

EXHIBIT B  
SCOPE OF WORK

B1. GENERAL REQUIREMENTS

- B1.1 The contractor shall perform a comprehensive and objective review of incurred claims processed by ANTHEM for calendar year 2024 and January-March, 2025, on behalf of Missouri Consolidated Health Care Plan (MCHCP). The claims auditor will determine whether claims were adjudicated according to contractual standards, appropriate Plan benefits, and industry standards.
- B1.2 The claims audit shall commence in July, 2025 with completion no later than January, 2026.
- B1.3 The contractor's audit team shall be comprised of individuals with ample experience in conducting claims audits of Third Party Administrators (TPAs) inclusive of experience with auditing Anthem.

B2. MEDICAL CLAIMS AUDIT

- B2.1 The contractor shall conduct an adjudication procedures review questionnaire that focuses on procedures used for all claims to ensure proper claims controls are in place (i.e. eligibility verification, claims handlings, internal review procedures, coordination of benefits, system edits, etc.) Key topics include:
  - B2.1.1 Eligibility interface with the claims processing system and confirmation of retroactive overpayment recovery efforts.
  - B2.1.2 Confirmation of manual entry procedures and controls, requests for additional information, appeals procedures, and referral of cases for clinical review.
  - B2.1.3 Detection and investigation procedures for coordination with other coverages and subsequent follow-up procedures in place with any subcontracted vendor.
  - B2.1.4 Identification of improper billings or duplicate submissions and resulting provider investigation and/or retraining.
  - B2.1.5 Timeliness of network repricing, use of secondary networks, and designated non-contracted allowances.
  - B2.1.6 Medical review interface with the claims processing system; assessment of the procedural steps (not clinical determinations).
  - B2.1.7 System capabilities including security of data and examiner edits guiding through the benefit determination process.
  - B2.1.8 Invoicing of MCHCP procedures and controls to capture claim payments, contract fees and necessary adjustments.
  - B2.1.9 Procedures and controls for submission of claims files to MCHCP's data warehouse contractor.
  - B2.1.10 Confirmation of processes in place for incurred claims beginning Jan. 1, 2025, that any pharmacy rebates earned are properly paid to MCHCP.
- B2.2 The contractor shall conduct a random, stratified sample of 210 medical claims by dollar amount to measure validity in the financial dollar value and incidence (number) accuracy of benefit payments processed during the audit period.
  - B2.2.1 From the stratified sample of 210 medical claims, the contractor shall select 15 providers to review the pricing against the agreements. Should a provider

agreement be selected for a non-Anthem plan, the contractor shall submit the request of Anthem to determine the non-Anthem's plan's willingness to share the agreement.

B2.2.2 The contractor shall trace the claims sample to MCHCP's data warehouse to validate the timely submission of the claims to the warehouse.

B2.2.3 The contractor shall trace the claims sample to the invoice(s) submitted to MCHCP along with any associated fees to ensure proper invoicing.

B2.3 The contractor shall sample 40 medical target claims identified through an electronic analysis of all claims designed to explore potential duplicate payments and/or sample various benefit applications (i.e., deductibles, member cost-shares, limitations and exclusions, and applicable areas of concern). The contractor shall consult with MCHCP to determine the areas of concern.

B2.4 The contractor shall communicate to Anthem a request for an audit and provide details on the proposed scope and requirements of the audit in writing. Anthem generally requires at least 60 days prior notice of the audit to ensure staffing. The scope document shall include the following:

B2.4.1 Audit purpose and objectives.

B2.4.2 Audit scope.

B2.4.3 Sampling methodology and expected sample size(s).

B2.4.4 Detailed description of the data requested for sample selections, including, the audit time period, date element requirements, plans to be included, programs to be included and data format.

B2.4.5 Description of documentation desired to be reviewed virtually.

B2.4.6 Timetable for the audit.

B2.4.7 Description of post-review audit activities and timeframes.

