

**ARIZONA DEPARTMENT OF ECONOMIC SECURITY
REQUEST FOR QUOTATIONS (RFQ) - Services
SPECIAL INSTRUCTIONS TO OFFERORS
Telephone Answering Services**

- 1.0 QUOTE SUBMITTAL:** Offerors shall comply with all submittal requirements as stated in this document. Failure to submit the documents specified in **4.0 SUBMITTAL REQUIREMENTS** may have a negative impact on the evaluation of the offer and may affect an Offeror's susceptibility for award.
- 1.1 QUESTIONS RELATED TO THIS SOLICITATION:** All questions related to this solicitation shall be submitted in ProcureAZ on the **Q&A tab no later than three (3) days prior to Bid Opening date and time.**
- 1.1.1** ADES reserves the right to respond to questions as an Amendment to the solicitation, to respond to all questions as a group through an Amendment to the solicitation, or to respond in ProcureAZ on the Q&A tab.
- 1.1.2** For instructions on submitting questions in ProcureAZ see <https://procure.az.gov/bsol/> and click on the appropriate link for Quick Reference Guides and Step-by-Step Guides.
- 1.2 SMALL BUSINESS:** In accordance with A.A.C. R2-7-D302 Solicitation – Request for Quotation, this procurement is restricted to small businesses.
1. A small business is one that, including its affiliates, is independently owned and operated, is not dominant in the type of business it conducts, and which employs fewer than 100 full-time employees or which has gross revenues of \$4 million or less.
 2. The Offeror shall certify on the RFQ Offer and Acceptance form its status as a small business.
 3. Notwithstanding, the State's intent to award to a small business, the State reserves the right to determine that it is impractical to award the contract to a small business in accordance with A.A.C. R2-7-D302 and to award the contract to a non-small business Offeror.
- 1.2.1** In accordance with A.R.S. 41-2533(G), the contract shall be awarded to the lowest responsible and responsive bidder whose quote conforms in all material respects to the requirements and criteria set forth in the request for quotation.
- 1.3 FUNDING:** A contract resulting from this solicitation will not exceed \$100,000 for all contract periods
- 1.4 OPENING:** Offers received by the due date and time will be opened online and the name of each Offeror will be publicly available. Offers will not be subject to public inspection until after contract award
- 1.5 VENDOR REGISTRATION:** Update all fields of the ProcureAZ Vendor Registration ensuring that the ProcureAZ registration matches the legal name on the Arizona Substitute W9 and that name matches the name the vendor is registered with at the Internal Revenue Service (<http://spo.az.gov/ProcureAZ/default.asp>).
- 1.6 ACCEPTABLE FORMATS:** All documents submitted in response to this solicitation shall be submitted in the ProcureAZ e-procurement system on the forms and in the acceptable format specified in the RFP. Acceptable document formats include .DOC and .DOCX (Microsoft Word), .XLS and .XLSX (Microsoft Excel), .PPT and .PPTX (Microsoft PowerPoint) and .PDF (Adobe Acrobat). Naming of the file shall conform to the name specified in the Instructions. Do not add any information in the Description line when uploading documents. Do not change the name in the File Name when uploading documents, keep the name as it self-populates.
- 1.7 ProcureAZ SUBMITTAL:** Offers in response to this solicitation shall be submitted in the State's eProcurement system, PROCUREAZ (<https://procure.az.gov>). Be advised that utilizing ProcureAZ requires a certain level of technical competency that should be considered when selecting staff to work in the system. The decisive submission of an offer in ProcureAZ is essential if the State is to receive and evaluate the offer.
- 1.7.1** Offers shall be received before the date/time listed in the solicitation's 'Bid Opening Date' field. Offers submitted outside ProcureAZ, or those that are received after the date/time stated in the 'Bid Opening Date' field, will be rejected. Questions in this regard shall be directed to the Procurement Officer or to the PROCUREAZ Help Desk, procure@azdoa.gov or 602-542-7600.
- 1.7.2** **In addition to any submission requirements of the ProcureAZ system**, attachments for this quote shall be submitted as stated in these ADES Special Instructions to Offerors. Failure to include the requested information

may have a negative impact on the evaluation of the offer. For instructions on submitting quotes in ProcureAZ see: <https://procure.az.gov/bs/> and click on the appropriate link for Quick Reference Guides and Step-by-Step Guides.

