



**REDACTED COPY**

## **Medicaid Direct Billing Services**

**Solicitation # 2021-022**

### **Technical Proposal**

**Proposal Opening: April 26, 2021**

**Prepared for:**

School District Five of Lexington and Richland Counties  
Purchasing Office  
1020 Dutch Fork Road  
Irmo, SC 29063  
Ms. Valerie Smith  
Procurement Official

**Prepared by:**

Eric D. Seguin  
Senior Vice President, Solix, Inc.  
Sivic Solutions Group, LLC  
973-581-7676  
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10 Lanidex Plaza West  
Suite 300  
Parsippany, NJ 07054  
www.sivicsolutionsgroup.com

## 1. COVER LETTER

April 26, 2021

Ms. Valerie Smith  
Procurement Official  
School District Five of Lexington and Richland Counties  
Purchasing Office  
1020 Dutch Fork Road  
Irmo, SC 29063

Re: RFP No. 2021-022, Medicaid Direct Billing Services

Dear Ms. Smith,

Sivic Solutions Group, LLC (“SSG”) is pleased to provide the School District Five of Lexington and Richland Counties (“District”) with our solution to continue to provide software and support for your Medicaid Direct Billing Services program (“Program”). As the District’s current business partner, we have proudly and successfully supported your Program since 2015. SSG possesses the requisite experience and expertise to continue to support the full scope of services requested without the aid of a subcontractor. The following highlights the benefit of SSG’s services and solutions:

- **As your current vendor, SSG is uniquely qualified to provide the District with high-quality program support on day one.** Over the past five years, SSG has provided the District with a high standard of service and program support. We are confident in our ability to continue providing the District with our unique combination of proven systems and procedures to ensure a compliant program. Our national experts will continue to identify strategies for ways to improve the District’s revenue. SSG’s goal is to manage the District’s Program in a manner that increases revenue, adheres to the highest level of program compliance, and minimizes the time of the District’s staff.
- **SSG has decades of experience working on both, direct service claiming and administrative claiming, for the largest districts in the country.** SSG is familiar with the unique challenges the District faces with the Program. SSG has provided several references of districts of similar size to show SSG is adept at working with districts similar to yours. In addition, SSG is proud of our partnerships with close to 100 school districts across the country. This includes 40% of the 10 largest districts in the country.

Eric D. Seguin  
Senior Vice President  
973-581-7676  
Eric.Seguin@solixinc.com



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Suite 300  
Parsippany, NJ 07054  
www.sivicsolutionsgroup.com

- **SSG provides the District with an exceptionally experienced staff specializing in school-based direct service Medicaid reimbursement. This staff is in place supporting the District today.** SSG's staffing plan brings together top Medicaid Specialists who have collectively provided Medicaid recovery services for more than a dozen states and hundreds of school districts. More importantly, SSG is familiar with the District's program based upon our five years of service.
- **SSG provides the District with proven, user-friendly web-based systems that are configured and implemented to meet your needs.** We recognize the importance of service provider time being spent with students, rather than with systems. SSG understands the value of providing the tools to providers and administrators to manage your school-based billing program to optimize revenue. To that end, our system meets all of the functional requirements for direct service claiming with an easy-to-navigate and user-friendly interface, while also providing the necessary reporting and business logic to easily manage the District's billing program for peak performance.
- **SSG presents the District a track record of success and prodigious value.** SSG prides itself on high-quality customer service and products, while increasing our clients' Medicaid reimbursements and maintaining a strict adherence to laws and regulations. SSG has a track record of reliable claiming for the School District Five of Lexington and Richland Counties.

Thank you for your consideration of our proposal. Please do not hesitate to contact me if you have any questions regarding our offer.

Sincerely,

A handwritten signature in blue ink that reads 'Eric D. Seguin'.

Eric D. Seguin  
Senior Vice President, Solix, Inc.

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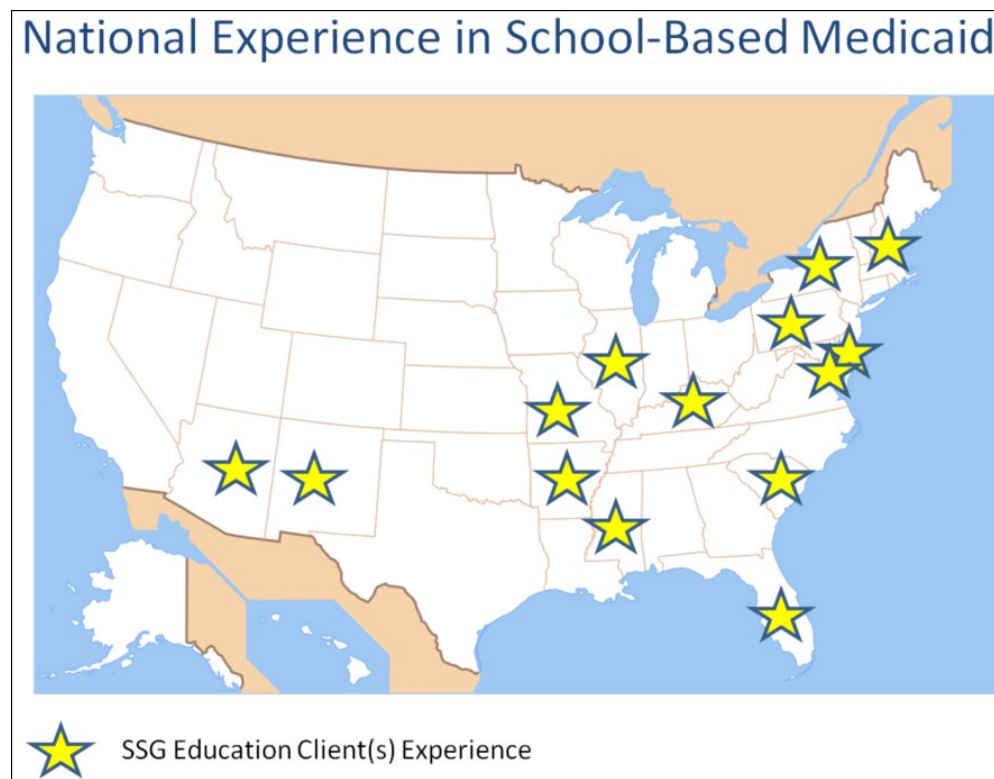
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### 3. COMPANY PROFILE

*a) State whether your firm is local, regional, or national*

#### **A National Business Partner**

Sivic Solutions Group, LLC (“SSG”) is a consulting firm with an esteemed national reputation in Medicaid. SSG and our parent company, Solix, Inc. (“Solix”) hold major client contracts across the United States. This includes our service as the long-time Medicaid biller for the School District Five of Lexington and Richland Counties (“District”). Our national experience in school-based Medicaid is illustrated below.