B2.5 Anthem's Customer Audit Policy & Procedural Manual is part of the agreement between MCHCP and Anthem. Any discrepancies between the scope of the medical claims audit proposed by the contractor and Anthem must be brought to the attention of MCHCP for pursuit of resolution. If the scope of work under this contract materially changes because of the discrepancy, the Contractor and MCHCP shall mutually agree to a change order setting forth any changes to the services, deliverables, or schedules.

### B3. REPORT OF FINDINGS

B3.1 The contractor shall prepare and present a preliminary draft report of findings to MCHCP for review.

B3.2 Once MCHCP completes its review of the preliminary draft, the contractor shall prepare a draft of findings and recommendations to Anthem for review.

B3.3 The draft report, inclusive of Anthem's response will be presented to MCHCP for review prior to issuing a final report.

B3.4 The contractor shall present the final draft report to the Board of Trustees for their consideration and acceptance of the report. The report is not final until the Board of Trustees has voted to approve the report.

B4. FEES AND BILLING

- B4.1 The contractor's fees for the audit shall be all inclusive as MCHCP will not separately pay for travel or other expenses related to the audit.
- B4.2 The contractor shall bill its fees based on the following installments:
  - B4.2.1 Upon release of the audit scope to Anthem
  - B4.2.2 Upon submission of the preliminary draft report to MCHCP
  - B4.2.3 Upon acceptance of the final draft report by the Board of Trustees.



EXHIBIT C  
GENERAL PROVISIONS

**C1. TERMINOLOGY AND DEFINITIONS**

Whenever the following words and expressions appear in this Request for Proposal (RFP) document or any amendment thereto, the definition or meaning described below shall apply.

- C1.1 **Amendment** means a written, official modification to an RFP or to a contract.
- C1.2 **Bidder** means a person or organization who submitted an offer in response to this RFP.
- C1.3 **Breach** shall mean the acquisition, access, use or disclosure of PHI in a manner not permitted by the Privacy Rule that compromises the security or privacy of the PHI as defined, and subject to the exceptions set forth, in 45 C.F.R. 164.402.
- C1.4 **Contract** means a legal and binding agreement between two or more competent parties, in consideration for the procurement of services as described in this RFP.
- C1.5 **Contractor** means a person or organization who is a successful bidder as a result of an RFP and/or who enters into a contract or any subcontract of a successful bidder.
- C1.6 **Employee** means a benefit-eligible person employed by the state and present and future retirees from state employment who meet the plan eligibility requirements.
- C1.7 **May** means that a certain feature, component, or action is permissible, but not required.
- C1.8 **Member** means any person covered as either a subscriber or a dependent in accordance with the terms and conditions of the plan.
- C1.9 **Must** means that a certain feature, component, or action is a mandatory condition. Failure to provide or comply may result in a proposal being considered non-responsive.
- C1.10 **Off-shore** means outside of the United States.
- C1.11 **Participant** has the same meaning as the word member.
- C1.12 **PHI** shall mean Protected Health Information, as defined in 45 C.F.R. 160.103, as amended.
- C1.13 **Pricing Pages** apply to the form(s) on which the bidder must state the price(s) applicable for the services required in the RFP. The pricing pages must be completed and uploaded by the bidder prior to the specified proposal filing date and time.
- C1.14 **Privacy Regulations** shall mean the federal privacy regulations issued pursuant to the Health Insurance Portability and Accountability Act of 1996, as amended from time to time, codified at 45 C.F.R. Parts 160 and 164 (Subparts A & E).

