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**UNMH PURCHASING DEPARTMENT
933 Bradbury Dr. SE, Suite 3165
ALBUQUERQUE, NM 87106**

ISSUANCE DATE: Friday, June 24, 2022

Request for Proposals Title and Number: RFP 456-22 Extended Business Office

1. **Offer Due Date/Time:** ALL OFFEROR PROPOSALS MUST BE RECEIVED FOR REVIEW AND EVALUATION BY THE PROCUREMENT SPECIALIST OR DESIGNEE REFERENCED ON THIS COVER PAGE NO LATER THAN **2:00 PM MOUNTAIN STANDARD TIME/DAYLIGHT TIME ON MONDAY, AUGUST 1, 2022**. Proposals received after this deadline will not be accepted. The date and time of receipt will be recorded for each proposal.

2. The UNMH invites you (“Offeror”) to submit an offer for materials and/or services set forth in this RFP. Please read carefully the instructions, specifications, and Standard Terms and Conditions, failure to comply therewith may result in an offer being classified as unresponsive and disqualified. New

of the proposal. PLEASE NOTE: The price of products offered or the cost of services proposed **shall not be designated** as proprietary or confidential information.

The UNMH

SECTION I. INTRODUCTION AND GENERAL INFORMATION

The purpose of this Request of Proposals (RFP) is to solicit sealed proposals to establish contract(s) through competitive negotiations for the procurement of goods and/or services as set forth in **Exhibit A, Scope of Work**.

It is intended that this RFP may will result in the UNMH entering into a contractual agreement with one or more successful Offeror(s), for a Multi-Term Contract subject to NMSA 13

1.5 Clarification and Questions

1.5.1 Submission. **Offerors may request clarification of this RFP by:**

- 1.5.1.1 Submitting all requests for clarification by email to the Procurement Specialist identified on page 1 of this RFP or as otherwise directed by the Procurement Specialist;
- 1.5.1.2 Including the Offeror's address, telephone number, facsimile number and email address;
- 1.5.1.3 If the question pertains to a specific section of this RFP, reference should be

1.9.2

SECTION III. ADDITIONAL INSTRUCTIONS TO OFFERORS NM Preferences. In accordance with NMSA 1978 § 13-1-21 (as amended), Offerors must include a copy of their preference certificate with their proposal. Certificates for preferences must be obtained through the New Mexico Department of Taxation & Revenue <http://www.tax.newmexico.gov/Businesses/in-state-veteran-preference-certification.aspx>. In addition, for the resident Veterans preference, the attached Resident Veteran Preference Certification” form (Exhibit C) must be completed and signed.

1.1.1 **New Mexico Business Preference.** If the Offeror has provided their Preference Certificate, the Preference Points for a New Mexico Business is 5%.

1.1.2 **New Mexico Resident Veterans Business Preference** If the Offeror has provided their Preference Certificate and the Resident Veterans Certification Form the Preference Point are one of the following:

- 10% for ~~are~~ one of the fG

- 1.2 AUTHORIZED SIGNATURE PAGE:** Review and submit the Authorized Signature Page attached hereto as **Exhibit D**.
- 1.3 SMALL AND DISADVANTAGED BUSINESS CERTIFICATION FORM:** Review and submit the Small and Small Disadvantaged Business Certification Form attached hereto as **Exhibit E**.
- 1.4 CONFLICT OF INTEREST CERTIFICATION FORM:** Review and submit Conflict of Interest Certification Form attached hereto as **Exhibit F**.
- 1.5 INSURANCE REQUIRMENTS:** The Offeror should provide proof of insurance coverage, meeting the requirements in the Section labeled “Insurance Requirements” or as noted in the specifications (**Exhibit G**). Offeror should submit proof of insurance in the form of a “Certificate of Insurance” with their response and prior to commencing work under the resulting contract. Offeror’s insurance shall remain in effect for the entire term of the contract and must be extended to coincide with any future contract extensions. The Offeror must provide proof of insurance coverage acceptable to the UNMHSC, in its sole discretion, prior to award of an Agreement.
- 1.6 INFORMATION SECURITY**

addition, the New Mexico criminal statues impose felony penalties for bribes, gratuities and kickback.