*b) Provide the location of the office from which the work is to be performed and the number of partners, managers, supervisors, seniors, and other professional staff employed at that office. One company representative must be clearly assigned to the District as the point of contact for all performance and contract issues. Include representative’s name, telephone number, email address and any other appropriate means for contact for the representative.*

## **SSG’s Primary Office and Company Contact (Contains Confidential Information)**

### **Primary Office**

SSG will continue to perform all work related to the District’s Program primarily from the following office:

414 Trenton Rd  
Utica, NY 13502

The table below provides additional details about the staff at this location.

<b>Office Staff</b>	<b>Number of Personnel</b>
Executive-/Senior-Level Officials and Managers	1
First-/Mid-Level Officials and Managers	15
Professionals	6
Administrative Support Workers	3

### **Company Contact**

The District’s contact at SSG for all performance and contractual issues is as follows.

[REDACTED]  
[REDACTED]  
10 Lanidex Plaza West, Suite 300  
Parsippany, NJ 07054

[REDACTED]  
[REDACTED]

Email: [Eric.Seguin@solixinc.com](mailto:Eric.Seguin@solixinc.com)

## 4. BACKGROUND AND ORGANIZATIONAL INFORMATION SCHEDULES

*a) Briefly furnish your organization’s history, legal form (sole proprietorship, partnership, corporation and State of Incorporation), number and location of offices, number of employees, days/hours of operation and other pertinent data.*

### Company Overview

Sivic Solutions Group, LLC (“SSG”), a Solix, Inc. company, is Limited Liability Company. Founded in 1998, SSG provides consulting and systems services to state health and human service agencies, child welfare agencies, and school districts across the country. In 2017, SSG was purchased by Solix, Inc. (“Solix”), a 100% U.S.-based provider of business process outsourcing services, technology solutions, and Business Process as a Service (BPaaS) for mission critical government and commercial programs.

*As expert providers of specialized public benefit programs, SSG and Solix combine our services to offer our customers a unique suite of solutions that improve the lives of millions of individuals and families each year.*

Solix and SSG are headquartered in Parsippany, NJ and SSG’s Operations Center is located in Utica, NY. The SSG Help Desk is available for administrative and technical support via telephone from 8 a.m. to 5 p.m. Eastern Time, Monday through Friday, excluding state and federal holidays. Our Medicaid Consultants are geographically located in close proximity to our clients. With more than 1,600 staff members combined, Solix and SSG hold major client contracts across the United States. The below map illustrates our footprint of major client contracts.



material changes to this coverage. For more information, please see *Appendix B: Certificate of Liability Insurance*.

***d) Describe how your organization is properly licensed, bonded, and/or insured (both fidelity insurance and errors and omissions insurance).***

## **Licensing, Bonding, and Other Insurance**

SSG has adequate error and omission insurance to cover losses that might incur as a result of dishonest, criminal, fraudulent, or malicious acts. For more information, please see *Appendix B: Certificate of Liability Insurance*.

*e) Certify that your organization and any principal of the organization is not prohibited, suspended or otherwise declared ineligible to contract or provide any services required hereunder by any federal, state, or local public agency.*

**Eligibility to Provide Services (Contains Confidential Information)**

SSG and its designated principal, Eric D. Seguin, Senior Vice President, Solix, Inc., are not prohibited, suspended, or ineligible to contract or provide services required by any federal, state, or local public agency.

*f) Provide current (or equivalent) Dun and Bradstreet rating, if available.*


SSG's current Dun and Bradstreet rating is 1R3.

## **SECTION 1**

*Cover Page – Page 1 of this Solicitation Document*

### **Solicitation Document – Page 1**

Please see below for page 1 of Solicitation #2021-022.

	<b>District Five of Lexington and Richland Counties</b>  <b>Request for Proposals</b>	Solicitation #	2021-022
		Date Issued	3/29/2021
		Procurement Official	Valerie Smith
		Phone	<b>(803) 476-8182</b>
		E-Mail Address	<b>D5bids@lexrich5.org</b>

DESCRIPTION	Medicaid Direct Billing Services
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*The Term "Offer" Means Your "Bid" or "Proposal"*

SUBMIT OFFER BY	April 26, 2021 @ 11:00 am
QUESTIONS MUST BE RECEIVED BY	April 9, 2021 @ 2:00 pm
NUMBER OF COPIES TO BE SUBMITTED	<b>On-Line Submission Only and four (4) copies mailed (marked 'copy')</b>

**Offers must be submitted in a sealed package. Solicitation number & Opening Date must appear on package exterior.**


SUBMIT YOUR SEALED OFFER TO:

<b>District Five of Lexington and Richland Counties Purchasing Office 1020 Dutch Fork Road Irmo, SC 29063</b>
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<b>CONFERENCE TYPE:</b> N/A <b>DATE &amp; TIME:</b> (EST) As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions	<b>LOCATION:</b> Not Applicable
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<b>AWARD &amp; AMENDMENTS</b>	The award, this solicitation, and any amendments will be posted at the following web address: <a href="https://www.lexrich5.org/Page/25417">https://www.lexrich5.org/Page/25417</a>
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You **must** submit a signed copy of this form with Your Offer. By submitting a bid or proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of sixty (60) calendar days after the Opening Date.

<b>NAME OF OFFEROR</b> (Full legal name of business submitting the offer) Sivic Solutions Group, LLC	<b>OFFEROR'S TYPE OF ENTITY:</b> (Check one) <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation (tax-exempt) <input type="checkbox"/> Corporate entity (not tax-exempt) <input type="checkbox"/> Government entity (federal, state, or local) <input checked="" type="checkbox"/> Other Limited Liability Company (See "Signing Your Offer" provision.)
<b>AUTHORIZED SIGNATURE</b>  (Person signing <b>must</b> be authorized to submit binding offer to enter contract on behalf of Offeror named above.)	
<b>TITLE</b> (Business title of person signing above) Senior Vice President, Solix, Inc.	
<b>PRINTED NAME</b> (Printed name of person signing above) Eric D. Seguin	<b>DATE SIGNED</b> 04/22/2021

Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror above. The entity named as the Offeror **must** be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, *i.e.*, a separate corporation, partnership, sole proprietorship, etc.

<b>STATE OF INCORPORATION</b> (If Offeror is a corporation, identify the state of Incorporation.)	<b>TAXPAYER IDENTIFICATION NO.</b> 16-1555030
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**COVER PAGE**

***Contact Information & Acknowledgement of Amendment(s) – Page 2 of this Solicitation Document and also a Table of Contents identifying the placement of enclosed documents.***

## **Solicitation Document – Page 2**

Please see below for page 2 of Solicitation #2021-022.

