



Request for Proposal #26-07372

Claims Editing Software

10801 6th Street
Rancho Cucamonga, CA 91730

This RFP and any ensuing Addenda are available at the following link:

<http://iehp.bonfirehub.com>

**NOTE: BIDDERS ARE RESPONSIBLE TO READ ALL INFORMATION THAT IS STATED IN THIS
REQUEST FOR PROPOSAL AND PROVIDE A RESPONSE AS REQUIRED**

Timeline

1. The following timeline is based on IEHP's requirements and will be strictly adhered to unless modified by written addendum:

Date:	Description:
9/24/2026	RFP release date
10/14/2026	Bidder Questions Due (5:00 p.m. PT)
10/23/2026	Bidder's Proposals Due (2:00 p.m. PT)
TBD	Bidder Demonstrations

IEHP anticipates holding Bidder Presentations/Demonstrations at a date which is to be determined. IEHP may choose to hold presentations/demonstrations with all, some or no Bidders, at its sole discretion, pursuant to this RFP.

2. The period of performance anticipated for this RFP shall be for an initial term of one (1) year. At the end of the initial term, IEHP shall have the option to renew the Agreement for up to four (4) additional consecutive one (1) year period(s), upon written notice. This RFP does not commit IEHP to award a contract, and there is no obligation by IEHP to purchase any specified amount of goods or services. IEHP will award a contract, if any, in its best interest and based on a proposal that best meets its needs as set forth herein.
3. IEHP reserves the right to award to multiple bidders, based on IEHP's needs, at IEHP's sole discretion.

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A. Solicitation Introduction

1. Background of IEHP

Inland Empire Health Plan (IEHP) is a local public entity of the State of California and is a rapidly growing Medi-Cal and IEHP DualChoice (HMO D-SNP [Dual Eligible Special Needs Plans]) health plan in California. Since September of 1996, IEHP has consistently focused on our mission: “We heal and inspire the human spirit”. As a result of the Healthcare Reform and participation in the California Coordinated Care Initiatives, IEHP grew to over 1 million members. With a provider network of over 7,500 providers and more than 3,200 employees, we now serve more than 1.3 million residents of the Riverside and San Bernardino counties who are enrolled in Medi-Cal, D-SNP, or Covered California.

IEHP’s Membership totals as of August 2026 are listed in the table below:

Line of Business	Member Count
Medi-Cal	1,320,774
D-SNP	38,483
Covered California	34,249
Total Membership	1,393,506

2. Key Principles

This RFP defines IEHP’s requirements for a comprehensive post-adjudication, pre-payment claims editing solution, including complex claims editing capabilities and historical pre-payment data analysis. IEHP’s Procurement Department (on behalf of the Payment Integrity Department) is soliciting proposals from qualified vendors to meet these requirements. A “Qualified Bidder” is one that can reliably and independently provide all required services for the full term of the agreement.

3. Primary Goals

The primary goal of this RFP is to engage a qualified vendor to deliver a comprehensive post-adjudication, pre-payment claims editing solution that enhances claims accuracy, strengthens compliance, and prevents improper payments.

4. Program Objectives

The objective of engaging a vendor for the Claims Editing Software RFP is to implement a comprehensive post-adjudication, pre-payment claims editing solution that provides a full suite of editing capabilities – including standard rule-based edits, complex logic edits, historical claims review, and specialized edits for areas vulnerable to fraud, waste, and abuse (such as hospice and laboratory services). The solution must also support the configuration and development of custom edits as needed, while ensuring successful implementation, ongoing maintenance, and continuous optimization of the claims editing platform and all associated

components. (All specific requirements are detailed in the Scope of Services section of this RFP.)

5. **Key Selection Criteria**

At the discretion of the Evaluation Team, 65 points will be allocated between the scope and company scores, 30 points will be assigned to price, and 5 points will be given for local preference. If demonstrations or interviews are conducted, an additional 10 points will be allocated to demo scores.

IEHP reserves the right, at its sole discretion, to award the contract to the responsive and responsible bidder whose proposal offers the **best value** to IEHP. Best value will be determined through a comprehensive evaluation of both price and non-price factors, including technical approach, experience, methodology, and other criteria specified in this RFP.

IEHP's standard evaluation and selection procedures are also described in **Exhibit A: RFP Bidder Terms and Conditions**.

6. **Program Outcomes**

The expected outcome of the program is a significant reduction in unnecessary financial risk by preventing payment of non-compliant or improper claims (claims that fail DHCS encounter logic or violate state and federal billing guidelines). The solution should also strengthen oversight, auditing, and compliance through targeted specialty-specific editing, improved operational efficiency in pre-payment claims processing, and achieve measurable cost avoidance across IEHP's claims operations.

7. **Target Population/Historical Information**

The service will focus primarily on claims for which IEHP maintains direct financial responsibility. However, IEHP may also evaluate a vendor's ability to apply the claims editing solution to delegated entities' encounters to assess whether those entities are performing appropriate pre-payment payment integrity editing across their claims universe.

8. **First=Tier, Downstream, and Related Entity (FDR) Status – NO**

The services outlined in this RFP are classified as non-delegated administrative or healthcare services. The contractor will not be recognized as an FDR vendor, and therefore is not subject to the associated requirements. However, if the status changes, as determined by IEHP, the contractor will be required to comply with all relevant FDR requirements.

9. **Piggyback Provision**

Other public agencies, municipalities, and government entities within the State of California may, at their discretion and with the awarded vendor's consent, utilize this Request for Proposal (RFP) and any resulting agreement. Any such use shall be arranged directly between the vendor and the participating entity, independent of IEHP. IEHP does not assume any responsibility or liability for contracts entered into by other entities under this provision.

B. Proposal Guidelines

Instructions:

1. **This document is provided to Bidders as a reference. Bidders are not required to enter answers to Bidder questions in this document. All required questions will be found under the associated solicitation number on the Bonfire portal at <http://iehp.bonfirehub.com>.**
 - a. All requested documents from each section shall be uploaded to their corresponding document slot at <http://iehp.bonfirehub.com>.
 - b. All questions from each section shall be answered by bidders in the corresponding questionnaire and/or bid table located at <http://iehp.bonfirehub.com>.
2. Follow the instructions in each section of this RFP.
3. All Proposals must include a detailed description of each proposed service to be provided.
4. Responses that do not comply with submission instructions may be delayed or not accepted for review.
5. Failure to comply with the submission instructions in this RFP or the non-negotiable terms in Exhibit A (RFP Bidder Terms and Conditions) may result in disqualification from the RFP process.
6. A duly authorized officer of the organization must sign your RFP response.
7. IEHP reserves the right to modify or terminate the RFP process at any time. IEHP may amend or modify the project scope of services prior to the award of a contract(s), as necessity may dictate, reject any and all proposals submitted (and rebid, if necessary), accept any or all proposals submitted, negotiate with any qualified source, or cancel, in part or in its entirety, this RFP if it is in the best interest of IEHP, at IEHP's sole discretion.
8. IEHP may keep submissions and negotiations confidential until the Governing Board approves the final contract and/or a contract is issued. Proposals may contain financial statements or other information which constitute a trade secret. In order to protect such data from disclosure, please identify the pages by clearly marking the applicable pages as confidential.
9. Upon receipt of this RFP, recipients are expected to read and understand the service priorities and requirements that have been defined by IEHP. Opportunity will be

given to ask questions and receive clarification. The character and operating principles of the successful vendor are important to IEHP. The following sections ask questions about the history and purpose of the vendor's company. Please answer the specific questions. If additional information would be informative to IEHP, please add it to the last question in each question set.

10. Each proposal will be reviewed by IEHP's Procurement team to determine if the proposal is responsive to the submission requirements outlined in the RFP. A responsive proposal, for the purpose of this RFP, is one which follows the requirements of this RFP, includes all documentation, is submitted in the format specified in this RFP document, is submitted on time, and has the appropriate signatures required on each document. Failure to comply with these requirements may result in the proposal being deemed non-responsive and, therefore, rejected, at the sole discretion of IEHP.
11. An Evaluation Committee comprised of IEHP stakeholders will review each bidder's responses to the questions contained in this RFP. If the respondent cannot represent and warrant the business requirements listed herein, the proposal may be rejected, at the sole discretion of IEHP.
12. The Evaluation Committee will review, evaluate, and score the proposals. The best response(s) may be recommended for another round of evaluation at IEHP's sole discretion. IEHP reserves the right to conduct as many rounds of evaluations as it deems to be reasonable or necessary in the public interest. Each round of evaluation may result in modification of scores, further clarification or addenda being issued, and changes in the RFP process.
13. Upon evaluation of the criteria and the rating and ranking, the Evaluation Committee may choose to conduct an oral presentation/demonstration with any bidder(s). Upon completion of the oral presentations/demonstrations, the Evaluation Committee members may re-evaluate, re-score and/or re-rank the proposals remaining in consideration.
14. The price proposal will be evaluated relative to the combination of the technical proposal, including an evaluation of how well it matches the bidder's understanding of IEHP's needs described in this Solicitation, the bidder's assumptions, and the value of the proposed solution and/or services. The pricing evaluation is used as part of the evaluation process to determine the bidder that will provide the best overall value to IEHP.
15. IEHP may direct negotiations with its first-choice bidder, negotiations with multiple bidders, and/or may request for best and final offers. The discussions may include price and conditions attendant to price. This RFP includes IEHP's standard, required contract terms, attached hereto as Exhibit B, which IEHP expects to be incorporated

into a final contract form together with other terms and conditions. Failure to accept IEHP's standard terms may result in the bidder being removed from consideration.