EXHIBIT A
SCOPE OF WORK

EXHIBIT B EVALUATION CRITERIA

This section describes the criteria to be used for analyzing and evaluating the various proposals. Cost will be a factor in the proposal evaluation with negotiable expectations; however, it is specifically a consideration of secondary importance to the need for competent and high-quality skilled Offeror(s).

The Hospitals' reserves the right to award contracts based directly on the proposals or to negotiate with one or more Offerors or reject all proposals. The Offeror(s) selected for a contract will be chosen on the basis of the greatest benefit to the Hospitals. All responses to this Request for Proposals become the property of the Hospitals and will become public information upon completion of Hospitals contract negotiation process.

An evaluation committee shall evaluate proposals based on the weighted criteria listed below. Submittals should completely address each of the following evaluation criteria in the order presented, elaborating on all responses where possible. The Hospitals reserves the right to judge the presentation of the Offerors submitting proposals in the evaluation and selection of the successful proposal. **Finalist(s) may be**

- (6) Please describe any areas of the Exhibit A, Scope of Work, which your firm cannot meet

2. Account Processes.

Clearly and in detail, explain on a point-by-point basis on how your proposed System meets or exceeds the requirements listed below. If your System is not able to meet any of the specification, briefly explain why, noting any concerns or issues the Hospitals should be aware of.

- (1) Describe your organization's unique billing and collection system capabilities and system name.
- (2) Describe your organization's ability to group accounts by guarantor.
- (3) Describe your organization's procedure for how and when accounts are returned during the account flow.
- (4) Describe your organization's policies and procedures for documenting accounts.
- (5) Describe the amount of documentation provided to UNM HSC in order to support documentation requirements.
- (6) Do you archive/store all transactions for later audit? What is the length of a time data maintained/stored? What format are records kept in?
- (7) What is the process for accessing archived data?
- (8) Explain your plan for protection of transmission and data storage in order to comply with HIPAA Security regulations (45 CFR 164.302 through 164.318).
- (9) How is customer service performed?
 - a) Charity evaluations;
 - b) Is there dedicated staff to make outbound calls;
 - c) How will your firm provide toll-free telephone services for the patients;
 - d) Is there dedicated staff to receive calls? What provisions do you have to receive calls after normal business hours;
 - e) Ability to manage call volumes;
 - f) Ability to tag the facilities phone system for call transfer;
 - g) What specific customer service performance outcomes will you be measuring and how will you monitor and report them to UNM HSC;
 - h) What is your procedure for handling patient complaints in a timely manner with corrective actions?

3. Reporting

- a) Describe your products analytic and reporting capabilities. Include the tools necessary and provided.
- b) Describe your products ability to provide real time reports. Describe the real time reports provided to UNM HSC.
- c) What patient tracking records will be accessible to UNM HSC's technical and business users? Is real-time viewing available? Who controls the amount and extent of access to data viewers?
- d) How will your product help UNMH reduce time spent collecting, analyzing and presenting data?
- e) Does your system allow direct connection to the database by users with full inquiry for extracting and reporting purposes?

- f) Describe any management dashboard and reporting capabilities.
- g) Does any dashboard or reporting tool allow on-screen drill-down to additional levels of data detail?
- h) Can user create custom reports independent of IT or vendor support?
- i) Please provide standard reporting samples from existing customers.
- j) What type of training is required for report building and generation?
- k) Please describe the number of different reports that can be created and the frequency of the standard reports you will provide UNM HSC.
- l) Are there any restrictions to the number and/or types of reports we can obtain?
- m) Please list the top 10 current requests for reports from existing customers.

