

REQUEST FOR PROPOSALS

for

Short Term Data Entry

Passive Renewal Project

IDAHO HEALTH INSURANCE EXCHANGE

dba

YOUR HEALTH IDAHO

Project: Idaho Health Insurance Exchange - YHI

Response Date: By Friday, October 10, 2014

Passive Renewal
Data Entry RFP

October 2, 2014

CONTENTS

INTRODUCTION AND BACKGROUND..... 4

ADMINISTRATIVE 6

EVALUATION FACTORS FOR AWARD.....12

ATTACHMENT A:Contract Info16

ATTACHMENT B: Independent Contractor Agreement.....16

INTRODUCTION AND BACKGROUND

BACKGROUND

The Idaho Health Insurance Exchange doing business as Your Health Idaho (“YHI”) is seeking qualified and experienced respondents (“Respondent”) to submit a written response (“Proposal”) to this Request for Proposals (“RFP”) to provide data entry services (“Services”) to conduct Passive Renewal Data Entry for 2014 health plan enrollees (approximately 50,000 households or 80,000 individual lives). This RFP process is intended to solicit binding proposals from qualified candidates who have demonstrated an interest in performing these Services and have been deemed qualified to perform the work. This RFP process is expected to rapidly result in the selection by YHI of a Respondent to provide the Services and upon execution of the Contract Confirmation (attached as Appendix B) by both parties, to result in a binding agreement between YHI and Respondent (that Respondent is the “Passive Renewal Data Entry vendor”).

On March 23, 2010, the President signed into law the Patient Protection and Affordable Care Act (“PPACA”). On March 30, 2010, the Health Care and Education Reconciliation Act of 2010 was signed into law. These laws, collectively referred to as the Affordable Care Act, include laws designed to expand coverage, to provide more health care choices, to enhance the quality of care for all Americans, to hold companies more accountable, and to lower health care costs. Among these provisions is the opportunity for each state to establish an American Health Benefit Exchange (“Exchange”) by January 1, 2014, that would 1) facilitate the purchase of qualified health plans; 2) provide for the establishment of a Small Business Health Options Program (“SHOP Exchange”) designed to assist qualified employers in facilitating the enrollment of their employees in qualified health plans offered in the SHOP Exchange; and 3) meet other requirements specified in PPACA.

Idaho received a Federal grant to begin establishment activities for an Idaho health benefit Exchange.

An independent Board representing key stakeholders has been appointed by the Governor of the State of Idaho, and has approved the creation of Your Health Idaho to oversee the implementation and ongoing operations of the Idaho State Benefit Exchange for insurance policies effective January 1, 2015.

The mission of YHI is to establish the Idaho State Health Insurance Exchange: a new online marketplace for Idaho where individuals and small businesses can search for, compare and make an informed decision about the health insurance coverage that is best for them and their families leading to a significant number of newly insured Idahoans. Additionally, YHI will provide individuals and small businesses access to tools, easy to understand information and expert resources that will empower them to use YHI to protect their long-term economic interests, the wellbeing of their families and, in the case of businesses, their employees.

YHI has awarded the design, development, implementation and ongoing provision of the software system comprising the Idaho State Benefit Exchange to Vimo, Inc., dba Getinsured.com

("GetInsured"). YHI has engaged Accenture LLP ("Accenture") to provide program management office and consulting services to YHI. YHI has engaged First Data Government Solutions, L.P. ("First Data") to provide independent verification and validation services to YHI. The Idaho Department of Health and Welfare is providing eligibility and verifications services for YHI.

STATEMENT OF WORK (SOW)

This Section sets forth the scope of Services to be provided. Proposals may include additional Services as long as the cost for such additional Services is separately presented.

This is a short term contract. The Passive Renewal Data Entry Vendor will be responsible for manually inputting data provided by YHI in order to ensure all 2014 health insurance policies holders can be re-enrolled in their current plan. The timeline for this project is expected to commence on or around October 24, 2014 for ramp-up and training activities, with data entry commencing on November 10, 2014 to be completed around December 15, 2014.

