



# **Request for Statement of Qualifications (RFSQ) Credentialing and Re-credentialing Services for California County Mental Health Plans and Drug Medi-Cal Plans**

**Applications Due by 5:00 PM Friday **December 9, 2022****



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## 1 RFSQ Summary

The California Mental Health Services Authority (CalMHSA), a Joint Powers Authority (JPA), serves California Counties and Cities as an independent administrative and fiscal intergovernmental structure for jointly developing, funding, and implementing mental health services and educational programs at the state, regional, and local levels. (*See Gov. Code §6500 et seq.*)

CalMHSA is seeking responses from a Credentials Verification Organization (CVO) interested in providing credentialing and re-credentialing services to California County Mental Health Plans (MHPs), Drug Medi-Cal Organized Delivery System (DMC-ODS) Plans, and DMC State Plans (hereafter referred to as “Plans”) to ensure each Plan’s provider network is appropriately qualified through registration, certification, licensure, and/or professional association memberships, and are in good standing with federal health care programs, including Medicare and Medicaid/Medi-Cal programs. The CVO is encouraged to be NCQA certified and/or URAC accredited.

The RFSQ application process allows organizations to be evaluated for capability and compliance prior to submitting a formal Request for Proposal. However, CalMHSA may choose to contract with the Applicant and omit the need for a Request for Proposal based on the RFSQ submission alone if deemed appropriate. This process does not commit CalMHSA to contract for any supply or service whatsoever. In addition, Applicants are advised that CalMHSA will not pay for any information or administrative costs incurred in response to this RFSQ; all costs associated with responding to this RFSQ will be solely at the interested party’s expense. Not responding to this RFSQ does not preclude participation in any future RFP, if any is issued.

## 2 Project Scope of Work

Per Mental Health and Substance Use Disorders Services Information Notice No: 18-019 Provider Credentialing and Re-Credentialing for Mental Health Plans (MHPs) and Drug Medi-Cal Organized Delivery System (DMC-ODS) Pilot Counties providers that are not properly credentialed and/or re-credentialed may not participate in any Plan’s provider network. To support counties in this requirement, CalMHSA is seeking a vendor to assist counties in performing credentialing and recredentialing activities on an ongoing basis. Deliverables include:

1. Develop credentialing and re-credentialing policy(s) and procedure(s) that can be used by a variety of provider network types in California County Plans. Please include details on what your turnaround time would be to complete this deliverable.
2. Create an attestation agreement for network providers to sign that is in alignment with the Department of Health Care Services statewide uniform credentialing and re-credentialing guidance. The document should be mutually agreed upon between the vendor, the Plans and CalMHSA.

3. Develop a credentialing and re-credentialing application to gather network provider information. Vendor must have the ability to perform this function on behalf of the Plans. The application must provide instructions on how to fill it out, must mention any required documents to submit along with application based on provider type, and where and how to submit application and required documents (if any).
4. Develop and maintain a tracking system for network providers' credentialing and re-credentialing record keeping, and deficiency reporting that California County Plans can utilize at a local level. Please include details on what databases/systems you will be utilizing to track, verify, and save each credential/re-credential supporting documentation. The tracking system must have a way to notify County Plans and network providers in advance when their credentials are about to expire (re-credentialing must occur at a minimum every three years).
5. CVO must have a secure way to receive and send providers' credentialing and re-credentialing information to county Plans (e.g. secure portal) to maintain confidentiality of all information obtained in the process.
6. CVO has the capacity to verify through a primary source, as required by the particular provider type, the following information. CVO must document how and when the information was received and how it was stored.
  - a. Appropriate license and/or board certification or registration
  - b. Evidence of graduation or completion of any required education
  - c. Proof of completion of any relevant medical residency and/or specialty training
  - d. Satisfaction of any applicable continuing education requirements
7. CVO has the capacity to verify the following network provider information, as required by the particular provider type, but not necessarily through primary source verification. CVO must document the verification source used for each item below, along with how and when the information was received, and how it was stored.
  - a. Work history;
  - b. Hospital and clinic privileges in good standing;
  - c. History of any suspension or curtailment of hospital and clinic privileges;
  - d. Current Drug Enforcement Administration (DEA) identification number/certificate, if applicable;
  - e. National Provider Identifier number;
  - f. Current malpractice insurance in an adequate amount;
  - g. History of liability claims against the provider;



- h. Provider information, if any, entered in the National Practitioner Data Bank, when applicable;
- i. History of sanctions from participating in Medicare and/or Medicaid/Medi-Cal
- j. History of sanctions or limitations on the provider's license issued by any state's agencies or licensing boards.

