

**Preferred Provider Solicitation Package
for
Inclusa, Inc.**

August 6, 2018

**Inclusa, Inc.
3349 Church Street, Stevens Point, Wisconsin 54481**

Personal Emergency Response System (PERS)

Proposals must be received no later than
September 14, 2018, 12:00 pm

SPECIAL INSTRUCTIONS:

1. Place the signed Signature Affidavit as the first page of your proposal.
2. **Proposers must submit an electronic copy of all materials.**
Submit all materials to the email address identified in #4 below. Subject line should contain the following:
Proposer's Name and the Company Representative's Name
Proposal Title: Personal Emergency Response System (PERS)
3. Vendor Conference: Wednesday, September 5, 2018
10:00 am – 11:30 am
Inclusa Office – Jackson Room
1407 St. Andrew Street, Suite 100, La Crosse, WI 54603
Video/Zoom option available for those who cannot attend in person
<https://inclusa.zoom.us/j/525282354>
4. Email proposals on or before September 14, 2018, 12:00 pm to:
MaryKay.Blaschke@inclusa.org
5. Provider Interviews: Inclusa, Inc. MCO
5310 Wall Street, Suite 600, Madison, WI 53718
Conference Room #3
Wednesday, October 10, 10:00 am – 11:30 am
Wednesday, October 10, 1:00 p.m. – 3:30 pm
Thursday, October 11, 10:00 am – 11:30 am
6. Final Award:
November 6, 2018 by Inclusa, Inc.

LATE, FAXED AND/OR UNSIGNED PROPOSALS WILL BE REJECTED

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1.0 GENERAL INFORMATION

1.1. Introduction and Background

The purpose of this document is to provide interested agencies with information to enable them to prepare and submit a proposal to provide Personal Emergency Response System (PERS) services to the members enrolled in the MCO known as Inclusa, Inc. Effective January 1, 2017, Inclusa, Inc. was formed to leverage years of experience in delivering a person-centered and community-focused approach to the Family Care program. Its founding organizations - Community Care Connections of Wisconsin, Western Wisconsin Cares, and ContinuUs - have been industry leaders for nearly two decades. In operation since 2000 as county pilot participants, Inclusa's rich history and collective experience allows us to remain committed to continued excellence in the delivery of Family Care supports and services to over 15,000 Family Care members across its 52-county service region in Wisconsin. Inclusa serves Adults with Long Term Care Needs that have a primary diagnosis of Intellectual/ Developmental Disabilities, Physical Disabilities, or Frail Elderly, and some members have a secondary diagnosis relating to mental health and AODA. As part of the MCO member benefit package, Inclusa must provide PERS services to the members as appropriate. Currently this solicitation is seeking agencies to provide services in all of the counties which Inclusa, Inc. serves. **We are seeking a rate for both Landline and Cellular units which would remain located in the members' homes.**

Inclusa intends to use the results of this process to award Preferred Provider Status to a designated vendor. In the Preferred Provider Purchasing Option, service recipients are given a choice of all qualified providers of services. This means that Inclusa may not limit the pool of qualified providers by offering an exclusive contract.

In this purchasing option, a Preferred Provider Solicitation Package will be forwarded to all known providers who offer the particular service that is being sought. Once the preferred provider selection is made, all other Proposers who submitted plans and met the minimum specifications will be offered a contract which would allow them to be a vendor for the service if they agree to provide the service at or below the rate established for the preferred provider.

Preferred Provider designation:

- Establishes preferred provider priority when a member does not have preference for a specific provider, and
- Permits all other qualified contracted providers to provide the same level of service as long as the service is provided at a cost which is equal to, or less than, the rate Inclusa has established through the preferred provider process.

The desired relationship between the contracting provider and Inclusa is one marked with a commitment to consistent quality service with continual improvement.

For an Agency to be considered as an in-network provider, Agency must meet the same service level standards as the Preferred Provider.

1.2. Scope of Services

A Personal Emergency Response System (PERS) provides a direct telephonic or other electronic communications link between someone living in the community and health professionals to secure immediate response and assistance in the event of a physical, emotional, or environmental emergency. This service may include devices and services necessary for operation of PERS when otherwise not available. This service may also include installation, upkeep, and maintenance of devices or systems as appropriate. Electronic devices must meet UL Standards. Telephonic devices must meet FCC regulations. (2018 DHS Family Care Contract Definition)

- Objectives: To supplement direct staff support through the creative use of technical/mechanical supports in the form of a variety of monitoring devices, which include speaker phones, pagers, motion detectors, smoke detectors, and various burglar alarm systems. The consumer may also wear a portable "help" button to allow for mobility. The system is connected to a patient's phone and programmed to signal a response center once a "help" button is activated. The response center is staffed by trained professionals.
- Needs/Expectations: Successful bidder shall provide a system of monitoring members in their homes through electronic devices and provide staff response to emergencies. Successful bidder shall have monitoring sites which are staffed 24 hours/day, 365 days/year. The successful bidder will employ staff who are professional and have a college degree in a human services field or extensive experience working with the target population (physical disabilities, developmental disabilities and frail elderly) served by Inlusa. To adequately meet the needs of this population, it is recommended that monitoring staff have been trained in these areas: Blood Borne Pathogens, Universal Precautions, First Aid, CPR, Medication Administration, Crisis Response, and Managing Threatening Confrontations, as well as specific training around the needs of the individuals that they support. Successful bidder shall develop pertinent records and protocols on each member at the monitoring site.
- Each PERS shall include: Installation in the member's home, including any needed phone jack modifications and devices; two-way voice communication; an average range, water proof, portable help button, with a 3 to 5-year battery. Models with additional features should be specified in the proposal (i.e. fall detection, smoke detector, medication reminder, etc.).
- Installation:
 1. It shall be the provider's responsibility to deliver and install each Personal Emergency Response System unit that is purchased or leased. The provider agrees to complete installation within 5 working days of receipt of the service order (Referral). Services billed in the month that PERS units are ordered and installed should be prorated to reflect the number of days that the PERS device was in use.
 2. The Inlusa Care Management Team will notify the provider by phone of a request for installation (followed by a written referral). The provider shall arrange with the member for a mutually convenient appointment within 5 working days of the provider's notification by the Care Management Team. The provider immediately shall notify the Care Management Team if it is unable to schedule or complete an installation within the required time frame.
 3. The provider shall provide all parts and equipment necessary for installing a landline emergency medical response system unit into a functioning telephone system.

