BEN requirements in subsequent project work excluded from the scope of this IFP.

Restriction

The Contractor selected through this IFP process will NOT be eligible to respond to procurements for the main Benefits Eligibility Network (BEN) design, development, implementation (DDI) and post implementation support work. Other project activities for which this Contractor may be eligible, if ODJFS would seek additional contractor services, may include business requirements definition and Independent Validation and Verification (IV&V) functions.

Evaluation

In the proposal evaluation phase, the committee will rate the proposals submitted in response to this IFP that meets the initial qualifying criteria and based on the offeror Profile, Candidate Information, Work Plan, and Quote sections of this IFP.

Basis for Selection

The Contractor that provides the best value to the State of Ohio will be selected. Best value will be determined by reviewing the offeror qualifications and demonstrated successful experience in similar engagements, the qualifications and experience of the offeror's staff, the proposed plan and budget for completing the work, and the offeror's and proposed staff's previous work performance based on client references.

Scope of Work

The Contractor must complete the following activities for the project:

A. Project Management

The Contractor must provide project management for the duration of the project. The Contractor must adhere to the proposed project schedule and provide weekly, bi-weekly and monthly status reports that document at a minimum the progress, issues and next steps for the project. Additionally, the Contractor must maintain logs for project issues and risks. The required project management tasks and deliverables are listed below.

A.T Project Management Tasks

- Create the Policy Crosswalks project schedule;
- Present the project schedule to gain concurrence from BEN Project Director;
- Manage business rule extraction, policy crosswalks, and repository development activities and tasks;
- Supervise daily activity of Contractor project staff to complete project work;
- Capture and report questions from Contractor staff to the BEN Project Director in a mutually agreed form and frequency;
- Report project status, weekly, bi-weekly and monthly, in the format, content and frequency as agreed with the BEN Project Director;
- Identify, document, report and resolve issues, weekly, bi-weekly and monthly, in conjunction with the BEN Project Director; and
- Identify, document, report and develop/implement risk management actions, weekly, bi-weekly and monthly, in conjunction with the BEN Project Director.

Project Management Deliverables utilizing the established BEN project eRoom

1. Project Schedule (addressing each area in the scope of work, including all tasks and deliverables);
2. Project Status Reports (Monthly – Executive Management Council, Bi-weekly – Leadership Committee, Weekly – BEN Project Director);
3. Issues Log and Resolutions created and updated weekly; and
4. Risk Lists and Risk Response Log created and updated weekly.

B. Policy Crosswalks and Business Rules Repository Development

The Policy Crosswalk Contractor will be responsible for designing, developing, and loading electronic repositories using Rational Requisite Pro tool set. We anticipate several thousand policies and business rules (including citations e.g.: CFR title, volume number, chapter number, part number, page number; ORC/OAC title, chapter number, section number) will be placed into the repository by manually keying the results from:

- C – Federal Policy and Ohio Policy Business Rule Extraction;
- D – Federal to Ohio Policy Crosswalks; and
- E – Program to Program Business Rule Crosswalks.

ODJFS MIS will provide VPN access from the Contractor's location to utilize ODJFS licensed and managed copies of Rational Requisite Pro running on ODJFS equipment. The Contractor is expected to provide workstation equipment and network internet access for Contractor staff to utilize VPN access, at the Contractor's work site at the Contractor's expense.

The Contractor will also be responsible for defining and documenting the procedures to be used to add, modify, replicate or delete repository entries. Procedures shall be provided to ODJFS in Microsoft Word and PDF formats. The procedures will be needed to allow State staff to maintain each repository as legislative and/or policy changes are made. The contractor will also be responsible for providing training to State staff in the use of Rational Requisite Pro, including adding, modifying, replicating and deleting entries to maintain the repository. Training will be done using a classroom setting, and will be delivered to a minimum of forty staff. ODJFS will provide the training facility. The staff training will be for business subject matter experts (SME) who currently have no working experience with Rational Requisite Pro.

The Federal and State Policy Repositories will be used to help create Detailed Requirements for the BEN Design, Development and Implementation (DDI) Request for Proposal work (not included in this IFP).

B.T Policy Crosswalks and Business Rules Repository Development Tasks

- Complete the ODJFS MIS VPN Access Forms;
- Present the ODJFS VPN Access forms to the BEN Project Director for approval;
- Test and confirm VPN Access;
- Create the electronic repository design;
- Present the electronic repository design to the BEN Project Director for approval;
- Create the electronic repository in Rational Requisite Pro;
- Create a Procedure Manual for entering, changing or deleting Federal Policy and State Policy entries in the repository;
- Present the Procedure Manual to the BEN Project Director for approval;
- Assign contractor project staff and schedule entry of crosswalk results into the repository;
- Present the updated schedule to the BEN Project Director; and
- Train state staff, identified by the BEN Project Director, in the entry, modification or deletion of items in the Rational Requisite Pro repository using the Procedure Manual.

The Federal and State Policy Repository Creation deliverables to be completed are:

5. ODJFS MIS VPN Access Forms;
6. Federal Policy and Business Rule Repository Design;
7. Ohio Policy and Business Rule Repository Design;
8. Federal Policy and Business Rule Repository developed in Rational Requisite Pro;
9. Ohio Policy and Business Rule Repository developed in Rational Requisite Pro;
10. Documented Procedures Manual for entering, changing or deleting Federal and Ohio repository items; and
11. Rational Requisite Pro training sessions for up to 40 State staff.

C. Federal Policy and Ohio Policy Business Rule Extraction

The Contractor will be responsible for using Federal and State Regulations/Policies to extract Business Rules. The Contractor will be responsible for reviewing and extracting United States Code, Code of Federal Regulation, Ohio Revised Code, Ohio Administrative Code, Federal Technical Letters and Ohio State Plans for the following ODJFS programs: Child Care, Disability Assistance (financial and medical), Food Stamps, Medicaid, SCHIP, Medicare Premium Assistance, Refugee Services, and TANF (OWF).

C.T Federal Policy and Ohio Policy Business Rule Extraction Tasks

- Create the Business Rules Report format;
- Present the Business Rule Report format to the BEN Project Director for approval;
- Assign Contractor staff and schedule completion of Business Rule Report deliverable(s);
- Present the updated schedule to the BEN Project Director;

- Populate the Business Rule Repository by ensuring all business rules are keyed or otherwise loaded into the repository; and
- Present the Business Rule Report to the BEN Project Director for approval.

The Federal Policy and Ohio Policy Business Rule Extraction deliverables to be completed are:

12. Federal Policy and Ohio Policy Business Rule Extraction Report Format;
13. Federal Policy and Ohio Policy Business Rule Extraction Report that includes the following:
 - Federal Child Care and Ohio Child Care – Business Rules;
 - Federal SCHIP and Ohio SCHIP - Business Rules;
 - Federal Food Stamp and Ohio Food Stamp - Business Rules;
 - Federal Medicaid and Ohio Medicaid - Business Rules;
 - Federal Medicare Premium Assistance and Ohio Medicare Premium Assistance - Business Rules;
 - Federal Refugee Services and Ohio Refugee Services - Business Rules;
 - Federal TANF and Ohio TANF (OWF) - Business Rules;
 - Ohio Disability Financial Assistance - Business Rules; and
 - Ohio Disability Medical Assistance - Business Rules.

D. Federal to Ohio Policy Crosswalks

The Contractor will be responsible for comparing Federal policy with Ohio policy to identify matches and gaps between Federal and State policy rules and regulations. The purpose of the crosswalk is to identify where Federal and State policy are the same, or identify where they are different so the program offices can address the differences. The objectives of the comparisons are to identify and document:

- Matches between Federal and Ohio rules and regulations, and
- Gaps between Federal and Ohio rules and regulations.

The results of the Federal to Ohio Policy Crosswalks will be keyed into the electronic repository by the contractor. The matches will also be used as part of the foundation for BEN requirements. Gaps will be loaded into the repository.

