



# OKLAHOMA

## Health Care Authority

RFP Services: Public Health Emergency (PHE) Unwinding  
RFP Number: 8070001430  
OHCA Contracting Officer: Zhonda Viney/ Misty Willetts  
OHCA Email: [Procurement@okhca.org](mailto:Procurement@okhca.org)

### Section A. Scope of Work

#### Calendar of Events

**All dates are estimates and subject to change.**

ACTIVITY	DATE
RFP available on OHCA website/email Bidders	December 28, 2022
RFP Questions Due by 3:00 p.m. CST	January 11, 2023
RFP answers available on website by 3:00 P.M. CST	January 25, 2023
Bids Due to OHCA by 3:00 p.m. CST	February 8, 2023
Interviews (optional)	
Award of Contract	TBD
Operations Begin	TBD

## A.1 DEFINITIONS

1. "Amendment" means a written restatement of or modification to a Contract Document executed by both parties.
2. "Betterments" means offerings proposed by the Bidder which fall within the outlined specifications and are more current or upgraded version than requested.
3. "Bid" means an offer in the form of a bid, proposal, or quote a Bidder submits in response to this Request for Proposal (RFP).
4. "Bidder" means an individual or Business Entity that submits a Bid in response to this RFP.
5. "Center for Medicare and Medicaid Services (CMS)" means the federal agency responsible to provide health coverage to more than 100 million people through Medicare, Medicaid, the Children's Health Insurance Program, and the Health Insurance Marketplace. CMS provides federal oversight to the Oklahoma Health Care Authority.
6. "Contract" means this RFP, which together with other Contract Documents, as may be amended from time to time, evidences the final agreement between the parties.
7. "Contract Document" means, when executed by all applicable parties as necessary, this RFP, the Bid of the awarded Contractor, any statement of work, work order, rider or similar document related hereto, any purchase order related hereto, other statutorily required or mutually agreed documents related hereto, and any Amendment to any of the foregoing.
8. "Contractor" means the Bidder with whom the State enters into the Contract awarded pursuant to this RFP.
9. "COTS" means software that is commercial off the shelf.
10. "Closing Date and Time" means 3:00 P.M. Central Time on the date this RFP closes.
11. "Deliverable" means specific tangible or intangible products, or services produced as a result of the Project Order. Deliverables may be a project, a report, a document, a test, a meeting, and other relevant outputs. Deliverables may be a single output completed within a month or may be composed of multiple smaller deliverables that are completed within specified timeframe that extends beyond a month.
12. "Eligibility and Enrollment (E&E)" means the electronic system OHCA uses to determine eligibility for Oklahoma's Medicaid program SoonerCare. To participate in Medicaid, federal law requires states to cover certain groups of individuals. Low-income families, qualified pregnant women and children, and individuals receiving Supplemental Security Income (SSI) are examples of mandatory eligibility groups. States have additional options for coverage and may choose to cover other groups, such as individuals receiving home and community-based services and children in foster care who are not otherwise eligible.
13. "Fiscal Agent" means an organization, such as a bank or trust company that acts on behalf of another party performing various financial duties. A fiscal agent may assist in the redemption of bonds or coupons, handle tax issues, replace lost or damaged securities and perform various other finance-related tasks.

14. “Governance” means the established policies, and continuous monitoring of their proper implementation, by members of the governing body of this contract. It includes the mechanisms required to balance the powers of the members (with the associated accountability), and their primary duty of enhancing the effectiveness and viability of the contract related to OHCA’s goals and objectives.
15. “Health Information Technology (HIT)” means the CMS initiative to provide the foundation for Medicaid health system transformation and administration that enables care coordination among clinicians, contains costs through the sharing of medical information useful in diagnosis and treatment decision making, facilitates patient registries, enables unified quality reporting, and empowers Medicaid beneficiaries to participate in their overall wellness and health.
16. “Independent Verification and Validation (IV&V)” means an independent contractor who performs planning, management, and other programmatic activities in conformance with the term’s usage in federal regulations at 45 CFR § 95.626.
17. “Medicaid Management Information System (MMIS)” means an integrated group of procedures and computer processing operations (subsystems) developed at the general design level to meet principal objectives. For the purposes of this RFP, "systems mechanization" and "mechanized claims processing and information retrieval systems" is identified in section 1903(a)(3) of the Act and defined in regulation at 42 CFR 433.111.
18. “Milestone” means specific progress point(s) or task(s) that must be reached to achieve progress on the Project. The milestone is a measurement of progress toward the deliverable.
19. “Oklahoma Health Care Authority (OHCA)” means the State of Oklahoma Agency responsible to administer the Medicaid program.
20. “Option to renew” means the optional contract years that may be authorized to continue contracted services resulting from this RFP. The State of Oklahoma law requires State agencies to contract by State Fiscal Year.
21. “Project” means the temporary endeavor authorized in a Project Order undertaken to create a unique product, service, or result. This may include a project to deliver one or more business products according to a specified business case.
22. “Request for Proposal (RFP)” means this document inviting Bids.
23. “State Fiscal Year (SFY)” means the annual financial year established by the State of Oklahoma which is July 1 through June 30.