PAGE TWO  
(Return Page Two with Your Offer)

<b>HOME OFFICE ADDRESS</b> (Address for Offeror's home office / principal place of business)  Sivic Solutions Group, LLC 10 Lanidex Plaza West, Suite 300 Parsippany, NJ 07054	<b>NOTICE ADDRESS</b> (Address to which all procurement and contract related notices should be sent.)  Sivic Solutions Group, LLC 10 Lanidex Plaza West, Suite 300 Parsippany, NJ 07054								
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Area Code:</td> <td style="width: 25%;">Number:</td> <td style="width: 15%;">Extension:</td> <td style="width: 45%;">Facsimile:</td> </tr> <tr> <td style="text-align: center;">973</td> <td style="text-align: center;">581-7676</td> <td></td> <td style="text-align: center;">973-599-6540</td> </tr> </table>		Area Code:	Number:	Extension:	Facsimile:	973	581-7676		973-599-6540
Area Code:	Number:	Extension:	Facsimile:						
973	581-7676		973-599-6540						
E-Mail Address: Eric.Seguin@solixinc.com									

<b>PAYMENT ADDRESS</b> (Address to which payments will be sent.)  Sivic Solutions Group, LLC PO Box 645659 Pittsburgh, PA 15264-5254  <input type="checkbox"/> Payment Address same as Home Office Address <input type="checkbox"/> Payment Address same as Notice Address (check only one)	<b>ORDER ADDRESS</b> (Address to which purchase orders will be sent)    Order E-Mail Address:  <input type="checkbox"/> Order Address same as Home Office Address <input checked="" type="checkbox"/> Order Address same as Notice Address (check only one)
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**ACKNOWLEDGMENT OF AMENDMENTS:** Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue.

Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date
One	4/13/2021						

DISCOUNT FOR PROMPT PAYMENT	10 Calendar Days (%)	20 Calendar Days(%)	30 Calendar Days (%)	_____ Calendar Days (%)
NA	_____	_____	_____	

**MINORITY PARTICIPATION**

Please answer the following question:

1. Are you certified as a MOB/WOB (minority-owned business/woman-owned business) by the State of South Carolina?  
 Yes  No  
 If yes, provide certification number: \_\_\_\_\_.

## SECTION 2 – RESPONSE TO PROPOSAL

*a) Offeror shall provide a detailed explanation regarding how the Scope of Work will be performed and how all specifications will be met. In this section to discuss those attributes of their proposal that clearly and succinctly states how the Contractor proposes to meet or exceed the requirements of the RFP if they are selected as the Contractor. Offeror shall describe in detail how the configuration and implementation of the Medicaid Direct Billing and Claiming services project will be accomplished by August 1, 2021.*

### **SSG’s Proven Approach (SOW #1-7) (Contains Confidential Information)**

SSG has the expertise, experience, and resources to satisfy all of the District’s Scope of Work requirements below.

Requirement	SSG Fully Complies & Currently in Place
1. Offeror shall provide Medicaid Third Party Liability processing services under the terms and conditions specified in the District’s contract with the South Carolina Department of Health and Human Services ( <a href="https://www.scdhhs.gov/">https://www.scdhhs.gov/</a> ).	√
2. Provide full service documentation capabilities for all Health-Related Services provided to students with enough space to log clinical documentation Offeror shall provide Medicaid consultation services which shall consist of technical assistance on Medicaid School-Based Services policy and procedures, Medicaid reimbursement and billing services (to include the collection and billing of direct services), on-site staff training and development, and onsite records review for contractual and policy compliance. Telephone availability of consultants shall be available. Technical assistance, training, and records review services (to include archived records) shall be scheduled and available upon the District’s request.	√
3. Offeror shall provide a quality assurance plan describing how it will ensure the quality of services being provided, how inappropriate services will be identified, and how identified problems will be corrected.	√
4. Offeror shall provide a response and/or plan that addresses challenges or issues that may arise that could interfere with the Contractor’s ability to fulfill any requirements or deliverables indicated in the Scope of Work or the terms and conditions.	√
5. The offeror must prepare and process at no additional charge; claims adjustments or claims that needs to be reprocessed to correct errors.	√
6. Offeror shall be available to provide assistance and/or necessary reports for any Medicaid audits which may be conducted by the SC Department of Education or the SC Department of Health and Human Services.	√

Requirement	SSG Fully Complies & Currently in Place
<p>7. Offeror shall provide the following reports at least quarterly:</p> <ul style="list-style-type: none"> <li>■ a. Summary of all claim lines entered. The report will show by date which provider submitted claims during the quarter. A yearly report shall also be provided.</li> <li>■ b. A report that shall provide details of authorized minutes in comparison to service minutes provided.</li> <li>■ c. A chart which details service time according to provider (time spent in treatment, IEP meetings, etc.).</li> </ul>	√

As your business partner, SSG provides comprehensive Medicaid processing services in compliance with the District’s requirements, as well as those of the South Carolina Department of Health and Human Services. SSG prides itself on quality contract management and preparedness for any issues that may arise. Our approach to planning is designed to ensure that activities are managed, controlled, coordinated, supervised, and continually focused on the District’s goals and objectives.

At SSG, we understand that effective management of the project schedule is of utmost importance to the District. Through careful planning and execution of proven project management strategies, SSG will deliver high-quality services on time and within budget. We have a long, successful history partnering with both small and large client organizations in the delivery of many projects of similar size and scope to the District’ Medicaid Direct Billing Services project.

### Project Management Methodologies

*SSG’s general management approach is essential in how we form partnerships with our clients and their stakeholders for effective project execution.*

SSG has adopted a core set of principles in managing our projects. These principles have been used by SSG staff members in similar projects and resulted in very successful outcomes and satisfied clients. We focus all employees to these principles and reinforce them during our project reviews. The figure below outlines these principles.



*SSG focus on the key principles of effective project management, resulting in successful projects and satisfied clients.*

The components of each of these principles are further outlined in the table below, describing the key management principles that comprise our Project Management approach.

