

Addendum #4 Changes to RFP

305PUR-DHHRFP-FEA-2014-MVA FISCAL/EMPLOYER AGENT FOR SELF-DIRECTED SERVICES

Revisions to the RFP by section

Response to Question number 5. Revised strike through only;

III. Scope of Work, C. Deliverables, 1. General Requirements and Expected Outcomes, g., page 17

~~g) develop, implement, and maintain a current online orientation, and skills training for participants/ responsible representatives and employees, which is subject to approval by BHSF;~~

Response to Question number 8. Revised strike through only

III. Scope of Work, C. Deliverables, 1. General Requirements and Expected Outcomes, #7, b), page 25

~~b) develop, implement, and maintain a current online orientation and skills training course for participants/ responsible representatives and DSWs; examples of required skill training are fiscal management of payroll, documentation required for all directly hired DSWs, completion of timesheets accurately and timely, and self-direction policies and procedures (based on the program's policy and existing handbook); the F/EA will be responsible for making the orientation and skills training available to participants and DSWs upon the start of the contract; the F/EA shall also develop, implement, and maintain a competency based online examination for DSWs to cover the information presented in the online training courses; the online examination should automatically provide the DSW with a score and allow the DSW to print a completion certificate; the F/EA will work with the DHH staff, participants and DSWs to provide training on the completion of State and Federal forms, and will provide them with the necessary forms and packets for participants; the F/EA will be available to answer questions and provide additional training by telephone to support coordinators and participants; BHSF shall approve all elements of the orientation/skill training prior to implementation and revision;~~

Response to Question number 10. Revised strike through and added red text.

C. Deliverables, #3, x. Operations Responsibilities for the F/EA, page 20

(x) Sample ~~payroll/budget~~ report and instructions.

C. Deliverables, #11. Reporting Requirements, *Monthly, c.*, page 28

~~Payroll/Budget~~ Reports, which will be mailed to each participant and DHH staff; the ~~payroll/budget~~ report should include the type of program, number of hours the participant has available for the prior authorization period, the number of hours used, number of hours remaining for use, hours worked by DSW, check date, amount, number, and taxes by DSW, and any vendor payments;

C. Deliverables, #1 General Requirements and Expected Outcomes, page 18

The Contractor shall ensure the following performance outcomes are achieved and sustained:

g) 100% of ~~bi-weekly~~ **bi-monthly** budget reports will be sent via U.S. mail or electronic mail to participants within three (3) days after the payroll period, providing that the F/EA is furnished with current addresses;

III. Scope of Work, C. Deliverables, 1. General Requirements and Expected Outcomes, Reporting Requirements #11, c), page 27

Bi-monthly reports

Payroll/Budget Reports, which will be mailed to each participant and DHH staff; the payroll report should include the type of program, number of hours the participant has available for the prior authorization period, the number of hours used, number of hours remaining for use, hours worked by DSW, check date, amount, number, and taxes by DSW, and any vendor payments;

Response Question 28. Revised strike through

III. SCOPE OF WORK, A. Project Overview, page 15

The purpose of this RFP is to solicit proposals from qualified Proposers that will assist the Department in complying with the Centers for Medicare and Medicaid (CMS) guidelines for financial management services in self-direction, including but not limited to: (a) verifying qualifications (criminal background check, etc.) of DSWs identified in the participant's approved plan of care and budget and enrolling them in the self-direction option; (b) processing payroll, withholding and filing and paying applicable federal income tax withholding, FICA and FUTA, SUTA and State income taxes; (c) disbursing payment to all DSWs identified in the participant's approved plan of care and budget; (d) billing for expenditures disbursed, based on the approved plan of care and budget, making refunds to Louisiana Medicaid as appropriate; (e) maintaining all records related to the DSW's payroll, taxes ~~and benefits~~; (f) providing customer support; and (g) producing & sending periodic reports to BHSF as set forth herein.

III. Scope of Work, A. Project Overview, #2, page 15

2. Participants/Responsible Representatives....

h) determine staff wages and ~~benefits~~ subject to State limits;

III. Scope of Work, C. Deliverables, #2, page 19

2. Programmatic Responsibility for the F/EA

g) maintenance of all records related to the DSW's payroll, taxes and ~~benefits~~;

Response to questions 36, 88, and 95. Revised strike through, and added red text

Table of Contents, Section VII, C., page 3

~~C. Retainage/Performance Bond~~

III. Scope of Work, B. Contractor Responsibilities, #4, page 16

4. Establishing ~~and~~ maintaining, ~~and showing proof of bonding and~~ registration with the Louisiana Secretary of State;

VII. Contractual Information, C. Retainage/Performance Bond/Letter of Credit, page 48

C. Retainage/~~Performance Bond/Letter of Credit~~

VII. Contractual Information, D. Indemnification and Limitation of Liability, #6, page 48

6. The State and Authorized User may, in addition to other remedies available to them at law or equity and upon notice to the Contractor, retain such monies from amounts due Contractor, ~~or may proceed against the performance and payment bond~~, if any, as may be necessary to satisfy any claim for damages, penalties, costs and the like asserted by or against them.

Response to question 62. Revised strike through

III. SCOPE OF WORK, C. Deliverables, #1 General Requirements and Expected Outcomes, page 17

~~g) develop, implement, and maintain a current online orientation and skills training for participants/responsible representatives and employees, which is subject to approval by BHSF;~~

Response to question 64. Replace with Revised Attachment V.

Revised Attachment V, Cost Worksheet 1, page 63

| PMPM Rate for 1-500 Participants | PMPM Rate for 501-1000 Participants | PMPM Rate for 1001-1500 Participants | PMPM Rate for 1501+ Participants | Background Check Rate 1-500 |
|----------------------------------|-------------------------------------|--------------------------------------|----------------------------------|-----------------------------|
| \$ | \$ | \$ | \$ | \$ |

Response to questions 59, 83 and 100. Revised strike through

IV. Proposals, P. Proposal Content, #7. Qualifications of Personnel, page 42

c) job descriptions, including the percentage of time allocated to the project and the number of personnel should be included and should indicate minimum education, training, experience, special skills and other qualifications for each staff position as well as specific job duties identified in the proposal; ~~job descriptions should indicate if the position will be filled by a sub-contractor;~~

Response to questions 123, 124 and 125. Revised strike through. Added red text.

IV. Proposals, P. Proposal Content, #3, Approach, page 39

3. Approach

Proposals should define proposer's functional approach in providing services and identify the tasks necessary to meet the RFP requirements of the provision of services, as outlined in ~~Section II~~ **Section III**.