Further information on credentialing and re-credentialing requirements can be found in Information Notice [18-019](#).

### **Guidelines and Standards**

To meet the deliverables stated in the Scope of Work, the selected vendor will need to incorporate the following elements into their project design.

1. Credentialing and re-credentialing policies and procedures must include:
  - a. Identification of the types of providers to be credential and re-credential  
Defined criteria and definitions for credentialing and re-credentialing and decision-making process
  - b. Identification of primary verification sources to be utilized for credentialing and re-credentialing of county Plan providers, as well as identification of secondary sources (not primary sources) to be used for credentialing and re-credentialing of county Plan providers
  - c. Tracking and file maintenance process
  - d. Timely notification of credentialing and re-credentialing decisions policy
  - e. Process for notifying county Plans and providers when information obtained through the credentialing/re-credentialing process is substantially different from the information submitted by the provider
  - f. Process for securing confidential information obtained during the credentialing/re-credentialing process except as otherwise provided by law
  - g. Non-discrimination policy
  - h. Acknowledgement of provider rights, including providers' right to correct erroneous information, to be informed of the status of their application upon request, and to review information obtained from outside sources to support their credentialing application
  - i. System control and oversight, for example: how information is received, stored, reviewed, tracked, and dated; authorization to modify information based on roles and

circumstances; tracking of modifications; security controls such as preventing unauthorized access

2. Creation of a credentialing/re-credentialing verification process, which includes application review and appropriate background checks.
3. Review and tracking of all applicable recredentialing cycle lengths.
4. Ongoing monitoring and tracking of current credentials for participating providers.
5. Create guidelines for Plans to designate a specific credentialing and re-credentialing liaison to manage county communications, expedite documents, coordinate staff responses, obtain signatures, and provide any other requested information to complete the credentialing or re-credentialing process.

### 3 Requested Information

Applicants should upload one PDF document answering the following questions. Organizational responses should be limited to no more than seven (7) pages:

Please submit the following components as part of your response:

1. **Background of organization** Please describe your organization's clinical, administrative, and managerial capacity to provide credentialing and re-credentialing services inclusive of:
  - a. The license types/disciplines/categories of staff anticipated to fulfill the requirements put forth in the scope of work (SOW).
  - b. The estimated number of FTEs of each staff type based on the SOW.
  - c. Relevant organizational and staff clinical behavioral health training/experience.
  - d. Relevant organizational and staff training/experience relevant to the SOW
2. **Letters of Support** (These are not inclusive of the 7-page limit):
  - a. Applicant must submit three (3) signed letters of support, including references from organizations with whom the Applicant has contractual or other business relationships who can substantiate the Applicant's capacity to provide such services as described in the SOW.
3. **Relevant Technology** Applicant should describe the organization's business infrastructure and technical capabilities relevant to the SOW. What technical platforms/applications do you anticipate utilizing for network provider tracking, management, renewals, and county communications?
4. **Budget**

- a. Applicant must provide an estimated fee schedule based on the proposed services to be completed. This should include estimated costs for staffing and supplies. \*
- b. Applicant must provide the above information for prime contractors as well as any sub-contractors included in their program.

**5. Timeline** Applicant should include a workplan and/or timeline detailing the length of time your organization would need to prepare to deliver the requested services listed in the SOW.

\* All cost estimates are subject to negotiation if selected to contract.

## 4 Minimum Requirements

Applicant must meet the requirements below otherwise they may be considered non-responsive, and the proposal may be rejected at CalMHSA's sole discretion.

1. Applicant(s) must have a minimum of five (5) years of experience providing related services for which your organization is responding as requested in the scope of work.
2. Applicant must not currently have a Settlement Agreement or Claim against them with any of CalMHSA's member counties or any state agency. If there are current claims against the Applicant in excess of \$10,000 within the last five (5) years, Applicant must disclose claims information as part of their response submittal.