D.T Federal to Ohio Policy Crosswalks Tasks

- Create the Federal and Ohio Policy Inventory Report Format;
- Present the Federal and Ohio Policy Inventory Report Format to the BEN Project Director for approval;
- Create an inventory of all Federal and Ohio policies to be compared;
- Present the Policy Inventory Report and gain approval of inventory accuracy with BEN Project Director;
- Create the Policy Crosswalk Report deliverable format;
- Present the Policy Crosswalk Report deliverable format to the BEN Project Director for approval;
- Assign Contractor staff and schedule completion of each policy crosswalk report;
- Present the updated schedule to the BEN Project Director;
- Complete each policy crosswalk deliverable. Be sure to document each match or gap and
- Present each Policy Crosswalk Report to the BEN Project Director for approval.

The Federal to Ohio Policy Crosswalks deliverables to be completed are:

14. Federal and Ohio Policy Inventory Report Format;
15. Federal and Ohio Policy Inventory Report;
16. Federal Child Care to Ohio Child Care - Matches and Gaps Report;
17. Federal SCHIP to Ohio SCHIP - Matches and Gaps Report;
18. Federal Food Stamp to Ohio Food Stamp - Matches and Gaps Report;
19. Federal Medicaid to Ohio Medicaid - Matches and Gaps Report;
20. Federal Medicare Premium Assistance to Ohio Medicare Premium Assistance - Matches and Gaps Report;
21. Federal Refugee Services to Ohio Refugee Services - Matches and Gaps Report; and

22. Federal TANF to Ohio TANF (OWF) - Matches and Gaps Report.

E. Program to Program Business Rule Crosswalks

The contractor will be responsible for comparing the Child Care, Disability Assistance, Food Stamp, Medicaid, Medicare Premium Assistance, Refugee Services, SCHIP and TANF programs' business rules, developed from Activity C – Federal Policy and Ohio Policy Business Rule Extraction, to identify overlapping business rules. The overlapping business rules will be used during future JAD sessions to determine if there are standardization or simplification opportunities.

E.T Program to Program Business Rule Crosswalks Tasks

- Create the Program Crosswalk report format;
- Present the Program Crosswalk report format to the BEN Project Director for approval;
- Assign Contractor staff and schedule completion of each program crosswalk deliverable;
- Present the updated schedule to the BEN Project Director;
- Complete each program crosswalk deliverable. Be sure to identify overlapping rules between programs and mark them; and
- Present the program crosswalk to the BEN Project Director for approval.

Contractor Deliverables

The Program Crosswalks deliverables to be completed are:

23. Program to Program Crosswalks Report Format;
24. Program to Program Crosswalks Report that includes:

- Child Care to Disability Assistance Overlap;
- Child Care to Food Stamps Overlap;
- Child Care to Medicaid Overlap;
- Child Care to Medicare Premium Assistance Overlap;
- Child Care to Refugee Services Overlap;
- Child Care to SCHIP Overlap;
- Child Care to TANF Overlap;
- Disability Assistance to Food Stamps Overlap;
- Disability Assistance to Medicaid Overlap;
- Disability Assistance to Medicare Premium Assistance Overlap;
- Disability Assistance to Refugee Services Overlap;
- Disability Assistance to SCHIP Overlap;
- Disability Assistance to TANF Overlap;
- Food Stamp to Medicaid Overlap;
- Food Stamp to Medicare Premium Assistance Overlap;
- Food Stamp to Refugee Services Overlap;
- Food Stamp to SCHIP Overlap;
- Food Stamp to TANF Overlap;
- Medicaid to Medicare Premium Assistance Overlap;
- Medicaid to Refugee Services Overlap;
- Medicaid to SCHIP Overlap;
- Medicaid to TANF Overlap;
- Medicare Premium Assistance to Refugee Services Overlap;
- Medicare Premium Assistance to TANF Overlap;
- Medicare Premium Assistance to SCHIP Overlap;
- Refugee Services to SCHIP Overlap;
- Refugee Services to TANF Overlap;
- TANF to SCHIP Overlap; and
- Overall Overlap Summary.

Milestone Deliverable Schedule

Following are the milestone deliverables that the state has identified for this project:

Deliverable	Target Start Date	Target End Date
A. Project Management	4/2007	11/2007
B. Policy Crosswalks and Business Rules Repository	4/2007	11/2007
C. Federal Policy and Ohio Policy Business Rules	4/2007	11/2007
D. Federal to Ohio Policy Crosswalks	4/2007	11/2007
E. Program to Program Business Rule Crosswalks	4/2007	11/2007

Work Hours & Conditions

The Contractor is expected to complete all project deliverables utilizing Contractor staff at Contractor facilities. ODJFS will not provide workspace, workstation, phone, supplies, etc., to Contractor staff.

The Contractor will be required to periodically report to ODJFS and meet with ODJFS staff to present project deliverables for approval. Contractor and ODJFS meetings will be scheduled in advance and occur at one of the following Columbus, Ohio locations: 30 East Broad Street (State Office Tower), 50 West Town Street (Lazarus Building), 4020 or 4200 East Fifth Avenue (Air Center). The ODJFS staff normal working hours are 8:00 a.m. to 5:00 p.m. with a one-hour lunch period for a total of eight working hours per day. ODJFS will notify the selected contractor of specific days, including State Holidays, when ODJFS staff will not be available during normal working hours as the project plan and schedule is developed.

Reimbursable Expenses

None

Bill to Address

The contractor must submit invoices in quadruplicate (1 original and 3 copies) for completed services by the first business day of each month to the bill to address on the purchase order. Contractor's federal tax identification number and purchase order number must appear on all statements and time sheets. One copy of the APPROVED DELIVERABLE ACCEPTANCE FORM must be submitted with the invoice. The invoices at the minimum should contain the deliverable details provided during the billing period. The provisions of Ohio Revised Code, Section 126.30 will also apply to any contract between the parties.

Ohio Revised Code (ORC) Section 9.24. Ohio Revised Code (ORC) Section 9.24 prohibits the State from awarding a Contract to any offeror(s) against whom the Auditor of State has issued a finding for recovery if the finding for recovery is "unresolved" at the time of award. By submitting a proposal, offeror warrants that it is not now, and will not become subject to an "unresolved" finding for recovery under ORC 9.24, prior to the award of a Contract arising out of this IFP, without notifying OIT of such finding.

Contractor's Fee Structure

The award will be for a not-to-exceed fixed price. The Contractor will be paid according to payment milestone/deliverable.

Payment Milestone/Deliverable	Payment % of Total Price
A. Project Management	
Project Schedule and Budget	9%
April Status Report, Issue Log and Risk Log	1%
May Status Report, Issue Log and Risk Log	1%
June Status Report, Issue Log and Risk Log	1%
July Status Report, Issue Log and Risk Log	1%
August Status Report, Issue Log and Risk Log	1%
September Status Report, Issue Log and Risk Log	1%
B. Policy Crosswalks and Business Rules Repository	15%
C. Federal Policy and Ohio Policy Business Rules	30%
D. Federal to Ohio Policy Crosswalks	20%
E. Program to Program Business Rule Crosswalks	20%

The BEN Project Director plans to approve all deliverables within 10 business days of receipt from the contractor. Upon receipt of a signed Deliverable Approval Form (Supplement 5) indicating the state agrees the Deliverable identified in the Work Breakdown Structure (WBS) is compliant or a milestone has been met and payment should be made, the Contractor may submit an invoice for that Deliverable/Milestone according to the payment schedule identified above.

HIPAA Notice

ODJFS will require the offeror selected through this IFP process to be in compliance with 42 United States Code ("USC") Sections 1320d through 1320d-8 and the implementing regulations found at 45 CFR 164.502(e) and 164.504(e) regarding disclosure of protected health information under the Health Insurance Portability and Accountability Act of 1996 ("HIPAA").

PART TWO: IFP INQUIRIES, AMENDMENTS AND FORMAT

Inquiries

Offerors may make inquiries regarding this IFP any time during the inquiry period listed on the IFP cover sheet. The state may not respond to any improperly formatted inquiries. The state will try to respond to all inquiries within 48 hours, excluding weekends and holidays. The state will not respond to any inquiries received after 8:00 a.m. on the inquiry period end date.

