

Attachment E

TRISTAR EVALUATION WORKSHEET

EVALUATION FORM

THIRD PARTY ADMINISTRATOR & Ancillary Services RFP #17-084

VENDOR:**EVALUATOR No. 1** - [REDACTED]

Date: July 2017

Third Party Administration Services

Includes clarity and general quality of the proposal submitted. Include in this rating category the caseload of examiners, education of County employees and supervisors, communications with County Risk Management, and the soundness of reserving policies and practices

2. Comprehensiveness of the Bidder's submitted proposal

Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category the attention to medical control, support for return to work, timeliness and consistency of contact with injured employee and doctor, interval of file review and apparent overall efficiency and effectiveness of administration.

3. Related Technical Capability

Expertise and experience of the bidder and staff personnel in providing similar services, which includes experience levels of examiners, on-going training, data management and reporting to County, access to claims management information system, organizational control and support of examiners.

4. Performance Capabilities

Include in this category reputation, reliability and service history as determined by reference validations.

Comments:

Clear overall proposal, very detailed. Training to County Staff. Requirements under CSAC. Dashboard, Tristar Call Center for employer reporting injuries. Nurse Triage, Pre Clinical Review, Provider Electronic Billing Program (Ebill), reporting, safety training videos (streaming!) Pass through fee for a large number of users.

Well noted throughout the RFP, including Medicare Section 111 reporting. Online reporting of 5020 claims report. Android and Apple compliant for employers and claimants.

Seasoned Claims Examiners. This includes Vice President of Claims Operations, Vice President of Management Claims operations, Branch Manager (Sharon Castillo), Director of Client Services (Brandon Wheeler), 1 Claims Supervisor (working?), 7 Senior Claims' Comp Examiners (5-7 years, complex cases with minimal supervision), 1 dedicated Nurse Advocate, 3 Claims Assistants/Medical Only Examiner/support staff. -Tri-star Client portal to track functional limitations, and return to work status. -ODG Medical Disability Adjuster-Predictive Model to help provide guidelines for disability duration and examples of expected duration days.

Quality assurance team conducts regular audits. Best practices overview: Coverage, Contact (same day), investigation (recorded statements on back injuries, client instructions, indexing on all lost time claims, initial diary set up within 30 days, reviewed every 60 days.), recovery/contribution (subrogation), evaluation, medical/disability/rehab management (agressive rtw), negotiation/disposition, supervision (supervisors initiate all new losses, reassignments and litigation referrals), customer service, managed care and medical cost containment.

5. Capability of Bidder to Complete the "Scope of Work"

Include in this category the effectiveness and timeliness of the claims set-up process, the schedule and procedures for file conversion, procedures for management and control of the trust checking account.

Yes noted in their Best Practices. Medical Control, Reporting services 24 hours a day for our 24 hour facilities. Emergency escalation protocols available. Supervisor reviews new claims, assigns, the adjuster receives the email, dairy established. Investigation, Client communication, Questionable claims immediate notice sent. Supervisor has to approve denial before sending out. 30-45 day reserve review.

6. Bidders Acceptance of Terms and Conditions of the RFP

Include in this category bidder's commitment to cooperate with other vendors, such as utilization review and bill review, conformance to County insurance requirements, assumption of responsibility for penalties arising from TPA failure to meet mandated deadlines and any exceptions bidders take to requirements set forth in the RFP

Yes including CSAC-EIA, SIP, Subrogation, reporting requirements, RTW utilizing policies and procedures established by the County. Branch Management and Client Services Director are responsible for keeping the County updated on the programs financial tends and developments. Stewardship report annually and quarterly matrix report with performance and established goals. When county explained that we have a right to contract with outside vendor for Medical Management Consultant, they stated they understand that it could be unbundled. They did not understand what this meant. Not sure if they asked at the vendor conference. This refer to services as provided by prior vendor David Donn.

7. Cost of Services

Include in this category the cost of services proposed in relationship to the "Scope of Work"

No discount on unbundled. Did indicate they reserve the right to make fee adjustments as necessary if our statistical data was incorrect. Quotes include investigations and recorded statements. OSHA logs. (do not include allocated loss adjustment expense, telephonic first notice of loss intake) Custom interface at \$150 an hour. No DATA CONVERSION Fees.

Additional Comments:

Lots of ad-hoc reports that are exactly what the county needs for provide updates to our Board.

Closing ratios could be a problem. Premature?

Loss of contracts in 24 months. Memorial Healthcare Systems; Valley Harvest and Packing SANDPIPA JPA-disbanded tristar retained some members; County of Mariposa

San Joaquin reference

Bill Review

Comments:

1. Overall responsiveness to the Request for Proposal

Includes clarity and general quality of the proposal submitted.