Data will be supplied by YHI and must be imputed and/or validated against the data stored in the YHI system by following YHI data entry protocol and procedure. Quality assurance checks must be followed to ensure the data is entered accurately and affords consumers the opportunity to renew their insurance policies without taking direct action on the Idaho Exchange.

Passive Renewal Data Entry Vendor is responsible for providing work space and technology to complete project. Passive Renewal Data entry Vendor must provide on-shore services and preferably within the state of Idaho.

The Passive Renewal Data Entry Vendor must follow all security and privacy rules as set forth by YHI including background checks for all personnel accessing records and data during this project. In addition the Passive Renewal Data Entry Vendor must have operational protocols to securely work with PII.

Respondent will provide Services including all project governance for the performance of Services, and overall project management for the completion of data entry. Respondent agrees that all material policy and operational decisions are subject to YHI approval. The Passive Renewal Data Entry Vendor is not authorized to act on behalf of or commit YHI. Respondent will manage the process to meet the deadlines required by YHI.

The Services should include, but are not limited to, the following:

1. Data Entry Staff Personal Background checks to be submitted to YHI
2. Data Entry Staff Onboarding and Training
3. Data Entry for Passive Renewal of approximately 50,000 households.
4. Quality Control Procedures and Reports, per YHI requirements
5. Corrective action/process improvement if enrollment accuracy reports do not meet YHI standard.

DELIVERABLES

The following Deliverables are required. The Proposal may include additional proposed Deliverables:

Deliverable #	Deliverable Name	Description
1	Data Entry	Coordinate data entry to ensure accurate renewal of insurance policies for all individuals enrolled through YHI during 2014
2	Privacy and Security Certification	Certification that all procedures follow YHI Privacy and Security Policies to protect individual data.
3	Quality Assurance	Regular Quality Assurance reviews to ensure accuracy of data input (e.g., daily metrics and reports)
4	Daily Status Reports	Daily status report(s) indicating accomplishments, any issues, key progress metrics (e.g., records completed), and any findings of QA reviews

ADMINISTRATIVE

PROPOSAL INQUIRIES

Potential Respondents may make inquiries regarding this RFP any time during the inquiry period listed below. YHI may not respond to any improperly formatted inquiries. YHI will not respond to any inquiries received after 5:00 PM on the inquiry period end date. YHI may extend the proposal due date.

To make an inquiry, vendors can send an email to RFP@YourHealthIdaho.org. Answers will be addressed in writing and posted to the YHI website (www.yourhealthidaho.org).

DUE DATES

All Proposals are due by 5:00 pm, MT, on Monday, October 10, 2014. Any Proposal received at the designated location after the required time and date specified for receipt may be considered late and non-

responsive. YHI reserves the right to not evaluate any late Proposal. YHI reserves the right to revise the due date for all Proposals by notice posted at www.yourhealthidaho.org.

SCHEDULE OF EVENTS

Event	Date All times listed are Mountain Time (MDT)
1. RFP Distribution to Potential Respondents	October 2, 2014
2. Questions from Potential Respondents Due	5:00 PM MDT, October 6, 2014
3. Responses to Potential Respondents Due (Posted to YHI website.)	1:00 PM MDT, October 8, 2014
4. Proposal Due Date	5:00 PM MDT, October 10, 2014
5. Target Date for Review of Proposal	October 13-14, 2014
7. Anticipated Decision and Selection of Vendor	October 15, 2014
8. Anticipated Commencement Date of Work	October 24, 2014

PROPOSAL SUBMITTAL

Each Respondent must submit signed copies of its Proposal to RFP@YourHealthIdaho.org. The Proposal is a binding offer to contract with YHI that remains open and irrevocable for a period of 60 days after submission. The Proposal must follow this format:

- Cover Letter (include phone and e-mail contact)
- Respondent Information:
 - Respondent References (1 minimum)
 - Respondent Business History
- Proposed Charges Including Hourly Rates and Any Fixed Price for All or a Portion of the Proposal
- Deliverables
- Deliverable Timeline
- Names and/or profiles of key staff members (e.g., Project Lead / Project Manager)
- Conflict of Interest Statement
- Payment Address
- Proof of Insurance
- W-9 Form
- Signed Independent Contractor Agreement

