

**ATTACHMENT E**  
**RLB#: R-89-07-0735**  
**Technical Proposal Score Sheet**

**PHASE I: Initial Qualifying Criteria**

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 **shall be disqualified from consideration.**

ITEM	PROPOSAL ACCEPTANCE CRITERIA	RLB Sec. Ref.	YES	NO
1	Was the proposal received by the deadline as specified in Section III. and IV of the RLB?	III. / IV.		
2	Did the vendor submit seven (7) copies of their Technical Proposal along with their Cost Proposal (in a separate sealed envelope) labeled: “NOTE: DO NOT OPEN. COST PROPOSAL ENCLOSED FOR MEDICAID TPL/CA SERVICES, RFP#: R-89-07-0735 SUBMITTED BY [VENDOR’S NAME HERE]. ”?	XI.		
3	Does the vendor’s proposal include all required affirmative statements and certifications, signed by the vendor’s responsible representative, as described in Attachment A and Attachment C?	XII B.1.		
4	Included in those certifications, has the vendor stated 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?	XIV. L. XIV. M.		
5	Has ODJFS’ review of the Auditor of State website verified that the vendor is not excluded from contracting with ODJFS by R.C. § 9.24 for an unresolved finding for recovery?	XIV. K.		
6	Does the vendor have a minimum of: a. Three (3) years experience performing third-party liability activities including cost avoidance for local, state or federal entities that administer a public healthcare program?	VI A. 1.		
	b. Three (3) years experience in determining private and commercial insurance policy plans, types of coverage and benefit verifications?	VI A. 2.		
	c. Three (3) years experience in securing agreements and performing data exchanges of eligibility or claim information with government or private companies?	VI A. 3.		
7	Has the vendor: a. Provided a client contact name, title, phone number, email address, company name, and mailing address and has included the same information for an alternate client contact, in the event ODJFS can not reach the primary contact?	VI B. 1.		
	b. Provided the name of the project where it obtained the mandatory experience?	VI B. 2.		
	c. Included each project’s beginning month and year and an ending month and year to show the length of time the vendor performed the work, not just the length of time the vendor was engaged by the reference?	VI B. 3.		
	d. Provided a description of the related service performed and reiterated the experience being described, including the capacity in which the work was performed and the role of the vendor on the project?	VI B. 4.		
	e. Provided a description of how the related service shows the vendor’s experience, capability, and capacity to develop the deliverables and to achieve this project’s milestones?	VI B. 5.		

**PHASE II: Criteria for Scoring of Technical Proposal**

Qualifying technical proposals will be collectively scored by a Proposal Review Team (PRT) appointed by ODJFS, Office of Ohio Health Plans. 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 RLB, and assign the appropriate point value, as follows:

0	6	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 **500 points** (a score which represents that it “meets” all the evaluation criteria) out of a maximum of **636 points**, will be disqualified from further consideration, and its cost proposal will neither be opened nor considered. Only those vendors 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	RLB SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 6	Meets 8	Exceeds 10
<b>REQ. VENDOR INFO. &amp; CERTIFICATIONS</b>							
1	The vendor has included, properly completed and signed, the Req. Vendor Info. & Certifications as specified in the RLB.	XV. B.1. Attach. A	1				
<b>VENDOR QUALIFICATIONS</b>							
<b>MANDATORY VENDOR QUALIFICATIONS</b>							
2	The vendor has demonstrated a minimum of three (3) years experience performing third-party liability activities including cost avoidance for local, state or federal entities that administer a public healthcare program.	VII A.1.	2				
3	The vendor has demonstrated a minimum of three (3) years experience in determining private and commercial insurance policy plans, types of coverage and benefit verifications.	VII A.2.	2				
4	The vendor has demonstrated a minimum of three (3) years experience in securing agreements and performing data exchanges of eligibility or claim information with government or private companies.	VII A.3.	2				
<b>QUALIFICATIONS REFERENCES</b>							
5	The vendor has provided a client contact name, title, phone number, email address, company name, and mailing address and has included the same information for an alternate client contact, in the event ODJFS can not reach the primary contact.	VII B.1.	1				
6	The vendor has provided the name of the project where it obtained the mandatory experience.	VII B.2.	1				
7	The vendor has included each project's beginning month and year and an ending month and year to show the length of time the vendor performed the work, not just the length of time the vendor was engaged by the reference.	VII B.3.	1				
8	The vendor has provided a description of the related service performed and reiterated the experience being described, including the capacity in which the work was performed and the role of the vendor on the project.	VII B.4.	1.5				
9	The vendor has provided a description of how the related service shows the vendor's experience, capability, and capacity to develop the deliverables and to achieve this project's milestones.	VII B.5.	1.5				
<b>ORG. EXPERIENCE &amp; CAPABILITIES</b>							
10	The vendor has provided at least two, but not more than four, projects of similar size and scope that demonstrates their expertise in providing third-party cost avoidance solutions in the past five (5) years from proposal submission date.	VII C. 1.	1.5				
11	The vendor has provided at least two, but not more than four, projects of similar size and scope that demonstrates their expertise in providing private and commercial insurance solutions in the past one (1) year from proposal submission date.	VII C. 2.	1.5				
<b>STAFF EXPERIENCE &amp; CAPABILITIES</b>							
12	The vendor has identified and assigned a Project Manager (a designated key staff person) in a position as liaison between the vendor's home base of operations and ODJFS. The project manager must present a resume with evidence of the following minimum qualifications: a. A minimum of two (2) successful TPL/CA project implementations in the last five (5) years;	VII D.1.a.	1				
13	b. Experience as a Project Manager where Medicaid and Medicare policies and procedures were utilized in at least one (1) project in the past five (5) years;	VII D.1.b.	1				
14	c. A minimum of three (3) years technical experience and knowledge utilizing system solutions and software where data entry, data exchange, database creation/update, claims processing, professional productivity tools, project reporting, determination of private and commercial insurance company policies and validation of benefits activities were involved; and,	VII D.1.c.	1				
15	d. A minimum of three (3) years experience in determining private and commercial insurance company policies and verifying benefits.	VII D.1.d.	1				
16	The vendor has identified, by position and by name, those additional staff the vendor considers key to the project's success.	VII D.2.	1				
17	The vendor has included resume(s), education, experience, and list of related published works of the Project Manager and all key personnel for this project (including any subcontractors), and specifically listed their qualifications and experience (in the areas described in Sec. VII., Scope of Work and Sec. VIII., Specifications of Deliverables of this RLB) of key staff expected to work on the project.	VII D.3.	1				