Yes

2. Comprehensiveness of the Bidder's submitted proposal

Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category:

- Administrative process
- Staffing
- Receipt of billings
- Location/Experience with California OMFS
- Financial stability

No Charge for duplicate billing. 85% of claims accessing a PPO network discount. Pharmacy Benefits Network (Tmesys Tetail, StoneRiver Pharmacy Solutions (SRPS), & PharmaComplete.

3. Related Technical Capability

Include in this category:

- Technological effectiveness (ensure payment at OMFS, avoid duplicate payments, etc)
- Ability to compile statistical data
- Reporting capability

Monitoring Medical Containment,

4. Performance Capabilities

Include in this category reputation, reliability and service history as determined by reference validations.

5. Capability of Bidder to Complete the "Scope of Work"

Include in this category:

- Timeliness of Processing
- Ability to assist in litigation efforts (liens, disputed treatment, etc.)
- Ability to handle special requests

*yes have their own
yes all outlined*

6. Bidders Acceptance of Terms and Conditions of the RFP

Include in this category:
to RFP

- Exceptions
- Ability to

work with non-affiliated TPA

7. Cost of Services

Include in this category the cost of services proposed in relationship to the "Scope of Work"

No discount on unbundled. \$208,522 includes 15,000 medical bills per year.

Additional Comments:

Nurse Case Management

Comments:

1. Overall Responsiveness to the Request for Proposal

Includes clarity and general quality of the proposal submitted.

Yes,

2. Comprehensiveness of the Bidder's submitted proposal

Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: Staffing/Relationships with local treaters, location/travel, administrative process.

Integral part of interdisciplinary team in order to facilitate open communication with the common goal of RTW, Coordination of care and return to health for the injured employee. Yes. Provider report cards. Outlines telephonic vs. field, suggested criteria.

3. Related Technical Capability

Include in this category: ability to compile statistical data, reporting capability.

Yes

4. Performance Capabilities

Include in this category reputation, reliability and service history as determined by reference validations.

5. Capability of Bidder to Complete the "Scope of Work"

Include in this Category: timeliness of processing, commitment to quality of care, philosophy.

Not noted in initial scope of work.

6. Bidders Acceptance of Terms and Conditions of the RFP

Include in this category: Exceptions to RFP, ability to work with non-affiliated TPA

7. Cost of Services

Include in this category the cost of services proposed in relationship to the "Scope of Work".

\$8,000 bundled or \$14,733 unbundled. Includes 335 NCM referrals per year.

Additional Comments:

Medical Provider Network

Comments:

1. Overall responsiveness to the Request for Proposal. Includes clarity and general quality of the proposal submitted.	Yes, they also have provider report cards that can help in clean up our MPN.
2. Comprehensiveness of the Bidder's submitted proposal. Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: Knowledge of local area, relationships with local providers, accessibility, administrative process.	Tristar has TRISTAR PLUS MPN, which they are the network service entity, and access to Harbor One, in which Harbor One is the network service entity. They can also help create or administer our own.
3. Related Technical Capability Include in this category: Ability to compile statistical data & reporting capability.	Was not asked in the RFP
4. Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	National Network Manager, Cynthia Fortes has 16 years of experience in the managed care industry.
5. Capability of Bidder to Complete the "Scope of Work" Include in this Category: development/approval; procedures and notices; employee communication; ability to work with County in Development	Yes
6. Bidders Acceptance of Terms and Conditions of the RFP Include in this category: Exceptions to RFP, ability to work with non-affiliated TPA	Yes
7. Cost of Services Include in this category the cost of services proposed in relationship to the "Scope of Work". Ability to offer fixed cost pricing and set up fees.	\$26,245 Development of custom MPN if the County requests it or can use two they have available.

Additional Comments:

Utilization Review

Comments

1. Overall responsiveness to the Request for Proposal. Includes clarity and general quality of the proposal submitted.	Yes.
2. Comprehensiveness of the Bidder's submitted proposal. Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: Compliance with UR standards, staffing, accessibility, and administrative process.	yes, ability to make examiner level decisions, pre-clinical review per ODG and ACOEM, Peer Review services included (Medical Director & Medical Speciality Director Networks). Treatment protocols reviewed annually and updated if necessary.
3. Related Technical Capability Include in this category: Ability to compile statistical data & reporting capability.	Yes
4. Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	Yes, DWC UR audits were perfect in RC, 99.4 in SD.
5. Capability of Bidder to Complete the "Scope of Work" Include in this Category: Timeliness of Processing, Procedures and Notices, Responsiveness to Health Care Providers, and Physician Qualifications.	Detailed UR workflow and QA process. Yes.
6. Bidders Acceptance of Terms and Conditions of the RFP Include in this category: Exceptions to RFP, ability to work with non-affiliated TPA	No exceptions noted.
7. Cost of Services Include in this category the cost of services proposed in relationship to the "Scope of Work". Ability to offer fixed cost pricing.	\$97,346 Includes 1,296 UR referrals, including 386 Peer Review Referrals per year.
Additional Comments:	