- C1.15 **Proposal Filing Date and Time** and similar expressions mean the exact deadline required by the RFP for the receipt of proposals by Optavise system.
- C1.16 **Provider** means a physician, hospital, medical agency, specialist or other duly licensed health care facility or practitioner certified or otherwise authorized to furnish health care services pursuant to the law of the jurisdiction in which care or treatment is received. A doctor/physician as defined in 22 CSR 10-2010(22). Other providers include but are not limited to:
- C1.16.1 Audiologist (AUD or PhD);
  - C1.16.2 Certified Addiction Counselor for Substance Abuse (CAC);
  - C1.16.3 Certified Nurse Midwife (CNM) – when acting within the scope of his/her license in the state in which s/he practices and performing a service which would be payable under this plan when performed by a physician;
  - C1.16.4 Certified Social Worker or Masters in Social Work (MSW)
  - C1.16.5 Chiropractor;
  - C1.16.6 Licensed Clinical Social Worker
  - C1.16.7 Licensed Professional Counselor (LPC);
  - C1.16.8 Licensed Psychologist (LP);
  - C1.16.9 Nurse Practitioner (NP);
  - C1.16.10 Physician Assistant (PA);
  - C1.16.11 Occupational Therapist;
  - C1.16.12 Physical Therapist;
  - C1.16.13 Speech Therapist;
  - C1.16.14 Registered Nurse Anesthetist (CRNA);
  - C1.16.15 Registered Nurse Practitioner (ARNP); or
  - C1.16.16 Therapist with a PhD or Master’s Degree in Psychology or Counseling.
- C1.17 **Request for Proposal (RFP)** means the solicitation document issued by MCHCP to potential bidders for the purchase of services as described in the document. The definition includes these Terms and Conditions as well as all Pricing Pages, Exhibits, Attachments, and Amendments thereto.
- C1.18 **Respondent** means any party responding in any way to this RFP.
- C1.19 **Retiree** means a former employee who, at the time of termination of employment, met the eligibility requirements as outlined in subsection 22 CSR 10-2.020(2)(B) and is currently receiving a monthly retirement benefit from a retirement system listed in such rule.
- C1.20 **RSMo (Revised Statutes of Missouri)** refers to the body of laws enacted by the Legislature, which govern the operations of all agencies of the State of Missouri. Chapter 103 of the statutes is the primary chapter governing the operations of MCHCP.
- C1.21 **Shall** has the same meaning as the word must.
- C1.22 **Should** means that certain feature, component and/or action is desirable but not mandatory.
- C1.23 **Subscriber** means the person who elects coverage under the plan.

## **C2. GENERAL BIDDING PROVISIONS**

- C2.1 It shall be the bidder's responsibility to ask questions, request changes or clarification, or otherwise advise MCHCP if any language, specifications or requirements of an RFP appear to be ambiguous, contradictory, and/or arbitrary, or appear to inadvertently restrict or limit the requirements stated in the RFP to a single source. Any and all communication from bidders regarding specifications, requirements, competitive procurement process, etc., must be directed to MCHCP via the messaging tool in the Optavise system, as indicated on the last page of the *Introduction and Instructions* document of the RFP. Such communication must be received no later than Friday, March 7, 2025, 5 p.m. CT (6 p.m. ET).

Every attempt shall be made to ensure that the bidder receives an adequate and prompt response. However, to maintain a fair and equitable procurement process, all bidders will be advised, via the issuance of an amendment or other official notification to the RFP, of any relevant or pertinent information related to the procurement. Therefore, bidders are advised that unless specified elsewhere in the RFP, any questions received by MCHCP after the date noted above might not be answered.

It is the responsibility of the bidder to identify and explain any part of their response that does not conform to the requested services described in this document. Without documentation provided by the bidder, it is assumed by MCHCP that the bidder can provide all services as described in this document.

- C2.2 Bidders are cautioned that the only official position of MCHCP is that position which is stated in writing and issued by MCHCP in the RFP or an amendment thereto. No other means of communication, whether oral or written, shall be construed as a formal or official response or statement.
- C2.3 MCHCP monitors all procurement activities to detect any possibility of deliberate restraint of competition, collusion among bidders, price-fixing by bidders, or any other anticompetitive conduct by bidders, which appears to violate state and federal antitrust laws. Any suspected violation shall be referred to the Missouri Attorney General's Office for appropriate action.
- C2.4 No contract shall be considered to have been entered into by MCHCP until the contract has been awarded by the MCHCP Board of Trustees and all material terms have been finalized. The contract is expected to be finalized and signed by a duly authorized representative of Contractor in less than fifteen (15) days from MCHCP's initial contact to negotiate a contract. An award will not be made until all contract terms have been accepted.

