



Solicitation Addendum

Solicitation Number: 30-190465-DHB
Solicitation Description: External Quality Review Organization Services
Solicitation Opening Date and Time: June 21, 2019 by 2:00 PM ET
Addendum Number: 1
Addendum Date: May 20, 2019
Addendum Description/Purpose: Revision to the RFP
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NOTIFICATIONS AND INSTRUCTIONS:

1. Return one properly executed copy of this Addendum #1 with response. Failure to sign and return this Addendum #1 may result in the rejection of Offeror's proposal.
2. Carefully read, review, and adhere to all Department responses in this Addendum #1.

Revisions to RFP:

Attachment B: Technical Proposal is deleted in its entirety and replaced with the following:

ATTACHMENT B: TECHNICAL PROPOSAL

The Technical Proposal must address all requirements and specifications of this RFP. Offeror should limit responses to five (5) pages per question number, excluding samples, templates, or other requested documents, unless specified otherwise.

	Information Required and Questions
Question Number	Section V.A: Proposed Work Plan & Approach
1	<p>The Offeror shall provide an implementation plan which must include and address, at a minimum, the following:</p> <ul style="list-style-type: none">a. A comprehensive list of each task, subtask, and deliverable to meet the requirements of mandatory CMS Protocols 1, 2, and 3, as detailed in Section V. of the RFP. Offerors should propose a schedule and identify Key Personnel and any other business and technical owners. Offeror must detail its strategy and approach to work with and provide technical assistance to the PHPs in order to successfully meet the requirements of this RFP.b. A comprehensive list of each task, subtask, and deliverable to meet all other CMS Protocols and requirements, as detailed in Section V. of the RFP. Offerors should propose a schedule and identify Key Personnel and any other business and technical owners. Offeror must detail its strategy and approach to work with and provide technical assistance to the PHPs in order to successfully meet the other CMS Protocols and requirements of this RFP. <p>Offeror should limit its response to ten (10) pages.</p>

2	<p>The Offeror shall provide the following:</p> <p>Project Plan and Methodology for Scope of Services: The Offeror shall include a draft project plan and methodology to implement the Initial Project Plan, pursuant to Section V.A.2.b), which shall:</p> <ul style="list-style-type: none"> i. Include the elements stated in Section V.A.2.c) i – Section V.A.2.c) viii.; and ii. Describe the Offeror’s management approach and detail how the Initial Project Plan will be executed. <p>Offeror should limit its response to fifteen (15) pages.</p>

Question Number	Section V.B and V.C.: Required Reports, Activities, and Deliverables
3	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.3. Annual Technical Report</i>, as follows: The Offeror shall indicate who will prepare the report (e.g., Offeror, Subcontractor(s)) and detail any limitations and/or issues with meeting the Department’s expectations and requirements. The response shall also include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach; b. Detail and describe the resources Offeror proposes to use in the production of the report, including: <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and

	<ul style="list-style-type: none"> iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan to timely producing the report. <p>c. Two (2) EQRO Technical Reports from two (2) different states prepared by the Offeror or Offeror’s proposed subcontractor that will be performing this activity. If the Offeror or Offeror’s proposed subcontractor has not previously prepared a report, the Offeror shall indicate such and provide a proposed report template.</p>
4	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.4. Annual PHP Performance Report</i>. The Offeror shall indicate who will prepare the report (e.g., Offeror, Subcontractor(s)) and detail any limitations and/or issues with meeting the Department’s expectations and requirements. The response shall also include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach b. Detail and describe the resources Offeror proposes to use in the production of the report, including: <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan to timely producing the report. <p>The Offeror shall provide the following supporting documentation to accompany its response:</p>

	<p>A sample report of the Annual PHP Performance Report that was prepared by the Offeror or its proposed subcontractor that will be performing this activity. If neither Offeror nor subcontractor have previously prepared a report, the Offeror shall indicate such and provide a proposed report template.</p>
<p>5</p>	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.5.CMS Protocol 1: Assessment of Compliance with Medicaid Managed Care Regulations</i>. The Offeror shall indicate who will provide the services (e.g., Offeror, subcontractor(s)) and detail any limitations and/or issues with meeting the Department’s expectations and requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of the Offeror’s proposed approach; b. Description of staff, systems, procedures, or materials used to perform this assessment, including at a minimum: <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan. c. Procedures and mechanisms the Offeror will utilize to remain up-to-date on applicable Federal and State regulations.