4. The provider shall instruct the member in the use and maintenance of the PERS unit and shall provide the member with simple written instructions, including how to report a malfunction of the PERS. The provider shall, upon request of the member or Inlusa team, provide additional follow-up instructions to the member on operating and maintaining the PERS unit.
 - The provider is responsible for informing the member and/or member's representative of their responsibilities and timeframes to have equipment available for pick-up upon termination of service or disenrollment of the member from Inlusa.
 - Provider is responsible for collection of equipment when service is discontinued.
 - Provider may not bill the purchaser for equipment that they are unable to collect from the member or their representatives after the service is terminated.
5. The provider shall forward to the Inlusa Care Management Team within 5 working days of the installation, either by mail or by facsimile, a form signed by a provider representative or employee and by the member or member's representative confirming the date of the installation and the member's understanding of the use and maintenance of the PERS unit.
6. If any applicable regulatory, industry, or manufacturer standards are changed, resulting in improvements or updating of equipment, the Community Resources/Provider Relations Contract Coordinator shall be notified, and each on-line consumer with leased equipment shall be provided with said new equipment within 60 days.
- Maintenance of Equipment and Service: Provider shall maintain all installed PERS units in proper working order. The provider shall make provision to ensure that each installed PERS unit is operating properly at least once every 24 hours. Provision for the daily testing will preferably be automated and cause the least possible inconvenience for the member. The provider shall follow-up with the member and notify the Care Management Team within 24 hours, or the next business day, of any PERS unit that is not operating properly. Malfunctioning equipment shall be repaired or replaced within 24 hours of notification or identification. Members may manually check/test the unit as frequently as desired.
- Suspension and Termination of Service: The decision to remove a PERS unit is at the sole discretion of the Care Management Team. For all PERS unit removals, notification will be by telephone, followed by written notification, from the authorized Inlusa team. If the provider is notified directly by a consumer's family or other representative to remove the PERS unit, authorization must first be obtained from the Care Management Team. When a member with a PERS unit no longer requires such services, regardless of the reason, the Care Management Team will discuss with appropriate staff, as needed, and contact the provider, so that the PERS unit may be transferred or removed.
 1. When a member's services are suspended because of the member's admission to the hospital, the Care Management Team will notify and/or authorize the provider to take the unit off-line. Services will be resumed to the member only after the Inlusa team notifies the provider. Payment for leased equipment will be made at the standard unit price as long as a unit remains in the home of a member.
 2. The provider shall disconnect/remove a PERS unit from a member's residence within 5 working days of notification by the Inlusa team. Inlusa will

discontinue payment effective 5 days after notice of disconnect or the following day after removal of the PERS, whichever is sooner.

3. If PERS is discontinued due to member disenrollment or death, payment will cease the following day after disenrollment or death.
4. Inlusa is not responsible for equipment that the provider is unable to collect from the member or their representative after service is terminated.

For additional information, please reference the enclosed Scope of Service for Personal Emergency Response Systems.

1.3. Purchasing and Contracting Division/Department

This Preferred Provider Solicitation Package process is administered by Inlusa, Inc., and the person responsible for managing the procurement process is Karla Lubinski, Regional Director Community Resources/Provider Relations.

The Preferred Provider designation resulting from this Preferred Provider Solicitation package will be acknowledged by Inlusa, Inc., MCO through December 31, 2021.

1.4. Clarification and/or Revisions to the Specifications

Proposers are expected to raise any questions, exceptions, or additions they have concerning the PPSP document prior to or at the Vendor conference. If a Proposer discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this PPSP, the vendor should immediately notify the above named individual of such error and request modification or clarification of the PPSP document.

In the event that it becomes necessary to provide additional clarifying data or information, or to revise any part of this PPSP, revisions/amendments and/or supplements will be provided to all recipients of this initial PPSP.

Each proposal shall stipulate that it is predicated upon the terms and conditions of this PPSP and any supplements or revisions thereof.

1.5. Vendor Conference

The MCO will have a vendor conference on **Wednesday, Sept. 5th at 10:00 am – 11:30 am** at Inlusa, La Crosse building – Jackson Room to respond to questions and to provide any needed additional instruction to vendors on the submission of proposals. Zoom video Link <https://inlusa.zoom.us/j/525282354>.

1.6. Reasonable Accommodations

The MCO will provide reasonable accommodations for the Vendor conference upon request. If you need accommodations at the vendor conference, contact Mary Blaschke, 608-785-6024.