Offerors may make inquiries regarding this IFP any time during the inquiry period listed on the IFP cover page. To make an inquiry, offerors must use the following process:

- Access the State Procurement web site at <http://www.ohio.gov/procure>;
- From the Navigation Bar on the left, select "Find it Fast";
- Select "Doc/Bid/Schedule #" as the Type;
- Enter the IFP Number found on Page 1 of the document;
- Click the "Find It Fast" button;
- On the document information page, click the "Submit Inquiry" button;
- On the document inquiry page, complete the required "Personal Information" section by providing:
 - First and last name of the prospective offeror's representative who is responsible for the inquiry,
 - Name of the prospective offeror,
 - Representative's business phone number, and
 - Representative's e-mail address;
 - Type the inquiry in the space provided including:
 - A reference to the relevant part of this IFP,
 - The heading for the provision under question, and
 - The page number of the IFP where the provision can be found; and
 - Click the "Submit" button.

Offerors submitting inquiries will receive an immediate acknowledgement that their inquiry has been received as well as an e-mail acknowledging receipt. Offerors will not receive a personalized e-mail response to their question nor will they receive notification when the question has been answered.

Offerors may view questions and answers using the following process:

- Access the State Procurement web site at <http://www.ohio.gov/procure>;
- From the Navigation Bar on the left, select "Find it Fast";
- Select "Doc/Bid/Schedule #" as the Type;
- Enter the IFP Number found on Page 1 of the document;
- Click the "Find It Fast" button; and
- On the document information page, click the "View Q & A" button to display all inquiries with responses submitted to date.

The state is not responsible for the accuracy of any information regarding this IFP that was gathered through a source different from the inquiry process described above.

Amendments

The state may extend the proposal due date or make changes to the IFP through an amendment on the state procurement web site. Amendments may be provided one business day prior to the proposal opening date.

If the state decides to revise this IFP before the proposal due date, amendments will be announced on the state procurement web site.

Offerors may view amendments using the following process:

- Access the State Procurement web site at <http://www.ohio.gov/procure>;
- From the Navigation Bar on the left, select "Find It Fast";
- Select "Doc/Bid/Schedule #" as the Type;
- Enter the IFP Number found on Page 1 of the document;
- Click the "Find It Fast" button; and
- On the document information page, click on the amendment number to display the amendment.

When an amendment to this IFP is necessary, the state may extend the proposal due date through an announcement on the state procurement web site. Amendment announcements may be provided any time before 5:00 p.m. on the day before the proposal is due. It is the responsibility of each prospective offeror to check for announcements and other current information regarding this IFP.

Proposal Format

Each proposal must be organized in the same format as described below, and, in Part 4. Any material deviation from the format outlined below may result in a rejection of the non-conforming proposal. Each proposal must contain an identifiable tab sheet preceding each section of the proposal.

**Cover Letter;
Offeror Profile;
Candidate Information;
Work Plan; and
Quote.**

The state will not be liable for any costs incurred by any offeror in responding to this IFP, even if the state does not select a contractor through this process. The state may decide not to select a contractor for the work. It may also cancel this IFP and procure the work through some other process or by issuing another IFP.

Cover Letter

The cover letter must provide the following and be signed by an individual authorized to legally bind the offeror.

- a. A statement regarding the offeror's legal structure (e.g., an Ohio corporation), Federal tax identification number, and principal place of business;
- b. The name, address, phone number, and fax number of a contact person who has authority to answer questions regarding the proposal;
- c. The offeror's valid STS number and expiration date; and
- d. A statement that the offeror is not now, and will not become subject to an "unresolved" finding for recovery under Revised Code Section 9.24, prior to the award of a Contract arising out of this IFP, without notifying DAS of such finding.
- e. A statement that the offeror is not excluded from entering into a contract with ODJFS, due to restrictions related to the federal debarment list, unfair labor findings, or R.C. § 9.24.

Offeror Profile

The offeror must include three (3) project references where it has demonstrated successful completion of a similar project with the following information:

- Name of the organization;
- Project details; and
- Contact/Project Manager including name, phone number and e-mail address.

The offeror must provide project references that clearly demonstrate how the offeror meets the experience requirements. Detailed requirements can be found in Supplement 6. A profile form has been provided as part of this IFP (Supplement 7). The form may be duplicated as many times as necessary to demonstrate how the offeror meets experience requirements.

Each reference must be willing to discuss the offeror's performance with the evaluation committee.

Candidate Information

Offerors must provide resumes for candidates that will be available and work on the project. The offeror must propose a project manager and a minimum of four subject matter experts. A profile form has been provided as part of this IFP (Supplement 8). The form may be duplicated as many times as necessary to demonstrate how the candidate meets each requirement. Resumes must demonstrate the candidate's ability to perform duties described below (with the understanding that one candidate may fill more than one role). Detailed requirements can be found in Supplement 6.

The IFP response must contain the names of specific people who will work on the Project. The quality and professional credentials of those people are material factors in the State's decision to enter into this Contract. Therefore, the Contractor must use all commercially reasonable efforts to ensure the continued availability of those people.

All candidates may be required to pass a background check.

Work Plan

Offeror must provide its proposed work plan that includes project schedule (including a work breakdown structure, dates and resources), for performing the Scope of Work (Tasks and Deliverables A-E) and meeting the projected high-level timeline for the project. Detailed requirements can be found in Supplement 6.

Quote

Offeror must provide its quote on company letterhead. Offeror must provide the total cost estimate and resource plan for the work outlined in the deliverables, including position description and hourly rate according to the offeror's current State Term Schedule (STS). Hourly rates offered may be less than rates included in Offeror's STS but may not be higher. Please refer to Part Four: Sample Quote.

PART THREE: PROPOSAL SUBMITTAL

Proposal Submittal

Each offeror must submit:

- one (1) electronic copy in PDF format on a CD-ROM, and, ten (10) complete, sealed, and signed copies of its Technical proposal; and
- one (1) electronic copy in PDF format on a CD-ROM, and, five (5) complete, sealed, and signed copies of its Cost proposal.

Each proposal must be clearly marked **Benefits Eligibility Network (BEN) Policy Crosswalks Project STSJFS1002** on the outside of its envelope.

All proposals and other material submitted will become the property of the state and may be returned only at the state's option.

Proposal Due Date and Time

All proposals are due **March 30, 2007 at 5:00 p.m.** Please send proposals to:

Ohio Department of Job and Family Services
Office of Contracts and Acquisitions
30 E. Broad Street, 31st Floor
Columbus, OH 43215
Attn: IFP/RLB Unit

Scoring of Proposals

ODJFS will contract with an offeror that best demonstrates the ability to meet requirements as specified in this IFP. Offerors submitting a response will be evaluated based on the capacity and experience demonstrated in their Technical Proposal and Cost Proposal. All proposals will be reviewed and scored by a Proposal Review Team (PRT) comprised of staff from ODJFS. Offerors should not assume that the review team members are familiar with any current or past work activities with ODJFS. Proposals containing assumptions, lack of sufficient detail, poor organization, and lack of proofreading and unnecessary use of self-promotional claims will be evaluated accordingly. PRT members will be required to sign disclosure forms to establish that they have no personal or financial interest in the outcome of the proposal review and contractor selection process.

Selection of the offeror will be based upon the criteria specified in Parts One, Two, Three and Four of this IFP. Any proposals not meeting the requirements contained in those sections of this IFP will not be scored or may be held pending receipt of required clarifications. The PRT reserves the right to reject any and all proposals, in whole or in part, received in response to this request. The review team may waive minor defects that are not material when no prejudice will result to the rights of any offeror or to the public. In scoring the proposals, ODJFS will score in three phases:

A. Initial Qualifying Criteria

In order to be fully reviewed and scored, proposals submitted must pass the following criteria. **Any "no" for the listed criteria below may eliminate a proposal from further consideration.**

1. Was the proposal received by the deadline as specified in Part Three?
2. Did the offeror submit ten (10) paper copies and one electronic copy of their Technical Proposal, as well as five (5) paper and one electronic copy of their Cost Proposal (in a separate

sealed envelope labeled: “**NOTE: DO NOT OPEN. COST PROPOSAL ENCLOSED FOR ‘BENEFITS ELIGIBILITY NETWORK (BEN) POLICY CROSSWALKS PROJECT’ STSJFS1002 SUBMITTED BY [OFFEROR’S NAME HERE].**”?