EVALUATION FORM

THIRD PARTY ADMINISTRATOR & Ancillary Services (RFP #17-084)

Vendor Name: Tristar

Evaluator Number: 2

Date: 8/10/17

TPA Services	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted. Include in this rating category the caseload of examiners, education of County employees and supervisors, communications with County Risk Management, and the soundness of reserving policies and practices	• Case load based on existing + anticipated claim inventory will be based on a departmental allocation by alpha split for the largest departments P. 20: Support pass an integrity test + extensive background + great client & claims skills test. All new staff are trained + have mostly corporate training programs
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category the attention to medical control, support for return to work, timeliness and consistency of contact with injured employee and doctor, interval of file review and apparent overall efficiency and effectiveness of administration.	P. 21: Same day contact w/ employee, employer + a Dr. to determine compensability + injury • Regular aggressive follow-up w/ contacts throughout the life of the file P. 22: Contact + return phone calls made same day • Coordinating a disability Mt and RTW efforts w/ Dept of Industrial Relations + standard Administration duties P. 23: re-adjusted control every 14 days or sooner when ee is off work P. 24: 30 hours of training to employees + Tristar (TPA) Ins. Assigned P. 25: 30 hours of business. 7 claim officers + claim system P. 26: accessed through "Client Portal" is a state of the art claim system. Provide inhouse service desk for system support + training. Tristar own software. Helps determine benchmark trends. Real time access provides customers + Tristar managers with agency at trends + enable access to all claim files and other data file P. 27: Vice President + w/ Tristar P. 28: 30 years experience STP + TPA certificate P. 29: In business 30 years. 7 claim officers + 7 claim officers (from ground) privately held TPA in the market. Received a 99.4% score in its most recent routine DRG audit. Govt. clients since 2001. 100% of US population P. 30: San Joaquin County - Since 2003, closing rate 100%
Related Technical Capability Expertise and experience of the bidder and staff personnel in providing similar services, which includes experience levels of examiners, on-going training, data management and reporting to County, access to claims management information system, organizational control and support of examiners.	
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	
Capability of Bidder to Complete the "Scope of Work" Include in this category the effectiveness and timeliness of the	Same day contact w/ employee, employer + doctor. Regular aggressive follow up w/ contacts throughout the life of the claim

Claims

claims set-up process, the schedule and procedures for file conversion, procedures for management and control of the trust checking account.

Bidders Acceptance of Terms and Conditions of the RFP

- Include in this category bidder's commitment to cooperate with other vendors, such as utilization review and bill review, conformance to County insurance requirements, assumption of responsibility for penalties arising from TPA failure to meet mandated deadlines and any exceptions bidders take to requirements set forth in the RFP

Cost of Services

Include in this category the cost of services proposed in relationship to the "Scope of Work"

Negotiate?

Historical data conversion + custom interfaces. No charge 0.15/hr for custom interfaces Will comply w/ any <u>any</u> requirements of the County. Requires "Positive P" to keep client funds secure per auditing + compliance protocol. THSTAR has capabilities + expertise to provide any + all of the claims of the claims + ancillary services directly. But will work w/ other providers selected by the County. Goal is to foster a close working relationship with ancillary vendors.	3-
Bundled + unbundled same price 1st 1,539,426 2nd 1,614,006 3rd 1,676,497 4th 1,728,904 5th 1,789,476	10

Additional Comments:

- Reserves the right to make fee adjustments.
- Claims philosophy - intent to handle claims ethically + in a manner which is fair, honest + equitable
 - 2nd to all parties involved
 - ELCess carrier P.31
 - Provides customized monthly, quarterly, annual + periodic report package for customers.
 - PP-hoc Reporting
 - Current system and manual work + limited w/ interaction to a Risk Mgt. Information System, Client Portal. Current system is paperless, web based, and open Android and Apple compatible. Mobile Apps for employees + claimants
 - Reports - pg. 66
 - Expend or ended contracts 4/ - the last 24 months - 4

Bill Review	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	Good - Thorough
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: - Administrative process - Staffing - Receipt of billings - Location/Experience with California OMFS - Financial stability	psb analyzes and reduces medical bills to fair and equitable amounts as allowed by OMFS. Bills are date stamped & forwarded to adjuster for authorization after adjuster approval. The bill review analyst review the charges for the schedule allowance and process per PPO contract reductions. This is electronically uploads final payment recommendations & supporting explanation of review into the Claim System. Highly trained analyst w/ years of experience & knowledge in medical billing schedule. Very thorough with some issues
Related Technical Capability Include in this category: - Technological effectiveness (ensure payment at OMFS, avoid duplicate payments, etc) - Ability to compile statistical data - Reporting capability	uses a Bill Review Software to compare the billings from the State provider community against millions of previous billings for same & similar ICD9/ICD10 codes, diagnosis, frequency of use of service against providers & applies years of medical billing history when evaluating frequency, duration, type, adequacy of provider charges to ensure that they are in line with encounter type patterns and review appropriateness. Capable psb analyzes & reduces medical bills to fair & equitable amounts as allowed by OMFS
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	

