KidTraks
Child Welfare Financial System

Request for Proposal (RFP) User Guide
# KidTraks – RFP User Guide

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1.0 INTRODUCTION

DCS KidTraks offers online access to Request for Proposals (RFPs) including the ability to submit proposals online.

Current vendors may access a listing of DCS contracts currently open for bid via their Vendor Portal page at the bottom of the screen. There is a link under Support Links titled, Contracting Opportunities.
Prospective vendors may access a listing of DCS contracts currently open for bid via the Request for Proposal (RFP) Inquiry Page which is linked as Contracting Opportunities on the KidTraks Login Page or directly via the following link: https://financials.dcs.in.gov/Public/RFP/RequestAvailable.aspx
2.0 VIEW LISTING OF CONTRACT OPPORTUNITIES

To view the individual details for each RFP and to begin the online proposal submission process, click on the RFP ID which corresponds with the Title of interest. Also included in the RFP Table are contract Start Date, End Date, and Proposal Due Date columns. Note that each RFP has a Status indicating whether the RFP is Open for Bidding or Closed. Proposals may only be submitted for those RFPs that are designated as Open for Bidding.
Once the desired RFP has been accessed, the applicant will be transferred to the *RFP Information Page*. Here the applicant will be able to view more details about the chosen RFP including a description and the *Service Standards* associated with the chosen RFP.

Note: There may be one or more *Service Standards* listed for a given RFP. Our example below includes 3 *Service Standards*.

To begin the online proposal submission process, click on the *Create Proposal* link which will transfer the applicant to the *Create New Proposal Page*. 

![RFP Information Page](image-url)
3.0 ATTAIN AUTHORIZATION TO CREATE A PROPOSAL

3A AUTHORIZATION FOR EXISTING KIDTRAKS VENDORS

From the Create New Proposal Page, applicants are required to identify whether they are an existing online KidTraks vendor, or if they need to register as a new user. In the below example, we illustrate the selection of an existing online KidTraks vendor.
When an applicant identifies themselves as an *Existing User* and clicks on the *Select* button, they are transferred to the *KidTraks Login Page* as demonstrated below. Here the applicant enters their KidTraks *User ID* and *Password*, then clicks on the *Login* button. The applicant then must return to the *RFP Inquiry Page* and select the desired *RFP ID* corresponding to the desired proposal for submission. Existing users may now advance to page 12 to continue the online proposal creation process.

![Management Gateway for Indiana’s Kids](image)

*Sign In*

- [Enter password]
- [Sign In]

[Check] *Remember Me*

[Reset Password?]
3B AUTHORIZATION FOR PROSPECTIVE KIDTRAKS VENDORS

Vendors not registered as online KidTraks users must complete the registration process. This begins by identifying yourself as a New User from the Create New Proposal Page and then clicking on the Select button as demonstrated below.
3C PROSPECTIVE KIDTRAKS VENDOR REGISTRATION

The applicant is then transferred to the Registration Page. Here the user completes the online form and clicks on the OK button as illustrated below.

A successful registration is indicated at the bottom of the Registration Page when the form is completed and the OK button is selected.
As indicated in the successfully submitted message on the *Registration Form* above, a confirmation notice is sent to the email address provided. Contained in the email is a link to *Change your Password*. By clicking on the link you will be taken to a page to create a new password.

**Note:** Please check your spam folder for confirmation emails. Confirmation emails are sent out immediately upon registration submission.

Once you enter in your new password, click on *Change My Password*. 

```
Change Password

Please submit the following information:

Email Address: RFP Testing

* New Password: 

* Re-enter New Password: 

[Change My Password]  [Back to Login]
```
Once your password has been successfully changed click on *Back to Login*. You will then be directed to the KidTraks login page to log in.

* New Password:

* Re-enter New Password:

From the *KidTraks Login Page*, enter your *User ID* (your email address) and paste your *Password*. Click on the *Login* button.
Once you are successfully logged into KidTraks, you will be directed to the screen below. Click on KidTraks.