ITEM #	EVALUATION CRITERIA	RLB SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 6	Meets 8	Exceeds 10
<b>SCOPE OF WORK</b>							
18	The vendor has provided a plan to retrieve and validate all existing data in the TPL Master File and provide weekly to ODJFS (in an electronic database format) a listing of all needed updates, additions or terminations.	VIII. A.	2				
19	The vendor has provided a plan to locate and validate new third party insurance coverage and provide a listing of all new records to ODJFS weekly in an electronic database format.	VIII. B.	2				
20	The vendor has provided a plan to develop a solution with features and functionality that provides the ability for county caseworkers to query a database in real-time in order to obtain other insurance information for new Medicaid enrollees in which the database environment and product deployed in support of the solution must be HIPAA compliant.	VIII. C.	2				
21	The vendor has provided a plan to maintain a file of all insurance carriers licensed to do business in the State of Ohio.	VIII. D.	1.5				
22	The vendor has provided a plan to either develop or utilize a current self-supported system to store third party information gathered from data exchanges and provide appropriate access to ODJFS.	VIII. E.	2				
23	The vendor has provided a plan to maintain a reasonable accuracy rate for all eligibility file data added to MMIS and ensure, at minimum, that: a. Records should be sent weekly to the designated ODJFS Contract Manager; b. A random sampling verification of all identified records will be done by ODJFS staff to ensure accuracy. Verification of newly identified records will be done within 10 business days of receipt; c. The last week of the month will be designated as systems wrap-up week. This will allow for final verification prior to invoicing for the previous month's identified records; d. Records should continue to be sent; e. Validation of records sent during the last week of each month will take place the first week of the following month; and, f. Upon conclusion of validation, the selected vendor may then bill for verified records that were previously mutually agreed upon.	VIII. G.	3				
24	The vendor has provided a plan to maintain validation of provided eligibility records; and ease of tracking documents.	VIII. H. a./b.	2				
25	The vendor has provided a plan for adjustment of overall Work cost basis; and, b. Re-engineering of solution to correct inconsistencies by the selected vendor at the selected vendor's cost.	VIII I. a./b.	2				
<b>SPECIFICATIONS OF DELIVERABLES</b>							
26	The vendor has provided a plan to secure new agreements and sustain existing agreements with government agencies and private companies for the execution of exchanges of data to determine the legal liability of third parties as required in the CFR Title 42 Volume 3 and is to be gathered on a daily basis from insurance carriers and shared with ODJFS.	X. A.	2				
27	The vendor has provided a plan to obtain and verify data for an effective and valid cost avoidance process as required in the CFR, Title 42 Vol. 3.	X. B.	2				
28	The vendor has provided a plan to check availability of third party insurance coverage prior to payment of the claim by Medicaid and update coverage information on the TPL Master File.	X. C.	2				
29	The vendor has provided a plan to provide weekly verified TPL Cost avoidance data, including Medicare data, for submission to ODJFS contracting Medicaid MCPs.	X. D.	2				
30	The vendor has provided a plan to retrieve and validate all existing data in the TPL Master File and provide weekly to ODJFS in an electronic database format, a listing of all needed updates, additions or terminations.	X. E.	2				
31	The vendor has provided a plan to locate and validate new third party insurance coverage and provide weekly to ODJFS a listing of all new records in an electronic database format.	X. F.	2				
32	The vendor has provided a plan to submit valid cost avoidance records in an electronic format at minimum on a weekly basis to ODJFS. Updates to the TPL Master File must contain the following information at a minimum: 1. Policy Holder name; 2. Policy Holder social security number; 3. Policy and Group numbers; 4. Insurance carrier code that corresponds to MMIS carrier file; 5. Begin and end date(s) of coverage; and, 6. Service Type codes of coverage that will correspond to MMIS codes to be able cost avoid against proper claims, e.g., Dental, Rx, Vision, Inpatient, etc.	X. G.	2.5				
33	The vendor has provided a plan to provide detailed reports monthly in an electronic format of all TPL activities to ODJFS.	X. H.	2				
34	The vendor has provided a plan to develop a solution with features and functionality that provides the ability for county caseworkers to query a database real-time to obtain other insurance information for new Medicaid enrollees and ensures that the database environment and product deployed in support of the solution is HIPAA compliant.	X. I.	2.5				

ITEM #	EVALUATION CRITERIA	RLB SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 6	Meets 8	Exceeds 10
35	The vendor has provided a plan to maintain a file of all insurance carriers licensed to do business in the State of Ohio. The vendor must provide, in an electronic format, new and updated carrier information upon receipt. The update should include the following: 1. Carrier name and identifier [NAIC and/or NPI]; 2. Technical entity contact information, including phone number; 3. Corporate contact name, address, and telephone number; 4. Claims submission address and phone number; 5. Indicators of participation in insurance disclosure, billing media (e.g., clearinghouses, trading partners, etc.) effective and end dates of activity; 6. Active/inactive status; and, Group and policy numbers and benefit packages supported by individual insurance carriers.	X. J.	1.5				
36	The vendor has provided a plan to develop or utilize a current self-supported system (which supports all specifications listed in Sec. X. K. 1-15 of the RLB) to store third party information gathered from data exchanges and provide appropriate access to ODJFS.	X. K.	2				
<b>ADMIN. STRUCTURES-PROP. WORK PLAN</b>							
37	The vendor has provided a technical approach and work plan to be implemented.	IX. A.	1				
38	The vendor has provided a status reporting procedure for reporting work completed, and resolution of unanticipated problems.	IX. B.	1				
39	The vendor has provided a timeline for each component of the scope of work and the overall project and including the staff hours for personnel involved.	IX. C.	.5				
40	The vendor has included a Table of Organization (including any subcontractors) which includes a chart specifying key management, administrative personnel and sub-contractor staff, and the percentage of time each key management person will devote to the project.	IX. D.	.5				
<b>Column Subtotal of "Partially Meets" points</b>							
<b>Column Subtotal of "Meets" points</b>							
<b>Column Subtotal of "Exceeds" points</b>							
<b>GRAND TOTAL SCORE:</b>							

Based upon the Grand Total Technical Score earned, does the vendor's proposal proceed to the Phase III evaluation of its Cost Proposal? (Vendor's Grand Total Technical Score must be at least 500 points.)

Yes \_\_\_\_\_ No \_\_\_\_\_ (If "No," Vendor's Cost Proposal will not be opened.)