## **C3. PREPARATION OF PROPOSALS**

- C3.1 Bidders must examine the entire RFP carefully. Failure to do so shall be at the bidder's risk.
- C3.2 Unless otherwise specifically stated in the RFP, all specifications and requirements constitute minimum requirements. All proposals must meet or exceed the stated specifications and requirements.

C3.3 Unless otherwise specifically stated in the RFP, any manufacturer's names, trade names, brand names, and/or information listed in a specification and/or requirement are for informational purposes only and are not intended to limit competition. Proposals that do not comply with the requirements and specifications are subject to rejection without clarification.

#### **C4. DISCLOSURE OF MATERIAL EVENTS**

C4.1 The bidder agrees that from the date of the bidder's response to this RFP through the date for which a contract is awarded, the bidder shall immediately disclose to MCHCP:

C4.1.1 Any material adverse change to the financial status or condition of the bidder;

C4.1.2 Any merger, sale or other material change of ownership of the bidder;

C4.1.3 Any conflict of interest or potential conflict of interest between the bidder's engagement with MCHCP and the work, services or products that the bidder is providing or proposes to provide to any current or prospective customer; and

C4.1.4 (1) Any material investigation of the bidder by a federal or state agency or self-regulatory organization; (2) Any material complaint against the bidder filed with a federal or state agency or self-regulatory organization; (3) Any material proceeding naming the bidder before any federal or state agency or self-regulatory organization; (4) Any material criminal or civil action in state or federal court naming the bidder as a defendant; (5) Any material fine, penalty, censure or other disciplinary action taken against the bidder by any federal or state agency or self-regulatory organization; (6) Any material judgment or award of damages imposed on or against the bidder as a result of any material criminal or civil action in which the bidder was a party; or (7) Any other matter material to the services rendered by the bidder pursuant to this RFP.

C4.1.4.1 For the purposes of this paragraph, "material" means of a nature, or of sufficient monetary value, or concerning a subject which a reasonable party in the position of and comparable to MCHCP would consider relevant and important in assessing the relationship and services contemplated by this RFP. It is further understood that in fulfilling its ongoing responsibilities under this paragraph, the bidder is obligated to make its best faith efforts to disclose only those relevant matters which come to the attention of or should have been known by the bidder's personnel involved in the engagement covered by this RFP and/or which come to the attention of or should have been known by any individual or office of the bidder designated by the bidder to monitor and report such matters.

C4.2 Upon learning of any such actions, MCHCP reserves the right, at its sole discretion, to either reject the proposal or continue evaluating the proposal.



**C5. COMPLIANCE WITH APPLICABLE FEDERAL LAWS**

- C5.1 In connection with the furnishing of equipment, supplies, and/or services under the contract, the contractor and all subcontractors shall comply with all applicable requirements and provisions of the Health Insurance Portability and Accountability Act (HIPAA) and The Patient Protection and Affordable Care Act (PPACA), as amended.
- C5.2 Any bidder offering to provide services must sign a Business Associate Agreement (BAA) (see Exhibit A-6) due to the provisions of HIPAA. Any requested changes shall be noted and returned with the RFP. **The changes are accepted only upon MCHCP signing a revised BAA after contract award.**
- C5.3 Upon awarding of the contract by the Board, the BAA shall be signed by both parties within five (5) working days of the request to sign, or the award of the contract may be rescinded.

**Introduction**

Missouri Consolidated Health Care Plan (MCHCP) provides the health benefit program for most State of Missouri employees, retirees, and their dependents covering nearly 90,000 members (lives). An additional 1,200 non-state local government members are covered through their public entity employer.

This document constitutes a request for sealed proposals from qualified organizations to provide a medical claim audit for MCHCP’s self-insured population administered by Anthem.

**Contracting Intentions:**

- The option to contract will be at the sole discretion of MCHCP.
- Any contract awarded from this RFP will be effective upon signature by MCHCP.
- MCHCP reserves the right to reject any or all proposals.