16. Notwithstanding the foregoing, if IEHP believes IEHP and the said bidder(s) cannot reach agreement on a contract, IEHP shall exercise its right to terminate or suspend negotiations and may begin negotiations with the other bidder(s). This process may continue until a contract acceptable to IEHP has been executed or all proposals are rejected. No bidder shall have any rights against the IEHP arising from such negotiations or termination thereof.
17. A bidder's protest of any IEHP decision to eliminate the bidder from further consideration for an award, or to award a contract to another bidder, shall be made in writing and submitted to IEHP by 5:00 p.m. PT on the fifth (5th) day following posting of Notice of Intent to Award, or posting Notice of Award of the contract, whichever occurs first. The written protest shall be submitted to procurement@iehp.org. The written protest shall fully describe each and every basis for protest and shall describe the manner in which IEHP failed to act within its discretion or abused its discretion. For avoidance of doubt, IEHP's intent is to reserve its discretion under this RFP to maximum amount allowed by law, and this RFP shall be construed in favor of reserving IEHP's discretion in all circumstances. Failure to timely and completely submit a protest shall constitute a final and conclusive waiver of any and all rights to bring a legal action to challenge an award of a contract under this RFP. IEHP will not consider untimely protests or protests where the bidder failed to timely object under Section 1 of the Bidder Acknowledgements below. All bidders expressly acknowledge that IEHP may proceed with awarding and implementing a contract under this RFP while any protest, or legal action related to a protest, is pending.

Bidder Acknowledgements

1. Clarifications, Exceptions, or Deviations

- a. All bidders must describe any exceptions or deviations from the requirements of this RFP in Question Set 1 of Questionnaire Q-45XY. Each clarification, exception, or deviation must be clearly identified. If your firm has no clarifications, exceptions, or deviations, include a statement to that effect. IEHP's standard contract terms are outlined in the **RFP Bidder Terms and Conditions** document incorporated herein by reference, and attached as Exhibit A.
- b. Any objection to the prescribed procedures, terms, conditions, or requirements set forth in this RFP or any component document must be submitted to IEHP as part of, or contemporaneously with, the bidder's proposal. Failure to timely submit an objection, or failure to submit a proposal, constitutes a final and conclusive waiver of any and all rights to raise such objection for any purpose, including, without limitation, any protest or legal action challenging an award of a contract under this RFP.
- c. All Bidders must specify any additional documents that IEHP will need to sign along with the standard Agreement (e.g., appendices, requirements documents, third-party agreements, service level agreements, compliance certifications) in Question Set 1 of Questionnaire Q-45XY. These documents must also be uploaded to the "Bidder Attachments" document slot.
- d. All Bidders must specify any additional costs that IEHP will be required to pay outside of the standard agreement (e.g., third-party fees) in Question Set 1 of Questionnaire Q-45XY. These costs should also be included in Bid Table BT-49GT.

2. Evidence of Insurability/Business Licenses

- a. All bidders must submit evidence of required insurance in the corresponding document slot on the Bonfire portal. An Acord cover page will suffice for submission. If awarded the contract, the bidder will have ten (10) calendar days to provide all required insurance documentation, including a certified endorsement naming IEHP as additionally insured.
- b. Bidders must also certify possession of all current required licenses or certifications. Do not purchase additional insurance until this RFP has been awarded. Provide a copy of your current business license or other applicable licenses. Failure to provide the required document may be grounds for disqualification of bidder from the RFP process, at IEHP's sole discretion.

3. **IEHP General Compliance Requirements for Contractors**

- a. If the services provided under this RFP are designated as delegated administrative or healthcare services, the contractor will be considered a First-Tier, Downstream, and Related Entity (FDR) vendor. IEHP requires all temporary FDR staff and contractors to participate in General Compliance Training as mandated by State and Federal regulations.
- b. The training includes a quiz to assess knowledge of compliance topics and covers the following objectives:
 - Understand the purpose and functions of a Compliance Program
 - Learn the 7 Elements of an Effective Compliance Program
 - Understand IEHP's Fraud, Waste, and Abuse and HIPAA Programs, including reporting requirements and procedures for suspected non-compliance.

4. **IEHP Background Check Requirements for Bidders**

IEHP may require all individuals assigned to provide services under this RFP to undergo a background check prior to commencement of work, at the contractor's expense, including any checks required by law.

5. **Revolving Door, Conflict of Interest, and Former IEHP Employee Restrictions**

Bidders shall comply with all applicable California conflict-of-interest and post-employment restrictions, including but not limited to Government Code §§ 1090, 1097.6, 87100 *et seq.*, 87401–87402, and 87406. Accordingly:

a. **Permanent Ban – Same Matter**

Bidders shall not assign, utilize, or engage any former IEHP employee who, during IEHP employment, participated personally and substantially in the planning, development, drafting, evaluation, negotiation, decision-making, or approval of this procurement, any related solicitation, or any matter that is the same “specific proceeding” as defined under Government Code §§ 87401–87402.

b. **One-Year Cooling-Off Period – Contact/Influence Ban**

Bidders shall not assign any former IEHP employee who left IEHP employment less than one (1) year ago to perform any compensated activity that involves communicating with, appearing before, advising, or attempting to influence IEHP in relation to this procurement, in accordance with Government Code § 87406.

c. **Government Code § 1090 Prohibited Interests**

No former IEHP employee may participate on behalf of a Bidder if the former employee would have a financial or organizational interest in a contract that they helped form or influence while employed with IEHP. Any such involvement permanently disqualifies the individual from participation on the Bidder's team.

d. **Follow-On Contracting Restrictions (Gov. Code § 1097.6)**

If a Bidder or any proposed team member previously provided preliminary planning, design, advisory, or preparatory services to IEHP related to the subject matter of this RFP, Bidder must disclose such work. Bidders shall not use any former IEHP employee in violation of the follow-on contracting requirements under Government Code § 1097.6.

e. **Certification Requirement**

Bidders must submit the "Former IEHP Employee Disclosure & Certification Form" as a required document. Failure to disclose, incomplete disclosure, or misrepresentation may result in disqualification, contract termination, and additional remedies available to IEHP.

6. **Out of Country Services Notice**

- a. IEHP will only consider service offerings within the continental United States, defined as the 49 States including Alaska and the District of Columbia; excluding Hawaii.
- b. Proposed solutions that create, transmit, receive and/or maintain IEHP data must always reside within the United States.
- c. IEHP's data must always remain in the United States.
- d. All persons, electronic processes, information systems, and devices accessing IEHP systems or data must be physically located in the United States.

7. **Executive Order N-6-22 – Russia Sanctions**

On March 4, 2022, California Governor Gavin Newsom issued Executive Order N-6-22 (the EO) regarding Economic Sanctions against Russia and Russian entities and individuals. "Economic Sanctions" refers to sanctions imposed by the U.S. government in response to Russia's actions in Ukraine, as well as any sanctions imposed under state law. The EO directs all California state agencies and departments to terminate contracts with, and to refrain from entering any new

contracts with, individuals or entities that are determined to be a target of Economic Sanctions. All contractors and grantees are obligated to comply with the Economic Sanctions. Accordingly, should the State of California (the State) or IEHP determine Contractor is a target of Economic Sanctions or is conducting prohibited transactions with sanctioned individuals or entities, that shall be grounds for termination of this Agreement. Contractor shall be provided with advance written notice of such termination, allowing Contractor at least thirty (30) calendar days to provide a written response. Termination shall be at the sole discretion of the State or IEHP.

8. Registration with California Agencies

All bidders must comply with California business registration and standing requirements including:

- a. **Secretary of State (SOS):** Register and maintain **active status** for your business entity (corporation, LLC, partnership) to legally operate and contract in California.
- b. **Franchise Tax Board (FTB):** Register with the FTB, ensure **good standing** (i.e., no outstanding state tax liabilities), and complete any required filings to participate in public procurement.
- c. **IEHP Procurement Compliance:** Review and adhere to IEHP's procurement procedures as documented in the **IEHP Purchasing Policies & Procedures Manual**, available here: [IEHP Purchasing Policy & Procedures Manual PDF](#)

This requirement ensures bidders are authorized and fully compliant with statutory and IEHP-specific procurement rules.

9. Governing Law; Venue

Governing law, venue, and related dispute provisions are part of IEHP's non-negotiable contract terms (see Exhibit B).

Required Documents

All required documents listed below shall be uploaded to their corresponding document slot in the Requested Information section at <http://iehp.bonfirehub.com>.

Note: Failure to provide the required documents listed below at time of bid may be grounds for disqualification of bidder from the RFP process, at IEHP's sole discretion.

1. Principal Certification Binding Bidder's Response (IEHP-provided form)
2. Certification of Non-Debarment (IEHP-provided form)
3. Non-Collusion Declaration (IEHP-provided form)
4. Local Preference Affidavit (If applicable – IEHP-provided form)
5. Contractor's Certificate Regarding Workers' Compensation (IEHP-Provided form)
6. Acknowledgment of Non-Negotiable Contract Terms (IEHP-Provided form)
7. Former IEHP Employee Disclosure & Certification Form (IEHP-Provided form)
8. Company W-9 Form listing company's Tax Identification Number (TIN)
9. Evidence of Insurability (ACORD Certificate of Insurance)
10. Business License(s)
11. Proof of Registration: Documentation verifying corporate registration with the California Secretary of State or if not a corporation, proof of tax registration with the California Franchise Tax Board.
12. Company Hierarchy/Organizational Chart **or remove from here and Bonfire if N/A**
13. Credentials/Certifications/Licenses Document
14. Account Management Narrative
15. List of three (3) contracts of similar value awarded to your company in the past three (3) years. Include the year, type of services, dollar amounts, services provided, location, contracting company, contact name, and phone number.
16. Policy and Procedures document detailing Bidder's background checking procedures and the name of any external company utilized to perform this service.
17. Pricing Narrative
18. Redacted Pricing Narrative
19. Financial Statements
20. IEHP Security Risk Assessment or remove from here and Bonfire if N/A
21. Data Sharing Assessment or
22. Vendor Security Documents Checklist
23. Bidder's Security Documents
24. Sample Standard Reports
25. Sample Proposed Document
26. Annual Report for publicly traded companies, or if privately held, details of financial stability.
27. Bidder's Standard Agreement Template, including detailed pricing and Scope of Work (for consideration). If not available, include a detailed proposal on Bidder's letterhead including detailed pricing and Scope of Work (for consideration).
28. References (Questionnaire Q-48IJ)
29. Cost Proposal (Bid Table BT-49GT)
30. Company Profile and Evaluation Criteria (Questionnaire Q-45XY)

31. Bidder Response Questions (Questionnaire Q-19GS)
32. Pre-Recorded Demo
33. Other Documents

Required Data

All required information listed below must be provided in the Requested Information section at <http://iehp.bonfirehub.com>.