<b>SSG's Project Management Principles</b>
<b>Access to Project Director &amp; Project Manager:</b> <ul style="list-style-type: none"><li>■ SSG's Project Director and Project Manager are the primary contacts for this project.</li><li>■ The Project Director is responsible for activities between the District and the SSG Team.</li><li>■ The Project Manager has primary responsibility for the SSG Team effort under the contract and will be immediately responsive to the District's questions and concerns.</li></ul>
<b>Access to Corporate Management:</b> <ul style="list-style-type: none"><li>■ Solix and SSG Management/Leadership can also be contacted to discuss any project concerns.</li><li>■ Corporate Management is always available to support the SSG Project Team.</li></ul>
<b>Detailed Upfront Project Planning:</b> <ul style="list-style-type: none"><li>■ Detailed upfront planning is a key factor in successful project management.</li><li>■ SSG will keep the District informed regarding detailed plans and schedules for completing each major milestone and deliverable.</li><li>■ All SSG project staff members have a complete understanding of the Work Plan and schedule.</li><li>■ A Work Plan is used as a baseline against which to report progress.</li><li>■ The Project Manager maintains and updates the Work Plan to reflect changes in the environment or other salient factors.</li></ul>
<b>Timely Delivery of Products and Services:</b> <ul style="list-style-type: none"><li>■ Timely receipt of project deliverables is of paramount importance.</li><li>■ SSG can accommodate ambitious timeframes.</li><li>■ Materials and services to support these timeframes are provided, as warranted.</li></ul>
<b>High-Quality Products and Services:</b> <ul style="list-style-type: none"><li>■ All deliverables go through a two-step approval process, with major deliverables having three approvals.</li><li>■ We will ensure that the District receives products and services that are accurate and current.</li><li>■ The District's satisfaction depends on our providing the best possible service and highest-quality deliverables.</li></ul>
<b>Effective Budgeting and Cost Control:</b> <ul style="list-style-type: none"><li>■ Keen attention to budget is integral to effective project management.</li><li>■ We carefully utilize resources to deliver the best possible services to ensure the best return on the District's investment.</li><li>■ The Project Team's scope of work is continually reviewed to make certain that project objectives remain as priority.</li></ul>
<b>Flexibility in Making Mid-Course Changes:</b> <ul style="list-style-type: none"><li>■ Mid-course changes may be necessary due to unforeseen developments.</li><li>■ The SSG Project Team is flexible in accommodating the District's needs, including if a contract amendment is required.</li></ul>

## SSG's Project Management Principles

- The Project Manager has ready access to Corporate Management/Leadership to make changes in direction with minimal disruption to the District's daily operations.

### Quality and Continuity of Staff:

- Quality and continuity of staff are keys to project success.
- Key personnel will continue in their assigned project roles after the initial stages of the project.
- A back-up plan for management personnel ensures uninterrupted project operations in the event of unforeseen turnover.
- If necessary, we may replace staff with individuals of equal or greater qualifications.

### Responsiveness to Client Concerns:

- The Project Manager and project staff will promptly respond to the District's concerns.
- Responses are constructive and effective in resolving the problem.
- The Project Manager has ready access to other experienced individuals within our organization, as well as Corporate Management/Leadership.

### Effective Management of Staff:

- Hiring well-qualified staff is the first step.
- Activities performed by assigned resources are properly coordinated and managed.
- The Project Manager utilizes effective procedures to ensure the quality and timeliness of all products and services delivered by staff.

## Implementation and Support

*As your long-term partner, SSG has extensive experience successfully supporting the District with your Medicaid Direct Billing Services program. We are ready on Day One of the new contract period with no new system configuration or implementation required.*

The District will benefit from the expertise of SSG's in-house staff, which is comprised of experienced Project Managers, Consultants, Information Systems professionals, and Operations and Administrative personnel. Our staff has years of program, claiming, and industry experience for this project and many other districts across the United States. We have the demonstrated knowledge and experience to support your programs and provide technology solutions that will streamline your processes.

## Quality and Communication Plans

Together, the Quality and Communication Plans support the Work Plan to foster effective project management. The SSG Project Manager uses Quality and Communication Plans in supporting the District. These documents are described below:

- **Quality Plan** – The Quality Plan is created in collaboration between the SSG Project Manager, the SSG Quality Team, and the District. The Quality Plan is utilized to guide the Project Team in assuring that the highest possible quality results are achieved within committed resources, schedule, and budget. SSG’s Project Manager will provide an initial draft Quality Plan to the District’s Project Team during project start-up.
- **Communication Plan** – Open communication and our responsiveness to the District’s concerns as the project proceeds are critical to the project’s success. The SSG Project Manager will develop a Communication Plan which includes items such as agreement on status meetings and reporting, and will detail how communication will occur (i.e., in-person meetings, conference call, email) and frequency of these communications.



## Status Reporting

The SSG Project Manager will continue to coordinate project reporting in accordance with requirements as outlined within the negotiated contract. SSG will meet with the project team regularly during implementation to ensure that project milestones, risks, and action items are clearly communicated to the District. Our status reports will provide a brief snapshot to project leadership as to the overall project health and upcoming tasks.

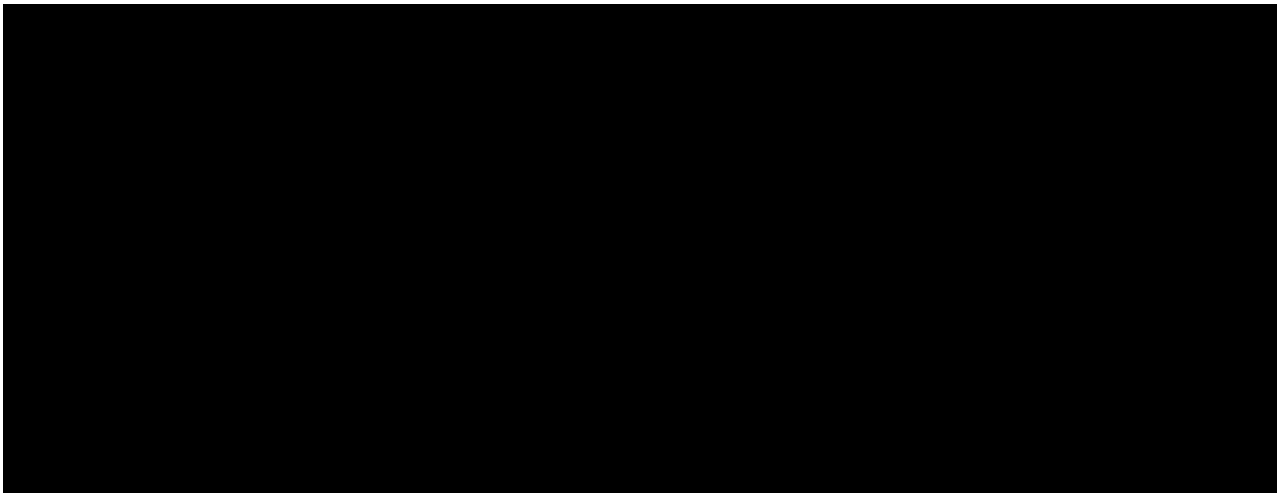
## Project Organization – Medicaid Billing

As your business partner, SSG uses a Project Work Plan (“Work Plan”) for all phases of the District’s project. The Work Plan includes the project administration tasks and the high-level software configuration and implementation tasks that may be needed, as aligned with the required project deliverables. In this section, we also discuss how we propose to develop and maintain open communication between the SSG Project Team and the District’s staff by utilizing a Project Work Plan and regularly scheduled status meetings and reporting through Communication and Quality Plans.