Next, click on Contracting Opportunities.
4.0 ONLINE PROPOSAL FORMS AND ATTACHMENTS

From the RFP Inquiry Page, select the RFP ID corresponding with the RFP desired for proposal submission.
4A RFP INFORMATION PAGE

Once you have selected the RFP desired for proposal submission, you will be directed to the RFP Information Page below, which provides some additional information. There are two links provided: the RFP Inquiry and Create Proposal links. Also, the Service Standard(s) for the selected RFP are itemized. Please verify that the selected RFP is the one intended for proposal submission. If not, the RFP Inquiry link will return you to the previous RFP Inquiry Page. In the provided example of Test2, we will begin to create the online proposal by clicking on the Create Proposal link.
4B PROPOSAL INFORMATION PAGE

The first page presented to the applicant after clicking upon the Create Proposal link is the Proposal Information Page. Note how the Proposal Information Page is divided into four sections which are accessed via the tabs Basic Information, Proposed Services, Errors, and Attachment. Clicking on the individual tabs will allow you to navigate between the proposal sections.

In addition, from the Proposal Information Page, the user is provided with options to Delete, Submit, or Print Proposal Application by clicking on the down arrow of the dropdown menu entitled Action. This dropdown menu with its respective options are available on the Proposal Information Page no matter which tab is selected.

Note: If the applicant selects Delete, the entire proposal will be deleted. Only correctly completed proposals will qualify for submission. The option to Print Proposal is available at any time in the process – whether the proposal has been submitted or if it is still open.

Also note there is an Eligible to Submit icon in the Proposal Header which provides the applicant with a gauge as to whether or not the proposal is ready for submittal. When you click on the red icon, you will be transferred to the Errors tab where a listing of errors is provided. If the icon registers as green, the proposal is ready for submission.
4C BASIC INFORMATION PAGE

The first form presented for completion is the Basic Information form. There are four links provided on the Basic Information form: Certified Minority Owned Business, Certified Women Owned Business, Buy Indiana Entity, and Veteran-Owned Business. These links all open to Indiana Department of Administration (IDOA) Pages which provide more information on how to qualify for these programs. For more information please see the IDOA Requirements document (Attachment IDOA 1) and the corresponding IDOA required attachments (Attachment IDOA 2-4). If already certified in any of these programs, please select the applicable program category(s).

Complete the Basic Information form by filling out all sections. The Chief Executive Officer, Financial Officer, Contact Person for Proposal, and Disaster Contact are critical sections to complete as the contact information entered are transferred into KidTraks. Once the form is completed, click on the Save button at the bottom of the page. Clicking on the Cancel button will remove your entries from the completed fields. Clicking on the Close button will log you out of KidTraks and return you to the KidTraks Login Page.

Note: If you navigate away from the Proposal Information Page prior to clicking on the Save button, all entries will be lost. Never use the browser Back button to return to previously viewed pages!

---

Legal Applicant/Agency Name:

Doing Business As:

Registered with Secretary of State:  [ ] Not Registered  [ ] Registered

Federal EIN or DBA:

Medicaid ID:

Physical Address:

Address Line 1:

Address Line 2:

City:

State:

Zip:

Applicant's Legal Status:

Chief Executive Officer:

Name:

Telephone:

Fax:

Financial Officer:

Name:

Telephone:

Fax:

Contact Person for Proposal:

Name:

Telephone:

Fax:

Disaster Contact:

Name:

Telephone:

Fax:
After clicking on the Save button, and if the Basic Information form is not completed correctly, error notifications will be visible via a red asterisk by the section in question, as well as bulleted explanations at the bottom of the page. See below for an illustration of an incomplete Basic Information form.
4D SELECTING APPLICABLE SERVICES FOR PROPOSAL

The next section of the online proposal submission to be completed is found under the Proposed Services tab. Click on the corresponding tab located on the Proposal Information Page as indicated below. The Proposed Services Section lists those Services Standards available for the selected RFP. Note the column indicating the completion status of each referenced service. To begin filling out the Proposed Services form(s), click on the corresponding Service Code.
4E PROPOSED SERVICES FORM

Begin the form completion by filling in the Contact Person for Service section of the form. Note that on the Proposed Services form, there are two links provided: Back to Service List and DCS State Region Map (Click Here). The DCS State Region Map (Click Here) link is addressed in Section 4G County/Contact Table. Clicking on the Back to Service List link will return you to the table itemizing all of the proposed Service Standards relevant to the selected RFP.