Note: Failure to provide the required information at the time of bid submission may result in disqualification from the RFP process at IEHP's sole discretion.

1. Ownership and Campaign Contributions

IEHP is a public agency with a Board of Directors composed of elected officials and public members. Under applicable law, elected officials are restricted from voting on any action concerning a contract if the contractor's owners have made campaign contributions of \$250 or more within the previous 12 months. To assist in compliance, please provide:

- a. The names of all company owners
- b. Disclosure of any campaign contributions made to IEHP Board members or elected officials within the past 12 months

2. Former IEHP Employee Disclosure

Bidders must disclose whether any proposed personnel are former IEHP employees and whether such individuals participated in any planning, drafting, evaluation, or decision-making related to this procurement.

3. Exclusions from State and Federal Programs

- a. In accordance with 42 C.F.R. §§ 438.610, 422.503 (b)(4)(vi)(F), 423.504 (b)(4)(vi)(F) and California Welfare and Institutions Code §§ 14043.6 and 14123, IEHP is prohibited from employing, contracting, or issuing payments to an individual or entity that is excluded, ineligible, or terminated from participation in State and Federal health care programs.
- b. Contract awards are contingent upon the bidder, its principals' and subcontractors', eligibility to participate in State and Federal health care programs.
- c. Bidders must certify that it or any of its subcontractors do not appear on State and Federal exclusionary lists in the Requested Data section of their response on the Bonfire portal.

4. DUNS Number

Provide your company's DUNS (Data Universal Numbering System) number.

Company Profile

This section of the proposal is designed to establish the bidder as an entity with the ability and experience to operate the program or provide goods and/or services as specified in the RFP. The Company Profile should be concise and clear, including descriptive information regarding service delivery. All Bidders shall answer these questions in Question Set 2 of Questionnaire Q-45XY, unless specifically stated otherwise below. Questions that also require the upload of a (Required Document) to the associated document slot are noted. Questions that require an answer in the form of (Required Data) are also noted.

2.1 Company Name and Corporate Structure:

2.1.1 Business name and legal business status (i.e., partnership, corporation, etc.).

2.2 Company overview related to RFP services or activities performed, including:

2.2.1 Company hierarchy (President, Vice President, Company Officers, etc.) and an organizational chart. The organizational chart shall clearly identify all staff members that will provide services under this contract. Upload this document to the corresponding document slot on Bonfire. (Required Document)

2.2.2 Number of years in business under the present business name, as well as prior business names, and the number of years of experience providing the proposed, equivalent, or related services.

2.2.3 Location of the office from which the work under this contract will be provided, and the staff allocation at that office.

2.3 Provision of Services:

2.3.1 Please provide a detailed response discussing how bidder plans on providing the services requested in this RFP; specifically, whether services will be provided by bidder's own forces, subcontractors.

2.4 Financial Interests:

2.4.1 Please indicate whether the Bidder holds controlling or interests in any other organization or is owned or controlled by any other person or organization. If none, please state N/A. Governmental agencies are exempt from this requirement.

2.4.2 Provide any financial interests in any other business. Individuals who are personally performing the contracted services and governmental agencies are exempt from this requirement.

2.4.3 Please indicate if the Bidder is privately or publicly held. If private, please provide details of financial stability. If public, please provide ticker symbol and copy of your most recent annual report.

2.5 Company Structure/Staffing:

- 2.5.1 Please describe any organizational changes (mergers, acquisitions, divestitures) that have occurred in the past five (5) years.
- 2.5.2 Please indicate whether Bidder has organizational changes (mergers, acquisitions, divestitures) planned within the next five (5) years.
- 2.5.3 Please indicate whether Bidder has any layoffs, or personnel expansions planned within the next five (5) years.

2.6 Legal:

- 2.6.1 Provide a detailed explanation of any litigation involving the Bidder or any principal officers thereof in connection with any contract within the last five (5) years. Is your firm, or the principals corresponding with your firm, under investigation, being sued, suing, or affiliated in any lawsuit or alternative dispute resolution with any governmental agency? If none, state N/A.
- 2.6.2 Has your company ever been or are you currently subject to any federal or state regulatory enforcement action including but not limited to exclusion and/or suspension from participation in a federal program?
- 2.6.3 List the officers of your organization who are authorized to negotiate the agreement with IEHP if awarded, and their positions within your organization.
- 2.6.4 Provide details of any failure or refusal to complete a contract. If none, that must be stated.
- 2.6.5 Has your company ever been or are you currently subject to any federal or state regulatory enforcement action including but not limited to exclusion and/or suspension from participation in a federal program?
- 2.6.6 State whether your company, or the principals corresponding with your company, are under investigation, being sued, suing, or affiliated in any lawsuit or alternative dispute resolution with any governmental agency. If so, please provide details.

2.7 Certification of Non-Debarment: (Required Document)

- 2.7.1 IEHP receives Federal and State funds. All Bidders must sign and submit the Certification of Non-Debarment document provided by IEHP in Bonfire that verifies that the bidder is not listed on any of the exclusion lists notated in the section below. If awarded a contract, awarded vendor must notify IEHP immediately if debarred at any time during the contract period.

- a. The Department of Health & Human Services (DHHS), Office of Inspector General (OIG), and List of Excluded Individuals and Entities (LEIE). Please visit <https://exclusions.oig.hhs.gov>.
- b. General Services Administration (GSA), and the System for Award Management (SAM.gov). Please visit <https://www.sam.gov>.
- c. California Department of Health Care Services (DHCS), and Medi-Cal Suspended and Ineligible Provider List (S&I List). Please visit <https://mcweb.apps.prd.cammis.medi-cal.ca.gov/references/sandi>.
- d. Medicare Opt-Out List. Please visit <https://data.cms.gov/tools/provider-opt-out-affidavits-look-up-tool>.

2.8 Financial Stability:

- 2.8.1 Please detail your insurance coverage, including the name of the carrier and coverage level for General Liability.
- 2.8.2 Please detail your insurance coverage, including the name of the carrier and coverage level for Tech Errors & Omissions (E&O).
- 2.8.3 Please detail your insurance coverage, including the name of the carrier and coverage level for Cyber Crime Insurance
- 2.8.4 Please provide your revenue for last five (5) fiscal years.
- 2.8.5 Please provide your profit/(loss) for last five (5) fiscal years.
- 2.8.6 Please provide your company ratings (i.e., A.M. Best, Better Business Bureau, etc.).
- 2.8.7 Please provide your annual R&D budget for the last five (5) fiscal years (break out by product offerings).
- 2.8.8 Explain how your company is planning to meet the increase in demand for your product (including implementation, training, and support) over the next five (5) years.

2.9 Eligibility to Participate in Federal and State Health Care Programs (Required Data)

- 2.9.1 In accordance with 42 C.F.R. 438.610, 422.503 (b)(4)(vi)(F), 423.504 (b)(4)(vi)(F) and California Welfare and Institutions Code, §§ 14043.6 and 14123, IEHP is prohibited from employing, contracting, or issuing payments to an individual or entity that is excluded, ineligible, or terminated from participation in State and Federal health care

programs. Contract awards are contingent upon the Bidder, its principals' and subcontractors', eligibility to participate in State and Federal health care programs.

Bidders must certify that it or any of its subcontractors do not appear on State and Federal exclusionary lists in the Requested Data section of their response on Bonfire.

Company Evaluation Criteria

This section of the proposal is designed to further establish the Bidder as an entity with the ability and experience to operate the program or provide goods and/or services as specified in the RFP. The Company Profile should be concise and clear, including descriptive information regarding service delivery. All Bidders shall answer these questions in Question Set 3 of Questionnaire Q-45XY, unless specifically stated otherwise below. Questions that also require the upload of a **(Required Document)** to the associated document slot are noted.

3.1 Differentiators

- 3.1.1 What do you consider to be your company's strengths, and how do you see your company as differentiated from other Bidders?
- 3.1.2 Is there any other information you would like IEHP to know about your company including value-added services?

3.2 Account Management Team **(Required Document)**

- 3.2.1 In the corresponding document slot on Bonfire, please provide the name(s) and general background(s) of each member of your account management team that will be assigned to IEHP. Include the information below:
 - Functional area to which each person reports
 - Years of service with your organization
 - Total years of experience with similar product implementation and operations
 - Number of public entity and/or health plan accounts currently handled
 - General size of the accounts (in terms of number of employees)

3.3 Organizational Information:

- 3.3.1 Provide a summary of the work plan and/or methodology and physical resources (staff and equipment) your company will commit to ensure successful services are provided under this RFP.
- 3.3.2 Will IEHP have a dedicated team assigned throughout the implementation? If so, who? Provide the organizational structure and experience for each team member, if not outlined above.
- 3.3.3 How would the account service team be structured after the implementation?
- 3.3.4 What is your company's Mission Statement?
- 3.3.5 Summarize your company's billing procedures.