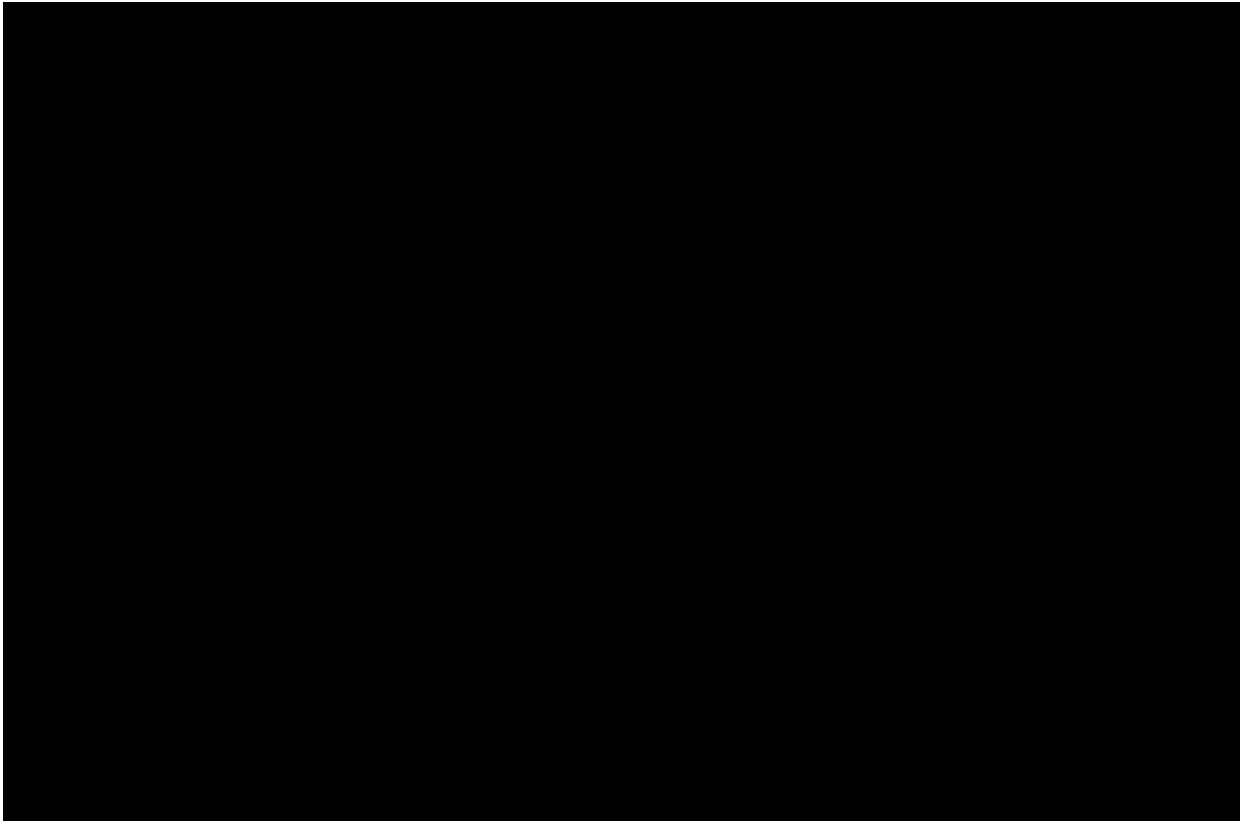
## Project Management Tool

**SSG is always seeking ways to innovate and enhance the client's experience.** We have implemented a best-in-class project management software tool to assist with our project Work Plans. Using this tool, we can share real-time project plan updates with the District's Project Manager and other stakeholders, including project progress and current status of project tasks, deliverables, and issues.

The figures below illustrate how SSG uses the project dashboard to communicate project health to our clients. SSG will leverage the power of this project management tool in support of the new contract with the District.



*SSG will use our project management tool for the District's school-based claiming project.*



*Another example of how SSG uses dashboards to display project status updates to the District.*

***b) Offeror shall describe software capabilities/features including data capture, and eligibility verification. Include sample reports and/or lists of generated reports.***

**Full-Service School-Based Medicaid Claiming Using MAXCapture (SOW #8) (Contains Confidential Information)**

SSG has the experience, expertise, and resources to satisfy all of the District’s Scope of Work requirements below.

Required Feature	Currently Compliant	Configuration Needed	Development Required
<b>The computer software shall include the following features:</b>			
a. A database to maintain consent and referral dates.	√		
b. Ability for the District to maintain provider lists and passwords. The District should have the capability to add/delete providers.	√		
c. A calendar feature which allows the District Administrator to enter holidays so that billing will not be extracted on those dates.	√		
d. Ability to prohibit service notes that were accidentally entered with a weekend service date from extracting.	√		
e. Ability to enter student information one time (such as diagnosis codes and goals), then have that information automatically merge into service notes.	√		
f. Ability to enter notes on all students (not only students who are Medicaid eligible) for the purpose of maintaining therapy data.	√		
g. Ability to prohibit service notes from extracting once a student has received the amount of service minutes designated on his/her IEP.	√		
h. Ability for the Supervisor or Medicaid Clerk to view and approve notes prior to be captured for billing.	√		
i. Ability to update student Medicaid eligibility monthly.	√		
j. Ability to designate the number of service minutes for group therapy and individual therapy based on what is in the student’s IEP. Software to keep track of allocated minutes, then no longer capture services for billing if allocated minutes have been exceeded.	√		