4. Information Technology Capabilities of your firm

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F. COST PROPOSAL (20 POINTS POSSIBLE)

1. Offeror must create and complete its own cost response form. All charges listed on the form must be justified and evidence of need documented in the proposal. All prices shall include all costs to fulfill the terms, conditions and scope of work as called for in this RFP. The cost form shall provide service fees and itemized anticipated costs and expenses to be charged per contract year.
2. Provide number of individuals, number of hours by type of personnel, hourly rate for each category of personnel, expected number of hours performed per contract year, and total fee.
3. Estimate of all other expenses including travel and incidentals.
4. Total project cost including gross receipts tax.
5. If applicable, a description of additional charges for any extra services, including a not to exceed amount.
6. The proposal should include hourly fees for additional related services as may be requested by UNMH.

G. EVALUATION CRITERIA SUMMARY. The following is a summary of the evaluation factors and the weighted value assigned to each.

EXHIBIT C
RESIDENT VETERANS PREFERENCE CERTIFICATION

_____ **INITIAL IF NOT APPLICABLE**

_____ (NAME OF CONTRACTOR) hereby certifies the following in regard to application of the resident veterans' preference to this procurement:

Please check one only:

_____ I declare under penalty of perjury that my business prior year revenue starting January 1 ending December 31 is less than \$1M allowing me the 10% preference discount on this solicitation. I understand that knowing giving false or misleading information about this fact constitutes a crime.

_____ I declare under penalty of perjury that my business prior year revenue starting January 1 ending December 31 is more than \$1M but less than \$5M allowing me the 8% preference discount on this bid or proposal. I understand that knowing giving false or misleading information about this fact constitutes a crime.

_____ I declare under penalty of perjury that my business prior year revenue starting January 1 ending December 31 is more than \$5M allowing me the 7% preference discount on this bid or proposal. I understand that knowing giving false or misleading information about this fact constitutes a crime.

"I agree to submit a report, or reports, to the State Purchasing Division of the General Services Department declaring under penalty of perjury that during the last calendar year starting January 1 and ending on December 31, the following to be true and accurate:

"In conjunction with this procurement and the requirements of this business' application for a Resident Veteran Business Preference/resident Veteran Contractor Preference under Section 13-1-21 or 13-1-22 NMSA 1978, when awarded a contract which was on the basis of having such veterans preference, I agree to report to the State Purchasing Division of the General Services Department the awarded amount involved. I will indicate in the report the award amount as a purchase from a public a body or as a public works contract from a public body as the case may be.

"I understand that knowingly giving false or misleading information on this report constitutes a crime"

I declare under penalty of perjury that this statement is true to the best of my knowledge. I understand that giving false or misleading statements about material fact regarding this matter constitutes a crime.

(Signature of Business Representative)*

Date:

**EXHIBIT D
AUTHORIZED SIGNATURE PAGE**

THE FOLLOWING OFFEROR INFORMATION MUST BE COMPLETED AND RETURNED WITH THE RFB:

Please note that the information requested on the certification form is for reporting purposes only and will not be used in evaluating or awarding an agreement.

ACKNOWLEDGMENT OF ADDENDA

The undersigned acknowledges receipt of the following addenda:

Addenda No. _____	Dated _____	Addenda No. _____	Dated _____
Addenda No. _____	Dated _____	Addenda No. _____	Dated _____
Addenda No. _____	Dated _____	Addenda No. _____	Dated _____

EXHIBIT F
THE UNMHSC SUPPLIER CONFLICT OF INTEREST AND DEBARMENT/SUSPENSION
CERTIFICATION FORM

CONFLICT OF INTEREST. **The authorized Person, Firm and/or Corporation states that to the best of his/her belief and knowledge:** No employee or Regent of The University of New Mexico Hospitals (or close relative), with the exception of the person(s) identified below, has a direct or indirect financial interest in the Offeror or in the proposed transaction. Offeror neither employs, nor is negotiating to employ, any University of New Mexico Hospitals employee, Regent or close relative, with the exception of the person(s) identified below. Offeror did not participate, directly or indirectly, in the preparation of specifications upon which the IFB or offer is made. If the Offeror is a New Mexico State Legislator or if a New Mexico State Legislator holds a controlling interest in Offeror, please identify the legislator: _____ List below the name(s) of any University or New Mexico employee, Regent or close relative who now or within the preceding 12 months (1) works for the Offeror; (2) has an ownership interest in the Offeror (other than as an owner of less than 1% of Offeror's stock, if Offeror is a publicly traded corporation); (3) is a partner, officer, director, trustee or consultant to the Offeror; (4) has received grant, travel, honoraria or other similar support from Offeror; or (5) has a right to receive royalties from the Offeror. _____