3.3.6 What office will support IEHP?

3.3.7 Please indicate your company's total number of employees this year and last year.

3.3.8 Please indicate your company's total number of contractors this year and last year.

3.4 Administration:

3.4.1 Describe any customer and/or member services available online.

3.4.2 Could IEHP link their website to your website?

3.4.3 Do you have a customer service department? If so, what is the phone number, and the hours of operation?

3.4.4 Please describe how your customer service department is organized. Would IEHP receive a dedicated team?

3.5 Experience:

3.5.1 Describe your company's experience/history with providing the services requested in this RFP.

3.5.2 Describe your company's experience with health plans, Medicaid programs, or public healthcare entities.

3.5.3 Describe your company's relationship/experience with governmental regulators (e.g., Department of Health Services, Department of Managed Healthcare, and the Centers for Medicare and Medicaid Services).

3.6.1 Credentials/Resumes/Certifications/Licenses: (Required Document)

In the corresponding document slot on Bonfire, please provide information for all employees/subcontractors responsible for administering or providing services. Provide a summary list of the organizational personnel that will actively participate and contribute their skills to this project. Include in this list:

- Name
- Job title
- Work location and
- Responsibilities
- Qualifications/Experience
- Relevant experience in projects of similar size and complexity. (Responses may be one page per individual.)
- Education

- Certifications/licenses, if applicable
- Years of service with your organization
- Total years of experience
- List other pertinent information that will assist in evaluating Bidder's qualifications.

3.7 Awarded Contracts: (Required Document)

- 3.7.1 In the corresponding document slot, provide a list of three (3) contracts of similar value awarded to your company in the past three (3) years. Include the year, type of services, dollar amounts, services provided, location, contracting company, contact name, and phone number.

Scope of Services

Summary of Services

The following criteria will be required of the awarded vendor(s):

Inland Empire Health Plan (IEHP) seeks a qualified contractor to deliver a comprehensive post-adjudication, pre-payment claims editing solution designed to strengthen IEHP's Payment Integrity program. IEHP's current claims editing process has areas where enhanced capabilities could add value – such as complex editing and historical data mining. The new solution should address these gaps by providing more comprehensive editing rules, advanced analytics, and robust pre-payment data mining, thereby expanding complex editing capabilities and enabling retrospective claims analysis, to improve claims accuracy and reduce post-payment recoveries.

The awarded vendor will provide an end-to-end suite of pre-payment clinical, coding, contractual, and regulatory edits to ensure claims accuracy, prevent improper payments, and support compliance with CMS, DHCS, DMHC, NCCI, MUE, and other nationally recognized coding and reimbursement standards.

The service will include standard rule-based edits, complex logic editing, historical claims review, and specialty-focused editing in high-risk areas (including, but not limited to, hospice and laboratory services). The vendor must provide robust capabilities to configure and create custom edits, simulate complex methodologies, and perform targeted analytics to identify emerging billing risks, missed savings opportunities, and complex coding inaccuracies prior to payment.

A core component of the solution is the use of advanced clinical and coding validation tools to identify issues such as overpayments, duplicate claims, inappropriate modifiers, unbundling, upcoding, coordination-of-benefits inconsistencies, medical necessity issues, DRG/APC/RVU discrepancies, contract-based reimbursement errors, and fraud, waste, or abuse. This includes prospective pre-payment review combined with historical data mining across a given period to assess rule efficacy, provider billing patterns, adjudication workflows, and overall pre-payment savings potential.

The primary focus of this service will be claims for which IEHP maintains direct financial responsibility; however, IEHP may also evaluate the vendor's ability to reprice delegated encounters and evaluate whether delegated entities are applying appropriate payment integrity controls across their claims universe.

IEHP currently utilizes MediTrac for Medi-Cal and D-SNP claims processing and HealthEdge HRP for Covered California, and the selected vendor will be expected to integrate with both systems through real-time API connectivity and nightly batch processing across all claim types. Bidders should price the solution based solely on IEHP's direct-paid claims, with

delegated-claims capabilities presented as optional rather than required in the initial scope. The vendor shall also provide industry best practices, including approaches used by similarly situated Managed Care Organizations for functions such as responding to provider billing inquiries, conducting manual claim reviews, and other operational workflows. In addition, the vendor must supply comprehensive customer support details—such as hours of operation, a dedicated support team and phone line, 24/7 technical assistance for critical issues, and next-business-day response times for routine matters. Responses and pricing estimates should be based on IEHP’s six-month average membership and monthly claim volumes for each line of business: Medi-Cal (1,318,121 members; 1,896,060 monthly claims), D-SNP (38,372 members; 164,875 monthly claims), and Covered California (33,731 members; 40,299 monthly claims).

The successful program is expected to reduce unnecessary financial exposure by preventing the payment of claims that fail to meet DHCS-accepted encounter logic or violate applicable state and federal billing guidelines. The solution should also strengthen oversight, auditing, and compliance through targeted, specialty-specific editing, improve operational efficiency in pre-payment claims processing, and achieve measurable cost avoidance and operational efficiency improvements in claims operations.

Overall, IEHP seeks a partner with strong clinical, coding, and technical expertise; configurable rule management capabilities; proven analytics; and a comprehensive claims editing platform capable of continuous optimization, ongoing maintenance, and successful integration into IEHP workflows.

BIDDER SCOPE OF WORK QUESTIONS:

IEHP requires Bidders to answer the following questions in full. Responses must be complete, accurate, and consistent with the specifications and requirements outlined in this RFP.

All responses must be answered in Questionnaire Q-19GS on the Bonfire portal. The questionnaire contains all questions below.

Bidder Response Questions (Questions in this section must be answered in Questionnaire Q-19GS, unless specifically stated otherwise)

Question Set 1

1.1 Claims Editing Operations and Update Governance

- 1.1.1 Describe your claims editing update process and frequency. Explain how rules are refreshed, the cadence of updates, regulatory/clinical sources used, and how clients are notified.
- 1.1.2 Describe your process for developing, validating, testing, and deploying new edits. Include clinical review workflows, QA steps, test environment structure, and average deployment time for new edits.

1.2 Medi-Cal Expertise, Compliance, and Regulatory Alignment

- 1.2.1 Explain your experience supporting California Medi-Cal, including APL compliance. Detail your track record with Medi-Cal payers, approach to APL implementation, regulatory monitoring, and timelines for incorporating new state requirements.
- 1.2.2 Provide client references for similar Medicaid/Medi-Cal implementations. Include at least one Medicaid or Medi-Cal plan and describe outcomes achieved.
- 1.2.3 Edit Coverage across all IEHP's lines-of-business. Describe your edit library coverage across Medi-Cal, D-SNP, and Covered California. Include how you incorporate Medi-Cal rules, Medicare-aligned logic for D-SNP, and commercial/exchange requirements for Covered California; how updates are monitored and applied; and how you ensure complete edit coverage across claim and provider types.

1.3 Performance Metrics and Provider Experience

- 1.3.1 Provide historical performance metrics for existing clients. Include PMPM savings, percent-of-allowed savings, edit accuracy, false-positive rates, denial overturn rates, and other quantifiable impacts.

- 1.3.2 Describe how provider abrasion is measured, tracked, and mitigated. Include appeal rates, overturn analysis, provider complaint data, and tools available to support transparency with providers.

1.4 Edit Library Coverage and Provider-Specific Logic

- 1.4.1 Provide information on your edit library coverage across claim types. Specify support for professional (CMS-1500), facility (UB-04), behavioral health, SNF/rehab, home health, DME, pharmacy, labs, and specialty lines.
- 1.4.2 Describe how your editing logic adapts to different provider types. Address NPIs/group types, facility levels, surgical subspecialties, mid-levels, FQHC/RHC logic, and other provider-specific tailoring.
- 1.4.3 Describe your edit library coverage across Medi-Cal, D-SNP, and Covered California. Include how you incorporate Medi-Cal rules, Medicare-aligned logic for D-SNP, and commercial/exchange requirements for Covered California; how updates are monitored and applied; and how you ensure complete edit coverage across claim and provider types.

1.5 Integration, Transparency, and System Infrastructure

- 1.5.1 Describe your integration capabilities with payer claims platforms. Include API/batch methods, latency expectations, data formats, real-time vs. pre-adjudication workflow support, and system configuration requirements.
- 1.5.2 Describe your transparency and documentation capabilities. Include provider-facing explanations, clinical rationales, edit-level citations, and support for dispute resolution.
- 1.5.3 Provide system uptime, failover, and disaster-recovery metrics. Include uptime SLAs, historical downtime, redundancy architecture, recovery time objectives, and incident-communication procedures.
- 1.5.4 Detailed Remittance Advice (CARC/RARC Mapping). Describe your solution's ability to generate detailed, accurate remittance advice communications that map each edit outcome to the appropriate CARCs and RARCs.

1.6 Implementation and Pricing Methodology

- 1.6.1 Describe your implementation methodology and project governance. Provide timeline, client resource needs, workflow design approach, and how rule governance is managed post-go-live.

- 1.6.2 Describe your organization's pricing methodology (fixed fee, transactional, tiered, shared savings, hybrid) for the post-adjudication, pre-payment claims editing solution. Include key cost drivers, minimums or extra fees, how pricing aligns with claim volume and complexity, and how you support health plans affected by H.R.-1 through fee reductions or other cost mitigation approaches.

PRE- RECORDED DEMO:

The Bidder's Pre-Recorded Demo should not exceed 30-minutes in duration and address (at a minimum) the following:

A comprehensive view of the solution as listed below:

- Dashboard overview
- High level features and benefits of the software solution
- Describe customer support overview

Upload to the corresponding document slot at <http://iehp.bonfirehub.com>.

*PLEASE NOTE: Bonfire has a maximum file size of ~1000MB (1 GB), please provide an external link from a video hosting platform of your choice, such as from YouTube or Vimeo, for example: <https://youtu.be/4bCGSQeqa3c>. or <https://vimeo.com/442270079>.