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Capability of Bidder to Complete the "Scope of Work" Include in this category: • Timeliness of Processing • Ability to assist in litigation efforts (liens, disputed treatment, etc.) • Ability to handle special requests	p.56 • Will track the receipt, input, & processing time and accuracy of each bill submitted. p.57 • Has the ability to customize reimbursement rules for each jurisdiction, and administer any direct contracts the county has w/ any ancillary provider.
Bidders Acceptance of Terms and Conditions of the RFP Include in this category: • Exceptions to RFP • Ability to work with non-affiliated TPA	p.56 Tristar acknowledges County's Bill Review program requirements and will support County's efforts in choosing as Claims Administrator or provide bill review services directly if selected to do so.
Cost of Services Include in this category the cost of services proposed in relationship to the "Scope of Work"	p.57 Bundled & Unbundled \$208,522

Additional Comments:

Nurse Case Management	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: - Staffing/Relationship with local treaters - Location/travel - Administrative Process	P.21 • Highly credentialed & experienced nurses are mgr. - Will serve the county from their local office in Fresno. P.21 • facilitate timely & safe RTW by working w/ County, medical providers, claim administrator & injured worker from Receipt of the file.
Related Technical Capability Include in this category: - Ability to compile statistical data - Reporting capability	P.21 • 24/7/365 Call Center for reporting injuries. P.21 • Nurse Case Managers utilize a proprietary system to help ensure compliance w/ WR and medical case mgr. protocols. Have access to software programs that provide tools to jurisdictional or state medical treatment guidelines.
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	P.1 • Role of Nurse Advocate responsible for managing all field case mgr. and telephone case management assignments & nurses. • Injure worker letter - Case Mgr. quick to help. Guided her through SX. • Delivery of a check - ACH wire transfer
Capability of Bidder to Complete the "Scope of Work" Include in this category: - Timeliness of Processing - Commitment to Quality of Care - Philosophy	P.21 • philosophy, policies and procedures were established to provide the highest quality. Comp. Mgt in the industry in compliance w/ statutes & regulations, & requirements outlined in law. • Intent to handle Claims in a fair, honest & equitable manner to all parties involved. • Case manager's role is to promote quality, timely & cost effective outcomes.
Bidders Acceptance of Terms and Conditions of the RFP	

→ Tr. pg. 1

Include in this category: Exceptions to RFP • Ability to work with non-affiliated TPA	
Cost of Services Include in this category the cost of services proposed in relationship to the "Scope of Work"	Nurse Advocate B & U.B. \$199,836 Nurse Case Mgt. B. \$8,000 U.B. 14,733

Additional Comments:

Proposed Model

3rd

12

MPN	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	Room for improvement - Relationship w/ local providers
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: - Knowledge of local area - Relationships with local providers - Accessibility - Administrative Process	• TriStar agrees that County will have final approval of the providers. • County primary point of contact in establishment + administration of its MPN is Cynthia Fortes • Offers 2 MPN services: TriStar plus (TriStar is the network service entity) And Harbor One (Harbor One is the network entity) p. 52
Related Technical Capability Include in this category: - Ability to compile statistical data - Reporting capability	3,
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	3,
Capability of Bidder to Complete the "Scope of Work" Include in this category: - Development /Approval - Procedures and Notices - Employee Communication - Ability to work with County in Development	P. 5 OFFERS 2 MPN services: TriStar Plus MPN (TriStar is the network service entity) - Can Also Work w/ County to establish a county specific MPN 3,

Utilization Review	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	Clear - Good quality
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: - Compliance with UR standards - Staffing - Accessibility - Administrative Process	1. p.53 "Storviks County philosophy - They believe in providing prompt access to appropriate, high quality med txnt, medications and services to ensure no delays in work flow." p.54 "Staff has thorough knowledge of applicable laws, ordinances, rules, regulations & statutory laws for State of CA." p.54 "Examiners are the first line of review and will give approval if txnt is within ACOG/MTS guidelines. If txnt is questionable then the examiner, medical & ancillary txnt request are forwarded to Nurse Case Managers provide UR"
Related Technical Capability Include in this category: - Ability to compile statistical data - Reporting capability	p.54 "Sophisticated software programs that provide tools for various jurisdictional or STATE medical txnt guidelines" p.55 "Will comply with County requirement by reporting. Reporting provide in recurring manner that shows level at which UR decisions were made, costs impact."
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	p.53 "Received exceptional results in most current routine DUR UR Audits."
Capability of Bidder to Complete the "Scope of Work" Include in this category: - Timeliness of Processing - Procedures and Notices - Responsiveness to Health Care Providers - Physician Qualifications	2. p.53 "Has a detailed UR workflow & quality assurance process in place. process is in place from the initial Receipt of the request to completion of the UR to monitor timelines and is compliant w/UR timelines set forth in CALABX LAW. The workflow ensures prompt receipt & referral w/immediate delivery to case mgr." p.55 "Referrals are made w/in 2 days of Receipt of txnt request. UR determinations are completed w/in 5 to 14 days. As life threatening"
	UR is completed w/in 72 hours. A determination letter is sent to all parties advising of the pre-certification or non-certification of requested services."