## 5 CalMHSA Rights and Responsibilities

1. CalMHSA is not responsible for representations made by any of its officers or employees prior to the execution of the Agreement unless such understanding or representation is included in this RFSQ or any written addenda to this RFSQ.
2. CalMHSA has the right to amend the RFSQ by written addendum. CalMHSA is responsible only for that which is expressly stated in the solicitation document and any authorized written addendum thereto. Such addendum shall be made available to each person or organization which CalMHSA records indicate has received this RFSQ. Should such addendum require additional information not previously requested, failure to address the requirements of such addendum may result in the Proposal Package not being considered, as determined in the sole discretion of CalMHSA. CalMHSA is not responsible for and shall not be bound by any representations otherwise made by any individual acting or purporting to act on its behalf.
3. Based on the qualifications of the applicants, CalMHSA may choose to:

- a. Enter into a contract with an organization to perform credentialing and re-credentialing services on behalf of participating County MHPs and DMC-ODS plans.
- b. Invite the most qualified organizations to submit a detailed proposal, to be reviewed and selected based on experience and qualifications to provide credentialing and re-credentialing services on behalf of participating County MHPs and DMC-ODS plans.

## 6 CalMHSA Option to Reject Proposal Packages

CalMHSA, at its sole discretion, may reject any or all Proposal Packages submitted in response to this solicitation. CalMHSA shall not be liable for any cost incurred by an Applicant in connection with preparation and submittal of any Proposal Package.

## 7 Truth and Accuracy of Representatives

False, misleading, incomplete, or deceptively unresponsive statements in connection with a Proposal Package shall be sufficient cause for rejection of the Proposal Package. The evaluation and determination in this area shall be at CalMHSA’s sole judgment and its judgment shall be final.

## 8 Submission Instructions and Requirements

### 8.1 Proposal Timeline\*\*

EVENT	Key Dates
RFSQ Issued	November 7, 2022
RFSQ Questions Due	November 18, 2022
RFSQ Questions Answered	November 23, 2022
Deadline for Responses to be Submitted	December 9, 2022
Application Review	December 13 - December 16, 2022

\*\*All dates are tentative and can be changed with per CalMHSA’s discretion. Any date changes that occur will be posted on the CalMHSA website.





## 8.2 Submittal Address

All Submissions must be submitted electronically using CalMHSa's e-Procurement Portal, Bonfire:

<https://calmhsa.bonfirehub.com/>.

## 8.3 RFSQ Questions and Clarifications

All questions and requests must be submitted through CalMHSa's e-Procurement Portal at: <https://calmhsa.bonfirehub.com/>. The deadline to submit questions for this RFSQ is **November 18, 2022** (No later than 5:00PM PST). The FAQ responding to the questions will be posted on **November 23, 2022** (No later than 5:00PM PST), at <https://calmhsa.bonfirehub.com/> and on the CalMHSa website.

To ensure all parties have access to the same information at the same time, except as stated below, CalMHSa will NOT respond to questions as they are received and will not accept telephonic questions.

It is the sole responsibility of the Applicant to refer to the FAQs, which will be posted on CalMHSa's e-Procurement Portal at <https://calmhsa.bonfirehub.com/>.

If an Applicant is unable to submit questions via the Bonfire e-Procurement Portal, the Applicant must provide CalMHSa with an email justification at [info@calmhsa.org](mailto:info@calmhsa.org) outlining why the Applicant is unable to do so.

If a question relates to a proprietary/trade secrets aspect of a proposal and the question would expose proprietary information if disclosed to competitors, the Applicant must mark the question as "CONFIDENTIAL." With the question, the Applicant must submit a statement explaining why the question is sensitive. If CalMHSa concurs that the disclosure of the question or answer would expose proprietary information, the question will be answered by email reply, and both the question and answer will be kept confidential. If CalMHSa does not concur regarding the proprietary nature of the question, the question will not be answered in this manner and the vendor will be notified and asked whether the vendor would like the question to receive a public response or no response at all.

## 8.4 Withdraw

An Applicant may withdraw or amend its proposal, but only before the Application Submittal Deadline, directly on CalMHSa's e-Procurement Portal at <https://calmhsa.bonfirehub.com/>.

## 8.5 Review of Applications

CalMHSa will receive all applications and review for completeness and adherence to the RFSQ rules stated in this document. Following the initial review, all qualified applications will be reviewed and scored by a review panel. The evaluation panel will conduct a fair and impartial evaluation of proposals received in response to this RFSQ.