Cost Proposal/Budget Narrative

In Bid Table BT-49GT, please submit pricing for the services requested in this RFP. Cost Proposals will be disclosed to the evaluators after the evaluation of the technical proposals has been completed. IEHP reserves the right to negotiate final fees with the selected Bidder(s). Proposals must fully describe all costs of charges to IEHP as part of this service/project. As stated in the Cost Proposal, Bidders must provide fully inclusive blended rates, which are all-encompassing of the Bidder's project-related or supported expenses, including travel expenses. Bidders may also include any other documents as information to further explain the proposed costs. **Any special government rates or considerations should be included in Bidder's quotation.**

Cost proposal must be all-inclusive and include, but not be limited to, administration, travel, training and related costs.

Cost Proposal-Line-Item Services Table

UNIT / BASIS OF COST	PROGRAM COSTS ITEM DESCRIPTIONS	Bidders must complete the pricing tables exactly as provided. Bidders may not add, delete, rename, or merge rows or columns. Any cost that does not clearly fit an existing category must be placed in the 'Other Costs' row with a detailed description.	
		DESCRIPTION OF COST	PER YEAR
Annual fixed fee	Annual fee for claims editing platform, rules engine, UI, reporting	Provide details.	\$
Cost per claim / PMPM	Per-claim or per-edited-claim charge for all lines of business	Provide details.	\$
Annual fee or included	Cost for ongoing rule refreshes, regulatory updates, clinical source updates	Provide details.	\$
One-time or hourly	Costs to integrate with payer platforms: API, batch, SFTP, test environments	Provide details.	\$
One-time fixed fee	Configuration, data setup, training, testing cycles, cutover	Provide details.	\$
Per edit or hourly rate	Cost for developing client-specific edits not in base library	Provide details.	\$
Included or fee	Cost for remittance advice mapping and provider-facing messaging	Provide details.	\$

Per module fee	BH, SNF/rehab, home health, DME, pharmacy, labs, FQHC/RHC logic	Provide details.	\$
Included or fee	SLA fees, performance guarantees, accuracy guarantees	Provide details.	\$
Annual fee	Costs for provider rationale display, documentation support	Provide details.	\$
Annual fee or included	Access to dashboards, audit analytics, ROI reporting	Provide details.	\$
Annual fee	Standard vs premium support; ticketing; response times	Provide details.	\$
Annual fee or included	Cost for monitoring Medi-Cal updates, APL logic changes	Provide details.	\$
Included or fee	DR environments, redundancy, failover services	Provide details.	\$
Percentage or fixed	HR-1 fee mitigation, multi-year discounts, volume tiers	Provide details.	\$
Total Fee	Implementation	Provide details.	\$
List with cost	All ongoing fees	Provide details.	\$
List with cost	Any optional functionality not required	Provide details.	\$
		TOTAL PROPOSED COSTS	\$

PRICING NARRATIVE (Upload EACH to its corresponding document slot)

1. Pricing Narrative (WITH PRICING):

In a separate document, provide a timeline with major milestones up to implementation. Define your proposed method of reimbursement for services at each stage of this project provided through your company and elaborate on the costs provided within the Bid Table submission. IEHP customarily prefers itemized billing on a project basis (or as major milestones are accomplished for very large projects) with specific deadlines identified in the proposal.

Include a description of any additional costs that may be incurred in completion of this project and the circumstances that would trigger those costs. Please include the pricing for these additional costs in the Bid Table, not in the pricing narrative.

2. Pricing Narrative (WITH **REDACTED** PRICING):

Upload a copy of the above requirement with all pricing redacted.

Financial Statements (Required for Proposals over \$200K)

The bidder must submit financial statements (Balance Sheet, Income Statement, and Statement of Cash Flows, or equivalent documentation to the satisfaction of IEHP) for its business that are dated no more than twelve (12) months prior to the date of the proposal submission and cover a period of at least two (2) years. These statements should clearly identify the financial status and condition of the bidder's entire business entity. Financials should provide sufficient detail to assure IEHP that the bidder can support services being offered and the contractor will not seek early payment for services delivered, expedited payments or checks delivered by any means other than regular mail through IEHP's Accounts Payable.

The bidder must provide the following documentation, or equivalent documentation to the satisfaction of IEHP, herein referred to as Financials, of sufficient financial strength and resources to provide the scope of services as required:

1. Two (2) years of most recent audited financial statements (Balance Sheet, Income Statement, and Statement of Cash Flows, or equivalent documentation to the satisfaction of IEHP). The audited financial statements must be:
 - a. Prepared with all monetary amounts detailed in United States currency;
 - b. Prepared under United States Generally Accepted Accounting Principles; and
 - c. Audited under United States Generally Accepted Auditing Standards.
2. Most recent unaudited Year-To-Date financial statements (Balance Sheet, Income Statement, and Statement of Cash Flows).
3. If the cash flows are negative for the most recent operating period, the documentation must include a detailed explanation of the factors contributing to the negative cash flows.
4. Contact Information of person to provide clarifications regarding Financials.

Due to the California Public Records Act and the Brown Act, IEHP cannot guarantee that the Financials submitted will be kept confidential. IEHP offers several solutions to our Bidders below. Bidders may submit Financials using the following methods:

1. **Preferred** - Upload Financials to its corresponding document slot at <http://iehp.bonfirehub.com> no later than 2:00 p.m. PT on or before bid close date. Or;
2. Mail in a hard copy of Financials with a stamped return envelope to the address listed on the cover page of this solicitation no later than 2:00 p.m. PT on or before bid close date. IEHP will mail back Financials using the return envelope upon completion of review.

IT Security Documents

As part of the requirements related to services that will be provided under this Request for Proposal (RFP), Bidders must complete a detailed Security Risk Assessment. This assessment is provided in the form of a spreadsheet with five distinct tabs, each covering different aspects of IT security. Bidders are required to thoroughly answer all questions in each tab.

In addition to the Security Risk Assessment, Bidders must also complete a Data Sharing Assessment. This assessment addresses what data will be shared and with whom it will be shared, the security measures in place to protect the data, and compliance with relevant data protection regulations.

Furthermore, Bidders must review a checklist of security documents. This checklist outlines the required security artifacts that Bidders shall upload to the associated document slot along with their proposal response.

All completed documents, including the Security Risk Assessment spreadsheet, Data Sharing Assessment, and security documents can be found on the Bonfire portal and in Exhibit C (IT Security Documents), and must be submitted along with the proposal response. Failure to include any of these documents may result in disqualification from the bidding process.

Exhibit A



10801 6th Street
Rancho Cucamonga, CA 91730

Terms and Conditions

**NOTE: BIDDERS ARE RESPONSIBLE TO READ ALL INFORMATION THAT
IS STATED IN THIS DOCUMENT**

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Attachment A:	Principal Certification Binding Bidder's Response
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Attachment C:	Non-Collusion Declaration
Attachment D:	Local Preference Affidavit
Attachment E:	Contractor's Certificate Regarding Workers' Compensation
Attachment F:	Former IEHP Employee Disclosure and Certification Form

1. Bidder Instructions

- a. Bonfire is a third-party web-based e-Procurement service provider utilized by IEHP for solicitations. Registering takes just a few minutes and is completely free. For future bidding, opportunities please also register online at <http://iehp.bonfirehub.com>.
- b. Format – Use the electronic format provided by <http://iehp.bonfirehub.com>. If submitting more than one bid, separate the bid documents.
- c. Return of Bid/Closing Date/Return – All proposals shall be submitted electronically to <http://iehp.bonfirehub.com> no later than 2:00 p.m. Pacific Time (PT) on the closing date listed in the Timeline Section of the Request for Proposal, unless otherwise stated in the Request for Proposal. Bid responses not received by IEHP Procurement on or before the closing date and time will not be accepted. IEHP will not be responsible for, and will not accept, late bids due to slow internet connection, or incomplete transmissions. If the Bidder cannot upload the bid response to the [Bonfire](#) portal, delivery of the bid response is accepted at Inland Empire Health Plan, 10801 Sixth Street, Rancho Cucamonga, CA 91730, by 2:00 p.m. PT on or before the bid closing date and time.
- d. Pricing/Delivery/Terms/Tax – All pricing shall be quoted F.O.B. Destination, (e.g., cash terms less than 20 days should be considered net) excluding applicable tax, which is a separate line item. IEHP reserves the right to designate method of freight. IEHP is exempt from Federal Excise tax but pays California Sales Tax. In the event of an extension error, the unit price shall prevail.
- e. Other Terms and Conditions – The terms and conditions as indicated in this document and/or attached are hereby included with full force and like effect as if set forth herein.
- f. Period of Firm Pricing – unless stated otherwise elsewhere in this document, prices shall be firm for 120 days after the closing date, and prior to an award being made. IEHP reserves the right to ask for an extension of firm pricing if conducting active proposal evaluations.
- g. Specification/Changes – Whenever brand names are used, the words "or equal" shall be considered to appear and be a part of the specification. If quoting another make or model, state this and replace IEHP's nomenclature with that which you are proposing. If no make or model is stipulated, insert yours. Attach applicable specifications and/or brochures. Variations in manufacturers, design, etc., may be acceptable. Bidders are encouraged to offer alternatives. However, IEHP reserves the right to reject those alternatives as nonresponsive.

- h. Recycled Material – Wherever possible, IEHP is looking for items made from, or containing in part, recycled material. Bidders are encouraged to bid items containing recycled material as an alternative for the items specified. However, IEHP reserves the right to reject those alternatives as nonresponsive.
- i. Bidders must submit their questions online at <http://iehp.bonfirehub.com> and must be in written format. All responses to Bidder's questions will be posted online at the Bonfire platform, <http://iehp.bonfirehub.com>.