PS1

non-affiliated TR

- Exceptions to RFP
- Ability to work with non-affiliated TPA

" Acknowledge county philosophy and will link up with ^{w/} county if chosen as Claims Administrator or provide WFC services if selected to do so by the County.

2

non-affiliated TR

Include in this category the cost of services proposed in relationship to the "Scope of Work"

B \$97,346 U. B. \$97,356

2

Additional Comments: _____

[illegible]

EVALUATION FORM

THIRD PARTY ADMINISTRATOR & Ancillary Services (RFP #17-084)

Vendor Name: Truster

Evaluator Number: 3

Date: 8/10/17

TPA Services	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted. Include in this rating category the caseload of examiners, education of County employees and supervisors, communications with County Risk Management, and the soundness of reserving policies and practices	Do list # of staff to be assigned Initial reserves in 5 days - 30 days on major cases? Overall feel in proposal - talk about jurisdictionally, not covering Talk about "home office" Reserves reviewed every 30-45 days Tailor training to client needs
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category the attention to medical control, support for return to work, timeliness and consistency of contact with injured employee and doctor, interval of file review and apparent overall efficiency and effectiveness of administration.	Will assign case loads per RFP to give us #s and levels Manager/sup "year of control" - very vague 3 pt contact same-day "aggressive" follows up strong reliance on Office/experience in Fresno Internal audit process 3 pt contact on "appropriate" info Daily intervals confusing Mention must call program cost? Examiner manager RFP - then talk about Transitioned work Coordinator?
Related Technical Capability Expertise and experience of the bidder and staff personnel in providing similar services, which includes experience levels of examiners, on-going training, data management and reporting to County, access to claims management information system, organizational control and support of examiners.	Paperless system not indicated Talk about predictive modeling - cost? Big IT Dept - lots of reports County can have access County can access systems Support for examiners subject to determine since year of control 3 pt contact will have help for 7 examiners on County Seemed to rely on technology more than personnel time
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	Large National TPA Fresno office 6th best in the world 2015 Relevant references
Capability of Bidder to Complete the "Scope of Work" Include in this category the effectiveness and timeliness of the	

claims set-up process, the schedule and procedures for file conversion, procedures for management and control of the trust checking account.	<i>set up how soon? One line 3000, direct billing, system generated 800 to County</i> Didn't address conversion except "effective, efficient" Can do banking - will they use bank of county checking?
Bidders Acceptance of Terms and Conditions of the RFP Include in this category bidder's commitment to cooperate with other vendors, such as utilization review and bill review, conformance to County insurance requirements, assumption of responsibility for penalties arising from TPA failure to meet mandated deadlines and any exceptions bidders take to requirements set forth in the RFP	No exceptions will work w/ other vendors unhurdled Process for penalty claims
Cost of Services Include in this category the cost of services proposed in relationship to the "Scope of Work"	Unhurdled = highest Unhurdled = 2 nd highest

Additional Comments:

Bill Review	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: • Administrative process • Staffing • Receipt of billings • Location/Experience with California OMFS • Financial stability	Integrated approach Audit bills, spot bid certain services Review your then a non-medical - work? National networks - have many of their own contracts Lots of ancillary networks Good processes in place "Highly trained" analysts
Related Technical Capability Include in this category: • Technological effectiveness (ensure payment at OMFS, avoid duplicate payments, etc) • Ability to compile statistical data • Reporting capability	Can customize rules and administer contracts country has in place Can compile statistical data Good reporting capability
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	

Capability of Bidder to Complete the "Scope of Work" Include in this category: • Timeliness of Processing • Ability to assist in litigation efforts (liens, disputed treatment, etc.) • Ability to handle special requests	Client can increase/decrease savings. Metadata depends savings at or above 80% What does TPA do? Client on own if they choose < 80%?
Bidders Acceptance of Terms and Conditions of the RFP Include in this category: • Exceptions to RFP • Ability to work with non-affiliated TPA	No exceptions will work w/ other TPA \$150/hr to develop interfaces
Cost of Services Include in this category the cost of services proposed in relationship to the "Scope of Work"	2nd lowest out of 4 on both bundled & unbundled