**Background Information**

- MCHCP is governed by the provisions of Chapter 103 of the Revised Statutes of Missouri. Under the law, MCHCP is directed to procure health care benefits for most State employees. Rules and regulations governing the plan can be found by following this link <http://www.sos.mo.gov/adrules/csr/current/22csr/22csr.asp>.
- Current MCHCP total state membership is nearly 90,000 covered persons; however, the self-insured health population enrolled as of December 1, 2024, in Anthem to be audited is provided below:

	PPO 750	PPO 1250	HDHP	Total
Subscribers	12,618	17,596	7,642	37,856
Total Lives	23,137	33,089	15,063	71,289

- The MCHCP total public entity membership enrolled as of December 1, 2024, in Anthem to be audited is provided below:

	PPO 750	PPO 1250	HDHP	Total
Subscribers	372	536	41	949
Total Lives	517	681	55	1,253

- The Board has contracted with Anthem as TPA since 2020 and continues to contract with them for administering claims on behalf of the self-insured members. Total claims payments were approximately \$386 million in CY 2024.

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- Claim audits for Anthem are conducted in Indianapolis, IN.
- The MCHCP Board of Trustees has final responsibility for the Plan.

### **Assumptions and Considerations**

Please submit your proposal using the Optavise online submission tool no later than **Monday, March 24, 2025, 5 p.m. CT (6 p.m. ET)**. Due to the limited timeframe for proposal analysis, no individual deadline extensions will be granted.

The MCHCP Board of Trustees has final responsibility for all contracts. Responses to the RFP and all proposals will remain confidential until awarded by the MCHCP Board of Trustees or its designee or until all proposals are rejected.

***Do not contact MCHCP directly regarding this RFP. Questions about the technical procedures for participating in this online RFP process should be addressed to Optavise. Any questions concerning the content of the RFP should be submitted via the messaging tool of the Optavise website.***

**Proposal Instructions**

***NOTE: READ THESE INSTRUCTIONS COMPLETELY PRIOR TO RESPONDING TO THE RFP***

To be considered you must respond to all sections of this RFP. Bidders are strongly encouraged to read the entire RFP prior to the submission of a proposal. The bidder must comply with all stated requirements. Bidders are expected to provide complete and concise answers to all questions. Your responses to all questions must be based on your current proven capabilities. You should describe your future capabilities only as a supplement to your current capabilities.

If any information contained in the proposal is found to be falsified, the proposal will immediately be disqualified.

Proposals must be valid until July 1, 2025. If a contract is awarded, prices shall remain firm for the specified contract period.

A proposal may only be modified or withdrawn by signed, written notice which has been received by MCHCP prior to the official filing date and time specified.

**Clarification of Requirements**

It is assumed that bidders have read the entire RFP prior to the submission of a proposal and, unless otherwise noted by the bidder, a submission of a proposal and any applicable amendment(s) indicates that the bidder will meet all requirements stated herein.

The bidder is advised that the only official position of MCHCP is that position which is stated in writing and issued by MCHCP as an RFP and any amendments and/or clarifications thereto. No other means of communication, whether oral or written, shall be construed as a formal or official response or statement.

**Schedule of Events**

The timeline for the procurement is provided below.

<b>Activity</b>	<b>Timing</b>
Online RFP Released	Monday, March 3, 2025 8:00 a.m. CT (9:00 a.m. ET)
Intent to Bid Document Due – uploaded as a response document within online event	Friday, March 7, 2025 5:00 p.m. CT (6:00 p.m. ET)
Bidder Question Submission Deadline – via Optavise’s messaging system	Friday, March 7, 2025 5:00 p.m. CT (6:00 p.m. ET)
MCHCP Response to Submitted Questions – via Optavise’s messaging system	Thursday, March 13, 2025 5:00 p.m. CT (6:00 p.m. ET)

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All Proposals Due	Monday, March 24, 2025 5:00 p.m. CT (6:00 p.m. ET)
Final Vendor Selection/Contract Award	Late May, 2025
Contract Effective Date	Upon signature

### Questions

During this bidding opportunity, MCHCP will be using the online messaging module of the Optavise application for all official answers to questions from bidders, amendments to the RFP, exchange of information and notification of awards. It is the bidder’s responsibility to notify MCHCP of any change in contact information of the bidder. During the bidding process you will be notified via the messaging module of the posting of any new bid-related information.