If you want to include this Service Standard in your proposal submission, you must check Include Service in Proposal, shown below.

Note: If you navigate away from the Proposal Information Page prior to clicking on the Save button, all entries will be lost. Never use the browser Back button to return to previously viewed pages!
4F COMPONENT CODE TABLE

Found next on the Proposed Services form is the Component Code Table (Billable Units). Here you will find the listing of all components relevant to the selected Service Standard within the RFP. This table also provides the applicant with the relevant Component Codes (Billable Units), Component Description, their Units of Measure, and their respective standardized rates.

Some Service Standards require that all the components be selected. These components will have a standard rate that cannot be negotiated. These are shown under the Rate column. These components with a fixed standard rate will have a field that cannot be edited, as shown below under My Proposed Rate column. In the example below for Home Based Family Centered Casework none of the rates can be edited within this column. By applying for this service your agency agrees to provide the service at the fixed standard rate.
4G COUNTY/CONTACT TABLE

Next on the Proposed Services form is the county selection area. To select the regions and/or counties corresponding to the associated services, click on the dropdown menu and select Add. Note: Clicking on the DCS State Region Map (Click Here) link will open up a browser window with an illustration of the state of Indiana identifying which counties are in which regions as depicted below.

Once Add has been selected from the county dropdown list, click on the Go button.
Clicking on the *Go* button opens up the *County Selection* dialog box. Begin by filling in the *Name*, *Phone* and *Email* fields. Note: Each county and/or region requires the entry of corresponding contact information.

There are two ways to populate the *Counties Selected* field. The first option is to click on the *Filter By Region* dropdown list which will provide a window listing all of Indiana’s regions as demonstrated below. See previous page for instructions on accessing a map of Indiana providing a region legend.

For our purposes we’ve elected to bypass the region option and select by county. Illustrated below is the selection of Carroll County from the *Counties Available* list. Once the desired county is selected, click on the *Select* link to move it into the *Counties Selected* field. Repeat this process to select all counties desired for service representation. Counties may be removed from the *Counties Selected* field by highlighting the applicable counties and clicking on the *Remove* link.
Having selected Carroll County for our service representation, it appears in the *Counties Selected* field and disappears from the *Counties Available* listing as illustrated below. Next, click on the *Submit* button.
4H FINALIZING PROPOSED SERVICES FORM

Once the county(s) and/or region(s) have been selected and the appropriate contact information has been entered and submitted for service representation, the record(s) appear in the Counties Table of the Proposed Services form.

Complete the form by clicking on the Save or Apply button. Clicking on the Save button will save all entries and return you to the Services Section listing all services pertinent to the selected RFP. Clicking on the Apply button will save all entries and maintain your placement on the current page. Clicking on the Cancel button will remove all field entries and return you to the Services Section listing.

County/Region records may be deleted by clicking on the box corresponding to the county/region you wish to delete. Then select Delete from the dropdown menu and click on the Go button.
By clicking on **Save**, you will be directed to the screen shown below. By clicking on **Apply**, the data will be saved but the user will not be directed to the next screen. In this example, the user completed all requirements under the Proposed Services tab for *Home Based Family Centered Casework Services*. Note the **Yes** comment under the Completed Section.

If the user wants to apply for the other available Service Standards, they should select the Service Code link from this screen. If the user only wants to apply for *Home Based Family Centered Casework Services*, the user should move on to 4I Uploading Attachments.