2. Does the offeror’s proposal include all required affirmative statements and certifications, signed by the offeror’s responsible representative, as described in Parts Two, Three and Four?
3. According to those certifications, does the offeror affirmatively indicate that it is not on the federal debarment list; that there are no unfair labor findings against it; and it is not in violation of R.C. section 9.24, and therefore may enter into a contract with ODJFS?
4. Does ODJFS’ review of the Auditor of State website verify that the offeror is not excluded from contracting with ODJFS by R.C. section 9.24 for an unresolved finding for recovery (*i.e.*, the proposal of any offeror whose name appears on the Auditor’s website as having an unresolved finding for recovery will be eliminated from further consideration.)?

B. Criteria for Scoring the Technical Proposal:

The PRT will then score those qualifying technical proposals, not eliminated in Initial Qualifying Criteria review, by assessing how well the offeror meets the requirements as specified in Parts One and Two of this IFP. Using the score sheet (see **Supplement 6** of this IFP for specific evaluation criteria), the PRT will read, review, discuss and reach consensus on the final technical score for each qualifying technical proposal.

A maximum of **2,700** points will be awarded for the Technical Proposal. A technical proposal must achieve a total of at least **2,160** points (a score which represents that the offeror can successfully perform the resulting contractual duties) out of the possible **2,700** points to qualify for continued consideration. Any proposal which does not meet the minimum required technical proposal points will be disqualified from any further consideration and its cost proposal will neither be opened nor considered.

All Phase II technical proposal evaluation criteria will be scored according to the following scale, based on a proposed plan’s ability to meet ODJFS needs. The Technical Proposal Score Sheet (see **Supplement 6**) uses the following definitions and point values for rating each requirement.

“**Does Not Meet Requirement**”- A particular IFP requirement was not addressed in the offeror’s proposal; or was addressed by merely restating the requirement and agreeing to perform accordingly, providing no meaningful description of how the requirement will be met; or was addressed but was otherwise non-responsive to the State’s purpose for establishing the requirement. **Score: 0**

“**Partially Meets Requirement**”-Offeror proposal demonstrates some attempt at meeting a particular IFP requirement, but that attempt falls below acceptable level, **Score: 4**

“**Meets Requirement**”-Offeror proposal fulfills a particular IFP requirement in all material respects, potentially with only minor, non-substantial deviation, **Score: 8**

“**Exceeds Requirement**”-Offeror proposal fulfills a particular IFP requirement in all material respects, and offers some additional level of value in excess of ODJFS expectations, **Score: 10**

IMPORTANT: Before submitting a proposal to ODJFS in response to this IFP, offerors are strongly encouraged to use the Technical Proposal Score Sheet (Supplement 6) and the above technical performance scoring information to review their proposals for completeness, compliance and quality.

All the remaining qualified Technical Proposals will proceed to the next level of review, which is consideration of the Cost Proposal. Any other proposals will be disqualified from further consideration, and the corresponding Cost Proposals will neither be opened nor will be scored.

C. Criteria for Considering the Cost Proposal

The Cost Proposal will be reviewed by ODJFS. The grand total of each technically qualified offeror's Cost Proposal is divided by that offeror's final Technical Proposal score. This compares the cost with the quality of the Technical Proposal, which will provide an average cost-per-quality point earned on the Technical Proposal.

If the cost proposals of all technically qualifying offerors (as determined by the scoring process described in this section and by the Technical Proposal Score Sheet, **Supplement 6** to this IFP) are in excess of the available funding for this project, ODJFS may, at its sole discretion, negotiate with all technically qualifying offerors for a revised cost proposal. Offerors may then submit one last and best offer, or may request that ODJFS view its original cost proposal as its last and best offer, or may formally withdraw from further consideration, and shall formally indicate its choice according to directions provided by ODJFS at that time. Upon receipt of all last and best offers, and assuming that one or more have submitted a cost proposal that is within project budget, ODJFS will then consider those offerors' revised cost proposals which are within the budget according to the cost-point assignment process described in this section, above, and in the Technical Proposal Score Sheet, **Supplement 6**, for calculation of the winning score.

Rejection of Proposals

The state may reject any proposal that is not in the required format, does not address all the requirements of this IFP, or that the state believes is excessive in price or otherwise not in its interest to consider or to accept. In addition, the state may cancel this IFP, reject all the proposals, and seek to do the work through a new IFP or other means.

The state may reject late proposals regardless of the cause for the delay.

The state may reject any Proposal that takes exception to the terms and conditions and/or pricing of the State Term Schedule.

Protest Procedure

Any potential, or actual, offeror objecting to the award of a contract resulting from the issuance of this IFP may file a protest of the award of the contract, or any other matter relating to the process of soliciting the proposals. Such a protest must comply with the following guidelines:

- A. A protest may be filed by a prospective or actual bidder objecting to the award of a contract resulting from this IFP. The protest shall be in writing and shall contain the following information:
 - 1. The name, address, and telephone number of the protestor;
 - 2. The name and number of the IFP being protested;
 - 3. A detailed statement of the legal and factual grounds for the protest, including copies of any relevant documents;
 - 4. A request for a ruling by ODJFS;
 - 5. A statement as to the form of relief requested from ODJFS; and
 - 6. Any other information the protestor believes to be essential to the determination of the factual and legal questions at issue in the written protest.
- B. A timely protest shall be considered by ODJFS, if it is received by ODJFS' Office of Legal Services, within the following periods:

1. A protest based on alleged improprieties in the issuance of the IFP or any other event preceding the closing date for receipt of proposals which are apparent or should be apparent prior to the closing date for receipt of proposals shall be filed no later than 3:00 p.m. the closing date for receipt of proposals, *as specified in Part Three, Proposal Due Date and Time, of this IFP.*
 2. If the protest relates to the announced intent to award a contract, the protest shall be filed no later than 3:00 p.m. of the eighth (8th) calendar day from the date of formal notification to all responding Offerors to all responding Offerors of the ODJFS selection decision.
- C. An untimely protest may be considered by ODJFS if ODJFS determines that the protest raises issues significant to the department's procurement system. An untimely protest is one received by ODJFS' Office of Legal Services after the time periods set forth in Item B. of this section.
- D. All protests must be filed at the following location:
- Chief Legal Counsel
ODJFS Office of Legal Services
30 East Broad Street, 31st Floor
Columbus, Ohio 43215-0423
- E. When a timely protest is filed, a contract award shall not proceed until a decision on the protest is issued or the matter is otherwise resolved, unless the Director of ODJFS determines that a delay will severely disadvantage the Department. The offeror(s) who would have been awarded the contract shall be notified of the receipt of the protest.
- F. ODJFS' Office of Legal Services shall issue written decisions on all timely protests and shall notify any offeror who filed an untimely protest as to whether or not the protest will be considered.

PART FOUR: SAMPLE QUOTE

Offeror must provide its quote on company letterhead. Offeror must provide the total price for completing the scope of work (Activities and Deliverables A-E) described in Part Two of the IFP for each deliverable. Costs must include the STS job category, hourly rate for this project, number of hours and page number according to the State Term Schedule being utilized to complete each deliverable.

Page #	Part Number / Position Description	Number of Positions	Hourly Rate (may not exceed STS rates)	# Hours	Total Cost

PART FIVE: SUPPLEMENTAL INFORMATION

The following page(s) contain supplemental information for this competitive document. The supplemental information is contained between this header and a trailer page. If you receive the trailer page, all supplemental information has been received.

If you do not receive the trailer page of this supplement, use the inquiry process described in the document to notify the Procurement Representative.

Note: Portions of the supplemental information provided may or may not contain page numbers. The total number of pages indicated on the cover page does not include the pages contained in this supplement.