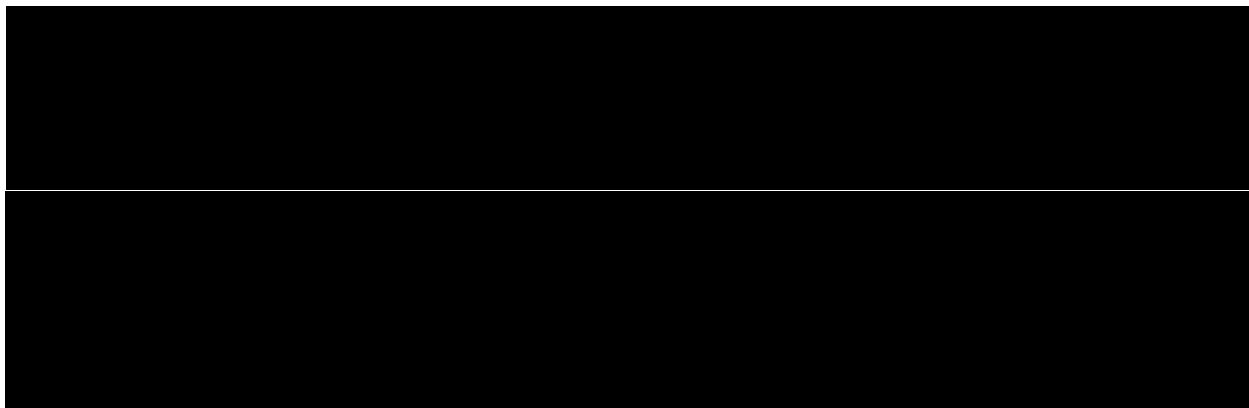
Required Feature	Currently Compliant	Configuration Needed	Development Required
k. Consist of a 90-day alert for therapists to complete a Summary of Progress. This alert shall occur every 90 days from the IEP start date.		√	
l. An online referral option which would give SLP and OT LPHA's the ability to enter a Referral for Evaluation/Treatment and the LPHA to sign electronically.			√
m. Consist of a two-tiered co-signing option for OT, PT, SLP assistant supervision. This would allow the supervising professional to co-sign and the District Medicaid clerk to review and/or approve.		√	

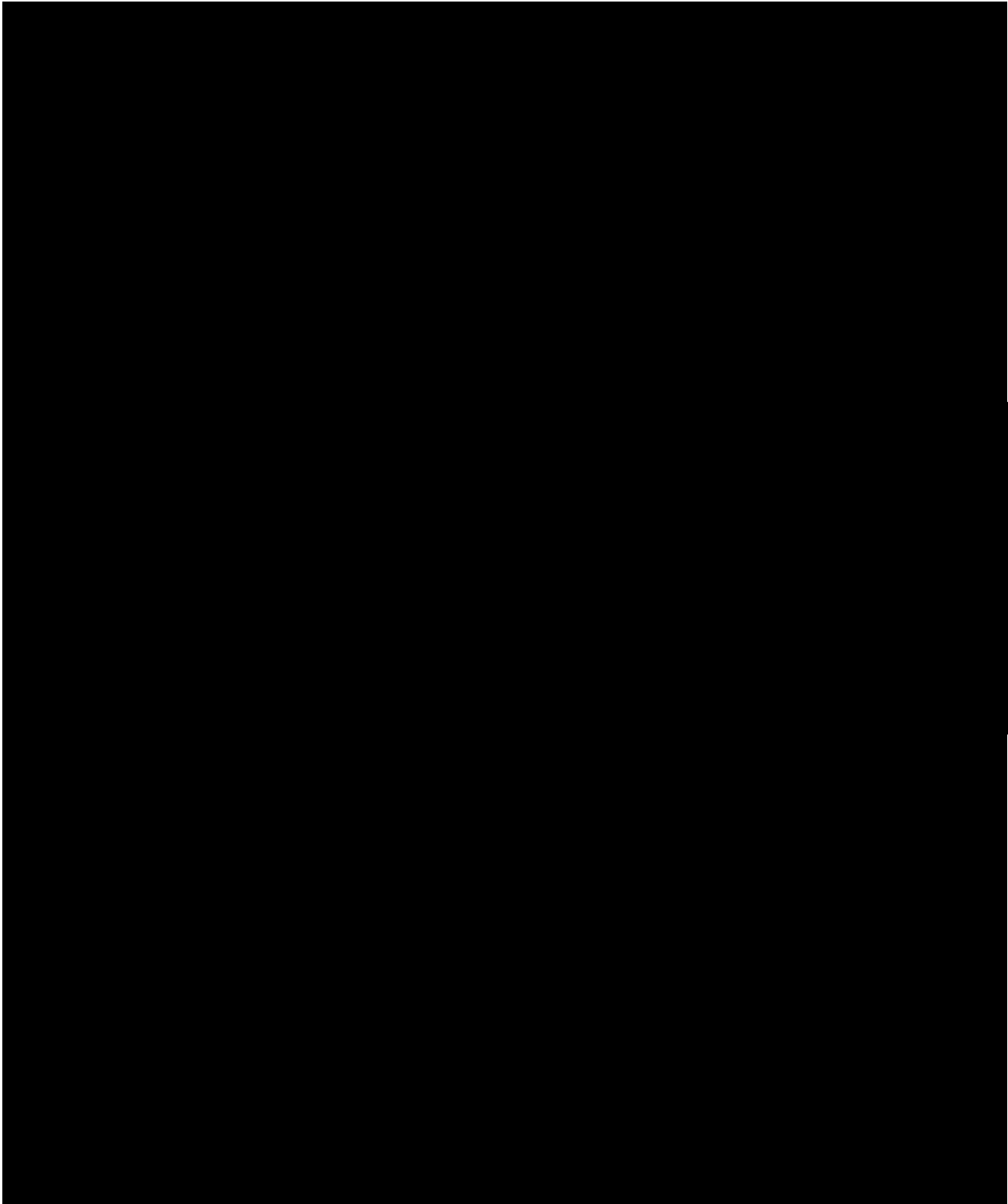
### Medicaid Direct Service Billing Application

SSG offers a comprehensive school-based Medicaid billing and documentation solution that includes claims submission, billing, and reporting services. As noted above, our extensive experience includes more than 75 Medicaid Fee-for-Service (FFS) claiming projects using our proprietary system, MAXCapture. The power of MAXCapture is in its ability to integrate the District's relevant data such as school/student/service/provider data to provide comprehensive reporting, data matching, and data analysis. It is a true district management and tracking product through which your Medicaid claims and reports can be submitted to state agencies.

MAXCapture supports the complete claiming process, which encompasses service capture, reporting, as well as our overall claiming system functionality. MAXCapture supports multiple data capture methods and multiple data sources with all service data being consolidated in our Claiming module. The strength of our system is the flexibility and configurability of the system screens and business rules to easily meet the District's unique requirements.

### Security and Compliance





## *Physical Security of Our Data Center*

SSG has a robust security program that includes a comprehensive set of policies, procedures, and controls that are implemented and managed by our Information Technology, Operations Management, and Compliance Office departments. SSG’s security program is based on laws, regulations, and best practices for the businesses we administer. SSG manages compliance through the use of policies and procedures, internal controls, awareness and training, and monitoring and auditing.