## **A.2 GENERAL INFORMATION**

### **1. Introduction**

Oklahoma Health Care Authority (OHCA) is issuing this Request for Proposal (RFP) for the following services: to transition Public Health Emergency (PHE) members from SoonerCare to other affordable insurance coverage and assistance.

### **2. Contract Overview**

OHCA shall award this contract to one Bidder.

### **3. Goals**

OHCA's goals are to

- a. Transition PHE members from SoonerCare to other affordable insurance coverage and assistance programs.
  - b. The goals for the proposed solution are to:
    - i. Be flexible to meet State and Federal policy changes; and,
    - ii. Be collaborative with OHCA staff with respect for the staffing limitations within OHCA and their other commitments.
4. Mandatory Provisions
- a. The Bidder shall:
    - i. Have an office located within the State of Oklahoma;
    - ii. Have a minimum of three years of experience providing individuals with affordable insurance coverage and assistance programs.
    - iii. Be able to stand up operations by x date or within x days of the PHE unwinding
5. Budget
- a. The budget for this RFP shall not exceed \$1,000,000.00 from the Contract Award Date through June 30, 2023.
  - b. There will be one option to renew for July 1, 2023-June 30, 2024, with a not-to-exceed of \$1,000,000.00

### **A.3 PROJECT/PROGRAM OVERVIEW**

6. OHCA overview

OHCA is the state agency that administers the Oklahoma Medicaid Program known as SoonerCare. Medicaid is a Federal and State entitlement program that provides funding for medical benefits to certain low-income individuals who have inadequate or no health insurance coverage. Medicaid guarantees coverage for basic health and long-term care services based upon income and/or resources. Created by Title XIX of the Social Security Act of 1965, Medicaid is administered at the Federal level by the Centers for Medicare and Medicaid Services (CMS) within the Department of Health and Human Services (HHS). CMS established and monitors certain requirements concerning funding, eligibility standards, scope, and quality of medical services. States have the flexibility to determine some aspects of their own program, such as setting Provider (an individual or entity contracted with OHCA to provide healthcare services to enrolled Members) reimbursement rates and determining the eligibility requirements and benefits offered within certain Federal parameters.

7. System Integrator

Gainwell Technology is currently contracted to provide the OHCA MMIS and to be the System Integrator for all contractors. The OHCA MMIS system currently encompasses claims processing, member enrollment, provider contracting, member and provider files, prior authorization system, data warehouse, etc. Contractor shall be required to coordinate with the System Integrator to complete the scope of work for this contract.

8. Project information

The Oklahoma Health Care Authority (OHCA) will have over 250,000 members who are currently protected with continuous eligibility by the PHE. When the PHE is terminated, those Oklahomans will lose their access to SoonerCare. OHCA is seeking a solution to smoothly transition these PHE protected members from SoonerCare to other affordable insurance coverage

and assistance programs.

OHCA’s goal is to minimize member burden, promote a seamless transition of coverage, and provide appropriate alternative sources of coverage and services to our most vulnerable and high-risk PHE protected members.

#### **A.4 CONTRACT GOVERNANCE**

OHCA and the Contractor both have key roles for a successful Contract. OHCA takes an active role during Contract implementation. A Governance process that includes OHCA and the Contractor is the most successful.

##### **9. OHCA Roles and Responsibilities**

The OHCA Contract team will coordinate the overall project management responsibilities including availability of OHCA resources as required to support the Contract. During the entire lifecycle of the Contract, the OHCA will:

- a. Define the goals and objectives of the Contract and services throughout implementation and ongoing operations;
- b. Communicate the goals, objectives, and ongoing status of the Contract to all stakeholders;
- c. Work with stakeholders to identify and monitor project and program risk and appropriate mitigation issues related to the Contract;
- d. Monitor the project management approach that will govern the Contract;
- e. Review the draft deliverables and final deliverables developed by the Contractor and provide feedback, request changes, and provide final review until the OHCA is satisfied with the resulting deliverable;
- f. Review and approve or reject final deliverables developed and revised by the Contractor; and,
- g. Provide access to OHCA management and Subject Matter Experts (SMEs) for the approval of the deliverables required to meet the goals and objectives of the project.