Additionally, please send 2 hard copies of the Proposal and a thumb drive of the Proposal to:

Your Health Idaho
 Jody Olson, Director of Communications
 1010 West Jefferson Street
 Suite 104
 Boise, ID 83702

NOTE: The 2 hard copies and thumb drive may be submitted by EOD Friday, October 10, 2014. Electronic submissions (PPDF format) to rfp@yourhealthidaho.org are subject to the October 10, 5:00 MDT deadline please.

Restrictions on Communications

From the issue date of this RFP until the Passive Renewal Data Entry Vendor is selected, Respondents and their representatives are not allowed to communicate with any YHI staff, Board members, staff of any agency of the state of Idaho, or other involved parties regarding this procurement except the RFP Issuing Officer, Jody Olson, or her designee. For violation of this provision, YHI reserves the right to reject any Proposal.

Disposition of Proposals

All Proposals received by YHI shall upon receipt become and remain the property of YHI. YHI shall have the right to use all concepts contained in any Proposal and this right will not affect the solicitation or rejection of any Proposal.

Release of Claims

By submitting a Proposal, the Respondent agrees that it will not bring any claim or cause of action against YHI based on: 1) any misunderstanding concerning the information provided herein; 2) concerning YHI's failure, negligent or otherwise, to provide the Respondent with pertinent information as intended by this RFP; or 3) YHI's decision to select a different party as the Passive Renewal Data Entry Vendor.

Subcontractors

In the event a Proposal is submitted that involves more than one organization, one organization shall be designated as the Respondent. All other participants shall be designated as subcontractors. All subcontractors shall be identified by name and for each proposed subcontractor, background information along with a description of the functions or tasks the subcontractor(s) would perform under this RFP must be included consistent with instructions found elsewhere in this RFP. The Respondent shall be wholly responsible for the entire performance whether or not subcontractors are used. The project leader (Project Manager) shall be an employee of the Respondent and meet all the relevant requirements.

The Respondent must acknowledge a binding agreement between the Respondent and any subcontractors has been executed. YHI reserves the right to review any subcontracting agreements.

Amendment to this RFP

YHI reserves the right to amend this RFP at any time. Amendments prior to the deadline for Proposal submissions will be posted to YHI's website at yourhealthidaho.org. It is the responsibility of the

Respondent to monitor the website for amendments and other communications from the Issuing Officer.

As part of the cover letter included with the Proposal, the Respondent shall acknowledge receipt of amendments, if any, to the RFP by identifying all amendment numbers and dates of posting.

Withdrawals

Prior to the submission deadline for the Proposal, an already submitted Proposal may be withdrawn by the Respondent by submitting a written request for its withdrawal to YHI, signed by the Respondent. Transmission of the written request via email is acceptable.

A Respondent may submit an amended Proposal before the submission deadline for Proposals. Such amended Proposal must be a complete replacement for a previously submitted Proposal and must be clearly identified as such in the Transmittal Letter of the amended Proposal. YHI will not merge, collate, or assemble Proposal materials.

Unless requested by YHI, no other amendments, revisions, or alterations to Proposals will be accepted after the submission deadline for Proposals, except as stated in this RFP or any amendment thereto.

Cancellation of the RFP

The RFP may be cancelled and any or all Proposals may be rejected in whole or in part, when it is determined to be in the best interest of the YHI or the State of Idaho. YHI shall not be liable for any costs, expenses, loss of profits, or damages whatsoever incurred by the Respondent in the event this RFP is cancelled or a Proposal is rejected.

Additional Materials and Documentation

Upon request from YHI, each Respondent shall submit any additional materials and documentation reasonably required by YHI in its evaluation of the Proposal.

Acceptance of Proposals

All Proposals properly submitted will be accepted by YHI. However, YHI reserves the right to request necessary amendments from a Respondent, reject any or all Proposals received, or cancel this RFP, according to the best interests of YHI and the residents of the state of Idaho.