All questions regarding specifications, requirements, competitive procurement process, etc., must be in writing and submitted through the online messaging module of the Optavise application by **Friday, March 7, 2025, 5 p.m. CT (6 p.m. ET)**. Questions received after March 7, 2025, will be answered and posted through the messaging module as time permits, but there is no guarantee of a response to these questions. For step-by-step instructions, please refer to the *Downloads* section of the Optavise application, and click on *User Guides*.

Questions deemed universally applicable will be answered in writing and shared with all vendors who have indicated they are quoting. The team will respond to your questions via the messaging module, with a summary of all questions and answers provided by **Thursday, March 13, 2025**.

Bidders or their representatives may not contact MCHCP employees or any member of the MCHCP Board of Trustees regarding this bidding opportunity or the contents of this RFP. If any such contact is discovered to have occurred, it may result in the immediate disqualification of the bidder from further consideration.

### Proposal Deadline

ALL questionnaires and pricing proposals must be submitted no later than **5 p.m. CT (6 p.m. ET), Monday, March 24, 2025**.

### Disclaimers

MCHCP will not be liable under any circumstances for any expenses incurred by the bidder or respondent in connection with the selection process.

The description of coverage and plan design contained in this RFP is solely intended to allow for the preparation and submission of proposals by bidders and does not constitute a promise or guarantee of benefits to any individual.

### **Confidentiality and Proprietary Materials**

Pursuant to Section 610.021 RSMo, proposals and related documents shall not be available for public review until a contract has been awarded or all proposals are rejected. MCHCP maintains copies of all proposals and related documents.

MCHCP is a governmental body under Missouri Sunshine Law (Chapter 610 RSMo). Section 610.011 requires that all provisions be “liberally construed and their exceptions strictly construed to promote” the public policy that records are open unless otherwise provided by law. Regardless of any claim by a bidder as to material being proprietary and not subject to copying or distribution, or how a bidder characterizes any information provided in its proposal, all material submitted by the bidder in conjunction with the RFP is subject to release after the award of a contract in relation to a request for public records under the Missouri Sunshine Law (see Chapter 610 of the Missouri Revised Statutes). Only information expressly permitted by the provisions of Missouri’s Sunshine Law to be closed – strictly construed – will be redacted by MCHCP from any public request submitted to MCHCP after an award is made. Bidders should presume information provided to MCHCP in a proposal will be public following the award of the bid and made available upon request in accordance with the provisions of state law.

### **Evaluation Process**

Any apparent clerical error may be corrected by the bidder before contract award. Upon discovering an apparent clerical error, MCHCP shall contact the bidder and request written clarification of the intended proposal. The correction shall be made in the notice of award. Examples of apparent clerical errors are: 1) misplacement of a decimal point; and 2) obvious mistake in designation of unit.

Any pricing information submitted by a bidder must be disclosed on the pricing pages as designated in this RFP. Any pricing information which appears elsewhere in the bidder’s proposal shall not be considered by MCHCP.

An award shall only be made to the bidder(s) whose proposal(s) complies with all mandatory specifications and requirements of the RFP. MCHCP reserves the right to evaluate all offers and based upon that evaluation to reject all offers.

MCHCP reserves the right to request written clarification of any portion of the bidder’s response to verify the intent of the bidder. The bidder is cautioned, however, that its response shall be subject to acceptance or rejection without further clarification.

MCHCP reserves the right to consider historic information and fact, whether gained from the bidder’s proposal, question and answer conferences, references, or any other source, in the evaluation process. The bidder is cautioned that it is the bidder’s sole responsibility to submit information related to the evaluation categories and that MCHCP is under no obligation to solicit such information if it is not included with the bidder’s proposal. Failure of the bidder to submit such information may cause an adverse impact on the evaluation of the bidder’s proposal.

