Multnomah County

Medical Claims Audit

Multnomah County is seeking a qualified vendor to conduct a comprehensive Medical Claims Audit of its self-insured health plans.

Open	8/21/2026, 8:00 AM PDT	Type	Request for Proposal (RFP)
Close	9/23/2026, 4:00 PM PDT	Number	RFP-12-2027
		Currency	US Dollar
Sealed Until	9/23/2026, 4:00 PM PDT		
		Payment Terms	0% 0, Net 30

Contacts

Jun Zhu

jun.zhu@multco.us

Phone +1 503-988-7603 ext. 87603

Commodity Codes

Commodity Code	**Description**
80101599	Consulting Services, General

Description

IMPORTANT: Suppliers who do not currently have access to the Multco Marketplace Supplier Portal will need to complete the "MMP Supplier Access Request Form". In order to allow the County sufficient time to review your request, the MMP Supplier Access Request form should be completed no fewer than 5 days prior to the Sourcing Event closing date.

Pre-Proposal Conference

There will be a virtual Pre-proposal Conference for this sourcing event.

Date: Wednesday, September 2nd, 2026

Time: 1:30pm PST

Google Meet Video Link: https://meet.google.com/hxf-iozj-xnf

Or Call: (US) +1 405-358-3143 PIN: 404 556 057#

Confidentiality

If your proposal has confidential information, read over the CONFIDENTIALITY statement in the Prerequisites section and then attach the necessary documentation in the “Suppliers Attachments” tab of the event.

Upload the information for those sections or questions marked as confidential as a PDF in the “Suppliers Attachments” tab of the event. The same page, text, or character limits that applied within the original sections or questions will apply to this uploaded PDF file.

SERVICE DESCRIPTION, FUNDING AND CONTRACTING INFORMATION

PURPOSE AND OVERVIEW

Project Overview

The County seeks proposals from qualified contractors to conduct comprehensive claims audits and operational assessments for its self-funded health plan. The selected contractor will perform independent audits at the discretion of the County, the scope to be determined at the discretion of the County.

Introduction and Program History

Employee Benefits administers benefits including health, life insurance, disability insurance, long term care insurance, HRA VEBA, and FSA for nearly 6,000 County employees. Approximately 2,300 employees and retirees are enrolled in the County’s self-funded PPO medical plans and approximately 2,600 employees and retirees enrolled in the County’s self-funded dental plan.

The County is seeking a qualified vendor to conduct a comprehensive Medical Claims Audit of its self-insured health plans. The primary objective is to ensure fiscal accountability, verify compliance with plan documents, and identify opportunities for cost recovery and process improvement. The selected firm must demonstrate independence and possess significant experience auditing public sector health plans of similar size and complexity.

Goals, Values, and Other Important Considerations

Funding

The County has budgeted sufficient funds to conduct the services outlined below in the Scope of Services.

Scope of Services

Conduct medical, prescription, and dental audits of self-funded health plans.

- **Stakeholder Engagement:**

  Provide a stakeholder engagement plan, including semimonthly progress reports in a mutually agreed format (e.g., written updates or virtual dashboards) and a process for escalating issues to the County within 24 hours.

- **Quality Assurance:**

  Implement robust quality assurance processes, including internal review protocols and error-checking methodologies, to ensure audit accuracy.

  Provide a plan for resolving disputes with health plan over claims findings, with examples of successful resolution from past projects (e.g., percentage of disputed claims resolved).

- **Knowledge Transfer:**

  Include a knowledge transfer plan to equip County staff with insights from the audit, such as a training session on key findings or documentation of audit methodologies and CAP monitoring processes. This plan should be included within the proposed fees unless otherwise specified.

- **Additional Projects:**

  Additional projects requested by the County, individually not expected to exceed $10,000, may be proposed and billed on (i) a time-and-expense basis (based on the Contractor ’s hourly billing rates in effect at the time), (ii) a fixed-fee basis, or (iii) as otherwise mutually agreed in writing. All such projects will be subject to the terms of the resulting contract.

- **Innovation and Value-Added Services:**

  Contractors are encouraged to propose innovative approaches or value-added services, such as predictive analytics to identify future claims risks, benchmarking against industry standards, or training sessions for County staff. Proposals should detail how these additions align with the project’s objectives and budget constraints.

- **Assumptions:**
  - Full and timely cooperation by health plan throughout the audit process, including timely resolution of open issues.
  - Health plan and the County provide complete, accurate, and timely information, materials, and data.

    - Fees do not include any charges that Contractors may impose for providing claims history data. Contractors must disclose any anticipated third-party fees in their proposals.

County Responsibilities

To support the audit, the County may assist with the following:

- Notify health plan that a contractor has been engaged to conduct the audit, using sample language provided by the contractor if needed.
- Provide the contractor with plan description materials, such as updated Summary Plan Descriptions (SPD), Summary of Benefits and Coverage (SBC), and/or benefit summaries in effect during the audit period.
- Review and sign, as approved by the County's legal counsel, any audit agreements required by health plan.
- Be available to assist with plan intent benefit clarifications, as necessary.