YHI also reserves the right to waive minor irregularities in Proposals, providing such action is in the best interest of YHI. In the event YHI waives any minor irregularity in any Proposal, such waiver shall in no way modify the requirements of this RFP or excuse the Respondent from full compliance with the specifications of this RFP nor excuse the Passive Renewal Data Entry Vendor from any contract requirement. At the discretion of YHI, YHI may contact the Respondent to clarify irregularities or provide missing requirements. The Respondent is required to submit clarifications or missing requirements with a turnaround time to be determined by YHI.

YHI reserves the right to exclude any and all non-responsive Proposals from any consideration under this RFP.

Proposal Opening and Inspection

During the Proposal evaluation and award recommendation period, Proposals shall not be available for inspection. Proposals shall not be opened publicly, but shall be opened in the presence of two or more individuals selected by YHI. The register of Proposals and Proposals shall be open to public inspection after a Passive Renewal Data Entry Vendor has been selected and YHI and the selected Vendor have entered into a contract.

Irregular Proposals

Proposals may be considered irregular and rejected for the failure to comply with the instructions herein or demonstrating a failure to comply with applicable law.

Proposal Considerations

Each Proposal shall remain a valid Proposal for 60 days from the Proposal due date.

Proposals that are submitted in a timely manner and meet the mandatory submittal requirements of this RFP will be reviewed and evaluated in accordance with this RFP.

By responding to this RFP, each Respondent acknowledges that YHI is working under significant time constraints and may or may not have the resources to provide a full and complete evaluation of every proposal received in response to this RFP. In that regard, YHI reserves the right, if deemed necessary and in its sole discretion, to conduct an initial review of all Proposals for the purpose of establishing a list of qualified semi-finalists. The initial review will be based on factors that are consistent with the evaluation criteria outlined below. In such an event, YHI will then move forward with a complete evaluation of those proposals. YHI will not be obligated to disclose the list of semi-finalists to any Respondent.

A Proposal Review Team will be charged with evaluating proposals based on the criteria set forth below. During the evaluation process, YHI may contact a Respondent for the purpose of obtaining clarification of its Proposal. YHI may, at its discretion, select finalists to provide a presentation to the Proposal Review Team either in person or remotely.

Award

Notification of intended contract award, if any, shall be provided to the selected Respondent on or about the date specified in this RFP. Such notification shall be subsequently confirmed in writing. The contract award is subject to availability of funding. Until YHI returns a countersigned Contract Confirmation and Independent Contractor Services Agreement, there is no binding agreement and

YHI retains the freedom to determine how to proceed, notwithstanding any notification of intended contract award it may have provided.

Neither YHI nor the State of Idaho are liable for any work, costs, expenses, loss of profits, or any damages whatsoever incurred by the Passive Renewal Data Entry Vendor prior to the official starting date, and contract work prior to this date may result in no payment. YHI reserves the right to modify this policy; any modification will be made in a written statement and signed by both YHI and the Passive Renewal Data Entry Vendor.

Contract Negotiation Process

Upon completion of the evaluation process, YHI may select one Respondent to be the Passive Renewal Data Entry Vendor, based on the evaluation findings and other criteria deemed relevant for ensuring that the decision is in the best interest of YHI. In the event that for any reason YHI does not complete the contract with the selected Respondent within three (3) days of such selection, YHI reserves the option of negotiating with another Respondent.

Protest Policy and Procedures

Respondents who submit Proposals in response to this RFP may protest the award of the contract resulting from this RFP. A Notice of Intent to Protest must be made in writing to YHI, attention Executive Director, and must be received no later than two (2) working days from the notice of non-award. If no such Notice of Intent to Protest is timely filed, the Respondent forgoes its right to pursue a protest.

A Protest Notification must be made in writing to the Executive Director and must be received no later than five (5) working days from the notice of non-award. The Protest Notification must contain specific grounds for the protest. Supporting documentation must be included with the protest. A protest must state all grounds upon which the protesting party asserts that the solicitation or award was improper. Issues not raised by the protesting party in the protest are deemed waived. A protest that is incomplete or not submitted within the prescribed time limits will be summarily dismissed.