10. Table 1 describes OHCA’s Key Staff and Roles and Responsibilities

**Table 1 OHCA Key Staff and Roles & Responsibilities**

<b>PROJECT TITLE</b>	<b>ROLES AND RESPONSIBILITIES</b>
<b>Business Owner</b>	<ol style="list-style-type: none"><li>1. Designate an OHCA employee to serve as Program Monitor (PM) who will be the primary contact for the Contractor;</li><li>2. Provide the Contractor access to the MMIS for its employees</li></ol>

PROJECT TITLE	ROLES AND RESPONSIBILITIES
	<ul style="list-style-type: none"> <li>3. Provide information on OHCA policy, eligibility, and other information requested by the Contractor;</li> <li>4. Review the criteria and protocols proposed by the Contractor for any conflict with OHCA standards or policies; and,</li> <li>5. Perform additional activities proposed by the Contractor and acceptable to OHCA.</li> </ul>
<b>Contract Coordinator</b>	<ul style="list-style-type: none"> <li>▪ Point of contact for Contract administration and disputes.</li> </ul>
<b>Professional Services Contracts Manager</b>	<ul style="list-style-type: none"> <li>▪ Point of contact for unresolved disputes by the Business Owner and/or Contract Coordinator.</li> </ul>
<b>Program Manager</b>	<ul style="list-style-type: none"> <li>▪ Provides daily management of the project and serve as the chief liaison to the Business Owner for design, development, and project implementation activities, as well as the project’s maintenance and operational phase;</li> <li>▪ Authorized to make day-to-day project decisions;</li> <li>▪ Responsible for managing the OHCA teamwork activities consistent with the approved work plan;</li> <li>▪ Responsible for identifying resource requirements, coordinating use of personnel resources, identifying issues, and solving problems, and facilitating implementation of the System.</li> </ul>

11. Contractor Staffing, and Roles and Responsibilities

The Contractor shall provide:

- a. All staff necessary to perform the services required under this RFP;
- b. The following Key Personnel:
  - i. A Project Director (PD) with day-to-day responsibility for the services required under this RFP.
  - ii. A Project Manager;

- iii. An information technology lead responsible for the Contractor’s access to the MMIS and/or establishing and maintaining electronic file transfer with OHCA;
  - iv. A trainer to learn OHCA policy and rules, and provide training to Contractor staff to be kept current on OHCA policy and rules; and,
  - v. A quality assurance officer (QAO).
- c. Contractor shall not change the designation of the Key Personnel without prior approval through formal correspondence from OHCA. (The Contractor may use its expertise and experience to propose other types of staff – OHCA at its sole discretion may decide to accept a proposed staff category.)
- d. Table 2 Contractor Key Personnel Roles and Responsibilities describes the key project positions, their corresponding roles project responsibilities, and minimum qualifications for each. Other positions may be proposed at the Contractor’s discretion.

**Table 2 Contractor Key Roles and Responsibilities**

TITLE	ROLES AND RESPONSIBILITIES	QUALIFICATIONS
<b>Project Director</b>	<ul style="list-style-type: none"> <li>▪ Primary point of contact with the OHCA Business Owner and Contract Coordinator for activities related to contract administration, overall project management and scheduling, correspondence between the OHCA and the Contractor, dispute resolution, and status reporting to the OHCA for the duration of the contract.</li> <li>▪ Authorized to commit the resources of the Contractor in matters about the implementation performance of the Contract.</li> <li>▪ Responsible for ensuring all Contractor-required resources identified by project manager are staffed on time.</li> <li>▪ Responsible for addressing any issues that cannot be resolved with the Contractor’s Project Manager.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Minimum of 3 years of direct project oversight.</li> <li>▪ Special consideration may be given to those who have Medicaid experience.</li> </ul>
<b>Project Manager</b>	<ul style="list-style-type: none"> <li>▪ Provide onsite management of the project and serve as the chief liaison to the OHCA for design, development, and project implementation activities, as well as</li> </ul>	<ul style="list-style-type: none"> <li>▪ Minimum of 3 years of project management experience for a government or private sector health care payer,</li> </ul>