![Proposed Services Table](image-url)
4I UPLOADING ATTACHMENTS

Under the Attachment tab within the Proposal Information screen, users will find the Required or Optional attachments needed for proposal submission.

In the screen below, you will see the list of Required and Optional attachments. Listed first are the Required attachments per contract Type. In this example, the RFP is for Community Based Services. Below these attachments are Required or Optional attachments specific to the Service Standard the user is proposing for. These are identified under the Service column. In the example below the user only applied for Home Based Family Centered Casework Services.

To add an attachment click on the Required or Optional link under the Attachment column. Descriptions of each attachment type can be found in Appendix B. The attachments are specific to the RFP type and proposed Service Standard.
Click on *Browse* to select the document you wish to upload from your computer. Once the document has been uploaded, type in the Description of the document. Then select *Submit*.

Once the *Submit* button has been selected, an *Attachment Upload* dialog box will appear indicating that the upload was completed successfully. Click on the *Close* button.
4J DELETING ATTACHMENTS

As the user uploads attachments, the attachments move to a completed section at the bottom of the screen. To delete an uploaded attachment, click on the X under the *Delete* column. To delete attachments from your proposal, simply click on the “X” next to the attachment you wish to delete.

When an attachment has been selected for deletion and the “X” has been clicked upon, a message window will appear asking you to verify that you want to delete the chosen attachment from the proposal. Click *OK* to continue with the deletion or *Cancel* to cancel the deletion.
4K PRINTING PROPOSAL APPLICATION

The screen below shows the Proposal Application has not yet been uploaded. Users should select *Action: Print Proposal Application* and *Go*. That will generate a PDF version of the user’s Proposal Application.
4L SIGNING PROPOSED APPLICATION

A pdf file will open that will look like this:

The user must complete the Application as instructed, including signing the Application in blue ink only.

Incomplete or unsigned Applications will not be processed.
4M UPLOADING PROPOSAL APPLICATION

Once the Proposal Application is signed, the user will upload the document in the same manner as the other attachments. As shown in the screen below, the Proposal Application has been uploaded showing all attachments within the completed section at the bottom of the screen.
5.0 PROPOSAL SUBMISSION

5A ELIGIBILITY TO SUBMIT

When users are ready to submit their proposal, it is important to look at the color of the Eligible to Submit button. If this button is Red, the proposal is not ready to be submitted and the user should check the Errors tab. Users can either click on the Eligible to Submit button or the Errors tab to view the errors.

In the screen below, the error has been corrected and the Proposal is ready for submission. Note the Green Eligible to Submit button.
Users should select *Submit* from the *Action* dropdown list located on the *Proposal Information Page* and click on the *Go* button.

**Note:** The *Action* dropdown list is available from any of the sections (tabs) located on the *Proposal Information Page*.

**Note:** *It is not possible to edit or delete a proposal once it has been successfully submitted.*
5B SUCCESSFUL PROPOSAL SUBMISSION

Once the proposal has been submitted, the Status of the proposal will show as Submitted. Select Close at the bottom of the screen to exit this page.
5C REVIEW PROPOSAL SUBMISSION

To review your submitted proposal(s), simply click on Close from the screen above to return to the RFP Inquiry Page. In the example below the provider opened several proposals, but only submitted one.

Note: It is possible to review your proposal both before and after submission.
6.0 DELETING PROPOSALS

Note: It is not possible to edit or delete a proposal once it has been successfully submitted.

Should you decide you don’t want to submit a proposal for the selected RFP select the Delete option from the Action dropdown list as demonstrated below. Next, click on the Go button and follow instructions on the following screen.