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After determining that a proposal satisfies the mandatory requirements stated in the RFP, the comparative assessment of the relative benefits and deficiencies of the proposal in relationship to the published evaluation criteria shall be made by using subjective judgment. The award of a contract resulting from this RFP shall be based on the lowest and best proposal received in accordance with the evaluation criteria stated below:

### **Evaluation Criteria**

Financial Proposal	500 points
Questionnaire Responses	<u>500 points</u>
	1,000 points

MCHCP will limit the number of finalists to the bidders receiving 80 percent (400 points) of the possible 500 non-financial points available or the top two bidders if less than two bidders receive 80 percent of the possible 500 non-financial points.

### **Pricing**

The bidder must provide a firm, fixed pricing arrangement for the services requested in this RFP.

### **Finalist Interview**

After an initial screening process, a technical question and answer conference or interview may be conducted, if deemed necessary by MCHCP, to clarify or verify the bidder's proposal and to develop a comprehensive assessment of the proposal. MCHCP reserves the right to interview the proposed audit team.

### **Negotiation and Contract Award**

The bidder is advised that under the provisions of this RFP, MCHCP reserves the right to conduct negotiations of the proposals received or to award a contract without negotiations. If such negotiations are conducted, the following conditions shall apply:

- Negotiations may be conducted in person, in writing, or by telephone.
- Negotiations will only be conducted with bidders who provide potentially acceptable proposals. MCHCP reserves the right to limit negotiations to those bidders which received the highest rankings during the initial evaluation phase. All bidders involved in the negotiation process will be invited to submit a best and final offer.
- Terms, conditions, prices, methodology, or other features of the bidder's proposal may be subject to negotiation and subsequent revision. As part of the negotiations, the bidder may be required to submit supporting financial, pricing, and other data to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the proposal.

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- The mandatory requirements of this RFP shall not be negotiable and shall remain unchanged unless MCHCP determines that a change in such requirements is in the best interest of MCHCP and its members.
- Bidder understands that the terms of any negotiation are confidential until an award is made or all proposals are rejected.

Any award(s) of a contract(s) resulting from this RFP will be made only by written authorization from MCHCP.

### **Using Optavise**

The 2025 MCHCP Medical Claim Audit RFP contains two broad categories of items that you will need to work on via the Optavise application:

#### 1) Items Requiring a Response:

- a) Pricing Form (e.g. Medical Claim Audit Pricing) is an online input form to collect your rate proposal as requested by MCHCP.
- b) Questionnaires (e.g., Medical Claim Audit Questionnaire) are also online forms to collect your responses to our questions about your capabilities.
- c) Response Documents (e.g., Exhibit A-1 Intent to Bid) are attachment files (e.g., MS Word or Excel) that are posted to the Optavise website. They should be downloaded, completed and/or signed by your organization, and then posted/uploaded back to the Optavise application. When you upload your response, from the drop-down menu, identify each uploaded document as a *Response* document and associate it to the appropriate document by name. For step-by-step instructions, please refer to the *How to Download and Attach Files* User Guide located in the *Downloads* section on the application homepage.

#### 2) Reference Files from Event Administrator:

- a) Documents (e.g., Exhibit B-Scope of Work) that you should download and read completely before submitting your RFP response.

All these components can be found in the Optavise application under the 2025 MCHCP Medical Claim Audit RFP on the Event Details page of the application.

Note that as you use the Optavise application to respond to this RFP, User Guides are accessible throughout the application by clicking on the help icon or from the *Downloads* area of the Optavise application homepage. For help with data entry and navigation through the application, you can contact the Optavise staff:

- Phone: 800-979-9351
- E-mail: [systemsupport@optavise.com](mailto:systemsupport@optavise.com)



**Responding to Questionnaires**

We have posted two forms for your response that are required for all bidders:

- Medical Claim Audit Questionnaire
- Mandatory Contract Provisions Questionnaire

The questionnaires need to be completed and submitted to Optavise by **Monday, March 24, 2025, 5 p.m. CT (6 p.m. ET)**.

