



STATE OF OKLAHOMA
OKLAHOMA HEALTH CARE AUTHORITY

December 9, 1999

Dear Sir/Madam:

This notice is to inform you of the State's release of a Request For Information (RFI) for fiscal agent services. The State of Oklahoma would like to enter into a successful contracting relationship with a vendor to transfer, make necessary modification, implement, operate, and maintain a certified Medicaid Management Information System (MMIS). It is expected that the successful vendor will transfer, enhance, implement, operate and maintain an MMIS that will meet user's requirements and that the successful vendor will perform the following tasks (which are further detailed in the draft Invitation To Bid, ITB):

- o **Development and Implementation Task** - This task includes those subtasks required to successfully validate the Oklahoma requirements and the necessary modifications, to design, develop, test and implement the necessary modifications and enhancements and convert data from the current Oklahoma MMIS. Subtasks associated with this phase include:
 - Design Subtask,
 - Development/Testing Subtask,
 - Conversion Subtask,
 - Acceptance Testing Subtask, and
 - Implementation Subtask.

- o **Operations Task** - This task consists of those subtasks that the contractor shall perform to operate the Oklahoma MMIS and to perform their fiscal agent responsibilities. This task is comprised of 32 operational subtasks. Subtasks associated with this phase include such items as:
 - Recipient data maintenance,
 - Claims adjudication,
 - Case management, and
 - Customer service.

- o **Maintenance and Modification Tasks** – These tasks include the contractor responsibilities for maintaining and modifying the Oklahoma MMIS throughout the term of the contract. These Tasks describe how future changes to the system will be categorized, the minimum staffing requirements, the milestones that must be met within task activities, and how state and contractor responsibilities are split.
- o **Turnover Task** – This task includes the contractor activities required to successfully turn over the Oklahoma MMIS to another vendor at the expiration of the contract.

The State has issued the RFI (including the draft ITB) to allow potential vendors, as well as other state agencies, advocacy groups, providers, the general public, and so forth, to have input into the process and to raise concerns regarding the terms of the proposed contract. The input obtained from these parties may be used to shape the final ITB that will form the basis of the new contract between the State and the successful vendor. The State is confident that this process will enable the development of a final ITB that will most closely match the needs of the State with the capabilities of qualified vendors.

The majority of the fiscal agent requirements were developed by state staff with the intent that vendors and other interested parties will be able to understand and comment on them. These requirements are stated in Section 3 of the draft ITB. However, in other instances, it was not possible to fully develop the requirements. This was due to uncertainty over the future, inability to come to final decisions regarding which options to implement and resulted in the desire to obtain input from potential vendors and other interested parties. To address these issues and to provide a forum for feedback, we have developed an 'Issues Document' which lists these issues. The Issues Document forms an integral part of and is included with the RFI.

An electronic version of the RFI document is published on the Agency's Internet site in Microsoft Word '97 format at:

<http://www.ohca.state.ok.us/technical/contracts/RFIs/>.

***Take Note:* Section 3 of the Draft ITB has been divided into two parts in order to facilitate its use. Both of these files will display a message when opened in MSWord indicating that the file may have been corrupted. There will be further instructions to copy and paste the contents of the file to a new document. If you want to preserve the formatting of the document, this instruction should not be followed. Instead, continue to open and use the document.**

The RFI document is comprised of the following items:

1. This Cover Letter with the attached RFI Response Form & Instructions
2. RFI Issues Document
3. Draft ITB Cover and Section Dividers

4. Draft ITB Table of Contents
5. Draft ITB Section 1 - INTRODUCTION
6. Draft ITB Section 2 - DESCRIPTION OF OKLAHOMA MEDICAID PROGRAM
7. Draft ITB Section 3 - SCOPE OF WORK – PART 1
8. Draft ITB Section 3 - SCOPE OF WORK – PART 2
9. Draft ITB Section 4 - BID SUBMISSION REQUIREMENTS
10. Draft ITB Section 5 - EVALUATION METHODOLOGY
11. Draft ITB Section 6 - CONTRACT TERMS AND CONDITIONS
12. Appendix A: Glossary of Terms and Acronyms
13. Appendix B: UNISYS and OHCA Architecture Environments
14. Appendix C: Procurement Library Contents
15. Appendix D: Open Change Order Listing
16. Appendix E: OHCA Organizational Chart
17. Appendix F1: Mandatory Requirements Checklist
18. Appendix F2: MMIS Requirements List
19. Appendix F3: Key to Discussion Points
20. Appendix F4: Modification Evaluation
21. Appendix G: Listing of Oklahoma Eligibility Populations
22. Appendix H: Pricing Sheets
23. Appendix I: *SoonerCare* Statistics
24. Appendix J: Eligibility Statistics
25. Appendix K: Claims Volume Statistics
26. Appendix L: Bid Certifications and Declarations