1.7. Calendar of Events

Listed below are specific and estimated dates and times of actions related to this Preferred Provider Solicitation Package (PPSP). The actions with specific dates must be completed as indicated unless otherwise changed by the MCO. In the event that

the MCO finds it necessary to change any of the specific dates and times in the calendar of events listed below, it will do so by issuing a supplement to this PPSP. There may or may not be a formal notification issued for changes in the estimated dates and times.

<u>DATE</u>	<u>EVENT</u>
August 6, 2018 (Monday)	Date of issue of the Preferred Provider Solicitation Package (PPSP)
September 5, 2018 (Wednesday) 10:00 am – 11:30 am	Vendor conference – Inclusa, La Crosse Office, Jackson Room
September 14, 2018 (Friday)	Proposals due from vendors by 12:00 pm
October 10 and 11, 2018	Vendor Interviews – Inclusa, Madison Office
November 6, 2018 (Tuesday)	Notification of intent to award sent to Vendors
January 1, 2019 (Tuesday)	Contract start date to transition members

1.8. Contract Term and Funding

The Preferred Provider Status shall be effective beginning, January 1, 2019, and will renew annually, upon Inclusa, Inc. annual approval, until December 31, 2021. Proposal should include the rates for each of the three years of the contract. The annual review will typically take place in the month of September.

2.0 PREPARING AND SUBMITTING A PROPOSAL

2.1. General Instructions

The evaluation and selection of a provider and the contract will be based on the information submitted in the vendor's proposal and any required on-site visits or interviews. Failure to respond to each of the requirements in the PPSP may be the basis for rejecting a response.

Elaborate proposals (e.g. expensive artwork) beyond that sufficient to present a complete and effective proposal, are not necessary or desired.

2.2. Proprietary Information

All restrictions on the use of data contained within a proposal and all confidential information must be clearly stated on the attached "Designation of Confidential, Trade Secret and Proprietary Information" form. Proprietary information submitted in a proposal, or in response to the PPSP, will be handled in accordance with the applicable Wisconsin State Statute(s).

2.3. Incurring Costs

Inclusa is not liable for any cost incurred by Proposers in replying to this PPSP.

2.4. Submitting the Proposal

Proposers must submit via email an electronic copy of all materials required for acceptance of their proposal by Friday, September 14, 2018, 12:00 pm, to: Mary Blaschke at MaryKay.Blaschke@inclusa.org.

Proposals must be received at the above email by the specified time stated above.

All proposals must show the following information on the subject line of the email:
Proposer's Name and the Company Representative's Name
Proposal Title: Personal Emergency Response System (PERS)

2.5. Proposal Organization and Format

All documents should be organized and presented in order and by the letter assigned to each attachment in the PPSP. Each of the attachments should be separated by tabs or otherwise clearly marked. The PPSP sections which should be submitted or responded to are:

Required forms

Attachment A	Signature of Affidavit
Attachment B	Vendor Data Sheet
Attachment C	Personal Emergency Response System (PERS) Unit Monthly Service Rate Proposal
Attachment D	Vendor Questionnaire/Evaluation Criteria
Attachment F	Designation of Confidential, Trade Secret, and Proprietary Information

2.6. Multiple Proposals

Multiple proposals from a vendor will be permissible; however each proposal must conform fully to the requirements for proposal submission. Each such proposal must be separately submitted and labeled as Proposal #1, Proposal #2, etc. on each page included in the response.

2.7. Vendor Interviews

Based on evaluations of the proposals, up to three submitters will be required to participate in interviews to support and clarify their proposals. Selection of vendors will be based on evaluation criteria as listed in Section 3.5. Vendors should be prepared to give a product demonstration. Interviews will be held on Wednesday, October 10 at 10:00 am and 1:00 pm, and Thursday, October 11 at 10:00 am.

3.0 PROPOSAL SELECTION AND AWARD PROCESS

3.1. Opening of Proposals

Shall occur on Monday, September 17, 2018 at Inclusa, Inc., MCO.

3.2. Preliminary Evaluation

The proposals will first be reviewed to determine if requirements in Section 2.0 are met and if additional mandatory requirements are met. Failure to meet mandatory requirements will result in the proposal being rejected. In the event that all vendors do not meet one or more of the mandatory requirements, Inclusa, Inc. reserves the right to continue the evaluation of the proposals and to select the proposal which most closely meets the requirements specified in this PPSP.

3.3. Right to Reject Proposals and Negotiate Contract Terms

Inclusa, Inc. reserves the right to reject any and all proposals and to negotiate the terms of the contract, including the award amount, with the selected proposer prior to entering into a contract. If contract negotiations cannot be concluded successfully with the highest scoring proposer, Inclusa, Inc. may negotiate a contract with the next highest scoring proposer.

In addition, Inclusa, Inc. reserves the right to discontinue the PPSP process at any time and makes no commitments, implied or otherwise, that this process will result in a business transaction with one or more vendors.

3.4. Proposal Scoring

Accepted proposals will be reviewed by an evaluation committee and scored against the stated criteria. The committee will review all proposals and may request interviews and use the results of those meetings in scoring the proposals.

3.5. Evaluation Criteria

Please complete Attachments A-D. Attachments C&D will be used in the evaluation of each proposal. The categories are as follows:

<u>Evaluation Categories</u>	<u>Points</u>
A. Agency Qualifications	50
B. Organization Capabilities	50
C. Staff Qualifications	50
D. Service Rate and Unit Proposal (Complete Attachment C)	50
INITIAL TOTAL	200
E. Vendor Interview	100
GRAND TOTAL	300

3.6. Final Offers

The final vendor selection shall be made after the Preferred Provider Solicitation Committee finalizes Proposal and Interview Evaluations and recommendation is presented and approved by Inclusa leadership in late October.