6	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.6. CMS Protocol 2: Validation of Performance Measures</i>. The Offeror shall indicate who will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s expectations and requirements. The response shall include:</p> <p>a. A detailed explanation of the Offeror’s proposed approach;</p> <p>b. Description of staff, systems, procedures, or materials used to validate the performance measures, including at a minimum:</p> <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan to timely validating performance measures. <p>c. The Offeror shall provide the following supporting documentation to accompany its response:</p> <p>A sample report on Validation of Performance Measures activities and findings previously prepared by the Offeror or its proposed subcontractor that will be performing this activity. If neither Offeror nor subcontractor have previously prepared a report, the Offeror shall indicate such and provide a proposed report template.</p>

7	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.7. CMS Protocol 3: Validation of Performance Improvement Projects (PIPs)</i>. The Offeror shall indicate who will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s expectations and requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach; and b. Description of staff, systems, procedures, or materials used to validate the PIPs, including at a minimum: <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan to timely validating the PIPs. c. A sample report on CMS Protocol 3: Validation of Performance Improvement Projects previously prepared by the Offeror or its proposed subcontractor that will be performing this activity. If neither Offeror nor subcontractor have previously prepared a report, the Offeror shall indicate such and provide a proposed report template.

8	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section A.V.8. Validation of Network Adequacy</i>. The Offeror shall indicate who will provide the services (e.g., Offeror, subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach for conducting “secret shopper” and telephone surveys; b. A detailed explanation of the process the Offeror will use to validate the accuracy of the provider information, including the provider directory as reported by the PHP; c. Description of staff, systems, procedures, or materials used to perform this requirement, including at a minimum: <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan to timely validating network adequacy. d. Sample reporting formats.

9	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section A.V.9. CMS Protocol 4: Validation of Encounter Data</i>. The Offeror shall indicate who will provide the services (e.g., Offeror, subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach; b. Description of staff, systems, procedures, or materials used to validate the Encounter Data, including at a minimum: <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan to timely validating the encounter data. c. Methodology to validate the completeness and accuracy of encounter data. d. The Offeror shall provide the following supporting documentation to accompany its response: A sample report that includes both narratives and charts/graphs on CMS Protocol 4: Validation of Encounter Data previously prepared by the Offeror or its proposed subcontractor that will be performing this activity. If neither Offeror nor subcontractor have previously prepared a report, the Offeror shall indicate such and provide a proposed report template.

10	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section A.V.10: CMS Protocol 5: Consumer Satisfaction Surveys</i>. The Offeror shall indicate who will provide these services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its survey approach; b. Proposed sampling plan and size based on estimated enrollment provided in <i>Attachment P</i>; c. Protections for confidentiality (e.g. PHI, PII); and d. Description of staff, systems, procedures, or materials used to validate the PIPs, including at a minimum: <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan to timely administering and validating the surveys.
11	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.11. CMS Protocol 5: Provider Satisfaction Surveys</i>. The Offeror shall indicate who specifically will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed survey approach; b. Proposed sampling plan and size, including minimum percentage of surveyed network providers and minimum response rate, based on estimated enrollment provided in Attachment E. North Carolina Medicaid and Health Choice Historical Enrollment; c. Protections for confidentiality (HIPAA); and

	<p>d. Description of staff, systems, procedures, or materials used to validate the PIPs, including at a minimum:</p> <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan to timely administering and validating the encounter data.
12	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.12. CMS Protocol 6: Calculation of Performance Measures in Addition to Those Reported by a PHP</i>. The Offeror shall indicate who will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach; and b. Description of staff, systems, procedures, or materials used to calculate the performance measures, including at a minimum: <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan to performing this activity.