Additional Comments:

Nurse Case Management	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	Little difficult to pick all stuff out of different places in proposal - generic
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: • Staffing/Relationship with local treaters • Location/travel • Administrative Process	cl pt contract closed when goal reached or agreed by parties Local relationships?
Related Technical Capability Include in this category: • Ability to compile statistical data • Reporting capability	Didn't talk about this - no questions
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	
Capability of Bidder to Complete the "Scope of Work" Include in this category: • Timeliness of Processing • Commitment to Quality of Care • Philosophy	Developing system w/commitment committed to etc. good outcomes Did provide nurse advocate consistent w/RFP
Bidders Acceptance of Terms and Conditions of the RFP	

Include in this category: Exceptions to RFP • Ability to work with non-affiliated TPA	no exceptions Full acceptance
Cost of Services Include in this category the cost of services proposed in relationship to the "Scope of Work"	lowest limited or unlimited? cost don't have right or any creative

Additional Comments:

MPN	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: • Knowledge of local area • Relationships with local providers • Accessibility • Administrative Process	<i>Say they have local provider relationships, but not about monitoring, report cards, etc. impersonal</i> <i>not convinced they have local relationships</i>
Related Technical Capability Include in this category: • Ability to compile statistical data • Reporting capability	
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	
Capability of Bidder to Complete the "Scope of Work" Include in this category: • Development /Approval • Procedures and Notices • Employee Communication • Ability to work with County in Development	<i>Appreciation take a few weeks</i> <i>Nothing about procedures/notices/ee communication</i> <i>will work w/county to develop - additional cost to develop boutique menu</i>

(Include in this category:

- ### Cost of Services

- Set up fees

Lowest 4- 64K bundled & unbundle fee

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper appears to be a standard notebook page or a sheet of stationery. There is no handwriting or other markings on the page.

Utilization Review	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: • Compliance with UR standards • Staffing • Accessibility • Administrative Process	Workflow & QA processes in place - Examiner first line
Related Technical Capability Include in this category: • Ability to compile statistical data • Reporting capability	
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	
Capability of Bidder to Complete the "Scope of Work" Include in this category: • Timeliness of Processing • Procedures and Notices • Responsiveness to Health Care Providers • Physician Qualifications	pre-clinical review - kinda like examiner review? Timelines provided - referred w/in 2 days of receipt of RFA

Include in this category:

- ### Cost of Services

no exceptions
will work whether TPA
when is all done?

Additional Comments: _____

EVALUATION FORM

THIRD PARTY ADMINISTRATOR & Ancillary Services (RFP #17-084)

Vendor Name: TRISTAR

Evaluator Number: 4

Date: 8/10/17

TPA Services	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted. Include in this rating category the caseload of examiners, education of County employees and supervisors, communications with County Risk Management, and the soundness of reserving policies and practices	will provide 7 dedicated senior examiners, 1 sup., 1 nurse advocate, 3 assistants/support. 24 hour claim reporting with escalation procedures for CAT claims Initial reserves w/in 5 days, then reviewed every 30-45 days or if a event occurs or new info is available. Also insured clients
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category the attention to medical control, support for return to work, timeliness and consistency of contact with injured employee and doctor, interval of file review and apparent overall efficiency and effectiveness of administration.	"Same day" contact for 3 point contact Physician contact every 14 days while TRS. Transitional work coordinator (assuming it is a Tristar employee) will work with county on RTW, interactive process "short diary" for a claim that is being investigated is listed as 15, 30, 45, 60 or 75 days. Delayed claims log posted
Related Technical Capability Expertise and experience of the bidder and staff personnel in providing similar services, which includes experience levels of examiners, on-going training, data management and reporting to County, access to claims management information system, organizational control and support of examiners.	Training for clients and examiners re case law, leg. changes trends etc. Routinely provides w/C 101 training to clients RTW training, Reserving, etc. Annual stewardship report and/or quarterly matrix. Client Dashboard provides data and trends, claim inventory and cost containment results
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	
Capability of Bidder to Complete the "Scope of Work" Include in this category the effectiveness and timeliness of the	

claims set-up process, the schedule and procedures for file conversion, procedures for management and control of the trust checking account.	
Bidders Acceptance of Terms and Conditions of the RFP Include in this category bidder's commitment to cooperate with other vendors, such as utilization review and bill review, conformance to County insurance requirements, assumption of responsibility for penalties arising from TPA failure to meet mandated deadlines and any exceptions bidders take to requirements set forth in the RFP	will work with other vendors take responsibility for penalties can conform/meet County insurance requirements
Cost of Services Include in this category the cost of services proposed in relationship to the "Scope of Work"	

Additional Comments:

page 14 mentions county employees have "a militant training and approach to their unique job duties", and in fact are associated with national militant organizations. what does this mean?