- 1.7.3 ProcureAZ will not save information entered directly on the ProcureAZ Attachments. Offerors shall copy ProcureAZ Attachments to the Offerors' computer, save the information entered, and submit the completed information as a new, appropriately re-named Attachment in ProcureAZ.
- 1.8 **OPENING:** Offers received by the due date and time will be opened online and the name of each Offeror will be publicly available. Offers will not be subject to public inspection until after contract award
- 1.9 **CONFIDENTIAL INFORMATION AND TRADE SECRET:** If the Offeror believes a portion of the quote contains information that should be withheld from public review, the Offeror shall identify **in ProcureAZ the document as confidential by clicking on the Confidential Box after the document is added as an Attachment.** The information identified as confidential shall not be disclosed until the ADES Chief Procurement Officer makes a written determination. Historically, only information which is patented, copyright protected, a trade secret, or proprietary has been deemed as confidential. The following will not be considered as confidential:
- 1.9.1 Rates
- 1.10 **EXCEPTIONS TO TERMS AND CONDITIONS:** If the Offeror is requesting exceptions to Terms and Conditions, in addition to submitting in ProcureAZ as stated in the Uniform Instructions to Offerors Section C.3, Offeror shall submit exceptions to the ADES Office of Procurement General Mailbox email address: eProcurement@azdes.gov no later than seven (7) days prior to Bid Opening date and time. Submittal shall include:
- 1.10.1 Offeror name
- 1.10.2 Contact information
- 1.10.3 Solicitation number
- 1.11 **PANDEMIC PLANNING CHECKLIST:** In accordance with the ADES Special Terms and Conditions, Contractors are required to have a written plan that illustrates how the Contractor shall perform up to the contractual standards in case of a pandemic. The attached **Exhibit A, Contractor Pandemic Planning Checklist**, is an example that may be used by the Contractor in identifying key succession and performance planning components, alternative methods to ensure that services or products are in the supply chain, and an up-to-date list of company contacts or organizational chart should a pandemic be declared.
- 1.12 **PERSONS WITH DISABILITIES:** Persons with a disability may request a reasonable accommodation, such as a sign language interpreter, by contacting the Solicitation contact person. Requests shall be made as early as possible to allow time to arrange for the accommodation.
- 1.13 **Definition of Key Words Used in the RFQ**
- Shall, Must: Indicates a mandatory requirement. Failure to meet these mandatory requirements may result in the rejection of a quote as non-responsive.
- Should: Indicates something that is recommended but not mandatory. If the Offeror fails to provide recommended information, the State may, at its sole option, ask the Offeror to provide the information or evaluate the quote without the information.
- May: Indicates something that is not mandatory but permissible.
- 2.0 EVALUATION**
- 2.1 In accordance with the A.R.S. § 41-2533. Competitive Sealed Bidding, award shall be made to the [small] business determined to be the most advantageous to the State in accordance with the evaluation factors identified below. The evaluation factors are listed in their relative order of importance.
- Evaluation Criteria 1: Rates
- 2.2 Exceptions to the Terms and Conditions, as stated in the Uniform Instructions Section C.3, will impact an Offeror's susceptibility for award. See Section 1.9 Exceptions to Terms and Conditions.

- 2.3 Attempts to reiterate the Offeror's qualifications/experience, responding "we will comply" or providing vague responses will have a negative impact on the evaluation.

3.0 **RATES**

3.1 ITEMS TAB IN ProcureAZ

3.1.1 The Offer is to complete the Items tab in ProcureAZ as follows:

1. One (1) Unit equals One (1) Month of Scheduled Telephone Answering Services. Unlimited monthly telephone calls received by the Contractor during all scheduled time periods: Monday through Friday from 5:00 PM to 8:00 AM Arizona time and twenty-four (24) hours per day on Saturdays and Sundays including State holidays, and the forwarding of all requests for Prior Authorizations and other requests related to health care services to the Division's On-Call Staff.
2. One (1) Unit equals One (1) Hour of Authorized Non-Scheduled Telephone Answering Services. Unlimited telephone calls received by the Contractor during a sixty (60) minute period as authorized by the Division, and the forwarding of all requests for Prior Authorizations and other requests related to health care services to the Division's On-Call Staff.

3.1.2 The Offeror is to use the drop-down to change the following fields from the default settings to "blank" on the Vendor General Tab:

- Payment Terms
- Freight Terms
- Shipping Method and
- Shipping Terms

3.1.3 Do not enter an Alternative Description

3.1.4 Do not enter Taxes

4.0 **SUBMITTAL REQUIREMENTS:** Failure to complete and submit the documents specified below may have a negative impact on the evaluation of the offer and could result in the offer being determined non-susceptible for award of a contract.