13	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.13: CMS Protocol 7: Conduct PIPs in Addition to Those Conducted by a PHP and Validated by an EQRO</i>. The Offeror shall indicate who specifically will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach; and b. Description of staff, systems, procedures, or materials used to conduct these PIPs, including at a minimum: <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan to performing this activity.

14	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.14: CMS Protocol 8: Conduct Studies on Quality that Focus on an Aspect of Clinical or Non-Clinical Services at a Point in Time</i>. The Offeror shall indicate who will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach; and b. Description of staff, systems, procedures, or materials used to conduct these studies, including at a minimum: <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan in conducting these studies.

15	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.15: Evaluation of the Department’s Quality Strategy</i>. The Offeror shall indicate who specifically will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach; b. A detailed explanation of its proposed approach; and c. Description of staff, systems, procedures, or materials used to conduct these studies, including at a minimum: <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan to evaluate the Department’s quality strategy. d. Sample report formats.

16	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.16: Information Systems Capabilities Assessment (ISCA)</i>. The Offeror shall indicate who specifically will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach; and b. Description of staff, systems, procedures, or materials used to conduct these studies, including at a minimum: <ul style="list-style-type: none"> i. Human resources, including staff functions and roles; and ii. Data collection methods and tools; and iii. Other systems and tools; and iv. Potential risks and proposed mitigation plan to perform the ISCA requirements. c. The Offeror shall provide the following supporting documentation to accompany its response: <ul style="list-style-type: none"> i. A sample report on an ISCA previously prepared by the Vendor or its proposed subcontractor that will be performing this activity. If the Vendor or its proposed subcontractor that will be performing this activity has not previously prepared a report, the Vendor shall indicate as such and provide a proposed report template. ii. Example interview questions and guide for PHP staff interviews.

17	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.17: Leading Collaborative Quality Improvement Forums</i>. The Offeror shall indicate who specifically will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach; b. Description of any staff, systems/tools, procedures, or materials used to perform this activity, including at a minimum: <ul style="list-style-type: none"> i. How each task will be performed; ii. Potential risks and proposed mitigation plan; and iii. Functions of staff members; and iv. Potential risks and proposed mitigation plan to perform this activity. c. Sample schedule and agenda that includes Forum topics; and d. Sample survey questions for attendees to have the opportunity to provide feedback on the Forum.

18	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.18: Annual Care Management Performance Evaluation</i>. The Offeror shall indicate who specifically will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach; b. Description of any staff, systems/tools, procedures, or materials used to perform this activity, including at a minimum: <ul style="list-style-type: none"> i. How each task will be performed; i. Potential risks and proposed mitigation plan; and ii. Functions of staff members; and iii. Potential risks and proposed mitigation plan to producing the annual care management performance evaluation. c. Current or previous EQRO experience with Care Management evaluation methods or performing an activity similar in nature, if applicable. d. The Offeror shall also provide the following supporting documentation: A sample report on Annual Care Management Performance Evaluation activities and findings previously prepared by the Offeror or its proposed subcontractor that will be performing this activity. If neither the Offeror nor its proposed subcontractor have previously prepared a report, the Offeror shall indicate as such and provide a proposed report template.
19	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A.19: Annual Health Equity Report</i>. The Offeror shall indicate who specifically will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach; and

	<ul style="list-style-type: none"> i. How each task will be performed; ii. Potential risks and proposed mitigation plan; and iii. Functions of staff members; and iv. Potential risks and proposed mitigation plan to producing the annual health equity report. <p>b. The Offeror shall provide the following supporting documentation to accompany its response: A sample Annual Health Equity Report previously prepared by the Offeror or its proposed subcontractor that will be performing this activity. If neither the Offeror nor its proposed subcontractor have previously prepared a report, the Offeror shall indicate as such and provide a proposed report template.</p>
20	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements of <i>Section V.A. 20: Program Integrity Reviews and Ad Hoc Reports</i>. The Offeror shall indicate who specifically will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <p>A detailed explanation of its proposed approach; and</p> <ul style="list-style-type: none"> i. How each task will be performed; ii. Potential risks and proposed mitigation plan; and iii. Functions of staff members; and iv. Potential risks and proposed mitigation plan to conducting the program integrity reviews and producing the ad hoc reports.

