

## **REQUEST FOR PROPOSAL - DEPENDENT ELIGIBILITY VERIFICATION**

The prospective vendor understands and acknowledges that A+ EMPLOYER's plan-related data, plan designs, financial data, contents of the RFP, and other information disclosed in this Request for Proposal process are the sole and exclusive property of A+ EMPLOYER.

The prospective vendor agrees that it will safeguard such information to the same extent it safeguards its own confidential material or data relating to its own business information that is of a confidential or proprietary nature. The prospective vendor agrees that it will not disclose any information disclosed by A+ EMPLOYER to any third party without permission from A+ EMPLOYER.

### **Project Objectives and Description of plan**

Narrative description about the organization and the plan should include:

Type of business?

Plan structure?

Current/past dependent verification efforts?

Enrollment information – Single, Family, Employee+? Active, retired, COBRA?

Retirees (pre-65, over-65), COBRA included?

Any special requests of prospective vendors?

Open enrollment timing?

### **Scope of Project**

The selected vendor shall be required to conduct a comprehensive dependent eligibility verification project. The project must include the following elements:

1. Prepare and send customized Project Announcement document to all employees included in the project. Content to be approved by A+ EMPLOYER.
2. Prepare and send customized project description, description of eligibility categories, required documentation and response requirements to all employees included in the project. Content to be approved by A+ EMPLOYER.
3. Receive, review and securely store eligibility-related documentation.
4. Provide call center to assist employees and respond to employee questions throughout the duration of the project.
5. Follow-up with employees who provide incomplete documentation.
6. Provide objective eligibility-related recommendations based on information collected for the project.
7. Provide routine reporting on project status and final reporting on project results.
8. Present project results at the conclusion of the project.

Please indicate your acknowledgement, and acceptance, of the vendor required elements outlined above by initialing below:

YES \_\_\_\_\_

NO \_\_\_\_\_

If "NO", please explain why your firm is unable to provide the required element:

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## Vendor Information and Qualifications

Please provide the following information about your organization.

1. An executive summary, management team competencies, and background.
2. What is your firm's competitive advantage?
3. Address, phone, email and any other pertinent information for the person who would be responsible for the project.
4. Three client references, similar to A+ EMPLOYER, including their contact information.

## Detailed Questions. Please respond to ALL questions, in order.

1. Please provide a proposed timeline for the dependent eligibility verification process.
2. Will a dedicated account manager be assigned to the project? Please describe the role and responsibilities of this person.
3. Is any part of the eligibility verification handled outside of the United States? If so, please describe.
4. Does your service include a reconciliation of multiple enrollment databases? If so, is there any additional cost?
5. Where is your call center located?
6. Does your firm provide an employee response rate guarantee? If so, what is it? Other guarantees?
7. Can A+ EMPLOYER fully customize the content of all employee communication materials? If not, what are the limitations?
8. How many communication pieces are included in the standard pricing for a dependent eligibility verification project?
9. Are communication pieces populated with employee-specific information? If so, what employee-specific information is included?
10. Please describe any optional services and expenses/fees that could be added to the final cost of the dependent eligibility verification project.
11. Please provide information about any best practices and/or additional, related, services that you would recommend.

## **Pricing and Project Fees**

A+ EMPLOYER is interested in knowing the complete, “all-in” final cost of the project, so please provide a precise cost of the project. Ensure that your final project cost figure includes any potential extra charges or add-on costs. Additional fees/charges will not be considered or paid for unless they are clearly indicated and tallied as part of the final cost figure, unless they occur as a result of direct action/inaction by A+ EMPLOYER and they are approved by both parties.

## **Submission Requirements**

All submissions must be received by 5:00PM on [DUE DATE]. Please send electronic version of your submission to the following email address: XXXXXXXXXXX

Any submissions received after 5:00PM on the due date will not be considered.

If you have any questions please contact: [NAME and/or TITLE], by email at: XXXXXXXXX