DEBARMENT/SUSPENSION STATUS: The Offeror certifies that it is not suspended, debarred or ineligible from entering into contracts with the Executive Branch of the Federal Government, or in receipt of a notice or proposed debarment from any Agency. The Offeror agrees to provide immediate notice to The University of New Mexico Hospitals Purchasing Department Buyer in the event of being suspended, debarred or declared ineligible by any department or federal agency, or upon receipt of a notice of proposed debarment that is received after the submission of the IFB or offer but prior to the award of the purchase order or contract.

CERTIFICATION: The undersigned hereby certifies that he/she has read the above CONFLICT OF INTEREST and DEBARMENT/SUSPENSION Status requirements and that he/she understands and will comply with these requirements. The undersigned further certifies that they have the authority to certify compliance for the Offeror named **and that the information contained in this document is true and accurate to the best of their knowledge.**

Signature: _____ Title: _____ Date: _____

Name Typed _____ Company Name: _____

Address _____ City/State/zip: _____

THE FOLLOWING MUST BE CERTIFIED IF THIS PURCHASE ORDER IS \$100,000 OR GREATER:

CERTIFICATION AND DISCLOSURE REGARDING PAYMENTS TO INFLUENCE CERTAIN FEDERAL TRANSACTIONS (September, 2005)

(a) In accordance with FAR 52.203-11, the definitions and prohibitions contained in the clause at FAR 52.203-12, Limitation on Payments to influence Certain Federal Transactions, included in this solicitation, are hereby incorporated by reference in paragraph (b) of this certification.

(b) Offeror, by signing its offer, certifies to the best of his or her knowledge and belief that on or after December 23, 1989:

1) No Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on his or her behalf in connection with the awarding of any Federal contract.

2) If any funds other than Federal appropriated funds (including profit or fee received under a covered Federal

EXHIBIT G INSURANCE REQUIREMENTS

CERTIFICATES OF INSURANCE: The Offeror shall furnish the Owner one copy each of Certificates of insurance herein required for each copy of the Agreement showing coverage, limits of liability, covered operations, effective dates of expiration of policies of insurance carried by the Offeror. The Offeror shall furnish to the Owner copies of limits. The Certificate of Insurance shall be in the form of AIA Document G-705 or similar format acceptable to the Owner. Such certificates shall be filed with the Owner and shall also contain the following statements:

1. "The Regents of the University of New Mexico Hospitals, the University of New Mexico Hospitals, its agents, servants and employee are held as additional insured."
2. "The insurance coverage certified herein shall not be canceled or materially changed except after forty five (45) days written notice has been provided to the owner."

COMPENSATION INSURANCE:

The Offeror shall procure and shall maintain during the life of this contract Worker's Compensation as required by applicable State law for all Offeror's employees to be engaged at the site of the project under this project and in case of any such work sublet the Offeror shall require the subOfferor or sub subOfferor similarly to provide Worker's

EXHIBIT H

CERTIFICATION AND DISCLOSURE REGARDING PAYMENTS TO INFLUENCE CERTAIN FEDERAL TRANSACTIONS (APRIL 1991)