Supplement 1: Sample Federal and Ohio Policy Inventory

Child Care

Code of Federal Regulation: www.gpoaccess.gov/fr/index.html

45 CFR Part 98

Vol. 63, No. 142, July 24, 1998

51 sections

Technical bulletins: <http://www.acf.hhs.gov/programs/ccb/report/formhelp/techbull/index.htm>

17 bulletins

Ohio Revised Code: <http://onlinedocs.andersonpublishing.com/oh/lpExt.dll?f=templates&fn=main-h.htm&cp=PORC>

Chapter 5104, 32 sections

Ohio Administrative Code: <http://emanuals.odjfs.state.oh.us/emanuals>

Chapter 5101: 2-12, 43 rules;

Chapter 5101: 2-13, 43 rules;

Chapter 5101: 2-14, 36 rules;

Chapter 5101: 2-15, 3 rules;

Chapter 5101: 2-16, 17 rules; and

Chapter 5101: 2-18, 25 rules.

16 Procedure Letters at: <http://emanuals.odjfs.state.oh.us/emanuals>

Disability Assistance (financial and medical)

United States Code, Code of Federal Regulation, Federal Technical Letters

Ohio Revised Code: <http://onlinedocs.andersonpublishing.com/oh/lpExt.dll?f=templates&fn=main-h.htm&cp=PORC>

Chapter 5115 – 16 Sections (DFA)

Food Stamps

Code of Federal Regulation: www.gpoaccess.gov/fr/index.html

7 CFR 271 – 280, 10 Federal rules

Ohio Revised Code: <http://onlinedocs.andersonpublishing.com/oh/lpExt.dll?f=templates&fn=main-h.htm&cp=PORC>

Chapter 5101, 1 Section

Chapter 5101, Under Children's Health Ins. Program, 1 Section
Chapter 329, Under Title III Counties, 2 Sections

Ohio Administrative Code: <http://emanuals.odjfs.state.oh.us/emanuals>

Chapter 5101:4 -1, 4 rules;
Chapter 5101:4 -2, 9 rules;
Chapter 5101:4 -3, 24 rules;
Chapter 5101:4-4, 12 rules;
Chapter 5101:4-5, 4 rules;
Chapter 5101:4-6, 16 rules;
Chapter 5101:4-7, 8 rules;
Chapter 5101:4-8, 6 rules;
Chapter 5101:9-10, 7 rules; and
Chapter 32 – 5101:9-32-01, 1 rule.

Medicaid

Ohio Revised Code, Ohio Administrative Code, Ohio State Plans
175 Eligibility Rules at <http://emanuals.odjfs.state.oh.us/emanuals/>

5101:1-38-05 Early and Periodic Screening, Diagnosis and Treatment (EPSDT) - "Healthchek".
5101:1-38-06 Pregnancy Related Services (PRS).
5101:1-41-20 Alien Emergency Medical Assistance (AEMA).
5101:3-26 Managed care, including
5101:3-26-02 Managed Health Care Programs: Eligibility, Membership and Automatic Renewal of Membership.

Residential State Supplement Program: 7 Rules

5101:1-17 The residential state supplement program <http://emanuals.odjfs.state.oh.us/emanuals/>

Covered Families and Children: 7 Rules

5101:1-37 Medicaid: introduction and definition of program <http://emanuals.odjfs.state.oh.us/emanuals/>

Medicaid Eligibility: 19 Rules

5101:1-38 Medicaid: the determination and re-determination of eligibility <http://emanuals.odjfs.state.oh.us/emanuals/>

Low-income Medicare Assistance Program: 59 Rules

5101:1-39 Medicaid: low-income Medicare assistance program <http://emanuals.odjfs.state.oh.us/emanuals/>

Covered Families and Children: 29 Rules

5101:1-40 Covered families and children (CFC) <http://emanuals.odjfs.state.oh.us/emanuals/>
Medicaid: assistance groups and definitions

Breast and Cervical Cancer Project (BCCP): 6 Rules

5101:1-41 Breast and cervical cancer project (BCCP) <http://emanuals.odjfs.state.oh.us/emanuals/>
Medicaid

Disability Medical Assistance: 1 Rule

5101:1-42 Disability medical assistance (DMA) program <http://emanuals.odjfs.state.oh.us/emanuals/>

WAIVER PROGRAMS

5101:3-31-03 Eligibility for enrollment in PASSPORT <http://emanuals.odjfs.state.oh.us/emanuals/>

5101:3-32-03 Eligibility for enrollment for the choice program <http://emanuals.odjfs.state.oh.us/emanuals/>

5101:3-33-03 Eligibility for assisted living HCBS waiver program <http://emanuals.odjfs.state.oh.us/emanuals/>

5101:3-40-01 Medicaid home and community-based services program – individual options waiver <http://emanuals.odjfs.state.oh.us/emanuals/>

5101:3-42-01 Medicaid home and community-based services program – level one waiver <http://emanuals.odjfs.state.oh.us/emanuals/>

Additional Waiver Rules

5101:3-3-05 <http://onlinedocs.andersonpublishing.com/oh/lp/Ext.dll?f=templates&fn=main-h.htm&cp=OAC>

5101:3-3-06

5101:3-3-07

5101:3-3-08

5101:3-3-15

5101:3-3-17

5101:3-3-54

5101:3-31-04

5101:3-31-06

5101:3-32-06

5101:3-33-04

5101:3-46-02

5101:3-46-07

5101:3-47-02

5101:3-49-01

5101:3-50-02

5101:3-56-02

5101:3-56-03

OAC

5123:2-1-08 ODMR/DD HCBS Waiver waiting lists, enrollment/disenrollment <http://odmrdd.state.oh.us/rules/odmrdd.htm>

ODA

No Medicaid eligibility rules in their section of the code, but they do reference Medicaid eligibility in general terms on their website related to the Medicaid programs they administer: Assisted Living, PASSPORT waiver, Choices waiver, Residential State Supplement (RSS), and the Program of All-inclusive Care for the Elderly (PACE). Rules regarding eligibility for these programs are located in ODJFS section of the OAC and in ORC