Note: The Action dropdown list is available from any of the sections (tabs) located on the Proposal Information Page.
7.0 APPENDICES

Appendix A: Helpful Tips

- This guide is best viewed in the screen resolutions of 1024 x 768 or 800 x 600.
- Those vendors using IE browsers which include the “Compatibility View” feature should have it deselected when viewing KidTraks sites.
- Some of the pages in this guide are legal size (8.5”x14”) rather than letter size (8.5”x11) in order to accommodate the graphics.
- For new users requesting authorization, please check your spam folder for password emails. Confirmation emails are sent out immediately upon registration submission.
- Do Not use the browser Back button to return to previously viewed pages!
- If you navigate away from the Proposal Information Page forms prior to clicking on the Save button, all entries will be lost.
- When users select Save and the screen refreshes, sometimes it scrolls down to the bottom of the screen. This may appear that you are on a blank page; however, you just need to scroll up.
- Service Code refers to the number assigned to a Service Standard.
- Component Code refers to the number assigned to a Component (Business Unit).
- Both Service Codes and Component Codes are used in the billing for services and will appear in Attachment A if a contract is entered into.
- A Service Narrative is required for each Service Standard proposed.
- The application must be signed in blue ink and uploaded as an attachment.
- Please refer to your RFP and Appendix B to clarify which document attachments are required for submission completion.
- When uploading attachments, file formats are restricted to Word documents (.doc), Excel documents (.xls), and Adobe Acrobat documents (.pdf).
- If an applicant elects to delete an open proposal, the entire proposal will be deleted. Only open proposals may be deleted or edited.
- Only completed proposals will qualify for submission.
- Proposals can be edited after they have been saved. They cannot be edited after they have been submitted.

The Department of Child Services (DCS) has legal limitations in answering questions regarding the RFP process. All questions/inquiries regarding an RFP should be submitted in writing by the deadline listed in the RFP. To access a list of responses to submitted questions please refer to the DCS Web site. Only answers posted on the DCS Web site, (http://www.in.gov/dcs/3153.htm), will be considered official and valid by the State. Inquiries are not to be directed to any staff member of DCS. Such action may disqualify the respondent from further consideration for a contract resulting from an RFP. However, for questions regarding technical issues with the online application, please email childwelfareplan@dc.s.in.gov.
APPENDIX B: ATTACHMENT DESCRIPTIONS

Provider Documentation

Providers should upload one copy of each of the following documents per RFP.

Attachment Name: Provider Narrative
Contract Type: Community Based and Youth Service Bureau
Document Description: This document will be listed as an attachment on the DCS Website located within the specific RFP you are applying. Respondents should provide one Provider Narrative for each proposal submitted.

Attachment Name: Organizational Chart
Contract Type: Community Based
Document Description: Please provide an organizational chart documenting your agency’s leadership structure. The chart should include the position and the name of the individual holding that position.

Attachment Name: Legal Status
Contract Type: Community Based
Document Description: Please provide supporting documentation of your agency’s legal status, including a Certificate of Existence from the Secretary of State.

Attachment Name: Provider Financials
Contract Type: Community Based
Document Description: Please provide the last 2 years Profit & Loss Statements.

Attachment Name: Funding Sources
Contract Type: Community Based
Document Description: Please provide supporting documentation of other funding sources.

Attachment Name: Agency Quality Improvement
Contract Type: Community Based
Document Description: Please provide your agency’s practice for assessing quality of services and monitoring improvement.

Attachment Name: Secretary of State Entity Report
Contract Type: Community Based
Document Description: Within the Secretary of State website (https://bsd.sos.in.gov/publicbusinesssearch) the provider must find their entity report. This report is the requested attachment. The status of the report should be Active and the Business Entity Report due date should be in the future.

Attachment Name: Provider Insurance
Contract Type: Community Based
Document Description: Please provide supporting documentation of agency’s current insurance.
Attachment Name: Budget
**Contract Type:** Child Advocacy Center, Community Partners, Youth Service Bureau, Community Based (Specialized Services only)
**Document Description:** This document will be listed as an attachment on the DCS Website located within the specific RFP you are applying. Respondents should submit a completed budget in compliance with the outlined format per RFP.

Attachment Name: Actual Costs Report
**Contract Type:** Healthy Families
**Document Description:** This document will be listed as an attachment on the DCS Website located within the specific RFP you are applying. Respondents should submit a completed report in compliance with the outlined format.