## **System Functions and Capabilities**

The table below provides a summary of various MAXCapture functions and related system capabilities.

Function	System Capability
Therapist/Provider Scheduling Module	Allows service providers to easily create and manage their calendars. Functions include creation of individual schedules, scheduling black-out times, creation of provider master schedules (automated, with manual override), and completion of service entry and documentation from the provider schedule screen.
Student Maintenance	Maintains student demographic information, school enrollment, IEP data, physician authorizations and data about the school district. An audit trail of the student data is maintained to track additions and changes to student records. We can load your student data either from each district’s student information file or from the statewide Student Information System (SIS), if available. We can receive these files in a variety of formats from ASCII to Excel and can upload them to the system based on the frequency required by the district coordinator. Once loaded, the coordinator can maintain the student data through our easy-to-use student information screen.
Claims Submission	<p>Generates and submits the electronic, HIPAA-compliant Medicaid Direct Services claims for Medicaid eligible students receiving special education services. After the services are documented, the Claims Submission module performs multiple edit checks (physician authorization, IEP authorization, Provider NPI, etc.), verifies eligibility, and generates the claim records. The records that are finally selected through these initial edits are then further checked for duplicate services and dates, which if found, are removed.</p> <p>Once the final claims are generated and converted to HIPAA-compliant formats, they are submitted to the State MMIS. This screen has the capability to track the complete history of a claim transaction, from creation to submission to payment, denial, adjustment, or recoupment. Inappropriately denied claims by MMIS can be rebilled, with an audit trail tying the rebilled claim to the original claim.</p>

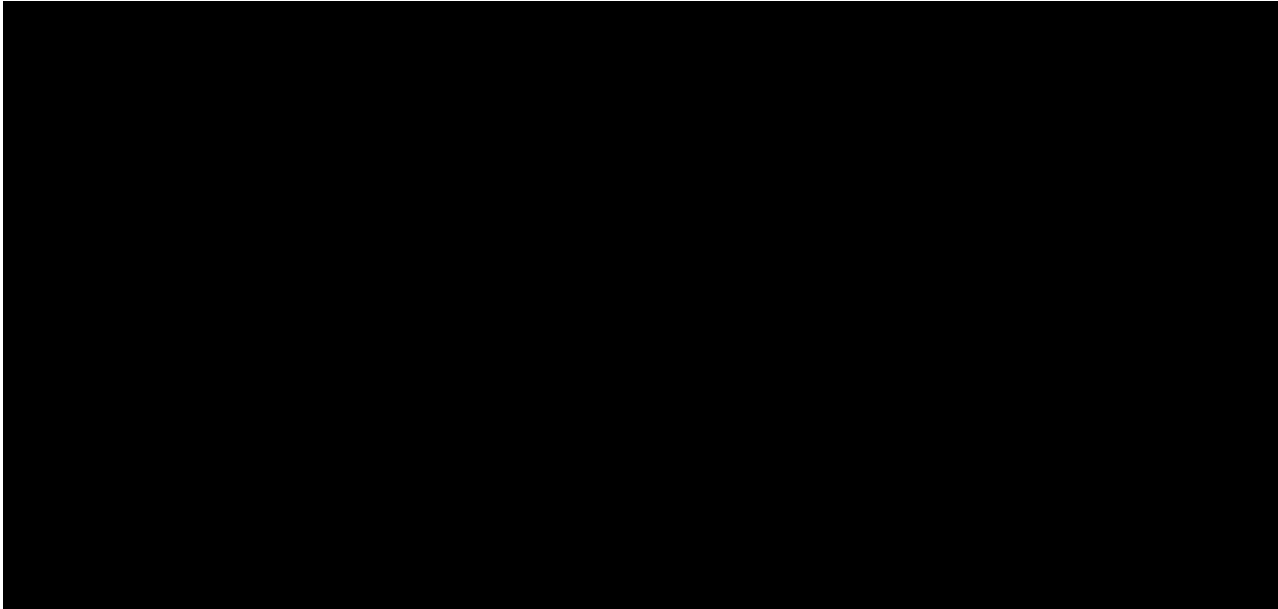
Function	System Capability
Third-Party Liability Processing	<p>Generates and submits electronic claims to other insurance agencies for services provided to students with other insurance. After the services are documented, the Claims Submission module identifies services with private insurance, performs multiple edit checks, and generates the claim records. The records that are finally selected through these initial edits are further checked for duplicate services and dates, which if found, are removed. Once the final claims are generated and converted to insurance agency-specific formats, they are submitted for adjudication.</p> <p>Once the district receives the Explanation of Benefits (EOB), as needed the denied claims can be reprocessed and submitted to Medicaid.</p>
Claim Reconciliation	<p>Captures claim processing results from the electronic remittance advices (RAs) to update each claim with information regarding payment, denial, pending, adjustment, and appropriate reason codes. The management reporting and reconciliation functions provide the ability to post, track, reconcile, and report claim payment status for all claims processed by Medicaid. Control procedures are employed to ensure that claims submitted and accepted by the MMIS have been processed and posted accurately.</p>
Rebill and Follow-Up	<p>Given the complexity of the Medicaid program, it is common for claims to be denied, even when applying the best data entry and billing processes and procedures. Our understanding and experience with Medicaid provide us the unique ability to perform the following functions:</p> <ul style="list-style-type: none"> <li>■ Evaluate claim denials;</li> <li>■ Identify and attempt to correct any discrepancies in the payment of claims;</li> <li>■ Assess denial codes to determine if any Medicaid processing errors have occurred; and</li> <li>■ Determine whether the denied claims can be corrected and resubmitted for processing.</li> </ul> <p>With the entire claim processing and reprocessing managed within MAXCapture, we can provide you with reports on the status of all claims, including those that are resubmitted for payment. Through these reports, we can analyze the causes for denial, processing errors, and if the claims can be corrected and resubmitted.</p>
Management Reporting	<p>Provides easy access to all data stored in the MAXCapture database. It provides management reports of keyed services, services that are delivered, reimbursement status, and financial management reports. Detail and summary reports can be produced by any combination of school, region, provider, discipline, or student. Additional details about the reporting capabilities of MAXCapture are provided in this section of this proposal.</p>

## **MAXCapture Screens**

The following describes and illustrate various MAXCapture screens.

