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**STATE OF INDIANA**

**ADDENDUM 2**

**Request for Proposal 23-75072**

**INDIANA DEPARTMENT OF ADMINISTRATION**

**On Behalf Of**

**Family and Social Services Administration**

**Solicitation For:**

**Indiana Pathways for Aging Member Support Services**

**Response Part One, Submission Form Due Date and Time:**

**May 11, 2023 @ 3:00 PM ET**

**Response Part Two, Submission of Proposals by Flash Drive Due Date and Time:**

**May 16, 2023 @ 3:00 PM ET**

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Indiana Department of Administration

Procurement Division

402 W. Washington St., Room W468

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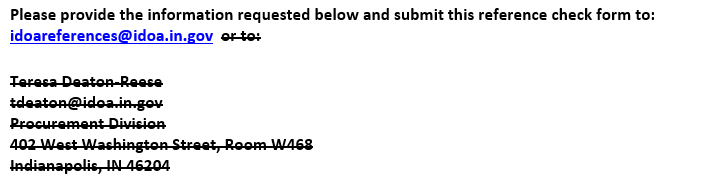
**Summary of Changes**

Deletions are indicated via ~~strikethrough~~ and additions have been made in red font in the corresponding documents.

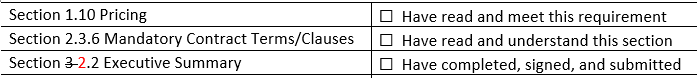
1. **The following edits have been made to Attachment F, Technical Proposal, Member Support Services – RFP #23-75072**
2. In section 5 – Grievances and Appeals, on page 4:

Confirm your acceptance of the requirements in Section 2.~~2~~ 3 and please describe your approach to meeting all the requirements identified in the Section 2.~~2~~ 3 of the Scope of Work. Specifically describe:

1. Your system and process for supporting members in navigating the Grievance and Appeals process ~~receiving and support the filing of grievances, and appeals~~, including how your system ensures all policy and processing requirements are met. Denote any steps or plans related to providing education to members who are also enrolled in an aligned D-SNP and have access to unified grievances and appeals processes.
2. How you will align or create seamless processes for supporting members with navigating their grievances and/or appeals.
3. **The following edits have been made to Attachment H, Member Support Services – RFP #23-75072**
4. On page 1, the State has removed the following language:



1. **The following edits have been made to Attachment J, Attestation Form, Member Support Services – RFP #23-75072**
2. On page 1, the State has updated the section numbering:



1. **The following edits have been made to Attachment K, Scope of Work, Member Support Services – RFP #23-75072**
2. In section 1.2 – Timeline, on page 2, the State has changed wording to clarify the onboarding and implementation timeline for the Member Support Services Contractor:

FSSA will launch Pathways for Aging in summer 2024, and 2023 has been set aside for managed care entity (MCE) readiness review. The Contractor will begin onboarding with the State ~~in late 2023 or early 2024~~ no later than the beginning of January 2024. The Contractor must complete requirements gathering and systems and operational development sufficient to begin engagement in comprehensive transition activities and readiness, such as material development and public/member messaging, in the first quarter of 2024. Additionally, the Contractor must submit any member-facing material drafts to the State for review by the end of the first quarter of 2024. The Contractor must be ready to begin ~~supporting~~ member-facing operations in ~~the late second quarter of 2024~~ July 2024 upon ~~during the transition period of~~ Pathways for Aging program go-live, or as determined by the State.

1. In section 2.2.4 – Member Issue Resolution, on page 8, the State has issued clarifying language around the role and expectations of the Contractor in the Grievance process.

The Contractor shall provide assistance in ~~filing Grievances~~ navigating the Grievance process when informal problem resolution proves unsuccessful or when otherwise requested by the Member (See Section 2.3 for Grievance and Appeals requirements). The Contractor shall not impede a member from filing a Grievance or Appeal before attempting to resolve an Issue if the member’s desire is to proceed directly with a Grievance or Appeal. The Contractor may not provide representation for the member at the State fair hearing in compliance with 42 CRF 438.810(b).

1. In section 2.3 – Grievance and Appeals, on page 13:

The Contractor shall provide assistance, upon request, in navigating the Grievance and Appeal process, as well as appealing Adverse Benefit Determinations by the MCE to a State Fair Hearing. The Contractor shall assist the member or the member’s family member, legal guardian, informal caregiver, Supported Decision Maker, and/or Authorized Representative (as applicable and/or determined by the member) with filing a Grievance or Appeal at the member’s request or responding to follow-up inquiries related to an Appeal or Grievance for which the member requests assistance. ~~This includes, but is not limited to, writing and filing an Appeal on behalf of the member.~~ As part of Grievance resolution, the member may request a warm hand-off to the MCE where the Contractor staff member continues to participate in the call to the extent requested by the member. The Contractor shall not provide representation to the member at a State Fair Hearing using funds from the Member Support Services Contract, but may refer the member to sources of legal representation.

1. In section 3 - Communications & Helpline, on page 14:

The Contractor shall establish a service delivery structure that includes a hotline, a website, and e-mail access to Contractor program staff or volunteers (this can be through subcontract(s). The Contractor will maintain an email address through which members and legally authorized individuals, which may include their family members, legal guardians, informal caregivers, Supported Decision Makers, and/or Authorized Representatives (as applicable and/or determined by the member), can submit electronic requests for information, advice, referrals, and direct assistance.

1. In section 3.1 – Methods of Interaction and In-person requirements, on page 14, the State has added the following language regarding timing requirements for the Contractor when scheduling in-person assistance visits.