3.7. Notification of Intent to Award

As a courtesy, a notification of award memo to responding vendors will be sent after the time of the award on Tuesday, November 6, 2018.

4.0. SPECIAL CONTRACT TERMS AND CONDITIONS

- 4.1. Inclusa, Inc. reserves the right to accept or reject any or all proposals or portions thereof without stated cause.
- 4.2. Inclusa, Inc. reserves the right to re-issue any requests for proposals.
- 4.3. Upon the selection of a finalist vendor, Inclusa, Inc., by its proper officials, employees, or agents, shall attempt to negotiate and reach a final agreement with this vendor. If Inclusa, Inc. for any reason is unable to reach a final agreement with this vendor, Inclusa, Inc. reserves the right to reject such vendor and negotiate a final agreement with the vendor who has the next most viable proposal or bid. Inclusa, Inc. may also elect to reject all proposals and re-issue a request for proposal.
- 4.4. Clarification of proposals: Inclusa, Inc. reserves the right to obtain clarification of any point in a vendor's proposal or obtain additional information.
- 4.5. Inclusa, Inc. is not bound to accept the proposal with the lowest cost, but may accept the proposal that demonstrates the best ability to meet the needs of Inclusa, Inc.
- 4.6. Inclusa, Inc. reserves the right to waive any formalities, defects, or irregularities in any proposal, response, and/or submittal where the acceptance, rejection, or waiving of such is in the best interests of Inclusa, Inc.
- 4.7. Inclusa, Inc. reserves the right to disqualify any proposal, before or after opening, upon evidence of collusion, intent to defraud, or any other illegal practice on the part of the vendor.

4.8. Indemnification

The Agency agrees to the fullest extent permitted by law, to indemnify, defend and hold harmless, Inclusa, Inc. and its agents, officers and employees, from and against all loss or expense including court costs and attorney fees by reason of liability for damages including suits at law or in equity, caused by any wrongful, intentional, or negligent act or omission of the Agency, or its (their) agents and/or subcontractors which may arise out of or connected with activities covered by Inclusa, Inc.'s Subcontract Agreement. PROVIDER'S aforesaid indemnity and hold harmless agreement shall not apply to liabilities, losses, charges, costs, or expenses caused by the sole negligence or willful misconduct of PURCHASER, its agents, officers and employees. PROVIDER acknowledges that Inclusa, Inc. is a Wisconsin local unit of government and is entitled to certain statutory limitations and immunities.

4.9. Insurance

- A. Agency agrees that in order to protect itself as well as Inclusa, Inc.'s executive management, Board, and employees under the indemnity provisions set forth in the paragraph above, Agency will at all times, during the terms of the contract, keep in force insurance policies issued by an insurance company authorized to do business and licensed in the State of Wisconsin.
- B. Vendor Insurance Requirements are as follows:

Workers' Compensation:	Minimum amount statutory
Comprehensive General Liability:	\$1,000,000 per occurrence and in aggregate for bodily injury and property damage
Auto Liability (if applicable):	\$1,000,000 per occurrence and in aggregate for bodily injury and property damage
Professional Liability (if applicable):	Minimum amount \$1,000,000
Excess Liability Coverage:	\$1,000,000 over the General Liability and Automobile Liability Coverage's

ATTACHMENT A

SIGNATURE AFFIDAVIT

In signing this proposal, we also certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the opening of proposals to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

The undersigned, submitting this proposal, hereby agrees with all the terms, conditions, and specifications set forth herein and required by Inclusa, Inc. in this Proposal, and declares that the attached proposal and pricing are in conformity therewith.

Name (Type or Print)

Title

Signature

Firm

Address: (Street, City, State, Zip Code)

Telephone

Fax

Email

Date

ATTACHMENT B
VENDOR DATA SHEET

1. Proposing Company Name: _____

Telephone: _____ Toll Free Telephone: _____ Fax: _____

Address: _____

City: _____ State: _____ ZIP + Four: _____

2. Contact Person in the event there are questions about your proposal.

Name: _____ Title: _____

Telephone: _____ Toll Free Telephone: _____

Address: _____

City: _____ State: _____ ZIP + Four: _____

Email Address: _____ Fax: _____

3. All vendors that have 25 or more employees and that are awarded \$25,000 or more on this contract will be required to submit Civil Rights Compliance information. Please list the person in your Company we can contact about this plan.

Name: _____ Title: _____

Telephone: _____ Toll Free Telephone: _____

Address: _____

City: _____ State: _____ ZIP + Four: _____

Email Address: _____ Fax: _____

4. Mailing address where purchase orders/contracts are to be mailed, and person the Wisconsin Department can contact concerning orders and billing.

Name: _____ Title: _____

Telephone: _____ Toll Free Telephone: _____

Address: _____

City: _____ State: _____ ZIP + Four: _____

Email Address: _____ Fax: _____

ATTACHMENT C

Personal Emergency Response System (PERS) - Unit Monthly Service Rate Proposal

Model No.	Unit Type/Special Features/ Product Specifications	Rental Rate (preferred) Including Unit & Monitoring			Purchase Rate (if applicable)	
		2019	2020	2021	Unit Purchase Cost Rate	Monthly Monitoring

Please include any product literature.

ATTACHMENT D

VENDOR QUESTIONNAIRE/EVALUATION CRITERIA

Please complete this Attachment D questionnaire which will be used in the evaluation of each proposal.