Only the following are acceptable grounds for protest:

- Failure to follow YHI procedures established in this RFP or YHI rules of procurement
- Errors in computing scores which contributed to the incorrect selection of a Respondent
- Bias, discrimination, or conflict of interest on the part of an evaluator

Disallowed grounds include:

- Evaluator qualifications to serve on the Proposal Review Team
- The professional judgment of the Proposal Review Team
- YHI's assessment of its own needs regarding the RFP

EVALUATION FACTORS FOR AWARD

REQUIREMENTS

The following will be considered in determining the Respondent to be selected for this project, according to a standardized scoring methodology:

- Scope and completeness of Proposal
- Relevant experience
- Relevant skill level
- Proposed contractor rate(s) and charges
- Acceptance of terms of the independent contractor agreement set forth in Appendix B

The successful Respondent will provide a complete Proposal meeting the requirements of this RFP, which may also include additional Services appropriate for the scope and subject matter of the project. The successful Respondent will have demonstrated experience in data entry and privacy and security procedures. The successful Respondent will have an understanding of the Affordable Care Act (“ACA”), health insurance exchanges, healthcare regulations, insurance exchanges, insurance company and Medicaid information systems, and business operations, processes, and performance measurements. The successful Respondent will demonstrate a full understanding of YHI’s privacy and security requirements.

The successful Respondent will be required to pass a background check conducted by YHI, if requested. YHI also reserves the right to obtain and consider information from other sources concerning a Respondent, such as the Respondent’s capability and performance under other contracts.

Each Proposal is required to include a signed Contract Confirmation in the form attached as Appendix A and signed copies of the independent contractor agreement attached as Appendix B. Each Proposal may propose changes to the independent contractor agreement by submitting a signed copy marking the changes made and including an editable and unlocked Word version also marking such changes. Respondents are encouraged to make few or no changes, as the extent of changes will be a significant factor in determining the successful Respondent.

Each Proposal must include a minimum of one reference with contact information for each reference. Reference contacts must be from a client who managed or supervised you or your firm’s work or who had oversight responsibility for you or your firm’s performance for that work experience. The reference contact must be available to validate the experience provided on the dates specified in the resume. Include the following information for each reference:

1. Engagement name
2. Brief description of the engagement
3. Contact name and title
4. Contact phone numbers and email address

The Proposal should also propose the governance model and procedures to ensure a well-run project, including any expectations of the commitment and availability of resources from YHI, GetInsured, Accenture and any other entities outside the Respondent's own team. The Proposal should describe how Respondent would initially engage with YHI and its stakeholders to organize and perform this work.

The Services will comply with all applicable rules, standards and specifications of the State of Idaho, the federal government and other regulatory agencies. The successful Respondent to this RFP must be licensed, if applicable, qualified, and must have the demonstrated ability to provide similar services for other projects similar in size and complexity to the solutions project.

As much as is practical and to the extent allowed by Idaho and federal law, YHI requests that Respondents team with companies that have a significant presence in Idaho.

GENERAL INFORMATION

GENERAL TERMS

This RFP does not commit YHI to enter into an agreement, to pay any costs incurred in the preparation of this proposal or in subsequent negotiations, or to procure or contract for any Services. Each Proposal is submitted as an offer to contract with YHI that may be accepted by YHI by countersignature of the Contract Confirmation and the Independent Contractor Agreement, in the discretion of YHI, or YHI reserves the right to respond to any or all Respondents for their best and final offer, including guidance by YHI on those portions of the Proposal that it suggests be revised, and reserves the right to further negotiate with Respondents to achieve the best result for YHI.