For members who request in-person assistance, the Contractor must schedule within three (3) days of the request for the meeting, and the scheduled meeting must be conducted within seven (7) days of scheduling unless the member is unavailable in this time period. If the member is unavailable within the prescribed timeframe, the Contractor shall meet with the member on the first mutually available date.

1. In section 3.3 – Helpline, on page 16:

The Contractor will establish and maintain an accessible, culturally and linguistically competent helpline that will answer calls Monday-Friday from 8am – 8pm Eastern Time zone. The helpline must have voicemail or an answering service after hours. The helpline will be accessible through a statewide toll-free number, be staffed, and shall provide information and assistance to members and legally authorized individuals, which may include their family members, legal guardians, informal caregivers, Supported Decision Makers, and/or Authorized Representatives (as applicable and/or determined by the member). The Contractor shall obtain a toll-free number within sixty (60) days of award. The helpline’s ~~must have TTY access and its~~ physical location must be located within the state of Indiana. The Contractor does not have to possess or provide TDD or special communications equipment to Deaf or Hard of Hearing (D/HoH) individuals who call the Contractor's phone number for assistance; however, the Contractor must be able to accept and place calls through TRS providers, such as Relay Indiana, for D/HoH individuals who prefer to use TTY/TDD for their communication. For D/HoH individuals who express an interest in but do not possess special communications equipment (e.g., captioned telephones, TDD, TTY, TT), the Contractor must be able to refer D/HoH individuals to resources that can assist them with accessing equipment, including but not limited to CapTel providers and Relay Indiana. The Contractor shall submit its helpline scripts to the State for review and approval during Implementation readiness.

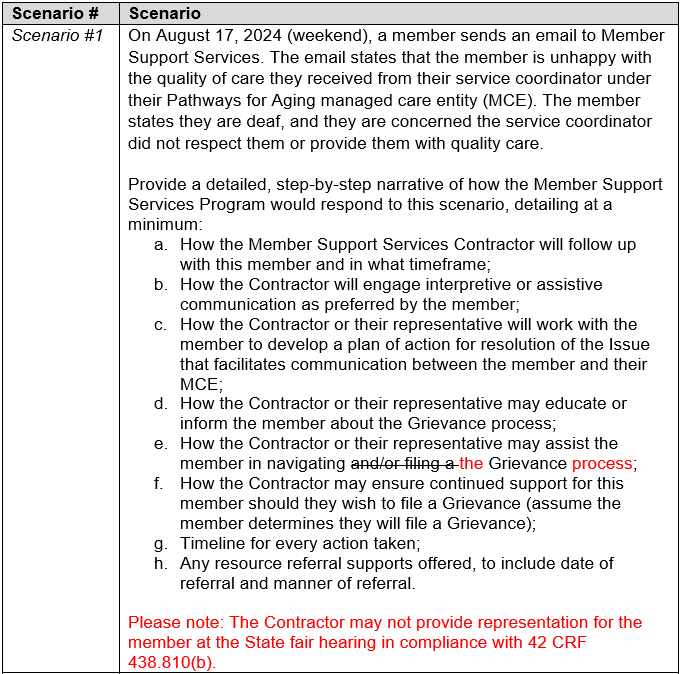
1. In section 3.3.3 – Call Recording, on page 18, the State has changed wording to clarify call retention requirements for the Contractor.
2. The Contractor must retain recordings of all calls for five (5) years after the member issue is resolved ~~according to the record retention requirements specified in Attachment B – Sample Contract~~. The Contractor shall submit policies and procedures related to digitally recording and storing calls to the State within ninety (90) days of Contract Commencement.
3. In section 5 – Technology Requirements, on page 24, the State has added language regarding disclosure requirements.

Public Record. Unless deemed confidential or otherwise prohibited, documents submitted in response to this RFP may be subject to disclosure pursuant to the Access to Public Records Act (APRA), I.C. 5-14-3.

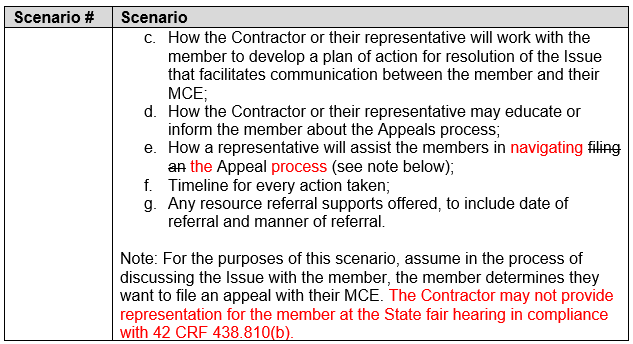
1. In section 11.2 – Readiness Review, on page 33, the State has changed wording to clarify Contractor readiness expectations.

If for any reason the Contractor does not pass the readiness review by the contract start date and there is a delay in the operational start date, the Contractor shall be subject to consequential damages and corrective actions as described in Section 16. The Contractor shall have an opportunity to make corrections within ninety (90) days of the effective date of the Contract and will be required, upon the State’s request, to submit documentation to the State that it has corrected the problem(s). If the Contractor is not ready to begin operations ~~within ninety (90) days of the effective date of the Contract,~~ by the date of Pathways Go-Live, the Contractor shall pay any costs the State may incur due to the delay and will be subject to sanctions as determined by the State. If the State identifies major deficiencies during the readiness review, the State may delay implementation until the Contractor adequately addresses the deficiencies or terminate the Contract if deemed by the State to be in the best interests of the State.

1. **The following edits have been made to Attachment L, Case Scenarios, Member Support Services – RFP #23-75072**
2. For Scenario #1, on page 2:



1. For Scenario #2, on page 3:

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