http://goldenbuckeye.com/infocenter/publications/profile_assisted_living

http://goldenbuckeye.com/infocenter/publications/profile_PASSPORT.html

http://goldenbuckeye.com/infocenter/publications/profile_choices.html

http://goldenbuckeye.com/infocenter/publications/profile_RSS.html

http://goldenbuckeye.com/infocenter/publications/profile_pace.html

<http://www.mh.state.oh.us/legaldiv/general/rules.html#preadmission>

Medicaid Eligibility Manual Standards of Timeliness

<http://emanuals.odjfs.state.oh.us/emanuals/>

State Buy-In Manual

<http://emanuals.odjfs.state.oh.us/emanuals/>

Administrative Procedure Manual

<http://emanuals.odjfs.state.oh.us/emanuals/>

Ohio Revised Code

<http://onlinedocs.andersonpublishing.com/oh/>

	lpExt.dll?f=templates&fn=mainh.htm&cp=PORC
Code of Federal Regulations	http://www.gpoaccess.gov/cfr/index.html
Centers for Medicare & Medicaid Services	http://www.cms.hhs.gov/default.asp?
Social Security Online	http://www.ssa.gov/
CRIS-E Procedures Manual	http://innerweb.odjfs.state.oh.us/Initiatives/CRIS-E/index.html
CRIS-E Notice Manual	http://jfs.ohio.gov/manuals/noticesm.pdf
CRIS-E Help Desk Quarterly Report and FIAT instructions	http://innerweb.odjfs.state.oh.us/Ofam/cris-e/flat-reports.shtml
Medicare.gov	http://www.medicare.gov/
Audit Manual Index	http://innerweb.odjfs.state.oh.us/oraa/BA/auditman/00ADauditman.shtml
Medicaid Program Assignment Table	R:\OM\BCPS\CRISe ASSESSMENT PROJECT\INFO REQ. LINKS & PATHS 2005-6-9.doc
Business Intelligence Reporting Data	R:\OM\BCPS\CRISe ASSESSMENT PROJECT\INFO REQ. LINKS & PATHS 2005-6-9.docBIC RPTS.xls
Medicaid Category Hierarchy Chart	R:\OM\BCPS\CRISe ASSESSMENT PROJECT\INFO REQ. LINKS & PATHS 2005-6-9.doc
Medicaid Eligibility Manual Standards of Timeliness	R:\OM\BCPS\CRISe ASSESSMENT PROJECT\INFO REQ. LINKS & PATHS 2005-6-9.doc
ODJFS Trainings on FIAT and Workaround Issues	R:\OM\BCPS\CRISe ASSESSMENT PROJECT\MORSE TRNS
New Worker Training (NWT) - Medical, Cash and Food Stamp Assistance Programs	http://odjfstcd.uv.net/manuals/Participants_Manuals/nwt/index.htm
New Worker Training (NWT) – Aged, Blind and Disabled (ABD) Medicaid (Release in 6/2005)	http://odjfstcd.uv.net/manuals/Participants_Manuals/index_pm.htm
<u>FEDERAL SITES</u>	
RMA (CFR 45)	http://www.acf.hhs.gov/programs/orr/policy/npr98fin.htm
GPO Home Page	http://www.gpoaccess.gov/cfr/index.html
CFR 42	http://www.access.gpo.gov/nara/cfr/waisidx_01/42cfrv3_01.html
CFR 20 Index	http://www.socialsecurity.gov/OP_Home/cfr20/cfrdoc.htm
CFR 47	http://www.access.gpo.gov/nara/cfr/waisidx_01/42cfr435_01.html
Public Law	http://www.gpoaccess.gov/plaws/
CMS[1]	http://www.cms.hhs.gov/SMDL/SMD/list.asp#TopOfPage
State Medicaid Director's Letters	http://www.cms.hhs.gov/smdl/01_overview.asp?
Ohio's State Plan[2]	Available in hard copy upon request
CMS Transmittals	http://www.cms.hhs.gov/transmittals/01_overview.asp?
SSA	http://www.ssa.gov/
SSI Home Page	http://www.ssa.gov/notices/supplemental-security-income/index.htm
POMS	https://s044a90.ssa.gov/apps10/poms.nsf/partlist!OpenView
SSI Law & Regulation Finder	http://www.ssa.gov/notices/supplemental-security-income/law-regs-finder.htm
Title XVI	http://www.ssa.gov/OP_Home/ssact/title16b/1600.htm
Title XIX	http://www.ssa.gov/OP_Home/ssact/title19/1900.htm
Title XXI	http://www.ssa.gov/OP_Home/ssact/title21/2100.htm

USC Home Page<http://www4.law.cornell.edu/uscode/>**STATE SITES****126 Ohio General Assembly HB 66**http://www.legislature.state.oh.us/bills.cfm?ID=126_HB_0066**Register of Ohio**<http://www.registerofohio.state.oh.us/>**ODJFS Home Page**<http://ohio.gov/>**ODJFS E Manuals[3]**<http://emanuals.odjfs.state.oh.us/emanuals/>**ODJFS Manual Transmittal Letters MTL**<http://www.odjfs.state.oh.us/lpc/mtl/>**Anderson's OnLine Documentation**<http://emanuals.odjfs.state.oh.us/emanuals/>**OTHER LINKS****Healthlaw**www.probono.net/healthlaw.org**Thomas (Library of Congress)**<http://thomas.loc.gov/>

[1] The CMS website is under construction, and it's quite possible the links, although accurate, may not work

[2] The online CMS Ohio state plan amendments website may not contain the most accurate information on our state plan. OHP's official state plan amendments are maintained by Becky Jackson in BHPP and are only available on paper

[3] The direct link to the MEM may change as ePubs modifies eManuals

MANAGED HEALTH CARE

As of October 1, 2005

<http://www.access.gpo.gov/cgi-bin/cfrassemble.cgi?title=200545>

As of October 1, 2006

<http://www.access.gpo.gov/cgi-bin/cfrassemble.cgi?title=200645>

Medicare Premium Assistance

United States Code, Code of Federal Regulation, Federal Technical Letters

Ohio Revised Code, Ohio Administrative Code, Ohio State Plans

Refugee Services

Refugee Cash Assistance - Federal

United States Code: <http://www.gpoaccess.gov/uscode/index.html>

8 U.S.C. 1521-1525, 19 Rules

Code of Federal Regulation: <http://www.gpoaccess.gov/cfr/index.html>

45 CFR - Part 400, 3 Federal rules (96 reserved)

8 CFR - Chapter 1& 5, 5 Federal rules

Ohio Revised Code: <http://onlinedocs.andersonpublishing.com/oh/lpExt.dll?f=templates&fn=main-h.htm&cp=PORC>

Chapter 5101 - Under Commission on Fatherhood - 1 Section

SCHIP

Code of Federal Regulation: <http://www.gpoaccess.gov/cfr/index.html>

42 CFR 457

Subpart A - Introduction; State Plans for Child Health Insurance Programs and Outreach Strategies; Subpart B - General Administration; Reviews and Audits; Withholding for Failure to Comply; Deferral and Disallowance of Claims; Reduction of Federal Medical Payments;

Subpart C - State Plan Requirements: Eligibility, Screening, Applications, and Enrollment;

Subpart D - State Plan Requirements: Coverage and Benefits;

Subpart E - State Plan Requirements: Enrollee Financial Responsibilities;

Subpart F - Payment to States;

Subpart G - Strategic Planning, Reporting, and Evaluation;

Subpart H - Substitution of Coverage;

Subpart I - Program Integrity;

Subpart J - Allowable Waivers: General Provisions;

Subpart K - State Plan Requirements: Applicant and Enrollee Protections.

Ohio Revised Code, Ohio Administrative Code, Ohio State Plans

TANF (OWF)

United States Code: <http://www.gpoaccess.gov/uscode/index.html>

42 U.S.C. 601- 619 = 23 Statutes

42 U.S.C. 1320b-7, 1 rule (IEVS)

Code of Federal Regulation: <http://www.gpoaccess.gov/cfr/index.html>

45 CFR 200- 265 = 19 Federal rules (1 reserved)

Ohio Revised Code: <http://onlinedocs.andersonpublishing.com/oh/lpExt.dll?f=templates&fn=main-h.htm&cp=PORC>

Chapter 5107 - OWF/Learnfare, 68 Sections

Ohio Administrative Code: <http://emanuals.odjfs.state.oh.us/emanuals>

OWF/DFA/Refugee

Chapter 5101:1-1, 8 rules;

Chapter 5101:1-2, 18 rules (including 2 appendixes);

Chapter 5101:1-3, 26 rules;

Chapter 5101:1-5, 8 rules;

Chapter 5101:1-23, 12 rules (including 2 appendixes); and

Chapter 5101:1-24, 1 rule.

TANF (PRT)

Ohio Revised Code: <http://onlinedocs.andersonpublishing.com/oh/lpExt.dll?f=templates&fn=main-h.htm&cp=PORC>

Chapter 5108 – PRT – 13 Sections

Supplement 2: Sample Policy Crosswalk - Matches and Gaps Report

NOTE: The sample documents included as Supplements 2, 3 and 4 were created in Microsoft Excel to give offerors examples of the desired content needed by ODJFS. The samples should not be duplicated for submission by the chosen offeror for the reporting requirements of the IFP. ODJFS anticipates the required reports will be created with the Rational Requisite Pro application.