Proposal Categories

A. Agency Qualifications

1. State the number of years the Agency has been in business:
Length of time and experience as a service provider of PERS:
2. History and experience providing services to Inclusa, Inc., target populations: elderly persons, persons with physical or intellectual/developmental disability, and mental health and/or AODA diagnoses:
3. Describe current or proposed infrastructure for providing this service:
 - What software programs will be utilized for the service:
 - Who will maintain staff scheduling to ensure an efficient response is made to consumers who push their "help" button/call for help:
 - Installation – who will complete the installation of the PERS unit:

B. Organization Capabilities

1. Please indicate your agency's ability to provide service to Inclusa, Inc., who is currently providing supports in 52 counties statewide.
2. Describe your current source(s) of referrals for this service?
3. Does your agency have a maximum capacity for clients served at any given time?
4. Where is the location of the monitoring site or call center?
5. Describe and provide the current or proposed staff organizational chart showing who will manage and provide direct services for the PERS (including installers and call-center staff).
6. Describe the process for installation of PERS devices.
7. Describe the steps taken to educate the consumer on how to use the PERS.
8. Please share any forms utilized to gather consumer information.
9. Describe the steps for discontinuation of service from the time notice to disconnect is given to removal of device from consumer's home.

10. Describe any additional costs which may be incurred by Inclusa, Inc. through the use of provider's PERS units. For example: lost 'help' buttons, lock boxes, battery backup required if phone provider does not have a land line connection, etc.

C. Staff Qualifications:

1. Describe the minimum educational and work experience required for the staff performing PERS Services to Inclusa members.

Monitoring Staff:

Installation Staff:

Service Rate & Unit Proposal: Complete Attachment C for both Landline and Cellular units which would remain located in the members' homes



SPC: 112.46

Provider Subcontract Agreement Appendix N

Purpose: Defines requirements and expectations for the provision of subcontracted, authorized and rendered services. Services shall be in compliance with the Provider Subcontract Agreement and the provisions of this service expectations document.

1.0	Service Definition
	<p>Inclusa follows the definitions and guidelines as defined for Personal Emergency Response Systems in the DHS Family Care contract, standard program category (SPC) 112.46.</p> <p>Personal emergency response system (PERS) is a service that provides a direct telephonic or other electronic communications link between someone living in the community and health professionals to secure immediate response and assistance in the event of a physical, emotional or environmental emergency. This service may include devices and services necessary for operation of PERS when otherwise not available. PERS may also include cellular telephone service used when a conventional PERS is less cost-effective or is not feasible. This service may include installation, upkeep and maintenance of devices or systems as appropriate.</p>
2.0	Standards of Service
2.1	<p>Provider must follow the standards for PERS. This Scope of Service reflects Inclusa policies and procedures.</p>
2.2	<p>The PERS provider should assure that these devices, where applicable, meet Federal Communication Commission standards or Underwriters Laboratory standards or the equivalent.</p>
2.3	<p>Service must be provided in a manner which honors member’s rights such as consideration for member preferences (scheduling, choice of provider, direction of work), and consideration for common courtesies such as timeliness and reliability.</p>
2.4	<p>Inclusa subcontracted providers of long-term care services are prohibited from influencing members’ choice of long-term care program, provider, or Managed Care Organization (MCO) through communications that are misleading, threatening or coercive. Inclusa and/or the WI Department of Health Services may impose sanctions against a provider that does so.</p> <p>Per Wisconsin Department of Health Services (DHS), any incidents of providers influencing member choice in a Family Care program must be reported to DHS immediately.</p>
3.0	Service Descriptions
3.1	<p>To supplement direct-staff support through the creative use of technical/mechanical supports in the form of a variety of monitoring devices, which include speaker phones, pagers, motion detectors, smoke detectors, and various alarm systems. The member may also wear a portable "help" button to allow for mobility. The system is connected to the member’s phone and programmed to signal a response center once a "help" button is activated. The response center is staffed by trained professionals.</p>
3.2	<p>Provider must offer a system of monitoring members in their homes through electronic devices and provide staff response to emergencies. Provider shall have monitoring sites, which are staffed 24 hours/day, 365 days/year.</p>
3.3	<p>Each PERS shall include: Installation in the member’s home, including any needed phone jack modifications and devices; two-way voice communication; and average-range, waterproof, portable help button, with a 3- to 5-year battery. Models with additional features should be specified in the contract, i.e., fall detection, smoke detector, medication reminder, etc.</p>