21	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements for <i>Section V.A.21: Annual Access to Care Report</i>. The Offeror shall indicate who specifically will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach, including proposed measures to include; and b. Data collection methods and tools; and c. Potential risks and proposed mitigation plan to analyzing the annual access to care report.

22	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements for <i>Section V.A.22: PHP Report Card</i>. The Offeror shall indicate who specifically will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach; and b. Data collection methods and tools; and c. Potential risks and proposed mitigation plan to developing the annual PHP report card. <p>A sample PHP Report Card previously prepared by the Offeror or its proposed subcontractor that will be performing this activity. If neither the Offeror nor its proposed subcontractor have previously prepared a report, the Offeror shall indicate as such and provide a proposed report template.</p>
23	<p>The Offeror shall provide a template for <i>Section V.A.23: Monthly Progress Reports</i>. The report template must include:</p> <ul style="list-style-type: none"> a. Status of major activities and tasks in relation to the Offeror’s project plan; b. Target dates for completion of remaining or upcoming tasks/activities; c. Any potential risks or delays anticipated or encountered in reaching target dates, the reason for such delays, and proposed mitigation plan; and d. Revisions to the overall work schedule.

24	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements for <i>Section V.A.24: Annual EQRO Activity Summary Report</i>. The Offeror shall indicate who specifically will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach, including leveraging the use of environmental scans; and b. Data collection methods and tools; and c. Potential risks and proposed mitigation plan to developing the annual EQRO activity summary report.
25	<p>The Offeror shall describe its approach and detail how it will meet the Department’s requirements for <i>Section V.A.25: Technical Assistance</i>. The Offeror shall indicate who specifically will provide the services (e.g., Offeror, Subcontractor(s)) and detail any limitations and issues with meeting the Department’s requirements. The response shall include:</p> <ul style="list-style-type: none"> a. A detailed explanation of its proposed approach; b. Examples of technical assistance that would be offered to both the PHPs and Department staff; and c. An explanation of how the need for technical assistance would be assessed.

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Question Number	Section V.D: Value-Added Services
26	<p>The Offeror shall describe each value-added service, related to the scope of this RFP but not specifically included in the RFP, Offeror could provide to the Department as follows:</p> <ul style="list-style-type: none"> a. Describe the value-added service; and b. Specify the applicable service areas for the proposed value-added service; and c. Identify the eligible category, group, or managed care members who would benefit from the value-added service; and d. Note any limitations or restrictions that apply to the value-added service; and e. Describe how the value-added service will be identified in the encounter data. <p>Offeror should limit its response to three (3) pages per value-added service.</p>

Question Number	Section: V.E: Qualifications, Staffing Plan, and Personnel Requirements
27	<p>The Offeror shall provide the following:</p> <ul style="list-style-type: none"> a. Name, address, telephone number, fax number, and e-mail address of the legal entity with whom the Contract is to be written; b. The name, title, email address, physical address, and telephone number of the person(s) with authority to bind the Offeror with regard to this RFP; c. The state in which the Offeror is incorporated or organized; d. Name, email address, telephone numbers of principal officers (president, vice-president, treasurer, chair of the board of directors, and other executive officers); e. A brief overview of the Offeror’s history and the services provided by Offeror; f. List of board members and their organizational affiliations; g. Legal status (i.e. whether the Offeror is an individual a corporation, a general partnership, a limited partnership, a joint venture or some other legal entity) and whether it is a for-profit or a not-for-profit company; h. Whether the Offeror is a Historically Underutilized Business (HUB) as defined by the State; i. Current organization chart that identifies the complete structure of the Offeror; and j. Any specific licenses and accreditations held by the Offeror. <p>Offeror should limit its response to ten (10) pages.</p>