Attachment Name: Other
**Contract Type:** Community Based
**Document Description:** This section is for any additional documents you want to upload as supporting documentation for your proposal. Additionally, this attachment category will be used for IDOA required attachments 2-4.
**Service Standard Documentation**

Providers should upload one copy of each of the following documents specific to the service standard they are applying for within the RFP.

**Attachment Name:** Service Narrative  
**Contract Type:** All  
**Service Standard:** All  
**Document Description:** This document will be listed as Attachment D on the DCS Website located within the specific RFP you are applying. Respondents should provide one Service Narrative for each Service Standard they are applying for. (NOTE: If respondents are proposing for Community Partners for Child Safety, respondents must include a service narrative for each region being proposed. The region number should be included in the service narrative).

**Attachment Name:** Licensed Child Placing Agency Documentation  
**Contract Type:** Community Based  
**Service Standard:** Family Prep  
**Document Description:** Respondents must provide supporting documentation of licensure.

**Attachment Name:** Comprehensive Service Certification  
**Contract Type:** Community Based  
**Service Standard:** Comprehensive Home Based Services  
**Document Description:** Respondents must provide certification for the Comprehensive Home Based Service they are proposing.

**Attachment Name:** Child Parent Psychotherapy (CPP) Certification  
**Contract Type:** Community Based  
**Service Standard:** Counseling  
**Document Description:** Respondents must provide CPP certification documentation.

**Attachment Name:** Functional Family Therapy (FFT) Certification  
**Contract Type:** Community Based  
**Service Standard:** Functional Family Therapy (FFT)  
**Document Description:** Respondents must provide FFT certification documentation.

**Attachment Name:** DMHA Certification  
**Contract Type:** Community Based  
**Service Standard:** Detoxification, Residential Substance Use, Substance Use Disorder Assessment, Substance Use Outpatient Treatment  
**Document Description:** Respondents must provide DMHA certification documentation.

**Attachment Name:** DMHA ASAM Scoring Designation Level  
**Contract Type:** Community Based  
**Service Standard:** Residential Substance Use Treatment  
**Document Description:** Respondents must provide their ASAM level, as shown in the letter and certificate designated by DMHA. If respondents are in the designation process, please upload any communication you have had with DMHA regarding this process. More information about ASAM designation levels is provided through this link: [https://www.in.gov/fssa/dmha/3073.htm](https://www.in.gov/fssa/dmha/3073.htm)
Attachment Name: Indiana Coalition Against Domestic Violence Certification  
Contract Type: Community Based  
Service Standard: Domestic Violence Batterers Intervention Services  
Document Description: Respondents must provide Indiana Coalition Against Domestic Violence certification documentation.

Attachment Name: Family Centered Treatment (FCT) Certification  
Contract Type: Community Based  
Service Standard: Family Centered Treatment (FCT)  
Document Description: Respondents must provide FCT certification documentation.

Attachment Name: CSAYC Certification (Optional)  
Contract Type: Community Based  
Service Standard: Sexually Harmful/Reactive Youth  
Document Description: If applicable, respondents should provide CSAYC certification documentation.

Attachment Name: Specialized Services Supporting Documentation  
Contract Type: Community Based  
Service Standard: Specialized Services  
Document Description: Respondents must provide documentation (including licensure, certification, etc.) to support the specialized service they are proposing.

Attachment Name: Specialized Populations Training, Certification, or Credentials (Optional)  
Contract Type: Community Based  
Service Standard: Any Community Based Services  
Document Description: If applicable, respondents should provide any training completion or in-progress documentation, certification, or credentials for working with specialized populations.

Attachment Name: Evidence Based/Promising Practice Documentation or Curriculum (Optional)  
Contract Type: Community Based  
Service Standard: Father Engagement, Parent Education, Detoxification/Withdrawal Management, Substance Use Disorder Assessment, Substance Use Outpatient Treatment  
Document Description: If applicable, respondents should provide any evidence based/promising practice documentation (in-progress or completion) or curriculum.