3.4	<p>Installation</p> <ol style="list-style-type: none"> 1. It shall be the provider's responsibility to deliver and install each Personal Emergency Response System unit that is purchased or leased. The provider agrees to complete installation within 5 working days of receipt of the service order. Services billed in the month that PERS units are ordered and installed should be prorated to reflect the number of days that the PERS device was in use. 2. The provider shall provide all parts and equipment necessary for installing an emergency medical response system unit into a functioning telephone system. 3. The provider shall instruct the member in the use and maintenance of the PERS and shall provide the member with simple written instructions, including how to report a malfunction of the PERS. The provider shall, upon request of the member or Inclusa team, provide additional follow-up instructions to the member on operating and maintaining the PERS. <ul style="list-style-type: none"> • The provider is responsible for informing the member and/or member's representative of their responsibilities and timeframes to have equipment available for pick-up upon termination of service or disenrollment of the member from the Inclusa. • Provider is responsible for collection of equipment when service is discontinued. • Provider may not bill the purchaser for equipment that they are unable to collect from the member or their representatives after the service is terminated 4. The provider shall forward to the Inclusa team within 5 working days of the installation either by mail or by facsimile a form signed by a provider representative or employee and by the member or member's representative confirming the date of the installation and the member's understanding of the use and maintenance of the PERS.
3.5	<p>Maintenance of Equipment and Service</p> <p>Provider shall maintain all installed PERS in proper working order. The provider shall make provision to insure that each installed PERS is operating properly at least once every 30 days. Provision for the testing will preferably be automated and result in the least possible inconvenience for the member.</p> <p>The provider shall follow-up with the member and notify the Inclusa team within 24 hours, or the next business day, of any PERS that is not operating properly. Malfunctioning equipment shall be repaired or replaced within 24 hours of notification or identification. Members may manually check/test the unit as frequently as desired.</p>
3.6	<p>Suspension and Termination of Service</p> <p>The decision to remove a PERS is at the sole discretion of the Inclusa team. For all PERS removals, notification will be by telephone, followed by written notification, from the authorized Inclusa team. If the provider is notified directly by a member's family or other representative to remove the PERS, authorization must first be obtained from the Inclusa team. When a member with a PERS no longer requires such services, regardless of the reason, the Inclusa team will discuss with appropriate staff, as needed, and contact the provider, so that the PERS may be transferred or removed.</p> <ol style="list-style-type: none"> 1. When a member's services are suspended because of the member's admission to the hospital, the Inclusa team will notify and/or authorize the provider to take the unit off-line. Services will be resumed to the member only after the Inclusa team notifies the provider. Payment for leased equipment will be made at the standard unit price as long as a unit remains in the home of a member. 2. The provider shall disconnect/remove a PERS from a member's residence within 5 working days of notification by the Inclusa team. Inclusa will discontinue payment effective 5 days after notice of disconnect or the following day after removal of the PERS, whichever is sooner. 3. If PERS is discontinued due to member disenrollment or death, payment will cease the following day after disenrollment or death. 4. Inclusa is not responsible for equipment that the provider is unable to collect from the member or their representative after service is terminated.

3.7	Service must be provided in a manner which honors member's rights such as consideration for member preferences and consideration for common courtesies such as timeliness and reliability.
3.8	PERS agencies must assure timely response to request for assistance calls, pushing help button. Industry standards indicate that a timely response would be within 1 – 3 minutes. It is understood that PERS agencies have no control over the processing of the call through the local phone company or local cellular provider; they only have control over the response time once the call hits the agency's receivers.
4.0	Units of Service and Reimbursement Guidelines
4.1	SPC 112.46 (S5161) – Personal Emergency Response Systems (PERS) service fee, per month. Provider must bill Inclusa using applicable SPCs, procedure codes and modifiers as defined in Appendix A of the Provider Subcontract Agreement.
4.2	Provider must prorate applicable contracted charges for equipment installed or removed mid-month.
4.3	The base monthly charge for basic telephone service that is necessary to allow PERS operation is paid by the member.
4.4	If the contracted provider agency uses a subcontractor for the installation of equipment, and/or the monitoring service, the contracted provider agency must notify Inclusa Provider Network department of the subcontracting relationship. Services billed may only be billed by the contracted provider agency. The subcontractor may not bill for service authorized through the contracted PERS agency.
4.5	Provider may not bill the purchaser or member for equipment that the provider is unable to collect from the member or their representatives after the service is terminated.
5.0	Staff Qualifications /Trainings
5.1	Caregiver Background Checks- Providers will comply with all applicable standards and/or regulations related to caregiver background checks as well as comply with the <i>Inclusa Provider Policy on Caregiver Background Checks</i> .
5.2	The installation of PERS systems should be done by qualified installers representing the health agency managing the personal emergency response system. In the event these installers are not available, the agency should seek experienced technicians to complete necessary line adaptations.
5.3	For the monitoring/response center employees, the provider shall employ staff who are professional and have a college degree in a human services field or extensive experience working with the target population (physical disabilities, developmental disabilities and frail elderly) served by the Inclusa.
5.4	Provider agency must orient and train their staff on the Family Care Program, Inclusa, and Community™, the trademarked care management model of Inclusa. Support materials regarding the Family Care Program and Community™ are available on the Inclusa website at www.inclusa.org .
5.5	To adequately meet the needs of this population, it is recommended that monitoring staff have been trained in these areas: <ul style="list-style-type: none"> • Blood Borne Pathogens • Universal Precautions • First Aid • CPR • Medication Administration • Crisis Response • Managing Threatening Confrontations • and specific training around the needs of the individuals that they support
5.6	Staff shall be trained in recognizing abuse and neglect and reporting requirements.
5.7	If the contracted PERS agency subcontracts for installation technicians and/or monitoring response staff, the contracted PERS agency is responsible to verify that subcontractors meet the staff qualifications/training requirements.