2. Definitions

- a. As used herein, "Addendum" refers to an amendment or modification to the Request for Proposal (RFP).
- b. As used herein "Bid" refers to the proposal submitted by a Bidder on the Bid Form consistent with the Instructions to Bidders, to complete the Work for a specified sum of money and within a specified period.
- c. As used herein, "Bidder" refers to an individual, firm, partnership or corporation that submits a qualified Bid for the Work, either directly or through a duly authorized representative.
- d. As used herein "Board" refers to IEHP's Governing Board.
- e. As used herein, "CCA" means "Covered California"
- f. As used herein, "Contractor" refers to any employee, agent, or representative of the contract company used in conjunction with the performance of the contract. For the purposes of this RFP, Contractor, Vendor, Bidder and Respondent are used interchangeably.
- g. As used herein, "DHCS" means California's "Department of Health Care Services."
- h. As used herein, "FDR" means "First-Tier, Downstream and Related Entities"
- i. As used herein, "HIPAA" means the Health Insurance Portability and Accountability Act of 1996, Public Law 104-91, enacted August 21, 1996, and the regulations promulgated thereto.
- j. As used herein, "HITECH" means the Health Information Technology for Economic and Clinical Health Act provisions of the American Recovery and Reinvestment Act of 2009, Public Law 111-5, enacted February 17, 2009.
- k. As used herein, "IEHP" means "Inland Empire Health Plan".
- l. As used herein, "JPA" means "Joint Powers Agency" specifically for the counties of San Bernardino and Riverside.
- m. As used herein, "MQs" refers to minimum qualifications.

- n. As used herein, “RFP” means “Request for Proposal”.
- o. As used herein, “PT” means “Pacific Time”

3. Preparation of Responses

- a. Before submitting a Proposal, each bidder is expected to thoroughly examine the specifications in the solicitation, and all other related contractual documents included in this RFP, including subsequent amendments to the RFP. Failure to do so will be at the bidder’s risk and may bar the bidder’s performance if a contract is awarded under this RFP.

Each bidder shall review and complete all Required Documents according to their instructions and submit them as part of the Proposal.

Each bidder must be satisfied by personal examination and by such other means as it may prefer, as to the actual conditions and requirements under which the contract will be performed.

- b. Former IEHP Employees – Mandatory Disclosure Requirement

Bidders must disclose whether any individual proposed to perform work under this solicitation is a former employee of Inland Empire Health Plan (IEHP). This disclosure is required to ensure compliance with applicable California conflict-of-interest and revolving-door restrictions.

If the Bidder proposes to use any former IEHP employee, the Bidder shall submit the “Former IEHP Employee Disclosure & Certification Form” with its proposal. Failure to provide this disclosure and the required form may result in the Bidder being deemed non-responsive.

IEHP reserves the right to determine, based on the information provided, whether any proposed former IEHP employee is prohibited from participating in this procurement under applicable law. Bidders are responsible for ensuring the accuracy and completeness of all information submitted.

4. Inquiries by Bidders

Requests for explanation must be submitted via the <http://iehp.bonfirehub.com> portal by the time designated in the RFP Timeline Section under “Bidder’s Questions Due.” The Procurement Agent, or duly authorized personnel, will post a response to the inquiries via the Bonfire portal.

5. Modifications/Amendments

All proposals must be submitted in accordance with the standards and

specifications contained within this RFP.

Modification of Proposals – any Bidder who wishes to make modifications to a proposal delivered and received by IEHP before the RFP submittal deadline must withdraw his/her proposal in order to make the modifications. All modifications must be made in ink, properly initialed by Bidder's authorized representative, executed, and submitted in accordance with the terms and conditions of this solicitation. Modifications are allowed at any time up to the RFP submittal deadline on the Bonfire portal. It is the responsibility of the Bidder to ensure that modified proposals are resubmitted before the RFP submittal deadline.

Bidders are advised that IEHP reserves the right to amend the requirements of this RFP prior to the date set for opening of bids, including, but not limited to, extending the RFP submittal deadline. Such revisions will be formally incorporated into the RFP document via written addendum published on the Bonfire portal.

6. Cancellation or Modification of Procurement

- a. IEHP reserves the right to modify or terminate the solicitation process at any time. IEHP may amend or modify the project scope of services prior to the award of contract, as necessity may dictate, reject any and all Proposals submitted (and rebid, if necessary), accept any or all Proposals submitted, negotiate with any qualified source, or cancel, in part or in its entirety, this RFP if it is in the best interest of IEHP, at its sole discretion.
- b. The procurement process may be canceled after opening, but prior to award if IEHP determines that cancellation is in the best interest of IEHP for reasons, including, but not limited to:
 1. Inadequate, ambiguous, or otherwise deficient specifications.
 2. The services are no longer required.
 3. Proposals received are at an unreasonable cost.
 4. Proposal did not arrive in open competition, were collusive, or not submitted in good faith.
 5. IEHP determines, after analysis of the proposals that its needs can be satisfied through a less expensive method.
- c. All Proposals will become the property of IEHP, and all such information submitted in connection to this RFP becomes public record and may be disclosed through the Public Records Act. IEHP may keep submissions and negotiations confidential until the Governing Board approves the final contract and a Purchase Order contract is issued. Proposals may contain financial statements or other information which constitute a trade secret. In order to protect such data from disclosure, please identify the pages by clearly marking the applicable pages as

confidential. Please note, disclosure of such data considered confidential by Bidder will only be withheld to the extent that IEHP determines that disclosure is improper under applicable law. It is important to further note that California law weighs heavily in favor of disclosing records submitted through an RFP process. IEHP assumes no responsibility for disclosure or use of unmarked data for any purpose.

- d. This solicitation does not commit IEHP to award a contract or to pay any costs incurred in the preparation of a proposal in response to this request. IEHP reserves the right to accept or reject any or all proposals received because of this request, to negotiate with any qualified source or to cancel in part or in its entirety this Request of Proposal if it is in the best interest of IEHP.

7. Withdrawal of Bids

Bidders may withdraw their proposals at any time prior to the due date and time by submitting notification of withdrawal signed by the bidder's authorized agent. Proposals cannot be changed or modified after the date and time designated for receipt.

8. Submitting Proposals

- a. Late proposals will not be accepted. Postmarks or the inability to submit the proposal on the Bonfire portal will not be accepted in lieu of this requirement. Proposals submitted to any other IEHP office will be rejected.
- b. If Bidder cannot upload their proposal on Bonfire, Bidder is to submit the proposal to IEHP's Corporate Offices at 10801 6th Street, Rancho Cucamonga, CA 91730. The proposal must be signed by an authorized agent and placed in a sealed package marked "Bidder Proposal," and clearly marked with the RFP's designated bid number.
- c. Binder capacity should be a minimum of 2" (two inches) in a 3-ring binder to allow for ease of referencing various sections. (Small binders that are overstuffed or difficult to open may count against the Bidder).
- d. Proposals must be typed uniformly on letter size (8 ½" x 11") sheets of white paper, single sided or double sided, each section clearly titled, with index dividers for each of the required documents listed in the RFP, and each page clearly and consecutively numbered. Proposals must be clean and suitable for copying. Proposals must be specific unto themselves. For example, "See Enclosed Manual" will not be considered an acceptable proposal. Receipt of all addenda, if any, must be signed and included in the proposal.

- e. The proposal shall be concise and to the point. A letter format in sufficient detail to allow thorough evaluation and analysis is required.
- f. All work papers prepared in connection with the contractual services will remain the property of the successful bidder. However, all reports rendered to IEHP are the exclusive property of IEHP and subject to its use and control. IEHP will follow the California Public Records Act.

9. Evaluation Process

- a. Proposals will be evaluated based on criteria determined to be appropriate by IEHP, which may include, but not necessarily limited to the following (in no particular order of precedence):
 - 1) Overall cost to IEHP. In no event will IEHP be limited to selecting a successful Bidder based solely upon total cost submitted. (Scored)
 - 2) Bidder's financial strength. (Pass/Fail)
 - 3) Bidder's corporate functional capabilities. (Scored)
 - 4) Bidder's responsiveness to the RFP. (Pass/Fail)
 - 5) References with demonstrated success with similar work to the Scope of Service. (Pass/Fail)
 - 6) Contract Terms (Clarifications, Exceptions or Deviations). (Pass/Fail)
 - 7) Technical capability and project methodology. (Scored)
 - 8) IEHP may provide special consideration with all vendors located within either Riverside or San Bernardino counties.
 - 9) The quantity and locations of facilities. (If applicable) (Scored)
 - 10) Company Hierarchy/Organizational Chart (if applicable) (Scored)
 - 11) Credentials/Certifications/Licenses Document (if applicable) (Scored)
 - 12) Account Management Narrative (if applicable) (Scored)
 - 13) Samples submitted. (If applicable) (Pass/Fail)
 - 14) Any other factors IEHP determines to be appropriate.
- b. The following required documents will be assessed on a pass/fail basis to indicate the Bidder's responsiveness to the RFP. However, these documents are not the only criteria used to determine overall responsiveness. Failure to provide

any of the required documents may lead to Bidder's disqualification from the RFP process, at IEHP's sole discretion.

- 1) Principal Certification Binding Bidder's Response (IEHP-provided form)
- 2) Certification of Non-Debarment (IEHP-provided form)
- 3) Non-Collusion Declaration (IEHP-provided form)
- 4) Local Preference Affidavit (If applicable – IEHP-provided form)
- 5) Contractor's Certificate Regarding Workers' Compensation (IEHP-Provided form)
- 6) Acknowledgment of Non-Negotiable Contract Terms (IEHP-Provided form)
- 7) Company W-9 Form listing company's Tax Identification Number (TIN)
- 8) Evidence of Insurability (ACORD Certificate of Insurance)
- 9) Business License(s)
- 10) Bidder's DUNS Number
- 11) Proof of Registration: Documentation verifying corporate registration with the California Secretary of State or if not a corporation, proof of tax registration with the California Franchise Tax Board.
- 12) Policy and Procedures document detailing Bidder's background checking procedures and the name of any external company utilized to perform this service.
- 13) Pricing Narrative
- 14) Redacted Pricing Narrative
- 15) List of three (3) contracts of similar value awarded to your company in the past three (3) years. Include the year, type of services, dollar amounts, services provided, location, contracting company, contact name, and phone number.