Nurse Case Management	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: • Staffing/Relationship with local treaters • Location/travel • Administrative Process	Tristar managed care - national NCM provider will align NCM services to match County's needs/desires/goals
Related Technical Capability Include in this category: • Ability to compile statistical data • Reporting capability	Tristar client portal can track and compile data
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	
Capability of Bidder to Complete the "Scope of Work" Include in this category: • Timeliness of Processing • Commitment to Quality of Care • Philosophy	meets or exceeds industry standards
Bidders Acceptance of Terms and Conditions of the RFP	

Include in this category: Exceptions to RFP • Ability to work with non-affiliated TPA	Yes, does so often.
Cost of Services Include in this category the cost of services proposed in relationship to the "Scope of Work"	

Additional Comments:

MPN	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: • Knowledge of local area • Relationships with local providers • Accessibility • Administrative Process	Tristar plus MPN or access to Harbor One can establish a custom MPN for the County
Related Technical Capability Include in this category: • Ability to compile statistical data • Reporting capability	Yes, same as NCM - Tristar Client Portal
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	
Capability of Bidder to Complete the "Scope of Work" Include in this category: • Development /Approval • Procedures and Notices • Employee Communication • Ability to work with County in Development	will work with county to meet their MPN needs

Utilization Review	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: • Compliance with UR standards • Staffing • Accessibility • Administrative Process	Tristar NCM provide UR. Peer review also available compliant with UR standards/requirements "pre-clinical review" DWC audits of UR - 99.4% score for San Diego office 100% for Rancho Cordova office
Related Technical Capability Include in this category: • Ability to compile statistical data • Reporting capability	Can provide as needed
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	
Capability of Bidder to Complete the "Scope of Work" Include in this category: • Timeliness of Processing • Procedures and Notices • Responsiveness to Health Care Providers • Physician Qualifications	

Bidders Acceptance of Terms and Conditions of the RFP

Include in this category:

- Exceptions to RFP
- Ability to work with non-affiliated TPA

Cost of Services

Include in this category the cost of services proposed in relationship to the "Scope of Work"

Additional Comments: _____

[illegible]

Bill Review	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: • Administrative process • Staffing • Receipt of billings • Location/Experience with California OMFS • Financial stability	Comprehensive Bill review program No charge for partial or full duplicates PPO contracts - local, regional, national can provide custom PPOs
Related Technical Capability Include in this category: • Technological effectiveness (ensure payment at OMFS, avoid duplicate payments, etc) • Ability to compile statistical data • Reporting capability	
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	

Capability of Bidder to Complete the “Scope of Work” Include in this category: • Timeliness of Processing • Ability to assist in litigation efforts (liens, disputed treatment, etc.) • Ability to handle special requests	
Bidders Acceptance of Terms and Conditions of the RFP Include in this category: • Exceptions to RFP • Ability to work with non-affiliated TPA	
Cost of Services Include in this category the cost of services proposed in relationship to the “Scope of Work”	

Additional Comments:

EVALUATION FORM

THIRD PARTY ADMINISTRATOR & Ancillary Services (RFP #17-084)

Vendor Name: TRISTAR

Evaluator Number: 5

Date: 8/10/17

TPA Services	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted. Include in this rating category the caseload of examiners, education of County employees and supervisors, communications with County Risk Management, and the soundness of reserving policies and practices	<i>Very qualified. Quality Assurance Dept provides quality review & Training. Did not give 24 hr list but did list training opportunities. Good staffing proposal</i>
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category the attention to medical control, support for return to work, timeliness and consistency of contact with injured employee and doctor, interval of file review and apparent overall efficiency and effectiveness of administration.	<i>Clearly understands what needs to be done.</i>
Related Technical Capability Expertise and experience of the bidder and staff personnel in providing similar services, which includes experience levels of examiners, on-going training, data management and reporting to County, access to claims management information system, organizational control and support of examiners.	<i>Has a lot of public entity clients. Has experienced people & will recruit such. Lots of Mgt/corporate support.</i>
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	<i>Very reputable company. Well known in the industry.</i>
Capability of Bidder to Complete the "Scope of Work" Include in this category the effectiveness and timeliness of the	<i>Very qualified. Would be able to perform what is outlined in RFP</i>

claims set-up process, the schedule and procedures for file conversion, procedures for management and control of the trust checking account.	No issues here. Entity knows how to manage claims & financial part of contract.
Bidders Acceptance of Terms and Conditions of the RFP Include in this category bidder's commitment to cooperate with other vendors, such as utilization review and bill review, conformance to County insurance requirements, assumption of responsibility for penalties arising from TPA failure to meet mandated deadlines and any exceptions bidders take to requirements set forth in the RFP	Demonstrated clear understanding of how to administer claims & contract.
Cost of Services Include in this category the cost of services proposed in relationship to the "Scope of Work"	

Additional Comments:

Very comprehensive response. Would have no problem performing duties. Corporate support in place.

