



Benefit Technology Solutions

Request for Proposal

Park Hill School District

February 20, 2019



Table of Contents

Title	Page
Table of Contents	1
I. Introduction.....	2
II. Proposal Specifications.....	5
III. Questionnaire	7

CBIZ Employee Services Organization
A Division of CBIZ Benefits & Insurance Services, Inc.

700 West 47th Street, Suite 1100
Kansas City, MO 64112
www.cbiz.com | 816.945.5500



I. Introduction

Client Name

Park Hill School District

Business

PHSD is located at 7703 NW Barry Road, Kansas City, MO 64153. PHSD serves students in a 71 square mile area in Platte County, Missouri and is fully accredited by the state of Missouri. PHSD has approximately 1,452 full-time benefit eligible employees. PHSD consists of 11 elementary, 4 middle and 2 high schools; an innovation studio for high school level students, a day school for students with special needs, an Early Childhood Education Center, an aquatic center, support services facility and administrative facility. Estimated student enrollment for the current school year approximates 11,500 (K-12).

Client Information

Address	7703 NW Barry Road, Kansas City, MO 64153
Locations	Missouri
Covered Population	Full-time employees, their spouses/domestic partners, and children
Eligibility	New hires are eligible on the first of the month following date of hire
Expected Participation	1,452
Current Vendor	CBIZSolutions Custom

Goals and Objectives

The top priority for Park Hill School District is

Proposal review will be evaluating how each vendor responds to these key critical elements:

- a. Competitive Pricing
- b. Weekly electronic data interface with benefit vendors
- c. Weekly bi-directional electronic data interface with client’s HRIS
- d. Efficiency and effectiveness of administrative tools
- e. Billing support
- f. Ease of online enrollment
- g. Decision support tools
- h. High level of customer service



Current Solution

The current system providing service requested is CBIZ Solutions Custom, a proprietary online enrollment, communication and administrative system. Additional services include project management, consolidated billing and a dedicated customer service representative. This system will run concurrently through the end of plan year 2019 with open enrollment services provided by the new system. CBIZ Solutions Custom agrees to provide necessary data transfers for a smooth transition.

Client HRIS

Park Hill School District utilizes the Alio system for HRIS and payroll processing. Based on recent experience, one of the key challenges for this engagement is related to sending election information back to Alio.

Open Enrollment

Open enrollment will be an active enrollment requiring all employees to affirm, approve, waive or make new elections. To ease the enrollment process, Park Hill School District seeks a technology solution that will pre-load the personal data and employee benefit elections currently maintained in CBIZ Solutions Custom and the Alio payroll/HRIS systems.

Requested Services

1. Park Hill School District requires the ability to go into the administrative system and make retroactive adjustments to benefit elections, eligibility and start and end-dates (up to the limit defined by each insurance contract, typically 90 days). Please indicate if your system has the ability to notify insurance companies (via EDI) of these retroactive adjustments.
2. The system must have the ability to track beneficiaries both primary and contingent.
3. Park Hill School District desires a dedicated customer service representative and call center support for employees.
4. Easy to use and flexible reporting capabilities for both standardized and customized reports.
5. Provide benefit portal for employees to log into the system to print forms or access information such as the summary plan documents, benefit guides, etc. throughout the year.
6. Provide decision support tools for employees during enrollment.
7. The system must be able to be accessed on various platforms. I.e., smart phones, Internet Explorer, IOS, Firefox, Chrome, etc.
8. Employee portal must be able to be customized with client specific branding.
9. Employee enrollment experience should be easy to use and engaging.

Timeline

Please submit any questions related to this marketing to Susan Endicott no later than **February 26, 2019**. Submit one printed copy and one electronic copy of your proposal to Susan Endicott contact no later than **4:00 p.m., Wednesday, March 13th**. If you elect to decline quotation, please advise us prior to the due date. It is the goal of Park Hill School District to finalize all vendor decisions relative to this RFP by May 15, 2019.

CBIZ RFP Contact	Susan Endicott
CBIZ Producer	Jim Vigliaturo
Effective Date	July 1, 2019
Proposal Due Date	March 13, 2019
RFP Questions Due	February 26, 2019
Responses to Questions	March 1, 2019
Vendor Decision Date	May 15, 2019



II. Proposal Specifications

General

Contract

The contracts are to be issued in the State of Missouri. Contracts are between Park Hill School District and vendor. CBIZ assumes no liability or guarantees for payment or service.

Guaranteed Rates

Proposals with multi-year rate and/or fee guarantees will receive the most favorable consideration.

Account Structure

Park Hill School District’s account structure for eligibility and benefits will be broken out by full-time employees by location as well as department.

Current Benefits and EDI

Renewal Date	Product	Vendor	EDI
January 1	Medical	Blue Cross and Blue Shield of Kansas City	Weekly to BCBS
January 1	Dental	Blue Cross and Blue Shield of Kansas City	Weekly to BCBS
January 1	Vision	VSP	Weekly to VSP
January 1	Life and Optional Life	Ochs	Annual to Ochs
January 1	Voluntary STD	Lincoln Financial	No feed
January 1	Accident and Critical Illness	Trustmark	Weekly to Trustmark
January 1	Section 125	Tri-Star	Weekly to Tri-Star
January 1	Legal Plan	Hyatt Legal Plans	Weekly to Hyatt Legal Plans
	Payroll/HRIS	Alio	Weekly

Rights to Records

All records and eligibility data used shall remain the property of Park Hill School District.

Proposal Contacts

Your proposal should be provided to Susan Endicott at CBIZ.