Program	CITATIONS																			Fed/Ohio Match?	Ohio Only?	Federal Only?
	U.S. Code						Federal Register				Ohio Revised Code				Ohio Administrative Code							
	Title	Chapter	Sub-Chapt	Part	Section	Location	Title	doc	Part	Section	Title	Chapter	Section	Paragraph	Agency	Division	Chapter	Rule	Paragraph			
Food Stamps	blank	blank	blank	blank	blank	blank	7	CFR	273	3	3	329	329.04	blank	5101	4	3	03	(A)	YES	NO	NO
Food Stamps	blank	blank	blank	blank	blank	blank	blank	blank	blank	blank	3	329	329.042	blank	blank	blank	blank	blank	blank	n/a	n/a	n/a
Food Stamps	blank	blank	blank	blank	blank	blank	blank	blank	blank	blank	51	5101	5101.54	blank	blank	blank	blank	blank	blank	n/a	n/a	n/a
Medicaid	blank	blank	blank	blank	blank	blank	42	CFR	435	403	51	5111	5111.01	blank	5101	1	39	54	(A)(B)	YES	NO	NO
Child Care	blank	blank	blank	blank	blank	blank	45	CFR	98	C	98.2	5104	blank	blank	5101	2	16	35	(A) (R)	NO	YES	NO
TANF	42	7	IV	A	602	(a)(1)(A)(i)	blank	blank	blank	blank	51	5107	5107.05	(A)(3)	5101	1	3	03	(A)	YES	NO	NO
Disability Assistance	blank	blank	blank	blank	blank	blank	blank	blank	blank	blank	51	5115	5115.03	(A)(4)	5101	1	5	10	(A)	NO	YES	NO
Refugee Services	7	II		273	273.3	(a)	blank	blank	blank	blank	51	5101	5101.49	blank	5101	1	2	40	blank	YES	NO	NO

Supplement 3: Sample Business Rule Report

Program	CITATIONS									Business Rule(s) Prose
	Ohio Revised Code				Ohio Administrative Code					
	Title	Chapter	Section	Paragraph	Agency	Division	Chapter	Rule	Paragraph	
Food Stamps	3	329	329.04	blank	5101	4	3	03	(A)	Applicant must be resident of Ohio for eligibility
Food Stamps	3	329	329.042	blank	blank	blank	blank	blank	blank	Applicant must be resident of Ohio for eligibility
Food Stamps	51	5101	5101.54	blank	blank	blank	blank	blank	blank	Applicant must be resident of Ohio for eligibility
Medicaid	51	5111	5111.01	blank	5101	1	39	54	(A)(B)	Applicant must be resident of Ohio for eligibility
Child Care	98.2	5104	blank	blank	5101	2	16	35	(A) (R)	Applicant must be resident of Ohio for eligibility
TANF	51	5107	5107.05	(A)(3)	5101	1	3	03	(A)	Applicant must be resident of Ohio for eligibility
Disability Assistance	51	5115	5115.03	(A)(4)	5101	1	5	10	(A)	Applicant must be resident of Ohio for eligibility
Refugee Services	51	5101	5101.49	blank	5101	1	2	40	blank	Applicant must be resident of Ohio for eligibility

Supplement 4: Sample Program Crosswalk - Business Rule Overlap Report

Program	CITATIONS									Fed/Ohio Match?	Ohio Only?	Federal Only?	Business Rule(s) Prose
	Ohio Revised Code				Ohio Administrative Code								
	Title	Chapter	Section	Paragraph	Agency	Division	Chapter	Rule	Paragraph				
Food Stamps	3	329	329.04	blank	5101	4	3	03	(A)	YES	NO	NO	Applicant must be resident of Ohio for eligibility
Food Stamps	3	329	329.042	blank	blank	blank	blank	blank	blank	n/a	n/a	n/a	Applicant must be resident of Ohio for eligibility
Food Stamps	51	5101	5101.54	blank	blank	blank	blank	blank	blank	n/a	n/a	n/a	Applicant must be resident of Ohio for eligibility
Medicaid	51	5111	5111.01	blank	5101	1	39	54	(A)(B)	YES	NO	NO	Applicant must be resident of Ohio for eligibility
Child Care	98.2	5104	blank	blank	5101	2	16	35	(A) (R)	YES	YES	NO	Applicant must be resident of Ohio for eligibility
TANF	51	5107	5107.05	(A)(3)	5101	1	3	03	(A)	YES	NO	NO	Applicant must be resident of Ohio for eligibility
Disability Assistance	51	5115	5115.03	(A)(4)	5101	1	5	10	(A)	NO	YES	NO	Applicant must be resident of Ohio for eligibility
Refugee Services	51	5101	5101.49	blank	5101	1	2	40	blank	YES	NO	NO	Applicant must be resident of Ohio for eligibility

Supplement 5: Sample Deliverable Approval Form

Purpose: This document is to ensure that the requirements and expectations of the deliverable are met, approved and accepted. This document may be used at the end of the project or during each phase as deliverables are submitted to the requesting organization and/ or client. This document is for non-software related projects. For Software Development projects, the User Acceptance Testing will be the Deliverable Acceptance.

PROJECT IDENTIFICATION		
Date of Deliverable Submitted	Project Name	Project Number
Program Director		Project Manager

DESCRIPTION OF DELIVERABLE

Signature indicates that the named deliverable(s), in the opinion of the signer:

- Meets the specification;
- Has no significant unresolved issues;
- Meets the acceptance criteria; and
- Is ready for release either as a baseline for subsequent work or as a production deliverable.

CONDITIONAL ACCEPTANCE – STATE CONDITIONS			
The parties agree that <Delivery Organization> satisfactorily completed and delivered all project deliverables and client accepts all <Project Name> <Phase Name> deliverables, with the following customization exceptions:			
Change Log #	Description	Issue Log #	Description

ACCEPTED BY	
Contractor Project Manager	
Anthony Trotman, ODJFS BEN Project Director	

Supplement 6: Technical Proposal Score Sheet**STSJFS1002
Technical Proposal Score Sheet****PHASE I: Initial Qualifying Criteria** _____ **Offeror Name**

The proposal must meet all of the following Phase I proposal acceptance criteria in order to be considered for further evaluation. Any proposal receiving a “no” response to any of the following qualifying criteria **may be disqualified from consideration.**

ITEM	PROPOSAL ACCEPTANCE CRITERIA	IFP Sec. Ref.	Y E S	N O
1	Was the offeror's proposal received by the deadline as specified in the IFP?	Part 3, Page 16		
2	Did the offeror submit ten (10) copies of their Technical Proposal labeled: “ Benefits Eligibility Network (BEN) Policy Crosswalks Project – (STSJFS1002) ”?	Part 3, Page 14		
3	Did the offeror submit ten (5) copies of their Cost Proposal labeled: “ Benefits Eligibility Network (BEN) Policy Crosswalks Project – (STSJFS1002) ”?	Part 3, Page 13		
4	Offeror's proposal includes a required cover letter, signed by the offeror's responsible representative, as described in Part 2 of this IFP?	Parts 2 and 3, Pages 10 - 14		
5	Included in those certifications in the cover letter, the offeror states that it is not excluded from entering into a contract with ODJFS, due to restrictions related to the federal debarment list, unfair labor findings, or R.C. § 9.24.	Part 1, Page 10		
6	ODJFS' review of the Auditor of State website verifies that the offeror is not excluded from contracting with ODJFS by R.C. § 9.24 for an unresolved finding for recovery.	Part 1, Page 10		
7	Did the offeror submit the Offeror Profile, Candidate Profiles with resumes, and Work Plan in the format requested?	Part 3, Pages 13, 14		

PHASE II: Criteria for Scoring of Technical Proposal

Qualifying technical proposals will be collectively scored by a Proposal Review Team (PRT) appointed by ODJFS. For each of the evaluation criteria given in the following score sheet, reviewers will collectively judge whether the technical proposal exceeds, meets, partially meets or does not meet the requirements expressed in the IFP, and assign the appropriate point value, as follows:

0	4	8	10
Does Not Meet Requirement	Partially Meets Requirement	Meets Requirement	Exceeds Requirements

A technical proposal's total PHASE II score will be the sum of the point value for all the evaluation criteria. The review team will collectively score each individual qualifying proposal. Technical proposals which do not meet or exceed a total score of at least **2,160** points (indicating that an offeror has adequately demonstrated the ability to successfully perform contractual duties) out of a maximum of **2,700** points (which includes assigned criteria weighting), will be disqualified from further consideration, and the corresponding cost proposals will neither be opened nor considered. Only those offerors whose Technical Proposals meet or exceed the minimum required technical points will advance to PHASE III of the technical proposal score sheet.