Compensation and Billing

Proposals must include fixed fees for services and travel, along with hourly rates for any potential additional work or extensions. Proposals must include standard hourly billing rates by role or expertise level for any additional work. **See Proposal Question 2.1.3**.

Subcontractors

The contractor may utilize subcontractors for tasks such as printing and mailing, development of interactive tools, graphic design, SaaS hosting, etc. The County consents to the use of subcontractors, provided they are disclosed in the proposal. The contractor must ensure that subcontractors receive the County's confidential information only on a need-to-know basis and under appropriate confidentiality agreements. The contractor remains fully responsible for the performance of all services, including those performed by subcontractors.

Data Security and Compliance

Contractors must describe their data security protocols for handling protected health information (PHI) in compliance with HIPAA, HITECH, and other relevant regulations. Proposals should detail encryption methods, access controls, and incident response plans used in similar audits to ensure the security of County and health plan data.

The County reserves the right to negotiate terms and fees with the selected contractor. Proposals will be evaluated based on criteria including cost, expertise, methodology, innovation, and alignment with the County's needs. Contractors are encouraged to seek clarification during the RFP process via a designated Q&A period to address any ambiguities.

Contract Term

The County may issue a contract not to exceed five years.

Contract Negotiations

The County will initiate contract negotiations with the responsive and responsible Proposer with the highest scoring proposal. Multnomah County may, at its option, elect to negotiate general contract terms and conditions, services, pricing, implementation schedules, and such other terms as the County determines are in the County's best interest. If negotiations fail to result in a contract, the County reserves the right to terminate the negotiations and initiate contract negotiations with the next highest scoring responsive and responsible Proposer. This process may continue until a contract agreement is reached.

Contract Award

Through this Sourcing Event process, the County is seeking to award one contract. Award, as determined by the County, will be made to the responsible Proposer whose Proposal the County determines is most advantageous to the County based on the evaluation process and evaluation factors described in this Sourcing Event.

Multnomah County strongly encourages the participation of Minority-Owned, Women-Owned, and Emerging Small Businesses and Organizations in providing these services.

Insurance Requirements

- **Professional Liability (Errors & Omissions):** $1,000,000 per occurrence / $2,000,000 aggregate.
- **Commercial General Liability:** $1,000,000 per occurrence / $2,000,000 aggregate (bodily injury, property damage, contractual liability).
- **Automobile Liability:** $500,000 combined single limit (if applicable, and only if travel reimbursement is permitted).
- **Workers' Compensation:** Per ORS 656.017; statutory limits (minimum $500,000).
- **Cyber Liability:** $1,000,000 per occurrence / $2,000,000 aggregate (for data handling).
- **Additional Insured:** County named on General Liability policies.

Minimum Requirements

At Proposal Submission: Proposers must meet the following minimum requirements. Failure to provide any of the required documents or meet any of the below requirements shall result in rejection of the proposal.

- Submit via County's sourcing portal by 4:00 PM PT on the Proposal due date.
- Certify to the Representations and Certifications (Pre-requisite page).

At Contracting

- Registered to do business in Oregon (ORS 60.701).
- Submit verification that all insurance requirements are met.
- No unresolved conflicts or litigation related to similar services.

Failure to meet requirements may result in rejection or cancellation.

🔒 Required to View Event

Prerequisites

★ Required to Enter Bid

★1. Proposer/Bidder agrees to receive all correspondence electronically and are responsible for keeping their supplier portal updated with current contact information.

★2. CONFIDENTIALITY - Please read the statutory requirements in the prerequisite link.

★3. Please review the statements in this certification regarding Assurances, Certification Regarding Debarment, Suspension and Other Responsibility Matters and Certification Regarding Conflict of Interest.

Buyer Attachments

1. How to Complete and Submit a Response to a Sourcing Event - MMP Supplier Guide
2. Procedural Instructions_Proposals 04_02_2024.pdf
3. SAMPLE General Services Agreement.pdf

