

**REQUEST FOR QUOTATION
AMENDMENT 3**

RFQ NUMBER: ODM14001
DATE ISSUED: December 10, 2013

The State of Ohio, the Ohio Department of Medicaid (ODM) is requesting quotations for:

CASE MANAGEMENT AND COMPREHENSIVE ASSESSMENT SYSTEM

INQUIRY PERIOD BEGINS: December 10, 2013
INQUIRY PERIOD ENDS: ~~December 24, 2013~~ ~~*** January 6, 2014***~~ ***** January 31, 2014*****
OPENING DATE: ~~January 7, 2014~~ ~~*** January 21, 2014***~~ ***** February 18, 2014*****
OPENING TIME: ~~11:00 a.m.~~ ~~*** 1:00 p.m.***~~
OPENING LOCATION: 30 E. Broad Street, 39th Floor Columbus, OH 43215

This RFQ consists of the following Parts and Attachments, totaling 60 consecutively numbered pages.
Please verify that you have a complete copy.

Ohio is in various stages of implementing the program changes that comprise this reform effort which include, increasing care coordination for individuals who are dually eligible for Medicare and Medicaid, beginning the process of harmonizing HCBS waivers serving individuals with a NF level of care, modernizing Medicaid eligibility, and implementing health homes for individuals with severe and persistent mental illness. These program reforms result from Ohio's efforts to identify specific "hot spots" within Medicaid that, over time, have proven inefficient and fragmented and result in high costs and poor outcomes for the individuals we serve.

For the past two years, Ohio's Money Follows the Person (MFP), also known as the HOME Choice program, has been working with a large group of stakeholders to revise and reform the State's current Medicaid level of care (LOC) determination process. Work has centered on making short-term LOC process changes and clarifying policy and procedures. The next phase of LOC work is long-term reform of the current fragmented, paper-based LOC determination process.

Another component of this work is the development of a new assessment tool (the Level 2 assessment) that will be used to determine eligibility for an array of Medicaid programs serving individuals with a NF LOC. This work affords Ohio the opportunity to integrate the Balancing Incentive Program (BIP) core data set into the new tool as well as to develop the Level 1 screening tool that will be used by the BIP No Wrong Door/Single Entry Point Agencies.

ODM also recently initiated a Medicaid Eligibility Modernization Project to simplify client eligibility, streamline State and local responsibility for eligibility determinations, and modernize eligibility system technology. This significant reform is scheduled for implementation in 2014.

Calendar of Events

The following is an outline of the planned sequence of events, timing, due dates and materials that will be provided to Offerors pertaining to this RFQ. The State reserves the right to modify or adjust this calendar as appropriate.

All times listed are Eastern Standard Time (EST).

Event	Date
1. RFQ Distribution to Offerors	December 10, 2013
2. Inquiry Period Begins	December 10, 2013
3. Inquiry Period Ends	December 24, 2013 *** January 6, 2014 *** *** January 31, 2014 ***
4. Proposal/Quotation Due Date	January 7, 2014 *** January 21, 2014 *** *** February 18, 2014 ***
5. Anticipated decision and selection of Offeror	January 28, 2014 *** February 11, 2014 *** *** March 11, 2015 ***
6. Anticipated commencement date of work	March 4, 2014 *** March 18, 2014 *** *** April 14, 2014 ***

There are references in this RFQ to the Quote due date. Unless it is clearly provided to the contrary in this RFQ, any such reference means the date and time (Columbus, Ohio local time) that the responses are due and not just the date.

PART THREE: GENERAL INSTRUCTIONS

The following sections provide details on how to get more information about this RFQ and how to respond to it. All responses must be complete and in the prescribed format.

Contacts.

The following person will represent the State during the RFQ process:

Procurement Representative:

Margaret Owens
Acquisition Analyst
30 E. Broad Street, 39th Floor
Columbus, OH 43215

During the performance of the Work, a State representative (the "Work Representative") will represent the Ohio Department of Medicaid and be the primary contact for the Work. The State will designate the Work Representative after the Contract award.

Inquiries.

Offerors may make inquiries regarding this RFQ any time during the inquiry period listed on the RFQ cover sheet. The State may not respond to any improperly formatted inquiries. The State will try to respond to all inquiries within 24 hours, excluding weekends and State holidays. The State will not respond to any inquiries received after 8:00 am on the inquiry period end date. The State may extend the proposal due date.