6.0	Supervision and Staff Adequacy
6.1	The provider agency shall maintain adequate staffing to meet the needs of members referred by Inclusa and accepted by the agency for service.
6.2	The PERS agency must assure adequate supervision of installation technicians and monitoring response staff.
6.3	Provider agency will ensure: <ul style="list-style-type: none"> • Staff are supervised and assessed to assure they are working effectively and collaboratively with members by conducting adequate on-site supervision and review. • Performance issues with staff are addressed promptly and Inclusa teams are kept informed about significant issues that affect the Inclusa member. • Provider staff are working collaboratively and communicating effectively with Inclusa staff.
7.0	Service Referral and Authorization
7.1	The Inclusa team will provide a written service referral form to the PERS agency which specifies the expected outcomes, amount, frequency and duration of services.
7.2	The provider will retain copies of the referral forms in the agency file as proof of authorization. Failure to have proper authorization from the MCO will be cause for non-payment of services during the unauthorized time period.
7.3	The PERS agency must notify the Inclusa team within 2 business days of receiving a referral regarding the acceptance of the referral. If accepted, the notification should also include the anticipated installation and activation start date or any delays in installation/activation by the requested start date. The PERS agency must continue to report weekly on the status of installation/activation until the PERS system is operating for the member referred and authorized.
7.4	The provider shall arrange with the consumer for a mutually convenient appointment within 5 working days of the provider's notification by the Inclusa team. The provider immediately shall notify the Inclusa team if it is unable to schedule or complete an installation within the required time frame (5 business days).
7.5	<p>Authorizations for Member Services</p> <p>The Inclusa Provider Portal is used by providers to obtain information about current authorizations. In addition, the provider must use the portal to acknowledge all new authorizations. The provider agency is responsible for ensuring that only currently employed and authorized staff have access to the provider portal, and for using the member authorization information available on the portal to bill for services accurately.</p> <p>For authorization needs such as new authorizations, additional units, or missing authorizations, during normal Inclusa business hours (8:00 a.m.-4:30 p.m.) the provider should:</p> <ol style="list-style-type: none"> 1) Contact the Inclusa team. 2) If the team is not available, contact the Inclusa team's Unit Manager. 3) If the Unit Manager is not available, contact the On-Call Unit Manager. <p>For authorization of services or products after Inclusa business hours, provider should contact the After-Hours Authorization Line at 1-800-285-6425.</p> <p>Questions regarding billing or claims for current authorizations and requests for Provider Portal assistance should be directed to should be directed to Inclusa Provider Customer Service at customerservice@inclusa.org or 1-888-544-9353.</p>
8.0	Communication, Documentation and Reporting
8.1	Inclusa communicates with providers regularly in the following formats: <ul style="list-style-type: none"> • Vendor forums • Mass notifications via email, fax, or mail • Notices for expiring credentialing

	<p>Notices are sent to providers via email when the provider has email available to ensure timeliness of communication.</p> <p>Provider agencies are required to ensure that Inclusa Community Resources/Provider Relations (CR/PR) staff, Inclusa teams, guardians and other identified members of the interdisciplinary team for a member have accurate and current provider contact information to include address, phone numbers, fax numbers, and email addresses.</p> <p>Providers can update their information by submitting the Provider Contact Information Form at www.inclusa.org/providers/resources, or by contacting Provider Relations at 1-888-294-7451 or ProviderRelations@inclusa.org.</p>
8.2	<p>The PERS agency shall report all emergency response calls placed by the member to the monitoring service within 2 business days of the call. Reports will be submitted to the member's Inclusa team via fax or email to the office where the team is located. It is necessary for the PERS agency to communicate these calls to keep the Inclusa team informed of any emergent health issues for the member.</p> <p>Accidental calls to the monitoring center do not need to be reported unless the accidental calls are frequent.</p>
8.3	<p>If any applicable regulatory, industry, or manufacturer standards are changed, resulting in improvements or updating of equipment, the Inclusa team shall be notified and each on-line member with leased equipment shall be provided with said new equipment within 60 days.</p>
8.4	<p>Providers will notify MCO of formal complaints or grievances received from MCO members within 48 hours of receipt. Written notification of completed complaint investigations will be forwarded to the Inclusa interdisciplinary team.</p>
8.5	<p>Member Incidents</p> <p>Provider agencies shall report all member incidents to the Inclusa team. Providers must promptly communicate with the Inclusa team regarding any incidents, situations or conditions that have endangered or, if not addressed, may endanger the health and safety of the member.</p> <p>Acceptable means of communicating member incidents to the Inclusa team would be via phone, fax or email within 24 hours. Additional documentation of incidents may be requested by the team or Inclusa Quality Assurance.</p> <p>Providers and Inclusa will comply with the Inclusa Incident Reporting Policy which is available on the Inclusa website at www.inclusa.org.</p>
8.6	<p>The provider agency shall give at least 30 days' advance notice to the Inclusa team when it's unable to provide authorized services to individual members. The provider agency shall be responsible to provide authorized services during this time period.</p> <p>The Inclusa team or designated staff person will notify the provider agency when services are to be discontinued. The Inclusa team will make every effort to notify the provider at least 30 days in advance.</p>
8.7	<p>Provider shall develop pertinent records and protocols on each consumer at the monitoring site.</p>
8.8	<p>The provider agency must maintain the following documentation, and make available for review by Inclusa upon request.</p> <ul style="list-style-type: none"> • Provider meets the required standards for applicable staff qualification, training and programming • Verification of criminal, caregiver and licensing background checks as required • Policy and procedure for responding to complaints, inappropriate practices, or matters qualifying as member-related incidents • Policy and procedure regarding work rules, work ethics and reporting variances to the supervisor • Employee time sheets/visit records which support billing to Inclusa