TITLE	ROLES AND RESPONSIBILITIES	QUALIFICATIONS
	<p>the project’s maintenance and operational phase.</p> <ul style="list-style-type: none"> <li>▪ Authorized to make day-to-day project decisions.</li> <li>▪ Responsible for facilitating the project by using the project management processes, organizing the project, and managing the teamwork activities consistent with the approved work plan.</li> <li>▪ Responsible for scheduling and reporting project activities, identifying resource requirements well in advance, coordinating use of personnel resources, identifying issues, and solving problems, and facilitating implementation of the services.</li> <li>▪ Shall host bi-weekly onsite status meetings, monthly milestone meetings, as well as interim meetings as needed. Will assign Contractor staff to those meetings as appropriate. Will provide an agenda and develop minutes for each meeting.</li> <li>▪ Possess business expertise in accessing members by assessing health risks with a strong understanding of the Contractor’s business application.</li> <li>▪ Provide expert guidance ensuring that policy and business rules as defined by the OHCA are correctly implemented in the Contractor’s solution.</li> <li>▪ Advise the OHCA regarding best practices and recommends modifications to business processes to improve the overall program.</li> </ul>	<p>including experience in a state similar in scope and size.</p> <ul style="list-style-type: none"> <li>▪ Possess current Project Management professional certification, e.g., Project Management Institute (PMI), etc.</li> </ul>



## **A5 SCOPE OF WORK**

### **1. The Contractor shall:**

- a. Have the resources to assist OHCA in:
  - i. Assessing and identifying members' health and social needs to ensure focus given to those members with the highest needs
- b. Assist members by
  - i. Assessing their health risks
  - ii. Assessing their social determinants of health
  - iii. Coordinating care by helping members enroll for appropriate assistance with health coverage through nonprofit social services, government programs, health systems and insurance plans.
- c. Provide services statewide for these members.
- d. Coordinate benefits when more than one third party resource is available.
- e. The Contractor shall provide:

All staff necessary to perform the services required under this RFP.

The following Key Personnel:

- i.** A Project Director (PD) with day-to-day responsibility for the services required under this RFP The Project Director does not have to be permanently located in Oklahoma City but must be regularly present in Oklahoma City during implementation of this program.
    - ii.** A Project Manager.
    - ii.** An information technology lead responsible for the Contractor establishing and maintaining electronic file transfer with OHCA.
  - f.** Contractor shall not change the designation of the Key Personnel without prior approval through formal correspondence from OHCA. (The Contractor may use its expertise and experience to propose other types of staff – OHCA at its sole discretion may decide to accept a proposed staff category.)
  - g.** Table 2 Contractor Key Personnel Roles and Responsibilities describes the key project positions, their corresponding roles project responsibilities, and minimum qualifications for each. Other positions may be proposed at the Contractor's discretion.
  - h.** The Contractor shall submit:
    - ii.** Monthly Cost Avoidance file of policy additions, changes, and terminations to support cost avoidance effort report.
    - i.** Deliver the following to support assistance with affordable health insurance programs and other social assistance:
      - 3.** Monthly invoice backup documentation
    - iv.** Submit Quarterly Report,
    - v.** Submit an Annual Report
    - vii.** Submit a Monthly Invoice Report

## **Obligations of Agency**

Agency shall:

- a.** Provide the Contractor access to the MMIS for its employees and/or cooperate with the Contractor to establish an electronic file transfer process.

- b.** Provide information on OHCA policy, eligibility, and other information requested by the Contractor.
- c.** Review the criteria and protocols proposed by the Contractor for any conflict with OHCA standards or policies.
- d.** Perform additional activities proposed by the Contractor and acceptable to OHCA; and,
- f.** The OHCA Contract team will coordinate the overall project management responsibilities including availability of OHCA resources as required to support the Contract. During the entire lifecycle of the Contract, the OHCA will:
  - i. Define the goals and objectives of the Contract and services throughout the life of the contract.
  - ii. Communicate the goals, objectives, and ongoing status of the Contract to all stakeholders.
  - iii. Monitor the project management approach that will govern the Contract.
  - iv. Review the final deliverables developed by the Contractor and provide feedback, request changes, and provide final review until the OHCA is satisfied with the resulting deliverable.
  - v. Review and approve or reject final deliverables developed and revised by the Contractor; and,
  - vi. Provide access to OHCA management and Subject Matter Experts (SMEs) for the approval of the deliverables required to meet the goals and objectives of the project.