Questions ★ Required Questions

Group 1.1:	**Company Certification Information - This section is not scored**	
Instructions:		
1.1.1	State of Incorporation	
1.1.2	Date of Incorporation	
1.1.3	ASSURANCES - Proposer attests that Proposer is either a non-resident proposer or a resident proposer (as described in Representation and Certification Prerequisite and ORS 279A.120) of the State of _________ and has not discriminated against any minority, women, or emerging small business enterprises certified under ORS 200.055 or a business enterprise that is owned or controlled by or that employs a disabled veteran as defined in ORS 408.225 in obtaining any required subcontracts, in accordance with ORS 279A.110. Enter state of residency here:	★
1.1.4	Where Proposer is unable to certify to any of the statements in Proposer Representations and Certifications of the Prerequisite, Proposer shall provide an explanation to their offer here.	
1.1.5	The Proposer certifies to the best of its knowledge and believes that neither it nor any of its principal participants and agents has or has had the following relationships with the specific firm(s)/individual(s), identified in this sourcing event, which may be determined to be an organizational conflict of interest. I understand that based on the information provided by Proposer, Multnomah County may exclude the Proposer from further consideration and may withdraw its selection if the real or apparent organizational conflict of interest cannot be avoided or mitigated. Proposer further certifies that the degree and extent of the relationship of the Proposer with these named firm(s)/individual(s) will be fully disclosed:	
1.1.6	Upload additional explanation as needed	
1.1.7	Name of person submitting the Proposal:	★
1.1.8	Title of person submitting the Proposal:	★
1.1.9	I represent that I am at least eighteen (18) years of age.	★
1.1.10	I represent that the printing of my name and the submittal of a Proposal is intended to authenticate this writing and to have the same force and effect as my manual signature.	★
1.1.11	I represent that I am either authorized to bind the Proposer, or that I am submitting the Proposal on behalf of and at the direction of the Proposer's representative authorized to contractually bind the Proposer.	★
1.1.12	I represent that the Proposer and/or its applicable representative(s) has reviewed the information contained in this Proposal and that the information submitted is accurate.	★
Group 2.1:	**Programmatic Questions (75%)**	
Instructions:		
2.1.1	Methodology and Approach: Describe your step-by-step methodology for conducting the 100% electronic claims audit and targeted sample audit, including how you ensure accuracy, compliance with industry standards, and integration with health plan systems. (15 points)	★
2.1.2	Experience and Qualifications: Provide details on your firm's experience with similar claims audits and operational assessments for public sector clients, including at least three relevant case studies or references, with outcomes such as error rates identified, overpayments recovered, and corrective action plan. (10 points)	★
2.1.3	Fees and Hourly Rates: Provide a breakdown of your proposed fixed fees for each scope of service (as outlined in the RFP), along with your standard hourly billing rates for any additional work or extensions, including how these rates are structured by role or expertise level. (10 points)	★
2.1.4	Subcontractor Management: If you plan to use subcontractors, describe their roles, qualifications, and how you will ensure they comply with confidentiality requirements and maintain the same quality standards as your primary team. (5 points)	★
2.1.5	Conflict of Interest Disclosure: Disclose any potential conflicts of interest, such as prior or current relationships with health plan administrators, and explain how you would mitigate them to ensure an independent and unbiased audit. (5 points)	★
2.1.6	Follow-Up and Reporting: Explain your process for developing and monitoring the Corrective Action Plan (CAP), including how you will conduct the semimonthly calls, track progress, and deliver the final report to ensure recommendations are actionable. (10 points)	★

2.1.7	Data Security and Compliance: Describe your firm's policies and procedures for handling sensitive health data, including compliance with HIPAA, data encryption methods, breach response protocols, and any relevant certifications. Provide examples of how you've managed data security in past audits involving protected health information. (5 points)	★
2.1.8	Technology and Tools: Detail the specific software, AI-driven tools, or analytics platforms your firm will use for the claims audit and operational assessment. Explain how these technologies enhance accuracy, efficiency, and error detection compared to manual processes. (8 points)	★
2.1.9	Risk Management and Contingencies: Outline your approach to identifying and mitigating risks during the audit, such as data inaccuracies from health plan, delays in information provision, or disputes over findings. Include examples of how you've handled similar risks in prior engagements. (10 points)	★
2.1.10	Innovation and Value-Added Services: Beyond the core scope, what innovative tools, technologies, or methodologies (e.g., AI-driven claims analysis or predictive analytics) do you employ to enhance audit efficiency and outcomes? Describe any value-added services you could offer at no additional cost, such as preliminary data analytics or benchmarking against industry standards. (12 points)	★
2.1.11	Performance Metrics and Outcomes: How do you define and measure success for medical claims audits? (10 points)	★
Group 2.2:	**Responsible Business Practice Questions (25%)**	
Instructions:		
2.2.1	Describe the energy conservation practices your firm utilizes to minimize the carbon footprint associated with data management and remote operations for this contract. Specifically, address how your data storage protocols or chosen SaaS hosting subcontractors optimize energy efficiency (e.g., utilizing energy-efficient data centers, green cloud hosting, or low-power server management) and how your reliance on virtual dashboards and electronic data transfers will be managed to minimize unnecessary energy consumption. (40 points)	★
2.2.2	How does your firm integrate equity-focused principles and demographic analysis into its auditing methodology to identify health plan disparities or barriers to care among historically underrepresented or marginalized employee populations? Additionally, describe the diversity of the leadership and key personnel who will oversee this project, including how your firm ensures culturally competent analysis and reporting. (30 points)	★
2.2.3	Provide an overview of the economic impacts your firm generates through its employee healthcare benefits, living wage standards, and workforce wellness programs. How does your firm utilize employee assistance, mental health support, or flexible work wellness initiatives to reduce auditor burnout, support staff retention, and directly ensure consistent, high-quality delivery and rigorous quality assurance over the course of this five-year contract? (30 points)	★

Product Line Items

There are no Items added to this event.

Service Line Items

★ Service Line Items

1.

#	Item Name, Commodity Code, Description	Allow Alternates	Qty.	UOM	Requested Service Delivery
S1	N/A: DO NOT COMPLETE		1		