To make an inquiry, Offerors must use the process outlined below.

- Access the State Procurement Web site at <http://procure.ohio.gov/>.
- From the Navigation Bar on the left, select "Find It Fast".
- Select "Doc/Bid/Schedule #" as the Type.
- Enter the RFQ number found on the first page of this RFQ (the RFQ number begins with "ODM").
- 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
 - Representative's e-mail address
- Type the inquiry in the space provided, including:
 - A reference to the relevant part of this RFQ
 - The heading for the provision under question
 - The page number of the RFQ where the provision can be found
 - Click the "Submit" button

An Offeror submitting an inquiry will receive an immediate acknowledgement that the State has received the inquiry as well as an e-mail acknowledging receipt. The Offeror will not receive a personalized response to the question nor notification when the State has answered the question.

Offerors may view inquiries and responses on the State's Procurement Web site by using the "Find It Fast" feature described above and by clicking the "View Q & A" button on the document information page.

All questions must be submitted by 8:00 am on ~~December 24, 2013~~ ~~*** January 6, 2014 ***~~ ***** January 31, 2014 *****. Questions submitted after this time will not receive a response from the State.

Quotation Submittal

On or before the due date, each offeror must submit a technical section and a cost section as part of its total quote. The offeror must submit the technical section as a separate package from the cost section, and each section must be submitted in its own separate envelope.

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Offerors must submit ~~five (5)~~ **ten (10)** complete (one original and ~~four~~ **nine** copies), sealed and signed copies of its quotation and each quotation must be clearly marked "Case Management and Comprehensive Assessment System – Technical Response" on the outside of its envelope along with Offerors name. The envelope with the cost section also must be sealed and contain three complete and signed copies of the cost section of the Proposal (one original and two copies) each cost section must be clearly marked "Case Management and Comprehensive Assessment System – Cost Response" on the outside of its envelope along with Offerors name. .

Each technical response must contain an electronic copy of everything contained within the technical proposal on CD-ROM in Microsoft Word, Microsoft Excel, Microsoft Project 2002 or PDF format, as appropriate. If there is a discrepancy between the hard copy and the electronic copy of any section of the Quote, the hard copy will control, and the State will base its evaluation of the Offeror's quote on the hard copy.

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

Quotations MUST be submitted to the State's Procurement Representative:

Margaret Owens
Acquisition Analyst
30 E. Broad Street, 39th Floor
Columbus, OH 43215

The State may reject any quote or unsolicited modifications it receives after the deadline. An Offeror that mails its quote must allow for adequate mailing time to ensure its timely receipt. Offerors also must allow for potential delays due to increased security. The location accepts packages between the hours of 7:30 A.M. to 5:00 P.M. Monday through Friday, excluding State Holidays. No deliveries will be accepted before or after these hours without prior arrangements. Offerors must allow sufficient time since the State may reject late quotes regardless of the cause for the delay.

Each Offeror must carefully review the requirements of this RFQ and the contents of its Quote. Once opened, Quotes cannot be altered or withdrawn.

PROPRIETARY INFORMATION

All quotations and other material submitted will become the property of the State and may be returned only at the State's option. Proprietary information should not be included in a quotation or supporting materials because the State will have the right to use any materials or ideas submitted in any quotation without compensation to the Offeror. Additionally, all quotations will be open to the public after the contract has been awarded.

WAIVER OF DEFECTS

The State has the right to waive any defects in any quotation or in the submission process followed by a Offeror. But the State will only do so if it believes that it is in the State's interest and will not cause any material unfairness to other Offerors.

REJECTION OF QUOTATIONS

The State may reject any quotation that is not in the required format, does not address all the requirements of this RFQ, 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 RFQ, reject all the quotations, and seek to do the work through a new RFQ or other means.

ATTACHMENT ONE: EVALUATION CRITERIA

Scored Criteria.