4.1 **REQUIRED DOCUMENTS**

4.1.1 A completed and signed **RFQ Offer and Acceptance Form**. **A physical address matching the Offeror's ProcureAZ registration is required. If you are using your SSN, as your Federal Employer Identification Number, leave the Federal Employer Identification No. blank.** Name the attached file in Procure AZ: **Offer and Acceptance**

4.1.2 A signed and dated **Arizona Department of Economic Security Health Insurance Portability Act of 1996 – HIPAA and Health Information Technology for Economic and Clinical Health Act of 2009 – HITECH Business Associate Agreement**. Name the attached file in ProcureAZ: **Offer Attachment 01 Business Associate Agreement**

4.1.3 Submit a complete **Facility Location Chart** form indicating each Office where the Offeror proposes to administer services. Name the attached file in ProcureAZ: **Offer Attachment 02 Facility Location Chart** Complete the chart as follows:

1. *Name of Facility, Physical Address, Mailing Address, Primary Phone and Fax Numbers where the Service Will Be Provided:* List the name, physical address, mailing address if it is different than the physical address, phone and fax number of each facility at which the service will be provided, contact person and contact person's email address. The name and address of any subcontractor facility where services will be provided must also be included in this listing.
2. *Sub:* Designate any subcontractor facility by placing a check mark in the "SUB" Column across from the facility name and address.
3. *Languages the Service is Provided in:* List all languages that the service will be provided in.
4. *Days and Hours of Operation:* List the days and hours during which the service is available.
5. *Contact Name and Telephone Number for the Division to Request Non-Scheduled Service:* List the Contact Name and Telephone Number for the Division to Request Non-Scheduled Service.

4.2 **BASIS OF AWARD DOCUMENTS**

4.2.1 Offerors may be requested to submit the following documents prior to the time of contract award. Failure to submit the additional requested documents may have a negative impact on the selection of the Offeror.

4.2.2 **Insurance Requirements:**

4.2.2.1 **Offeror Insurance:** Submit valid certificates of insurance from the Offeror's Insurer or Producer indicating coverage in the minimum amounts stated in the ADES Special Terms and Conditions. **Attachment 03**

4.2.2.2 **Subcontractor Insurance:** In accordance with ADES Special Terms and Conditions, all subcontractors are required to provide adequate coverage in the minimum amounts stated.

4.2.3 **Certification Regarding Lobbying; Attachment 04**

4.2.4 **Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion Lower Tier Covered Transitions; Attachment 05**

4.2.5 Sole Proprietor Waiver or Independent Contractor Agreement: Determine if completion of either of the forms is applicable depending on the Offeror's business type;

4.2.5.1 Sole Proprietor Waiver; **Attachment 06** (if applicable)

4.2.5.2 Independent Contractor Agreement; **Attachment 07** (if applicable)

4.2.6 The Department has determined that a Data Sharing Request/Agreement is required to be executed when a contract is awarded. **Exhibit B** is the **ADES Data Sharing Request Agreement**. No action on behalf of the Offeror is required at this time. If you are awarded a contract, you will be required to complete this form and submit it to the Designated ADES Program staff prior to any work commencing or data shared.

5.0 The Offeror may use the following **Offeror Submittal Checklist** to verify that documents have been completed, properly named, and up-loaded to ProcureAZ:

<input type="checkbox"/>		Offer and Acceptance form
<input type="checkbox"/>	Attachment 01	Business Associate Agreement
<input type="checkbox"/>	Attachment 02	Facility Location Chart
		BASIS OF AWARD DOCUMENTS
	Attachment 03	Certificate of Insurance
	Attachment 04	Certification Regarding Lobbying
	Attachment 05	Certification Regarding Debarment
	Attachment 06	Sole Proprietor Waiver (if applicable)
	Attachment 07	Independent Contractor Agreement (if applicable)

The following was completed and saved in ProcureAZ (Not added as an attachment)

☐ Items Tab

6.0 **QUOTE OPENING**

6.1 Quotes shall be opened at the due date and time in accordance with the ProcureAZ electronic system.

7.0 **DEBRIEFING**

7.1 After contract award the Offeror is encouraged to ask questions in order to clarify or resolve any concern arising from this solicitation or contract award. The primary goal is to answer the Offeror's questions and concerns at the lowest administrative level. Experience has demonstrated that most issue may be successfully resolved at this level and it is therefore preferable to more formal procedures. Questions should be directed to the DES solicitation contact person.

8.0 **PROTESTS**

8.1 In addition to the Uniform Instructions to Offerors "Protests" section, the following is added: Any protests must be filed with the Chief Procurement Officer, Department of Economic Security, Office of Procurement -805Z, 1789 W. Jefferson, Phoenix, Arizona 85007. If the protest is being hand delivered, the physical location is in the South Central area of the 4th Floor.