Direct all communications concerning this Request for Proposal in writing to CBIZ. Under no circumstances may a vendor contact Park Hill School District regarding this RFP. All correspondence and discussion related to this RFP should be treated confidentially.

Renewal Notice

After the initial fee guarantee period has expired, Park Hill School District requires that any change to fees and other pricing are effective on July 1 of each year and notice of any fee/pricing change must be provided at least five months in advance.

Cancellation Provisions

After the first year, Park Hill School District reserves the right to terminate its contract without cause, by providing at least 30 days in advance. Park Hill School District can terminate with cause with 30 day notice unless proper remedy is provided by vendor. The vendor may only terminate for cause with proper legal minimum notice requirements.

Should you be awarded this business, you agree to assist with transition of data in the future should Park Hill School District select a new vendor at no additional cost.

Hold Harmless

The vendor shall be responsible for and agree to indemnify and hold harmless Park Hill School District from damages to property or injuries (including death) to any person(s) and any other losses, damages, expenses, claims, demands, suits and actions by any party against Park Hill School District in connection with the work performed by the vendor.

Confidentiality Agreement

Information relative to this RFP may not be released to parties external to this process without the written consent of Park Hill School District and CBIZ. In addition, CBIZ and Park Hill School District agree to hold the information you provide in the strictest confidence and will not share your proposal responses with others outside of our respective organizations in accordance with the law.

Vendors Errors/Omissions

Neither Park Hill School District nor CBIZ will be responsible for errors or omissions made in your proposal. You will be permitted to submit only one set of proposals. You may not revise or withdraw submitted proposals after the deadline date. After that, revisions to your original submission will not be allowed except as requested by CBIZ or Park Hill School District.

III. Questionnaire

General

1. We will assume that you will provide 180-day final renewal rates. Please state if you are not able to meet this requirement.
2. Do you agree to maintain proper licensure as required by any state law where it relates to the services that you will be performing for Park Hill School District?
3. Do you agree to provide no less than 30 day notice to Park Hill School District for any changes involving the sale, merger, data breaches, layoffs, participating provider facility terminations, consolidation or outsourcing of services to foreign workers that will impact Park Hill School District?

Company Overview

1. Briefly describe your firm's history, number of employees, number and location of your primary offices and years in existence.
2. What is your average client size?
3. Is online benefit administration and enrollment your company's core product/service? If not, what is your core business?
4. Identify subcontracted relationships, if any, and explain how your company will be responsible for their performance.
5. Provide the location from which our account will be serviced and description of services that will be provided through that office.

Technology

1. Do you own or lease the proposed enrollment platform? If you do not own proposed platform, please identify the subcontractor and explain how your company will be responsible for their performance.
2. Please provide an overview of the system capabilities, functionality and additional modules that may be available.
3. Describe the capabilities of a system administrator posting documents (SPD, Benefit Highlights) to the website, posting weekly articles, adding links, videos, etc.

4. Describe the process during transition between plan years and how your system handles enrollment for current plan year and open enrollment. For example, is there a different look to the open enrollment site, a welcome page, mapping over of enrollment for new hires into new plan year enrollment.
5. Please describe any customized or ad hoc reporting capabilities. Please specify any additional cost for customized or ad hoc reporting.
6. Provide a sample listing of the standard reports available to administrators.
7. Is reporting available in real-time? If not, how frequently is the data updated?
8. What is the typical turnaround time for special request reports? (i.e., 10 days, 30 days)

Security

1. Please describe in detail your current activities related to compliance with the Health Insurance Portability and Accountability Acts (HIPAA).
2. Describe your organization disaster recovery process and protocols.

Data Exchange

1. Please identify the types of data that can be imported to your system, and any limitations in data importing (e.g., dependent elections, beneficiaries, benefit elections, etc.).
2. What validation measures are performed to ensure all records on the file load accurately?
3. Once in production, how will you confirm EDI files have been 1) sent, 2) received and 3) loaded?
4. How are file/eligibility errors identified and resolved? Who is the responsible party for working the discrepancies?

Implementation

1. What is your implementation service philosophy?
2. Describe the implementation team and structure. Provide a description of each function and the background, skills, and experience of each team members.
3. Are there different teams for implementation versus ongoing account management? Please explain.
4. What is the location and hours of operation (including time zone) for the implementation team?
5. What is your required implementation timeframe in business days? Submit a preliminary implementation plan that clearly identifies critical dates, the process and which party is responsible.

6. Describe the training available to administrators during implementation and ongoing.
7. Do you provide the client with system user manuals? If yes, are they updated periodically?
8. Does your organization track member satisfaction during implementation? If so, please describe the measurement tool and provide recent results.

Account Management

1. What is your philosophy on client services?
2. Please describe your account management structure and teams. What level of support can be expected on an ongoing basis? Are the personnel who are assigned to implementation also responsible for ongoing service?
3. Please describe typical account support structure, including any program/account management and business development staff.
4. What training and support will you provide to the client's personnel?
5. Does your organization have dedicated technical resources who coordinate with the client's payroll department and carriers?
6. Please describe your reporting capabilities during implementation, annual enrollment and ongoing enrollment?

Communications

1. Does your company provide communication materials to support enrollment events or other client initiatives? If so, are these services provided with in-house resources, or do you partner with an outside company?
2. To what extent can open enrollment communication materials be customized? Are they available in languages other than English?
3. In what formats do you provide open enrollment, new hire and other communication materials to employees? Please provide samples.
4. What is the typical turnaround time for special request reports? (i.e., 10 days, 30 days)
5. Do you offer decision support tools during enrollment? Please provide samples.
6. Is there an additional cost for decision support tools, if so please describe?