The review panel is comprised of individuals with varied backgrounds, to include professional expertise, lived experience, personal knowledge, etc. Panelists' information will not be disclosed as a matter of confidentiality. CalMHSa is committed to ensuring the RFSQ review panel is representative of California's racial, ethnic, and cultural diversity.

Selection will not be based exclusively on price or highest score. CalMHSa reserves the right to negotiate with Applicants who, in the opinion of the review panel, have submitted the best proposal in an attempt to reach an agreement. If no agreement is reached, CalMHSa may negotiate with other Applicants or may choose to extend the proposal period. CalMHSa also reserves the right to meet with vendors to gather additional information. Additional information may include, but is not limited to, a demonstration of skills described in the proposal.

## 8.6 Protest Procedures

Protests must be received no later than Five (5) business days after the Notice of Intent to Award is posted on the CalMHSa website. The sole bases for protest are that the award was (1) in violation of law, (2) in violation of the provisions of this RFSQ, or (3) in violation of CalMHSa's procurement process. All protests must be in writing and (1) state in detail each and every ground asserted for the protest, citing to the law, RFSQ provision, or particular provision of the procurement policy on which the protest is based; (2) explain why the error prevented the aggrieved organization from being awarded the contract; and (3) identify the remedy sought.

Written protests can be sent to the following:

Via Email:

[info@calmhsa.org](mailto:info@calmhsa.org)

Via Certified Mail:

CalMHSa  
Attn: Chief Administrative Officer  
1610 Arden Way  
STE 175  
Sacramento, CA 95815



Within 14 days of receipt of any protest, CalMHSA's Executive Director will provide a written decision which shall be final upon transmission to the protesting party. If the Executive Director determines that the error identified by the protesting party has deprived that party from receiving the contract, the Executive Director may act to rectify the error, including but not limited to: cancellation of the RFSQ or proposed contract, correction or other revision of the awarded contract, termination of an improperly awarded contract, or affirmation of an existing contract if the discovered defect is immaterial or the Executive Director determines that affirmation is in the best interest of CalMHSA.

### **8.7 Notice Regarding Public Records Act Request**

CalMHSA is subject to the Ralph M. Brown Act and the California Public Records Act. All proposals received for this RFSQ are ultimately subject to public review; however, during the competitive bid process, all proposals will be kept confidential. Upon award and execution of the contract by awardee(s), all proposals and supplemental information will be subject to public review, with the exception of those elements of a proposal which contain elements that are clearly marked as confidential or trade secrets. Any such designation should be accompanied by a brief explanation of the reason the information is non-public and protected from disclosure under California law. CalMHSA reserves the right to disregard such designations if they have been applied indiscriminately to non-protected information, and in no event shall CalMHSA, its agents, representatives, consultants, Directors, or Officers be liable to a responding party for the intentional or inadvertent disclosure of all or a portion of a proposal submitted under this RFSQ, regardless of whether it was marked as confidential or trade secret.

Although the California Public Records Act allows certain confidential or trade secret information to be protected from disclosure, CalMHSA may not be in a position to establish that the information submitted is protected. If CalMHSA receives a request for public disclosure of all or any portion of a proposal that has been designated as exempt from disclosure, CalMHSA will use reasonable efforts to notify the responding party of the request and give such party an opportunity to assert, at its own expense, a claimed exception under the California Public Records Act or other applicable law within the time period specified in the notice issued by CalMHSA and allowed under the California Public Records Act.

### **8.8 Format of Proposal**

Proposals must be submitted through CalMHSA's e-Procurement Portal at: <https://CalMHSA.bonfirehub.com/>. Submissions by other methods will not be accepted. Internet Explorer 11, Microsoft Edge, Google Chrome, or Mozilla Firefox. JavaScript must be enabled.

Browser cookies must be enabled. Applicants should contact Bonfire at [Support@GoBonfire.com](mailto:Support@GoBonfire.com) for technical questions related to submissions or visit Bonfire's help forum at: <https://bonfirehub.zendesk.com/hc>.

Submission materials should be prepared in the file formats listed under Requested Information for this opportunity in the Bonfire Portal. All PDFs documents must be formatted in Times New Roman, 12 pt. font, double spaced, unless otherwise indicated in the Requested Information. The maximum upload file



size is 1000 MB. Documents should not be embedded within uploaded files, as the embedded files will not be accessible or evaluated.