All proposals will be given thorough review. All contact during the bidding process and review selection phase must be through IEHP's Procurement Department. Attempts by the Bidder to contact any other IEHP representative may result in disqualification of the Bidder.

Other than information publicly presented by IEHP, all evaluation material may be considered confidential and not released. IEHP reserves the right to split or make the award that is most advantageous to IEHP.

10. Proposal Selection and Contract Negotiations

- a. If a proposal is accepted, IEHP will enter into a contractual agreement with the selected Bidder. Bidder shall review IEHP's Standard Required Contract Terms, attached hereto as Exhibit A, and will be deemed to have agreed to the terms and conditions therein unless Bidder identifies an objection, and lists such objection Question Set 1 of the Company Profile and Evaluation Criteria Questionnaire located in Bonfire. Should IEHP agree to a change of the contractual language, it shall do so in writing prior to the execution of the agreement. If an agreement cannot be reached, negotiations with the second ranking Bidder shall commence.
- b. The award will be made, in whole or in part, to the responsive, responsible Bidder whose Proposal is most advantageous to IEHP; price, delivery, and other factors considered. IEHP recognizes that prices are only one of several criteria to be used in judging an offer and IEHP is not legally bound to accept the lowest offer.
- c. IEHP reserves and may, in its sole discretion, exercise any one or more of the following rights and options with respect to proposal selection:
 - 1) To issue a notice of intent to contract and/or execute a contract for any or all of the items in any proposal, in whole or in part, as IEHP, in its sole discretion, determines to be in IEHP's best interest;
 - 2) To discontinue negotiations with any applicant at any time prior to the execution of a final contract, whether or not a notice of intent to contract has been issued to the applicant, and to enter into negotiations with any other applicant, if IEHP, in its sole discretion, determines it is in the best interest of IEHP to do so;
 - 3) To rescind, at any time prior to the execution of a final contract, any notice of intent to contract issued to an applicant, and to issue or not issue a notice of intent to contract to the same or a different applicant and enter into negotiations with that applicant, if IEHP, in its sole discretion, determines it is in the best interest of IEHP to do so;
 - 4) To elect not to enter into any contract with any applicant, whether or not a notice of intent to contract has been issued and with or without reissuing the notice of contract opportunity, if IEHP determines that it is in IEHP's best interest to do so;

- 5) To reject any or all offers, to waive any discrepancy, any irregularity, or technicality which IEHP deems reasonably correctable or otherwise not warranting rejection of the proposal;
- 6) To split or make the award in any manner determined by IEHP to be most advantageous to IEHP.

Note: Some contracts are subject to IEHP Board approval

11. HIPAA Business Associate Agreement (If applicable)

If activities or services of Bidder arising from this RFP require Bidder to receive, maintain or transmit any protected health information, the Bidder shall enter into a HIPAA Business Associate Agreement (“HIPAA BAA”) with IEHP to warrant that the Bidder will comply with HIPAA, HITECH, and the laws and regulations promulgated thereto, as a Business Associate of IEHP. Bidder shall review the terms of the HIPAA BAA, attached as Attachment D to the sample Professional Services Agreement, if applicable, and will be deemed to have agreed to the terms and conditions therein unless Bidder identifies an objection, and lists such objection in Question Set 1 of the Company Profile and Evaluation Criteria Questionnaire located in Bonfire.

ATTACHMENTS



CERTIFICATION

I, _____, a duly authorized agent of,
Printed Name of Agent/Officer **Name of Organization**

hereby certify that _____ by submission of this proposal
Name of Organization

in response to RFP _____
RFP Number and Title

agree upon contract award to carry out the requirements specified, and obligations set forth therein.

Signature: _____ Date: _____

Title of Agent/Officer: _____

"Execution hereof is certification that the undersigned has read and understands the terms and conditions hereof, and that the undersigned's principal is fully bound and committed."

ATTACHMENT B: CERTIFICATION OF NON-DEBARMENT



CERTIFICATION

As an authorized representative of my Firm/Company/Sole Proprietorship, I hereby attest that my Firm/Company/Sole Proprietorship is not excluded, ineligible, or terminated from participation in State or Federal health care programs and does not appear on any of the following lists:

- a. The Department of Health & Human Services (DHHS), Office of Inspector General (OIG), and List of Excluded Individuals and Entities (LEIE). Please visit <https://exclusions.oig.hhs.gov>.
- b. General Services Administration (GSA), and the System for Award Management (SAM.gov). Please visit <https://www.sam.gov>.
- c. California Department of Health Care Services (DHCS), and Medi-Cal Suspended and Ineligible Provider List (S&I List). Please visit <https://mcweb.apps.prd.cammis.medi-cal.ca.gov/references/sandi>.
- d. Medicare Opt-Out List. Please visit <https://data.cms.gov/tools/provider-opt-out-affidavits-look-up-tool>.

I further attest that if selected, my Firm/Company/Sole Proprietorship will conduct regulatory sanction and exclusion screenings of subcontracted entities prior to engagement with said entities and monthly thereafter.

I understand that if my Firm/Company/Sole Proprietorship becomes excluded, ineligible, or terminated from participation in State and Federal health care programs, any contracts held with IEHP will be subject to immediate termination for cause.

RFP Name/Number: _____

Signature: _____ Date: _____

Title of Agent/Officer: _____

"Execution hereof is certification that the undersigned has read and understands the terms and conditions hereof, and that the undersigned's principal is fully bound and committed."

Attachment C: Non-Collusion Declaration



**NON-COLLUSION DECLARATION
TO BE EXECUTED BY BIDDER AND SUBMITTED WITH QUOTATION/PROPOSAL**

The undersigned declares:

I am the _____ of _____, the party making the foregoing bid.

The bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The bid is genuine and not collusive or sham. The bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid. The bidder has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or to refrain from bidding. The bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder. All statements contained in the bid are true. The bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a bidder that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the bidder.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on:

[date], _____ at [city],
[state].

Signature Date

ATTACHMENT D: LOCAL PREFERENCE AFFIDAVIT



Local Business Qualification Affidavit

Inland Empire Health Plan (IEHP) has adopted a local preference program to be used when evaluating quotations submitted from firms or individuals engaged in “for profit” business activities paid for in “whole” or “in part” out of IEHP General Funds. The IEHP Local Business Preference of 5 points may be applied to a bidder’s bid submission if the bidder qualifies for this preference. Potential Bidders, please submit this form along with your bid response if claiming the preference.

1.0 DEFINITION OF A LOCAL BUSINESS

A local business shall mean a business/firm with fixed offices located within the geographical boundaries of Riverside and San Bernardino Counties, authorized to perform business within these two counties, and in doing so, credit all sales tax from sales generated within Riverside or San Bernardino County. Vendors who provide product or perform contracted work using employees, of whom the majority are physically located in said local offices located within the County boundaries, might claim the Local Preference of 5 points.

“Local businesses” must have a Riverside or San Bernardino County business street address. Post office box numbers, residential addresses or unstaffed sales offices shall not suffice to establish status as a “local business”. To qualify as a “local business” the location must be open and staffed during normal business hours and the business must establish proof that it has been located and doing business in Riverside or San Bernardino County for at least (6) six months preceding its certification to IEHP as a local business.

Additional supporting documentation requested by IEHP to verify qualification includes:

1. A copy of a current BOE 531-A and/or BOE 530-C form: (State, Local & District Sales and Use Tax Return Form). Businesses submit this form to the State Board of Equalization when paying the sales tax to the State of California indicating the amount of their tax credits to each jurisdiction (i.e., Counties, Cities).
2. A current business license is required for the political jurisdiction the business is located.
3. Proof of the current business address: The local business needs to be operating from a functional office that operates and has staffing of the company’s employees, during normal business hours. A residential address will not suffice.

Scoring:

1. Each proposal will receive scoring for each category being evaluated as demonstrated below. The qualified local business will receive 5 points for “Local Preference” towards their overall score.
2. Example:

Criteria	Possible Score	Bidder #1 (Local)	Bidder #2 (Non-Local)

Overall Cost	95	95	95
Local Preference	5	5	0
Grand Total	100	100	95



**Awarded
Bidder**

Business name: _____

Physical address: _____

Phone: _____

Cell: _____

E-Mail: _____

Length of time at this location: _____

Number of company employees at this address: _____

If less than 6 months, list previous location(s) _____

County location: _____

Riverside

San Bernardino

Business license # (where applicable): _____

Hours of operation: _____

Primary function of this location (i.e., sales, distribution, production, corporate, etc): _____

Signature of Company Official/Title _____

Date _____

**ATTACHMENT E: CONTRACTOR'S CERTIFICATE REGARDING WORKERS'
COMPENSATION**



Contractor's Certificate Regarding Workers' Compensation

I am aware of the provisions of § 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this Contract.

Name of Bidder _____

Signature _____

Name _____

Title _____

Dated _____

Attachment F: FORMER IEHP EMPLOYEE DISCLOSURE AND CERTIFICATION FORM



FORMER IEHP EMPLOYEE DISCLOSURE AND
CERTIFICATION FORM

1. Former IEHP Employee Involvement (REQUIRED)

Please indicate whether the Bidder is proposing any former IEHP employees to perform work under this solicitation:

Select one:

- ☐ Yes – Bidder is proposing one or more former IEHP employees.
- ☐ No – Bidder is *not* proposing any former IEHP employees.

2. Former IEHP Employee Details

(Complete this section only if “Yes” is selected above.)

Former Employee Name:

IEHP Job Title:

IEHP Department:

IEHP Employment End Date:

Describe Proposed Work on this Contract:

3. Certification

I certify that the information provided in this form is true and complete. I understand that any proposed former IEHP employee must comply with all applicable California conflict-of-interest and revolving-door restrictions. Misrepresentation may result in disqualification, contract termination, or any other remedy allowed by law.