The questionnaires are located within the *Items Requiring a Response* tab. This tab contains all the items you and your team are required to access and respond to. For step-by-step instructions, refer to the *How to Submit a Questionnaire* User Guide located in the *Downloads* section of the Optavise application homepage. You have the option to “respond online” or through two different off-line (or desktop) tools.

**Completing Response Documents**

The following exhibits must be completed, signed and uploaded to Optavise:

- Exhibit A-1 – Intent to Bid (due 5 p.m. CT, March 7, 2025)
- Exhibit A-2 – Proposed Bidder Modifications (due 5 p.m. CT, March 24, 2025)
- Exhibit A-3 – Confirmation Document (due 5 p.m. CT, March 24, 2025)
- Exhibit A-4 – Contractor Certification (due 5 p.m. CT, March 24, 2025)

The following exhibits must be reviewed, and the bidder provide any suggested red-lined changes to the documents using Microsoft Word Track Changes functionality. Changes proposed may or may not be accepted by MCHCP.

- Exhibit A-5 – Sample MCHCP Contract (due 5 p.m. CT, March 24, 2025)
- Exhibit A-6 – MCHCP Business Associate Agreement (due 5 p.m. CT, March 24, 2025)

**Completing Pricing Worksheets**

The financial worksheet may be accessed in *Items Requiring a Response*. The *Pricing or Bid* contains a worksheet to collect fee quotations based on the services requested in this RFP. For step-by-step instructions, please refer to the *How to Submit a Bid* User Guide located in the *Downloads* section of the Optavise application homepage.

**Notes Regarding Pricing**

Quotes should assume:

- Contract effective upon signature
- Proposed prices shall be firm and are subject to negotiation prior to the award of a contract by MCHCP. Refer to this Instructions document for detailed pricing worksheet instructions.

## 2025 Medical Claim Audit RFP – Introduction and Instructions

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### Submitting Bids

The pricing function allows you to work on a bid submission in draft form. You can enter your rates and *Save* without submitting your proposal to Optavise.

Once you have submitted your bid(s), you can make adjustments at any time up until the bids are due. Simply select the pricing/bid and choose *Edit* to make changes. Follow the steps above to save and re-submit.

Refer to the following list of instructions before attempting to input/submit a bid:

- Enter your rates well in advance of the required bid date.
- You will be able to view your final rate submission prior to submitting to Optavise.
- If your data are accurate and complete, click on the *Submit Bid* icon to submit your bid(s) to Optavise.
- Data that are submitted incorrectly will receive error messages when submitted.
- Data fields that are marked as a number or currency must be filled with a numerical value or 0. Blanks and text such as “n/a” are not permitted. If you attempt to *Submit* your data with incomplete fields, you will receive an error message.
- Be sure to save your data often. For security purposes the system will automatically log you out after a specified time if there is no activity.

### RFP Checklist

Prior to the Monday, March 24, 2025, close date, be sure you have completed and/or reviewed each of the documents listed below.

Type	Document Name
Questionnaire	Medical Claim Audit Questionnaire
Questionnaire	Mandatory Contract Provisions Questionnaire
Pricing/Bid	Medical Claim Audit Pricing
Response	Exhibit A-1 Intent to Bid.docx <b>DUE: March 7, 2025</b>
Response	Exhibit A-2 Proposed Bidder Modifications.docx
Response	Exhibit A-3 Confirmation Document.docx
Response	Exhibit A-4 Contractor Certification.docx
Response	Exhibit A-5 Sample Contract.docx
Response	Exhibit A-6 Business Associate Agreement.docx
Reference	Introduction and Instructions – 2025 Medical Claims Audit RFP.pdf
Reference	Exhibit B – Scope of Work.docx
Reference	Exhibit C – General Provisions.docx

**Contact Information**

We understand that content and technical questions may arise. All questions regarding this document and the selection process must be submitted through the online messaging module of the Optavise application by **Friday, March 7, 2025, 5 p.m. CT (6 p.m. ET)**.

For technical questions related to the use of Optavise, please contact the Optavise customer support team at [systemsupport@optavise.com](mailto:systemsupport@optavise.com), or by calling the Customer Support Line at 800-979-9351.