Interested parties are encouraged to take the opportunity to actively participate in the procurement process by thoroughly acquainting themselves with the applicable issues and system and operational descriptions/requirements. Potential vendors (and others) are encouraged to submit questions, comments, and, most importantly, to recommend solutions. In order for a response to be considered, it must be received by 10:00 a.m. CT on December 23, 1999. The State requests that for recommended solutions, information be provided on why the recommendation is the best approach. It is the State's intention to utilize the RFI process to alter the terms of the requirements of the ITB, where deemed appropriate by the State.

The following timeline is anticipated for the procurement process.

RFI/Procurement Timeline

EVENT	SCHEDULE
RFI Issued	December 9, 1999
Closing date and time for receipt of vendor responses to the RFI	10:00 a.m., CT, December 23, 1999
Estimate Release Date – ITB	April 5, 2000

EVENT	SCHEDULE
Mandatory Bidders' Conference	April 19, 2000 9:00 A.M. CT
Closing Date and Time for Receipt of Bids	June 9, 2000 2:00 P.M. CT
Notification of Intent to Award Contract	July, 2000
Contract Start Date (Estimate)	July, 2000
Fiscal Agent Operations Start Date	July 1, 2002

The State desires an honest and valuable dialogue with the vendor community and the State recognizes that a public dialogue might impact a vendor's competitive edge. Therefore, all responses to this RFI will become the property of the State of Oklahoma and, to the extent permitted by applicable law, will be kept confidential. The State will make every effort to protect from disclosure all submissions and discussion in response to this RFI. It is the State's position that the material received in response to this RFI is part of the overall MMIS procurement process and therefore will in no circumstances, be released prior to the award of the contract.

It is important to note that responding to the RFI is not mandatory. A vendor's inability to respond or desire not to respond to RFI issues will not preclude the vendor from further participation in the procurement process. However, to reiterate, it is important to the State for potential vendors and other interested parties to take this opportunity to actively participate in the process.

The State presents this opportunity to the vendor community and other interested parties in the belief that the final outcome will be a mutually beneficial contract and a resulting relationship that will be of the greatest possible benefit to the State, the provider community and to the clients who receive health care services.

Thank you for your anticipated participation in this process.

Sincerely,

Rolondo Davila
Contracts Administrator

To facilitate the analysis of responses, please use the enclosed RFI Response Form. Additional copies should be made as necessary. Please adhere to the following general guidelines when responding:

1. A separate form should be submitted for each topic addressed.
2. If you are commenting on a particular requirement in the draft ITB, please reference the applicable ITB section number(s) on the form.
3. If you are responding to an issue from the RFI Issues Document, please reference the issue number on the form.
4. General (non-specific) issues should be addressed utilizing the same form with an indication that it is a general issue.
5. Where issues may be interrelated, the State encourages those responding to indicate the relationship and the suggested course of action.

The RFI Response Form consists of the following sections, and should be completed according to instructions:

- **IDENTIFICATION OF RESPONDENT:** Enter requested identifying information.
- **RFI SECTION REFERENCE:** Cite the section number from the draft ITB or the issue number from the RFI Issues Document, or indicate that it is a general issue.
- **TYPE OF RESPONSE:** Indicate if the response relates to a requirement/issue that needs clarification, or a recommendation to modify the requirement, or a suggestion to pursue another course of action, or other.
- **SPECIFIC QUESTIONS/COMMENTS:** Please be precise and limit statements to the referenced section (unless addressing a general topic or if the topic is related to another section or issue).

All vendor responses to the RFI must be received by 10:00 a.m., CT, December 23, 1999. The State prefers that RFI responses be E-mailed, however, postal deliveries are also acceptable. All responses must be sent to the attention of Debra Johnson, Contracts Manager, CPO (telephone 405-522-7346).

E-mail Address: JohnsonD@ohca.state.ok.us

Postal Address: Debra Johnson, Contracts Manager, CPO
Oklahoma Health Care Authority
4545 N. Lincoln Blvd., Suite 124
Oklahoma City, OK 73105

NOTE: Hand delivered RFI responses are permissible by appointment only, and only with the prior approval of the Contracts Manager, CPO.

State of Oklahoma
MMIS - Request For Information

RFI RESPONSE FORM

Date: _____

Page Number: _____

Organization Name:	Address:	Phone:
Contact Person:		Fax:
Title:	Email:	

RFI Issue No. or ITB Section No.	S=Suggestion U=Unclear M=Modification O=Other	Comments