4. Authorized Representative

Authorized Representative Name:

Title:

Signature (Electronic or Handwritten):

Date:

EXHIBIT B



10801 6th Street
Rancho Cucamonga, CA 91730

IEHP Standard Required Contract Terms

**NOTE: BIDDERS ARE RESPONSIBLE TO READ ALL INFORMATION THAT
IS STATED IN THIS DOCUMENT**

TABLE OF CONTENTS

A. IEHP'S STANDARD, REQUIRED CONTRACT TERMS

1. Nondiscrimination
2. Conflict Of Interest
3. Public Entity Status; Brown Act/Public Records Act
4. Compliance With Legal and Regulatory Requirements
5. Exclusion/Debarment Lists
6. Governing Law; Venue

B. ATTACHMENTS

Attachment A: Acknowledgment of Non-Negotiable Contract Terms

The following are IEHP's standard, required contract terms. Notwithstanding the foregoing, IEHP reserves the right to negotiate a contract in its best interest, and may waive any contract terms, in its sole and absolute discretion.

1. NONDISCRIMINATION

This Agreement hereby incorporates by reference the provisions of Title 2, CCR, §§ 11105 *et seq.*, as may be amended from time to time. CONTRACTOR agrees to comply with the provisions of Title 2, CCR, §§ 11105 *et seq.*, and further agrees to include this Nondiscrimination Clause in any and all subcontracts to perform services under this Agreement.

2. CONFLICT OF INTEREST

CONTRACTOR shall have no interest, and shall not acquire any interest, direct or indirect, which will conflict in any manner or degree with the performance of services required under this Agreement.

3. PUBLIC ENTITY STATUS; BROWN ACT/PUBLIC RECORDS ACT

The parties hereby acknowledge and agree that IEHP is a local public entity of the State of California subject to the Brown Act, California Government Code §§ 54950 *et seq.*, and the Public Records Act, California Government Code §§ 7920 *et seq.*

4. COMPLIANCE WITH LEGAL AND REGULATORY REQUIREMENTS

- A. General. The parties shall observe and comply with all applicable county, state and federal laws, ordinances, rules and regulations now in effect, subsequently amended or hereafter enacted. The parties shall further observe and comply with all applicable executive orders, directives, requirements (including state and/or federal contract requirements), and standards by any organization having jurisdiction over IEHP to regulate the delivery of health care services. This shall include applicable accrediting organizations. All the aforementioned items are hereby made a part hereof and incorporated herein by reference.
- B. Plan Licensing/State Requirements. CONTRACTOR understands that IEHP is a Medi-Cal Managed Care Health Plan and subject to the requirements under applicable laws (including but not limited to the Knox-Keene Health Care Service Plan Act and the Waxman-Duffy Prepaid Health Plan Act), contractual obligations set forth under the contract between IEHP and the California Department of Health Care Services ("DHCS"), and regulations promulgated by the California Department of Managed Health Care ("DMHC") and DHCS. CONTRACTOR understands that specified requirements of the DHCS and

DMHC may apply to CONTRACTOR as a contractor of IEHP.

5. EXCLUSION/DEBARMENT LISTS

- A. CONTRACTOR represents that it, and the employees and consultants engaged under this Agreement, are not excluded, debarred, or suspended individuals/entities under any exclusion or debarment list relating to state or federal health care programs, including the Federal List of Excluded Individuals/Entities, System for Award Management, and the Suspended and Ineligible Provider List. CONTRACTOR warrants that such status shall be maintained throughout the term of this Agreement.
- B. CONTRACTOR understands that appearing on any such list requires IEHP to terminate this Agreement immediately, and prohibits IEHP from paying CONTRACTOR for any services rendered on or after the date of exclusion. Should CONTRACTOR be in receipt of payment for services rendered after the exclusion date, CONTRACTOR agrees to submit a refund of such fees upon written notice by IEHP. IEHP expressly reserves its right to recoup payment of such fees under Section 3 (DISALLOWANCE).
- C. On March 4, 2022, California Governor Gavin Newsom issued Executive Order N-6-22 (the EO) regarding Economic Sanctions against Russia and Russian entities and individuals. "Economic Sanctions" refers to sanctions imposed by the U.S. government in response to Russia's actions in Ukraine, as well as any sanctions imposed under state law. The EO directs all California state agencies and departments to terminate contracts with, and to refrain from entering any new contracts with, individuals or entities that are determined to be a target of Economic Sanctions. All contractors and grantees are obligated to comply with the Economic Sanctions. Accordingly, should the State of California (the State) or IEHP determine CONTRACTOR is a target of Economic Sanctions or is conducting prohibited transactions with sanctioned individuals or entities, that shall be grounds for termination of this Agreement. CONTRACTOR shall be provided with advance written notice of such termination, allowing CONTRACTOR at least thirty (30) calendar days to provide a written response. Termination shall be at the sole discretion of the State or IEHP.

6. GOVERNING LAW; VENUE

- A. The provisions of this Agreement shall be construed in accordance with the laws of the State of California, excluding its conflicts of law provisions.
- B. The provisions of the Government Claims Act (California Government Code §§ 900 *et seq.*) must be followed for any disputes under this Agreement.

- C. All actions and proceedings arising in connection with this Agreement shall be tried and litigated exclusively in the state or federal (if permitted by law) courts located in the counties of San Bernardino or Riverside, State of California.

ATTACHMENTS

IE♥HP | *Procurement*

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EXHIBIT C



10801 6th Street
Rancho Cucamonga, CA 91730

IT Security Documents

**NOTE: BIDDERS ARE RESPONSIBLE TO READ ALL INFORMATION THAT
IS STATED IN THIS DOCUMENT**

TABLE OF CONTENTS

A. IEHP'S STANDARD IT SECURITY DOCUMENTS

1. General guidelines

B. ATTACHMENTS

Attachment A:	IEHP Security Risk Assessment Template
Attachment B:	Data Sharing Assessment
Attachment C:	Vendor Security Documents Checklist

The following are IEHP's standard IT Security Documents. These documents must be submitted along with Bidder's proposal response **only if listed** in the **'Required Documents'** section of this RFP.

ATTACHMENTS

Attachment A:

IEHP Security Risk Assessment Template



IEHP Security Risk
Assessment Templat

IEHP Data Sharing Assessment Form

Section A: IEHP Contact Information

IEHP Department(s) Using Service or Vendor	
IEHP Point of Contact Name	
IEHP Point of Contact Title	
IEHP Point of Contact Extension	

Section B: 3rd Party / Vendor Contact Information

Company Name:	
Company Address:	
Company Web Site:	
Primary Contact Name:	
Primary Contact phone number:	
Primary Contact email address:	
Estimated Start Date	
Estimated End Date	

Section C: Services Provided to IEHP (Please give detailed explanation)

--

Section D: How is/ will sensitive information be transmitted, received, created/ maintained

--

Section E: Will 3rd party/ Vendor use offshore resources/ subcontractor(s)/ have a global

--

Section F: Identify the types of information that will be received, viewed, used, disclosed or handled by vendor

Personally Identifiable Information (PII)	WHO IS THE DATA ABOUT?		
	IEHP Members	IEHP Team Members	IEHP Providers
Full first name			
Full last name			
Complete addresses smaller than a state			
Date of Birth			
Phone numbers			
Fax numbers			
Email addresses			
Social Security numbers			
Member health plan ID number			
Banking or Financial accounts			
Driver's License numbers			
Vehicle identifiers and serial numbers, including			
Individual's Website URLs			
Internet Protocol (IP) address numbers			
Biometric identifiers, including finger, retinal and			
Full face photographic images			
Any other unique number characteristic or code directly related to an individual not listed above			
Medical or Behavioral Health Information	WHO IS THE DATA ABOUT?		
	IEHP Members	IEHP Team Members	
Medical information including diagnosis, healthcare treatment, medical history, medical			
Prescriptions			
Healthcare payment information including claims, explanation of benefits			
Ancillary services including x-rays and labs			
Data or information related to the provision of not listed above			

Section G: Number of persons information being shared

Approximate number of persons whose information will be viewed, used, disclosed or handled

Attachment C:

Vendor Security Documents Checklist

Please include as many artifacts from the below list as possible within Conga for IEHP IT Security to review (* items are mandatory):

	New Vendor	Existing Vendors	Business Process Vendor	SaaS Vendor	Software Vendor (On-Prem)	Consulting/Staff Augmentation	Notes
Non-Disclosure Agreement (NDA)	X		X	X	X	X	
Professional Service Agreement (PSA)							
Statement of Work (SOW)	X		X	X	X	X	
Master Service Agreement (MSA)	X		X	X	X	X	
Business Associate Agreement (BAA)		X	X	X		X	New BAA needed if the current BAA is older than the most recent contract update
Disaster Recovery/Business Continuity Plan	X	X	X	X*			
HITRUST/ISO 27001/FedRAMP/StateRAMP	X	X	X	X*			Need certificate and full assessment report
Penetration Test	X	X	X	X*			Must be from within last 365 days, need a list of critical/high vulnerabilities and remediation status
SOC 2 Type II Audit Results and Full Report	X	X	X	X			Need full report or executive summary with critical/high vulnerabilities and status
IEHP Data Sharing Assessment	X*	X*	X*	X*	X*		
IEHP Security Assessment Tool	X*	X*	X*	X*	X*		
Network Diagram	X	X	X	X*			
Data Flow Diagram	X	X	X	X*			
List of Security Tools Used	X	X	X	X			
SecOps/DevSecOps Practices	X	X	X	X	X	X	
Cyber Liability Insurance	X*	X*	X	X*			For under 50,000 members information, we need at least 3 million dollars of insurance, over 1 million members, we need 10 million dollars of coverage
Cyber Tabletop Exercise Results	X	X	X	X			
Disaster Recovery Testing Results	X	X	X	X*			Need full test report
List of Emergency Contacts	X*	X*	X*	X*	X*	X*	
Total # of records stored in vendor sites	X	X	X	X*			
List of Data Center Locations	X	X	X	X*			