RESERVATION OF RIGHTS BY YHI

The issuance of this RFP does not constitute an assurance by YHI that any contract will actually be entered into by YHI and YHI expressly reserves the right to:

- Waive any immaterial defect or informality in any Proposal or Proposal procedure.
- Reject any and all Proposals.
- Request additional information and data from any or all Respondents.
- Supplement, amend, or otherwise modify the RFP or cancel this request with or without the substitution of another RFP.
- Disqualify any Respondent who fails to provide information or data requested herein or who provides inaccurate or misleading information or data.
- Disqualify any Respondent on the basis of any real or apparent collusion or conflict of interest.
- Disqualify any Respondent on the basis of past performance on other projects, or being in arrears on existing contracts with the State of Idaho or having defaulted on a previous contract with the State of Idaho.

- Prior to the response time, YHI may meet with and consult with some or all of the potential Respondents to this request.
- YHI may negotiate with any Respondent to this RFP and shall have the sole discretion to choose the best combination of qualifications and price for the Project and Services.
- YHI shall have the sole discretion to select one, none or several different Respondents to provide the Services, or portions thereof, as described in this RFP.

By responding to this RFP, each Respondent agrees that any finding by YHI regarding any fact in dispute as to this RFP or the Proposals shall be final and conclusive except as provided herein.

EVALUATION

A Proposal Evaluation Team will evaluate and determine the individual and comparative merits of each of the Proposals received. It is the responsibility of the Respondent to ensure that its Proposal complies with this RFP, demonstrates qualifications, and provides the information requested. If the Respondent fails to provide any information requested in this RFP, such failure may result in either non-qualification of a particular category of service or rejection of the Proposal. The Proposal Evaluation Team may choose to interview some, none or all Respondents.

PROPRIETARY MATERIAL

YHI assumes no liability for disclosure of proprietary material submitted by Respondents. Proposal submittals may be considered public documents under applicable Idaho law except to the extent portions of the submittals are otherwise protected under applicable Idaho law. Any specific items of information that constitute trade secrets and which are included in a response to this RFP shall be segregated by Respondent from the other portions of the RFP response and labeled as such. Respondent shall not label an entire document as a “trade secret,” merely because a portion of that document is or may be a trade secret. If any trade secret information becomes the subject of a public records or other such request for production, YHI will notify the Respondent and, upon the execution of an agreement to defend and indemnify YHI, will allow the Respondent to address the public records or other request on behalf of YHI in the appropriate forum.

AGREEMENTS

Each Proposal must include signed copies of the following:

- A signed Contract Confirmation in the form attached as Appendix A
- The YHI independent contractor agreement attached as Appendix B, with any changes proposed by the Respondent marked clearly in the document signed (and Respondent must also submit an editable version in the form provided by Respondent).

PRICE PROPOSAL

The Proposal must include all fees and charges for the provision of Services. Respondents should provide a detailed breakdown of all fees and costs. At a minimum, respondents should include hourly rates for the performance of the Services that are commercially competitive for the level of

skill and experience of each category of personnel proposed to provide Services. YHI encourages fixed price Proposals, setting a single price for all or portions of the Services.

QUESTIONS AND RESPONSE TIME

Questions or requests for clarification must be submitted by 5:00 PM Mountain Time, Monday, October 6, 2014. Questions and requests for clarification must be sent to RFP@YourHealthIdaho.org. No questions will be answered orally. Relevant questions and the corresponding answers will be made available to all proposers at the following event:

Answers to questions will be posted to YHI website by Wednesday, October 8, 2014.

Responses to this RFP must be received by 5:00pm, Mountain Time, Friday, October 10, 2014 and should be sent to RFP@YourHealthIdaho.org

ATTACHMENT A: CONTRACT CONFIRMATION

Respondent is required to submit a signed copy of the attached Contract Confirmation offering to contract with YHI on the terms of the Independent Contractor Agreement and NDA required to be submitted herein and the terms of this RFP and the Proposal submitted by the Respondent, which offer will remain open for sixty (60) days from submission by the Respondent.

ATTACHMENT B: INDEPENDENT CONTRACTOR AGREEMENT

Respondent is required to submit a signed copy of the attached independent contractor agreement, with any changes proposed by the Respondent marked in the copy it signs and submits. Respondents are encouraged not to make changes to this agreement, and changes to the agreement will be evaluated as set forth above.