MPN	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	Xlot a lot of detail (later pages) provided great deal of how MPN is run
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: • Knowledge of local area • Relationships with local providers • Accessibility • Administrative Process	Says they have their own but will coordinate with County Not person over MPN
Related Technical Capability Include in this category: • Ability to compile statistical data • Reporting capability	Did not see
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	Provided a lot of detail of MPN criteria
Capability of Bidder to Complete the "Scope of Work" Include in this category: • Development /Approval • Procedures and Notices • Employee Communication • Ability to work with County in Development	Did not go into detail well established company though. (Later pages). Gave a lot of info on what is expected of MPN providers.

Bidders Acceptance of Terms and Conditions of the RFP (Include in this category: • Exceptions to RFP • Ability to work with non-affiliated TPA	<i>Will work w/other TPA</i>
Cost of Services Include in this category the cost of services proposed in relationship to the "Scope of Work" • Set up fees	

Additional Comments:

Did not give much detail in this area but T&E-STAR is well recognized in the industry.

Added detail later. Good list of local doctors.

Utilization Review	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	<i>Good Response. Very thorough in explain philosophy & program</i>
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: • Compliance with UR standards • Staffing • Accessibility • Administrative Process	<i>Response was detailed & thought out Appropriate. Did not explain staffing but that's OK.</i>
Related Technical Capability Include in this category: • Ability to compile statistical data • Reporting capability	<i>Did not say</i>
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	<i>TRE-STAR is very reputable.</i>
Capability of Bidder to Complete the "Scope of Work" Include in this category: • Timeliness of Processing • Procedures and Notices • Responsiveness to Health Care Providers • Physician Qualifications	<i>One question on TL has for like - threatening injured. Should be faster.</i>

Bidders Acceptance of Terms and Conditions of the RFP

Include in this category:

- Exceptions to RFP
- Ability to work with non-affiliated TPA

Will work with non-affiliated TPA

Cost of Services

Include in this category the cost of services proposed in relationship to the "Scope of Work"

Did not give "per-unit" pricing

Additional Comments: *I liked Pre-Clinical Review extra cost though.*

Bill Review	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	<i>Very Good. Good explanation of services provided</i>
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: • Administrative process • Staffing • Receipt of billings • Location/Experience with California OMFS • Financial stability	<i>Showed great understanding of BR process. Comprehensive.</i>
Related Technical Capability Include in this category: • Technological effectiveness (ensure payment at OMFS, avoid duplicate payments, etc) • Ability to compile statistical data • Reporting capability	<i>They have the technical tools to do the job.</i>
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	<i>TRC - Spec is very capable to perform the service.</i>

Capability of Bidder to Complete the "Scope of Work" Include in this category: • Timeliness of Processing • Ability to assist in litigation efforts (liens, disputed treatment, etc.) • Ability to handle special requests	<i>met, or exceed criteria</i>
Bidders Acceptance of Terms and Conditions of the RFP Include in this category: • Exceptions to RFP • Ability to work with non-affiliated TPA	
Cost of Services Include in this category the cost of services proposed in relationship to the "Scope of Work"	<i>Did not give "per-unit" pricing</i>

Additional Comments:

Service. TRE STAR would have no problems returning this

Nurse Case Management	Comments
Overall responsiveness to the Request for Proposal Includes clarity and general quality of the proposal submitted.	<i>Good Response. Detailed as to what they will do.</i>
Comprehensiveness of the Bidder's submitted proposal Bidder's understanding of the desired scope of work and the ability to perform such work as evidenced by Bidder's proposal. Include in this category: • Staffing/Relationship with local treaters • Location/travel • Administrative Process	<i>Did not address</i>
Related Technical Capability Include in this category: • Ability to compile statistical data • Reporting capability	<i>Did not address</i>
Performance Capabilities Include in this category reputation, reliability and service history as determined by reference validations.	<i>Very well known in industry</i>
Capability of Bidder to Complete the "Scope of Work" Include in this category: • Timeliness of Processing • Commitment to Quality of Care • Philosophy	<i>Good philosophy Detailed as to referral criteria</i>
Bidders Acceptance of Terms and Conditions of the RFP	<i>Met T&C</i>

Include in this category: Exceptions to RFP • Ability to work with non-affiliated TPA	<i>will work w/other TPA</i>
Cost of Services Include in this category the cost of services proposed in relationship to the "Scope of Work"	<i>Did not give "per unit" pricing.</i>

Additional Comments:

Very detailed and criteria for referrals