In the technical evaluation phase, the State will rate the technical merits of the Proposals based on the following requirements and the weight assigned to each requirement

Scored Criteria	Weight	Does Not Meet	Partially Meets	Meets	Exceeds	Greatly Exceeds
Offeror Scored Criteria						
The State desires to leverage existing State investments in the Microsoft Dynamics CRM Architecture by favorably weighting the evaluation of future investments toward solutions which use this platform. Offerors who demonstrate benefits to the State in the areas of economics of scale, local internal knowledge, market flexibility, and license costs, by utilizing the Microsoft Dynamics CRM Architecture will be scored higher.	405	0	3	5	7	9
The offeror or subcontractor must have a minimum of two projects configuring, deploying and hosting systems in support of Medicaid Service organizations at the State or Federal level.	140	0	3	5	7	9
The offeror must have a minimum of one project providing a Health and Human Services related case management solution that is similar in scope and complexity to this project.	70 ***91***	0	3	5	7	9
Proposed Solution						
Business Requirements Response	Weight	Does Not Meet	Partially Meets	Meets	Exceeds	Greatly Exceeds
Intake	12	0	3	5	7	9
Catalog of Questions	15	0	3	5	7	9
Results Algorithms	18	0	3	5	7	9
Comprehensive Assessment	18	0	3	5	7	9
Authorization and Billing	13	0	3	5	7	9
Service Planning	18	0	3	5	7	9
Consumer Portal	11	0	3	5	7	9
Provider Portal	11	0	3	5	7	9
Case Assignment	10	0	3	5	7	9
Records	11	0	3	5	7	9
Incident Management	10	0	3	5	7	9
Provider Enrollment	10	0	3	5	7	9
Provider Sanctioning	10	0	3	5	7	9
Compliant Processing	10	0	3	5	7	9
Medicaid Fraud Referral	10	0	3	5	7	9
Hearings	10	0	3	5	7	9
Dashboards, Reporting and Quality Improvement	13	0	3	5	7	9

Technical Requirements Response	Weight	Does Not Meet	Partially Meets	Meets	Exceeds	Greatly Exceeds
SOA	12 ***16***	0	3	5	7	9
Interoperability	12 ***20***	0	3	5	7	9
Performance	9 ***11***	0	3	5	7	9
Regulatory and Policy	11 ***14***	0	3	5	7	9
Access and Usability	10	0	3	5	7	9
Data Management	11	0	3	5	7	9
Security	10 ***12***	0	3	5	7	9
Reporting	11 ***20***	0	3	5	7	9
Workflow and Rules	11	0	3	5	7	9
Portal	10 ***12***	0	3	5	7	9
DBMS	9 ***11***	0	3	5	7	9
Transaction Monitoring and Logging	8 ***9***	0	3	5	7	9
Documents, Files and Attachments	8 ***9***	0	3	5	7	9
Identity Management	8 ***9***	0	3	5	7	9
Implementation Work Plan	20 ***48***	0	3	5	7	9
Project Management Plan	15 ***36***	0	3	5	7	9

Price Performance Formula. The evaluation team will rate the Proposals that meet the Requirements based on the following criteria and respective weights.

CRITERIA	PERCENTAGE		
Preferred Platform	15% ***0%***	Total Non-Cost Criteria Weight 70%	100%
Medicaid Experience	20%		
Case Management Experience	10% ***13%***		
Work Plan	5% ***12%***		
Business Requirements Response	30%		
Technical Requirements Response	20% ***25%***		
One Time Costs / Build and Configure	50%	Total Cost Criteria Weight 30%	
Monthly Operations Service Costs	50%		

To ensure the scoring ratio is maintained, the State will use the following formulas to adjust the points awarded to each Offeror.

The Offeror with the highest point total for the Technical Proposal will receive 700 points. The remaining Offerors will receive a percentage of the maximum points available based upon the following formula:

Technical Proposal Points = (Offeror's Technical Proposal Points/Highest Number of Technical Proposal Points Obtained) x 700

Cost Summary Points = (Lowest Total Evaluation Price/Offeror's Not-To-Exceed Fixed Price) x 300

Total Points Score: The total points score is calculated using the following formula:

Total Points = Technical Proposal Points + Cost Summary Points

~~ATTACHMENT FIVE: OFFEROR PROFILE SUMMARY~~

~~OFFEROR/SUBCONTRACTOR REQUIREMENTS~~

~~**Requirement:** The State desires to leverage existing State investments in the Microsoft Dynamics CRM Architecture by favorably weighting the evaluation of future investments toward solutions which use this platform. Offerors who demonstrate benefits to the State in the areas of economics of scale, local internal knowledge, market flexibility, and license costs, by utilizing the Microsoft Dynamics CRM Architecture will be scored higher.~~

~~Offerors must indicate if their proposed solution utilizes Microsoft Dynamics CRM.~~

~~Circle One.~~

Yes	No
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~~If the solution includes the Microsoft Dynamics CRM architecture, identify the components and functionality each component will provide:~~