28	The Offeror shall provide a statement of whether any of the Offeror’s directors, partners, proprietors, officers, or employees or any of the proposed project staff are related to any Department employees. If such relationship(s) exist, identify the related individuals, describe their relationships, and identify their responsive employers.
29	The Offeror shall provide a description of the physical location of the central business office and satellite offices, if applicable. The hours of operation should be noted for each office, as applicable to this RFP. In addition, the Offeror shall describe how it intends to establish a presence in North Carolina, if any, to fulfill the requirements of the RFP.
30	The Offeror shall provide a statement that the Offeror and the proposed Offeror staff are not excluded from participation by Medicaid or the Office of the Inspector General of the United States Department of Health and Human Services.

31	<ol style="list-style-type: none"> 1. The Offeror shall summarize its mission, corporate and governance structure, and experience qualifying it to successfully meet the requirements of this RFP. 2. Offeror must detail its strategy and approach to work with and provide technical assistance to the PHPs in order to successfully meet the requirements of this RFP. 3. Offeror shall also provide the following: <ol style="list-style-type: none"> a. The number of years Offeror has provided similar services; b. Detailed organizational background, with an emphasis on experience performing Medicaid external quality review activities with state agencies and Medicaid managed care organizations; c. Background and experience with NCQA accreditation standards, NCQA HEDIS measures, and CAHPS surveys; d. Knowledge of and experience working with Medicaid and CHIP populations and their communities; e. A description of its relevant experience providing services to the State of North Carolina; f. Detailed description of the number of clients, customers, and geographic locations Offeror currently provides services within the scope of this RFP; and g. Any other related experience Offeror determines to be relevant to this RFP. <p>Offeror should limit its response to ten (10) pages.</p>

32	<p>The Offeror shall disclose, in <i>Attachment B. Table 1: EQRO Contract Termination or Non-Renewal in the Past 5 Years</i>, whether, in the past five (5) years, the Offeror has voluntarily terminated all or part of any contract for EQRO or similar services or if Offeror has had a contract for EQRO or similar services partially or fully terminated before the contract end date (whether with or without cause); or whether Offeror has had a contract for EQRO or similar services not renewed.</p> <ol style="list-style-type: none"> a. If so, the Offeror shall describe the type of contract and the services provided; the month and year of the contract action; the reason(s) for the termination or non-renewal; the parties involved; and provide the name, address and telephone number of the client/other party. b. If the Contract was terminated/non-renewed based on the Offeror’s performance, the Offeror shall describe any corrective actions taken to prevent any future occurrence of the problem leading to the termination/non-renewal. c. If the violation(s) was the subject of an administrative proceeding or litigation, the Offeror shall indicate the result of the proceeding/litigation. d. If a claim was made on a payment or performance bond, the Offeror shall submit full details of the termination and the bonds including the other party’s name, address, and telephone number.

Attachment B. Table 1: EQRO Contract Termination or Non-Renewal in the Past 5 Years								
Type of Contract	Services Provided	Month & Year of Corrective Action	Reason(s) for Termination or Non-Renewal	Involved Parties	Name of Other Party	Was the contract terminated/not renewed based on the Offeror's performance? If "Yes," describe any corrective actions taken to prevent future occurrence of the problem leading to the termination/non-renewal. If "No," enter N/A.	Was the violation the subject of an administrative proceeding or litigation? If "Yes," indicate the result of the proceeding/litigation. If "No," enter N/A.	Was a claim made on a payment or performance bond? If "Yes," include full details of the termination and the bonds including the other party's name, address, and telephone number. If "No" enter N/A.
33	<p>The Offeror shall disclose all sanctions imposed against the Offeror as part of a contract for EQRO or similar services in the past five (5) years in <i>Attachment B. Table 2: Disclosure of Imposed Sanctions as part of an EQRO Contract in Past 5 Years</i>. For the purposes of this question, a sanction shall include any monetary penalty (e.g., civil monetary penalty or liquidated damage).</p> <p>a. If imposed, describe the nature of the sanction, the underlying action leading to the sanction, the market in which the sanction was imposed, and the assessed monetary amount (if applicable).</p>							