1. The definitions and prohibitions contained in the clause, at FAR 52.203-12, Limitation on Payments to influence Certain Federal Transactions, I included in this solicitation, are hereby incorporated by reference in paragraph (b) of this certification.
2. The Offeror, by signing its offer, hereby certifies to the best of his or her knowledge and belief that on or after; December 23, 1989;
 - a. Federal appropriated funds have not been paid and will not be paid to any person for influencing or attempting to Influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on his or her behalf in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal contract, grant, loan, or cooperative agreement;
 - b. If any funds other than Federal appropriated funds (including profit or fee received under a contract) are used to influence an

EXHIBIT I
STANDARD TERMS AND CONDITIONS

The following General Terms and Conditions are an equal and integral part of this Request For Proposal (RFP). The

18.

foreign patent laws and to enjoy the benefits of ownership of the invention, whether or not the invention was required of the Seller or member of the consulting team as part of the performance of Work. The Seller hereby assigns all right, title and interest in and to inventions made in the course of the Work to UNMHSC and agrees to execute and deliver all documents and do any and all things necessary and proper to effect such assignment.

Return or Destruction of CDI: upon termination, cancellation, expiration or other conclusion of the Purchase Order/Agreement. Service Provider shall return all CDI to Institution or, if return is not feasible, destroy any and all CDI. If the Service Provider destroys the information, the Service Provider shall provide Institution with a certificate confirming the date of destruction of the data.

Maintenance of the Security of Electronic Information: Service Provider shall develop, implement, maintain and use appropriate administrative, technical and physical security measures to preserve the confidentiality, integrity and availability of all electronically maintained or transmitted CDI received from, or on behalf of Institution or its students. These measures will be extended by contract to all sub-contractors used by Service Provider.

Reporting of Unauthorized Disclosures or Misuse of Covered Data and Information: Service Provider shall, within one day of discovery, report to Institution any use or disclosure of CDI not authorized by this Purchase Order/Agreement or in writing by Institution. Service Provider's report shall identify: (i) the nature of the unauthorized use or disclosure, (ii) the CDI used or disclosed, (iii) who made the unauthorized use or received the unauthorized disclosure, (iv) what Service Provider has done or shall do to mitigate any deleterious effect of the unauthorized use or disclosure, and (v) what corrective action Service Provider has taken or shall take to prevent future similar unauthorized use or disclosure. Service Provider shall provide such other information, including a written report, as reasonably requested by Institution.

Indemnity: Service Provider shall defend and hold Institution harmless from all claims, liabilities, damages, or judgments involving a third party, including Institution's costs and attorney fees, which arise as a result of Service Provider's failure to meet any of its obligations under this Purchase Order/Agreement.

Note: Inclusion of data by students into the terms of the contract will depend upon the contract and may not be needed."

52. PUBLIC INFORMATION. All information, except that classified as confidential, will become public information at the time that the RFP is awarded. Confidential information must be marked "CONFIDENTIAL" in red letters in the upper right hand corner of the pages containing the confidential information. Price and information concerning the specifications cannot be considered confidential. (UNMHSC Purchasing Regulations 11.6.3.)
53. PURCHASE ORDER/AGREEMENT. Any resultant Purchase Order/Agreement shall be the sole and entire Purchase Order/Agreement between the parties; any documents incorporated into the Purchase Order/Agreement are listed explicitly on the front side of the Purchase Order/Agreement, or are incorporated by implication by the terms of any resultant Purchase Order/Agreement. Any terms inconsistent with or in addition to any resultant Purchase Order/Agreement proposed by Seller are deemed rejected unless agreed to in writing by an appropriate University official.
54. RELATIONSHIP OF PARTIES. The parties and their respective employees are at all times acting as independent Offerors. Offeror will not be considered an employee of UNMHSC for any purpose, including, but not limited to, workers' compensation, insurance, bonding or any other benefits afforded to employees of UNMHSC. Neither party has any express or implied authority to assume or create any obligation or responsibility on behalf of or in the name of the other party.
55. RELEASE UNMHSC REGENTS. The Contractor shall, upon final payment of the amount due under the contract release Regents of the University of New Mexico Hospitals, their officers and employees and the State of New Mexico from liabilities, claims and obligations whatsoever arising from the contract. The Contractor agrees not to purport to bind the University of New Mexico Hospitals or the State of New Mexico to any obligation not assumed in the contract by the Regents of the University of New Mexico Hospitals or the State of

