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| ETF_logo_large | STATE OF WISCONSIN **Department of Employee Trust Funds**  **Robert J. Conlin**  SECRETARY | 4822 Madison Yards Way  Madison, WI 53705-9100  P. O. Box 7931  Madison, WI 53707-7931  http://etf.wi.gov |

Date: July 23, 2020

To: All Potential Proposers to RFP ETJ0043

RE: **ADDENDUM No. 1**

**Request for Proposals (RFP) ETJ0043**

**Third Party Administration of the State of Wisconsin Income Continuation Insurance (ICI) Program**

This Addendum is available on ETF’s web site at <https://etf.wi.gov/node/18461>

**Acknowledgement of receipt of this Addendum No. 1:**

**Proposers must acknowledge receipt of this Addendum No. 1 by providing the required information in the box below and including this Page 1 in Tab 1 of their Proposal.**

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| --- | --- |
| Company Name: |  |
| Authorized Person (Printed/Typed Name and Title): |  |
| Date: |  |

**Please note the following updates to RFP ETJ0043:**

**1.** **ADD** to the RFP the following questions regarding RFP ETJ0043 from Proposers and answers from the Department:

**RFP ETJ0043 Income Continuation Insurance - Vendor Questions**

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| Q # | RFP Section | Question/Rationale | Department Answer |
| Q1 | Enrollment Requirements | After our evaluation of the full RFP and Q&A exchange, if we determine we would not offer this service, would that preclude us from bidding? | A Proposer must be able to perform all services according to the requirements contained in the RFP. |
| Q2 | Enrollment Requirements | For each one below, what is the process currently in place, including timeframes and which entity is completing the activities?   1. Processing initial enrollments, deferred enrollments, and Evidence of Insurability applications: 2. Providing medical underwriting standards for Evidence of Insurability applications; Additional question: do you require that an underwriter provide these? 3. Processing reconsideration requests, based on medical review, within processing standards. 4. Participating in legal appeals; the Contractor shall be responsible for costs related to Contractor’s staff and Subcontractors’ participation in administrative hearings | 1. The Contractor is responsible for reviewing and processing all enrollment applications. The Contractor accesses the applications through ETF's system and is responsible for any follow-up with the Employee and Employer. Evidence of Insurability applications must be processed within 15 Calendar Days of having all necessary information to make a determination. 2. An underwriter must develop the medical underwriting standards, the standards must be approved by the Board prior to the start of the Contract period. 3. Upon receipt of a reconsideration request, the Contractor reviews the claim to make sure that it was adjudicated according to plan rules and sends a response to the claimant. This must be done within 60 Calendar Days of receipt of all required information needed to make a determination. 4. The Contractor’s staff is required to participate in any appeals, including administrative hearings, in which their participation was requested by ETF or required under subpoena or other judicial or administrative process. The timeframe is unpredictable. But these occasions are generally rare, and participation may be via phone or video conferencing as the tribunal so orders. |
| Q3 | Premiums | Is the successful bidder required to assist with Premium collections while the employee is on disability? If so, what is the process today and who is performing it. If we determine we would not offer this service, would that preclude us from bidding? | The Contractor is not responsible for premium collections. |
| Q4 | 7.4.2a | Storing and distributing program materials (forms and brochures).  In what format are these materials maintained today? Do any of them have to be printed in color? Are any of these hardcopy only that can’t be sent as a printed 8.5x11 version? | These are hard copies that are mailed to claimants. The brochures are updated and printed by ETF and sent to the Contractor. All other forms can be black and white and can be sent as printed 8.5 x 11 versions. The Contractor can substitute their own in-house form pending pre-approval of form by ETF. |
| Q5 | 7.5.2 | What data elements does the Department expect to be sent/received from the new insurance administration system and on what frequency? | The insurance administration system (IAS) will be the source of ICI enrollment data. The Contractor will be required to access the IAS to accurately determine benefit eligibility. The Contractor will be required to indicate in the IAS when an Employee is receiving ICI benefits including waiver of premium information. |
| Q6 | 7.6.1d | With regard to conducting an annual mailing of earnings statements and reviewing statements to determine if all earnings were properly offset from benefit payments:  Can you please explain this in more detail? Where would the earning statements come from? | ETF will provide a template of the earnings statement to the Contractor. The Contractor will print and send the earnings statements to claimants once per year. Earnings statements will be returned to ETF, and the Contractor will access them through ETF’s system. The Contractor will review returned statements and determine if an underpayment or overpayment exists. The Contractor will also follow up with claimants who fail to return a completed earnings statements, and suspend or terminate ICI benefits when appropriate. |
| Q7 | 7.6.1u | For the requirement of providing individual Employer training (over the telephone) on completion of enrollment and claims documentation, can you provide further expectations of this individualized training? | The Contractor will answer Employer questions and assist them in completing forms as needed. If a form is completed incorrectly, the Contractor will contact the Employer and explain the Program rules and how to determine the correct response. This is informal training. |
| Q8 | 7.8 | Employer Services – are there any differences in processes or reporting requirements based on different employers other than the U of WI faculty that is mentioned? | State and local premiums and benefits are different in that sick leave plays a role in premium amounts and in the benefit start date for State Employees, but it doesn't for local Employees. But the enrollment application processing and claim processing are the same. |
| Q9 | Multiple areas | Referenced in the RFP is Appendix 3 Performance Standards & Penalties – can you please provide this document? | The document is located at <https://etf.wi.gov/node/18461> |
| Q10 | General | What are the current expiring terms of the contract for annual fees and related services? | The current contract expires on December 31, 2021. |
| Q11 | General | What are the expectations of coordination of leaves or other absence and disability with other State or outside providers? Please detail the providers and nature of services. Are there any related expectations of interfaces associated with this need as well, if applicable? For example, what systems platforms are utilized, what frequency of data exchange is required? | The Contractor is not responsible for coordination of leaves or other absence and disability with other State or outside providers. |
| Q12 |  | Where would you like the response to the PG request in the proposal response? | ETF assumes the question is referring to RFP section 7.12.1, Performance Standards and Penalties. Include your response to 7.12.1 in Tab 2 of your proposal (see Section 2.5.1 Format Requirements). If you have assumptions/exceptions to Appendix 3, Performance Standards and Penalties, see RFP Section 2.5.2, Instructions for Submitting Assumptions and Exceptions. As stated in RFP Section 2.5.1, Format Requirements, Assumptions and Exceptions should be included in Tab 3 of your Proposal. |

**END**