	<p>b. Describe any corrective actions taken to prevent any future occurrence of the problem leading to the sanction(s).</p> <p>c. If the sanction(s) was the subject of an administrative proceeding or litigation, indicate the result of the proceeding/litigation.</p>
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Attachment B. Table 2: Disclosure of Imposed Sanctions as part of an EQRO Contract in Past 5 Years						
Type of Contract	Services Provided	Describe the nature of the sanction	Describe the underlying action leading to the sanction	Describe the assessed monetary amount, if applicable	Describe the corrective actions taken to prevent any future occurrence of the problem leading to the sanction(s)	Was the sanction the subject of an administrative proceeding or litigation? If "Yes," indicate the result of the proceeding/litigation. If "No" enter N/A.

34	<p>The Offeror shall describe:</p> <ul style="list-style-type: none"> a. The Offeror’s experience in using Medicaid claims, provider, and eligibility data for research and in evaluations; b. Ongoing internal controls to safeguard access to data as well as the Offeror’s contingency plan for data system failure in any critical EQR areas; c. The Offeror’s data storage, management, transfer, verification, and analytics approach; and d. Offeror’s current data security protocol offerings and data protection capabilities.
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35	<p>The Offeror shall indicate whether it currently has an existing web portal for the secure transfer of data.</p> <ul style="list-style-type: none"> a. If so, describe the web portal’s functionalities and protocols, including permissions, and its user interface framework. b. If not, describe Offeror’s plan and approach to create a web portal and include the portal’s functionalities and protocols. <p>Offeror should limit its response to ten (10) pages, including diagrams, charts, figures, etc.</p>
36	<p>The Offeror shall provide:</p> <ul style="list-style-type: none"> a. The Offeror’s Enterprise Architecture Framework; b. The Offeror’s Single-Sign On (SSO) capabilities; c. The Offeror’s Secure File Transfer Protocol (SFTP) link; d. Any file size limitations on files sent through the EQR file transfer site; and e. Any file size limitations on files sent through the SFTP file transfer site.

<p>37</p>	<p>The Offeror shall provide the following:</p> <ol style="list-style-type: none"> 1. Staffing Plan: Offeror shall submit a detailed description of its staffing plan, including Key Personnel and all positions required to perform the required activities. Offeror shall detail the proposed employment status of the positions (e.g. full-time, part-time, or temporary employees of Offeror; independent contractors or subcontractors to Offeror), who shall supervise the positions, and the job descriptions for each. 2. Functional Organizational Chart: Offeror shall provide a functional organizational chart of the proposed project structure and organization, identifying the lines of management for proposed staff directly involved in performance of this RFP and relationships of the staff to each function of the organization. 3. Staff Qualifications and Resumes or Biographies: Offeror shall provide job descriptions for all Key Personnel defined in <i>Section V.E.1.d</i>), including job summary, qualifications, experience, and expertise requirements. Resumes or biographies are limited to two (2) pages per position and shall include: <ol style="list-style-type: none"> a. Longevity with Offeror, including applicable dates; b. Relevant education, experience, and training; c. Certifications and licensures; d. Percentage of time to be devoted to the project; and e. Contact information for all Key Personnel designated, pursuant to <i>Section V.E.1.d</i>). <p>The Offeror may submit documentation as an appendix to the Offeror Technical Proposal and reference that appendix in the response box below.</p> <p>Offeror should limit its response to ten (10), excluding resumes or biographies.</p>
<p>38</p>	<p>The Offeror shall describe how it will train and educate its staff regarding the roles and responsibilities described in the RFP. The Offeror shall include specific strategies to educate personnel on North Carolina’s Medicaid Managed Care Program and indicate ongoing training to be provided to personnel.</p>

39	The Offeror shall describe how it will oversee and ensure review and rating consistency among its staff. The Offeror shall describe its internal controls to assure consistency, accuracy, and completeness of external quality review activities.

Addendum Execution Page Follows

Execute Addendum #1:

Offeror: _____

Authorized Signature: _____

Name and Title (Typed): _____

Date: _____