contracted price. Such amount will be limited to Seller's actual cost, and may not include anticipated profits. The University shall not be liable for consequential damages. The University may by written notice terminate any resultant Purchase Order/Agreement in whole or in part for Seller's default if Seller refuses or fails to comply with the provisions of a resultant Purchase Order/Agreement or fails to make progress so as to endanger performance and does not cure such failure within a reasonable period of time. In such event, the University may otherwise secure the materials, supplies or services ordered, and Seller shall be liable for damages suffered by the University thereby, including incidental and consequential damages. If after notice of termination, the University determines Seller was not in default, or if Seller's default is due to failure of the University, termination shall be deemed for the convenience of the University. The rights and remedies of the University provided in this paragraph shall not be exclusive and are in addition to any other rights and remedies provided by law or under a resultant Purchase Order/Agreement as used in this paragraph, the word "Seller" includes Seller and Seller's sub-supps14f10.00048>390055>-160 612 792 reW* nBT/F1 10.08 Tf1 0 0 1 183.19 584.09 Tm0 g0 G(s)8(up

EXHIBIT J

ORGANIZATIONAL REFERENCE QUESTIONNAIRE FOR:

 (Name of Offeror)

This form is being submitted to your organization for completion as a business reference for the company listed above.

For questions or concerns regarding this form, please contact the UNMHSC Procurement Specialist listed above. When contacting us, please include the Request for Proposal number listed at the top of this page.

Organization providing reference	
Contact name and title/position	
Contact telephone number	
Contact e-mail address	
Project description	
Project dates (starting and ending) Identify the length of time services were provided for. Include specific reason(s) why the organization is you (if applicable);	
Technical environment for the project (i.e., Software applications, Internet capabilities, Data communications, Network, Hardware)	

QUESTIONS:

- Briefly describe in what capacity have you worked with this Offeror in the past?
- How would you rate the Offeror’s knowledge and expertise regarding the purpose of this RFP?
 Excellent Satisfactory Unsatisfactory Unacceptable

Brief explanation of above rating:

- Was the Offeror required to provide reports to your organization for the project?
 Yes No

If yes, what is your level of satisfaction with the reports produced by the Offeror?

Very Satisfied Satisfied Not Satisfied Unacceptable

Brief explanation of above rating:

EXHIBIT K INFORMATION SYSTEMS SECURITY PLAN INFORMATION

The UNMHSC Information Security Plans are to be developed and documented for IT systems, as per the UNMHSC' Information Technology Security Procedures. This template is to be used as a guide in developing individual security plans for new and changing application and infrastructure systems. All projects must also be placed into the Online Request System (ORS) for project prioritization, development and resource review. Purchases, Contracts and Implementation of new IT assets will not move forward without the completion of an IT Security Plan.

Note to our vendors: your equipment, applications, databases, etc. end up on our environment. All of these must be reviewed for proper resources, security, backup, etc. You must work with the team or project leader to complete the questions below for the most effective and timely implementation.

The IT Security Plan answers start with the data flow diagram. Without an understanding how the system works and where the application, system or database resides and how the users and support access and support the system is very difficult to answer the following questions.

Note: For confidential or Restricted Data outsourcing the UNMHSC requires all available third party security certifications/attestations (preferably based on standards such as: (ISO 27002, HITRUST, NIST 800-53, SSAE-16 SOC 2, or equivalent) from the vendor that are applicable to the service / application under consideration. For payment card hosting, PCI DSS attestation and reports will be required.

- If necessary, the vendor can submit a redacted copy of certifications to safeguard sensitive information.
- The UNMHSC reserves the right to request and review the vendor's third party certifications/attestations annually.
- Any vendor who also partners with third parties that create, use, transmit, receive or store the UNMHSC data are required to provide independent third party security certifications/attestations.