9.0	Quality Assurance
9.1	<p>Purpose</p> <p>Inclusa quality assurance activities are a systematic, departmental approach to ensuring and recognizing a specified standard or level of care expected of subcontracted providers. These methodologies are established to review and inspect subcontracted provider performance and compliance.</p> <p>Inclusa will measure a spectrum of outcomes against set standards to elicit the best picture of provider quality.</p> <p style="padding-left: 40px;">Inclusa provider quality assurance practices:</p> <ol style="list-style-type: none"> 1) Establish the definition of quality services; 2) Assess and document performance against these standards; and 3) Detail corrective measures to be taken if problems are detected. <p>It is the responsibility of providers and provider agencies to maintain the regulatory and contractual standards as outlined in this section. Inclusa will monitor compliance with these standards to ensure the services purchased are of the highest quality.</p> <p>Resulting action may include recognition of performance at or above acceptable standards, working with the provider to repair and correct performance if it is below an acceptable standard, or action up to termination of services and/or contract should there be failure to achieve acceptable standards and compliance with contract expectations.</p>
9.2	<p>Quality Performance Indicators</p> <ul style="list-style-type: none"> • Legal/Regulatory Compliance- evidenced by regulatory review with no deficiencies, type of deficiency and/or effective and timely response to Statement of Deficiency • Education/Training of staff- Effective training of staff members in all aspects of their job, including handling emergency situations. Established procedures for appraising staff performance and for effectively modifying poor performance where it exists. • Performance record of contracted activities- <ul style="list-style-type: none"> ○ tracking of number, frequency, and outcomes of assigned Inclusa Quality Teams related to provider performance ○ tracking of successful service provision (member achieving goals/outcomes, increased member independence and community participation, etc.) • Contract Compliance- formal or informal review and identification of compliance with Inclusa contract terms, provider service expectation terms, applicable policies/procedures for Inclusa contracted providers • Availability and Responsiveness- related to referrals or updates to services, reporting and communication activities with Inclusa
9.3	<p>Inclusa Sources and Activities for Measuring Provider Performance</p> <ul style="list-style-type: none"> • Member satisfaction surveys • Internal or external complaints and compliments • Onsite review/audits • Statement of Deficiency (SOD) (state regulated entities) • Quality Teams (as assigned based on significant incidents, trend in quality concerns or member-related incidents, or issued Statement of Deficiency) • Tracking of performance and compliance in relation to the subcontract agreement and appendices <p>Statistical reviews of time between referral and service commencement</p>

9.4	<p>Expectations of Providers and Inclusa for Quality Assurance Activities</p> <ul style="list-style-type: none">• Collaboration: working in a goal oriented, professional, and team based approach with Inclusa representatives to identify core issues to quality concerns, strategies to improve, and implementing those strategies• Responsiveness: actions taken upon request and in a timely manner to resolve and improve identified issues. This may include submitted documents to Inclusa, responding to calls, emails, or other inquiries, keeping Inclusa designated staff informed of progress, barriers, and milestones achieved during quality improvement activities• Systems perspective to improvement: approaching a quality concern, trend, or significant incident with the purpose of creating overall improvements that will not only resolve the issue at hand, but improve service and operations as a whole• Member-centered solutions to issues: relentlessly striving to implement solutions with the focus on keeping services member-centered and achieving the goals and outcomes identified for persons served <p>Inclusa is committed to interfacing with providers to collaboratively and proactively discuss issues identified with processes and assist with implementing improvements and reviewing the impact of the changes as a partner in the mission to serve members.</p>
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ATTACHMENT F

DESIGNATION OF CONFIDENTIAL, TRADE SECRET, AND PROPRIETARY INFORMATION

Material submitted in response to Inclusa's Request for Proposal for **Personal Emergency Response System (PERS) Services** includes information that we have determined is proprietary, confidential and/or information which qualifies as a trade secret, as provided in Wis. Stat. Section 134.90.

Therefore, I request that the following pages not be released:

Section	Page	Topic

*NOTE: Proposers are cautioned that the ENTIRE PROPOSAL MAY NOT FALL WITHIN THE CONFINES OF THE PLEDGE OF CONFIDENTIALITY. THE ABOVE DESIGNATION(S) OF CONFIDENTIALITY IN NO WAY GUARANTEES THAT DESIGNATED INFORMATION WILL BE KEPT CONFIDENTIAL.

IF INCLUSA AGREES WITH PROPOSER'S DESIGNATION OF TRADE SECRET OR CONFIDENTIALITY AND THE DESIGNATION IS CHALLENGED, THE UNDERSIGNED HEREBY AGREES TO PROVIDE LEGAL COUNSEL OR OTHER NECESSARY ASSISTANCE TO DEFEND THE DESIGNATION OF TRADE SECRET OR CONFIDENTIALITY.

Failure to include this designation in the proposal response may mean that all information provided as part of the proposal response will be open to examination and copying.

_____ Signature (Authorized Representative)	_____ Telephone Number
_____ Name (Please Print)	_____ Company Name
_____ Title	_____ Date

PROPRIETARY INFORMATION: Proprietary information submitted in response to this request for proposal will be handled in accordance with applicable Inclusa procurement regulations. A proposal responding to this Request for Proposal should not include any proprietary information or protected trade secret(s) as part of its proposal unless the proposer 1) designates the specific information that it maintains is proprietary or trade secret and the reasons for such designation in a separate document, and 2) identifies the specific information when it occurs within the proposal.

Inclusa's preference is for the proposer to segregate all information designated as confidential into one section of the response to the Request for Proposal and/or a separate document for easier removal to maintain its confidential status. The response to the Request for Proposal should indicate which portion of the requested information is confidential and where this information is located within the response, i.e. under separate cover, in confidential Section No.____, etc. Data contained in the proposal and all documentation becomes the property of Inclusa.

OPEN AUTHS FOR PERS BY REGION

(as of 5/22/2018)

REGION	COUNT
Green	716
Red	533
Yellow	857
TOTAL	2106