ITEM #	EVALUATION CRITERIA	Weight	IFP SEC. REF.	Doesn't Meet 0	Partially Meets 4	Meets 8	Exceeds 10
PROFILE							
Offer Profile – Required Experience							
1	Has the offeror provided three (3) references where it has demonstrated successful completion of a similar project? (must include organization name, project details, contact name, telephone number and e-mail address) NOTE: Each reference must be willing to discuss the offeror's performance with the evaluation committee.	3	Part 2, Page 14				
2	Has the offeror demonstrated experience identifying and analyzing business requirements or business rules for federal or state human services agencies in the United States,	7	Part 2, Page 14				
3	Has the offeror demonstrated experience defining, designing, building and populating a business rule repository in Rational Requisite Pro	7	Part 2, Page 14				
Offer Profile – Desired Experience							
4	The offeror has experience with human services policy design and development or policy audit experience within the past ten (10) years.	5	Part 2, Page 14				
5	The offeror has experience with human services policy design and development or policy audit experience within the past ten (10) years with a Medicaid 209(b) state.	5	Part 2, Page 14				
6	The offeror has experience with three (3) projects of similar size and scope for federal or state human services agencies in the United States.	5	Part 2, Page 14				
Offer Profile - Candidate Information							
7	The Project Manager candidate has at least thirty-six (36) months experience in project management in at least three successful projects similar in size and scope.	8	Part 2, Page 14				
	The proposed Project Manager experience cannot be used to meet the requirements listed below. The offeror must propose separate SME's to meet each of the requirements 8 through 11,						
8	One or more candidates with experience as Subject Matter Experts (SME's) in TANF on at least three Human Services projects.	8	Part 2, Page 14				
9	One or more candidates with experience as Subject Matter Experts (SME's) in Food Stamps on at least three Human Services projects.	8	Part 2, Page 14				
10	One or more candidates with experience as Subject Matter Experts (SME's) in Child Care on at least three Human Services projects.	8	Part 2, Page 14				
11	One or more candidates with experience as Subject Matter Experts (SME's) in Medicaid on at least three Human Services projects.	8	Part 2, Page 14				
12	Two or more candidates with experience as Business Analysts with experience in Human Services eligibility determination.	8	Part 2, Page 14				
13	One or more candidates with experience defining, designing, building and populating business rule repositories in Rational Requisite Pro software.	8	Part 2, Page 14				
14	One or more candidates with experience providing Rational Requisite Pro software training to add, modify, replicate, and delete repository contents.	8	Part 2, Page 14				
WORK PLAN							
Project Management							
15	The proposal provides a proposed plan and schedule (WBS) that demonstrates an understanding of the scope of work for completion of the Policy Crosswalks project.	6	Part 1, Page 6				

ITEM #	EVALUATION CRITERIA	Weight	IFP SEC. REF.	Doesn't Meet 0	Partially Meets 4	Meets 8	Exceeds 10
16	The proposal provides an outline to manage business rule extraction, policy crosswalks and business rule repository development activities and tasks.	6	Part 1, Page 6				
17	The offeror provides an adequate description of their project management methodology to capture and report questions from Contractor staff to the BEN Project Director	6	Part 1, Page 6				
18	The offeror provides an adequate description of their project management methodology to report project status weekly, bi-weekly and monthly.	4	Part 1, Page 6				
19	The offeror provides an adequate description of their project management methodology to identify, document, report and resolve issues weekly, bi-weekly and monthly, in conjunction with the BEN Project Director.	6	Part 1, Page 6				
20	The offeror provides an adequate description of their project management methodology to identify, document, report and develop/implement risk management actions weekly, bi-weekly and monthly, in conjunction with the BEN Project Director.	6	Part 1, Page 6				
Policy Crosswalks and Business Rule Repository Development							
21	The proposal includes an approach and schedule to establish VPN access with the ODJFS network.	4	Part 1, Pages 6, 7				
22	The proposal includes a clearly defined approach, plan and schedule to develop the electronic repository in Rational Requisite Pro.	6	Part 1, Pages 6, 7				
23	The proposal includes a clearly defined approach, plan and schedule to develop the Procedure Manual for entering, changing, replicating or deleting Federal Policy and State Policy entries in the repository.	6	Part 1, Pages 6, 7				
24	The proposal includes a clearly defined approach, plan and schedule to train state staff in the entry, modification, replication or deletion of items in the Rational Requisite Pro repository using the Procedure Manual.	6	Part 1, Pages 6, 7				
Federal Policy and Ohio Policy Business Rule Extraction							
25	The proposal includes a clearly defined approach, plan and schedule to create the Business Rules Report format.	6	Part 1, Pages 7, 8				
26	The proposal includes a clearly defined approach, plan and schedule to complete the Business Rules extraction, populate the repository, and prepare the Report for each of the program areas (Child Care, Disability Assistance, Food Stamps, Medicaid, SCHIP, Medicare Premium Assistance, Refugee Services, TANF (OWF)).	40	Part 1, Pages 7, 8				
Federal to Ohio Policy Crosswalks							
27	The proposal includes a clearly defined approach, plan and schedule to create the Federal and Ohio Policy Inventory Report.	6	Part 1, Page 8				
28	The proposal includes a clearly defined approach, plan and schedule to complete the comparisons of Federal Programs to like Ohio Programs to produce a Matches and Gaps report per program topic.	30	Part 1, Page 8				
Program to Program Business Rules Crosswalks							
29	The proposal includes a clearly defined approach, plan and schedule to create the Program Crosswalk report.	6	Part 1, Pages 8, 9				
30	The proposal includes a clearly defined approach, plan and schedule to complete the Program Crosswalk of each program area against every other to create the required Overlap Report.	30	Part 1, Pages 8, 9				

POLICY CROSSWALK PROJECT DELIVERABLES						
Subtotal of "Does Not Meet" points			0			
Subtotal of "Partially Meets" points						
Subtotal of "Meets" points						
Subtotal of "Exceeds" points						
GRAND TOTAL TECHNICAL SCORE						

Based upon the Grand Total Technical Score earned, does the offeror's proposal proceed to the Phase III evaluation of its Cost Proposal? (Offeror's Grand Total Technical Score must be at least 2,160 points.)

Yes _____ **No** _____
 (If "No," Offeror's Cost Proposal will not be opened.)

Supplement 7: Offeror Profile Summary

OFFEROR REQUIREMENTS

Company Name:	Contact Name:(Indicate Primary or Alternate)	
	Contact Title:	
Company Address:	Contact Phone Number:	
	Contact Email Address:	
Project Name:	Beginning Date of Expr: Month/Year	Ending Date of Expr: Month/Year
List Related Service Provided:		
Describe how the Related Service shows the offeror's experience, capability, and capacity to develop the Deliverables or to achieve the milestones for this Project:		

Company Name:	Contact Name:(Indicate Primary or Alternate)	
	Contact Title:	
Company Address:	Contact Phone Number:	
	Contact Email Address:	
Project Name:	Beginning Date of Expr: Month/Year	Ending Date of Expr: Month/Year
List Related Service Provided:		
Describe how the Related Service shows the offeror's experience, capability, and capacity to develop the Deliverables or to achieve the milestones for this Project:		

Supplement 8: Personnel Profile Summary

CANDIDATE REQUIREMENTS

Candidate's Name:

Requirement: **{List a candidate requirement}**

Company Name:	Contact Name: Primary or Alternate:	Contact Title:	
Address:		Contact Phone Number: Email Address:	
Project Name:	Beginning Date of Expr: Month/Year	Ending Date of Expr: Month/Year	
Description of technical experience, capacity performed, and role that is related to services to be provided for this Project:			

Company:	Contact Name: Primary or Alternate:	Contact Title:	
Address:		Contact Phone Number: Email Address:	
Project Name:	Beginning Date of Expr: Month/Year	Ending Date of Expr: Month/Year	
Description of technical experience, capacity performed, and role that is related to services to be provided for this Project:			

Supplemental Information Trailer

This page is the last page of supplemental information for this competitive document. If you received this trailer page, all supplemental information has been received.

Note: Portions of the supplemental information provided may or may not contain page numbers. The total number of pages indicated on the cover page does not include the pages contained in this supplement.