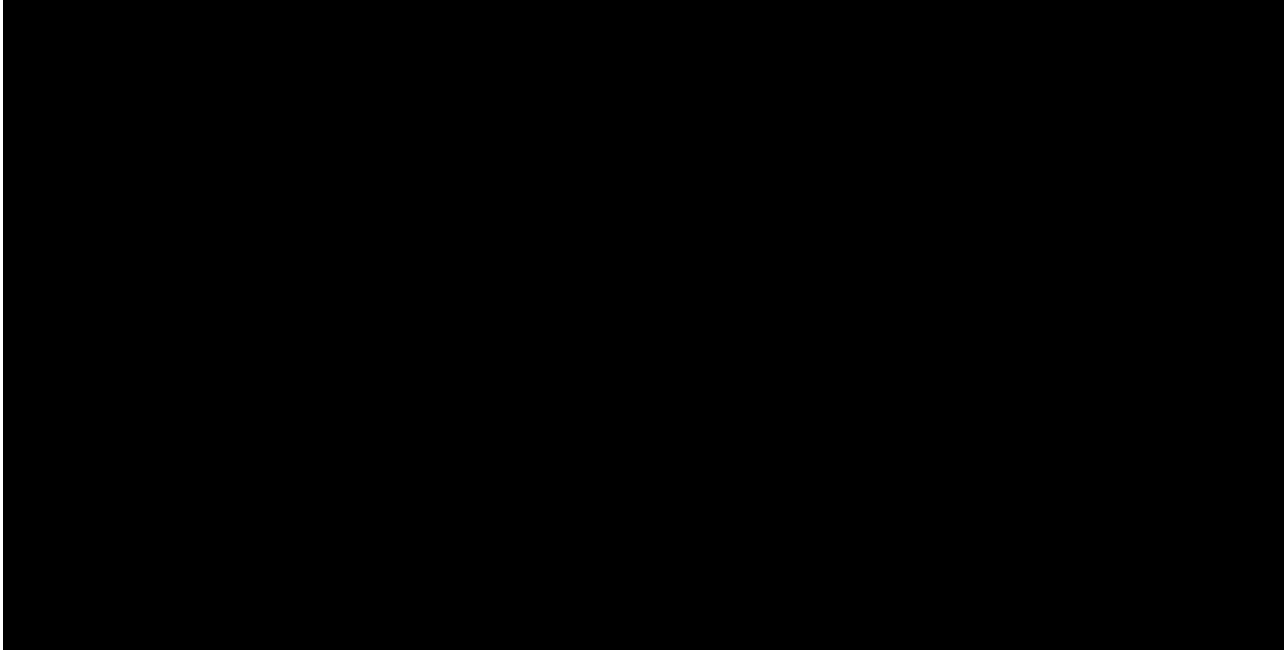
### ***Home Page Screen***

When a provider first logs in, they come to a home page that is tailored to show a snapshot of the students for whom they provide services, as well as other important information about the services they are providing.



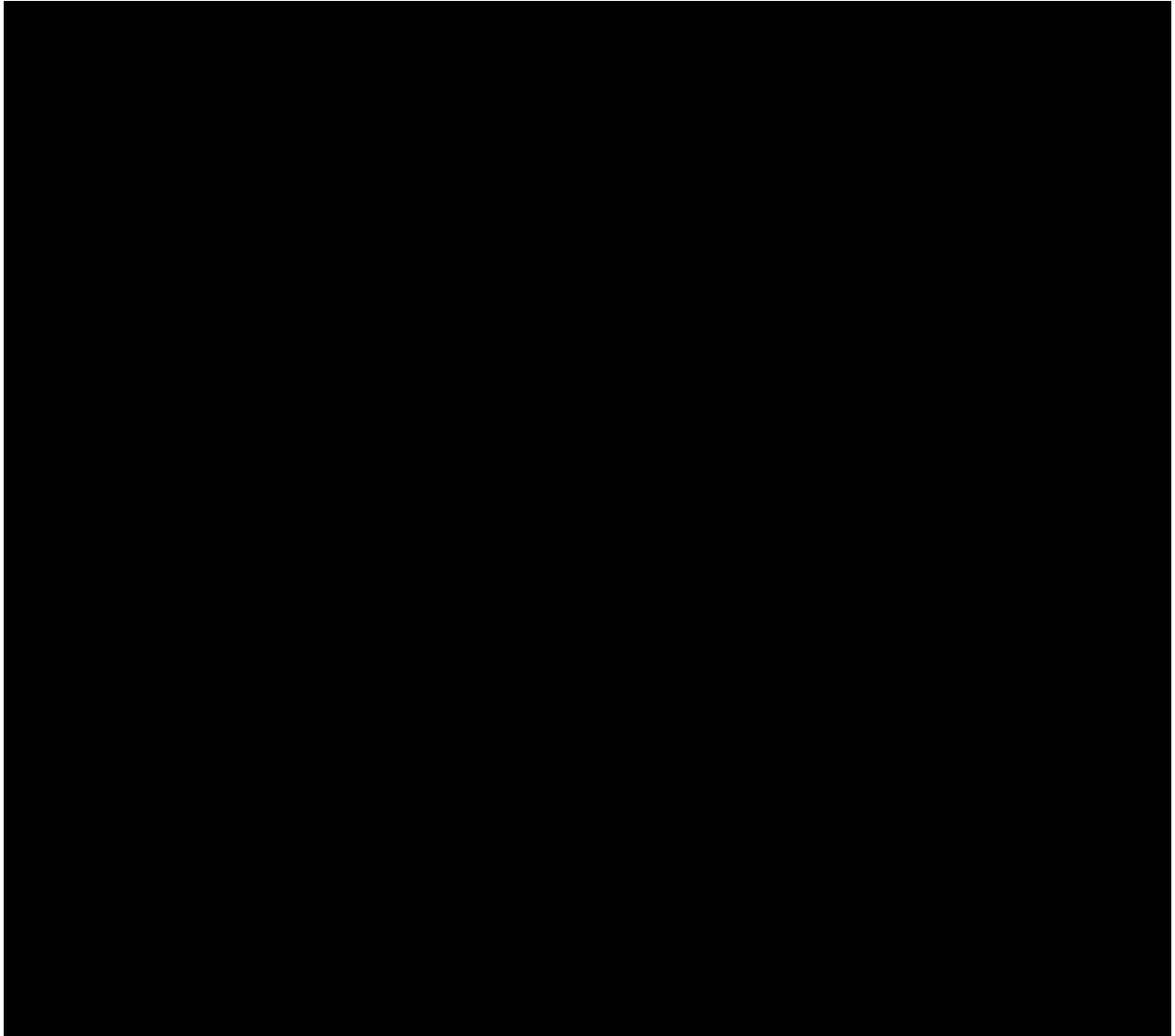
### ***Maintain Provider Roster Screen***

Provider rosters can be maintained to allow providers easy access to children on their caseload. Names of Medicaid-enrolled students will be in **bold** font and have an asterisk (\*). Students currently on the service provider's roster will be highlighted in **red**.



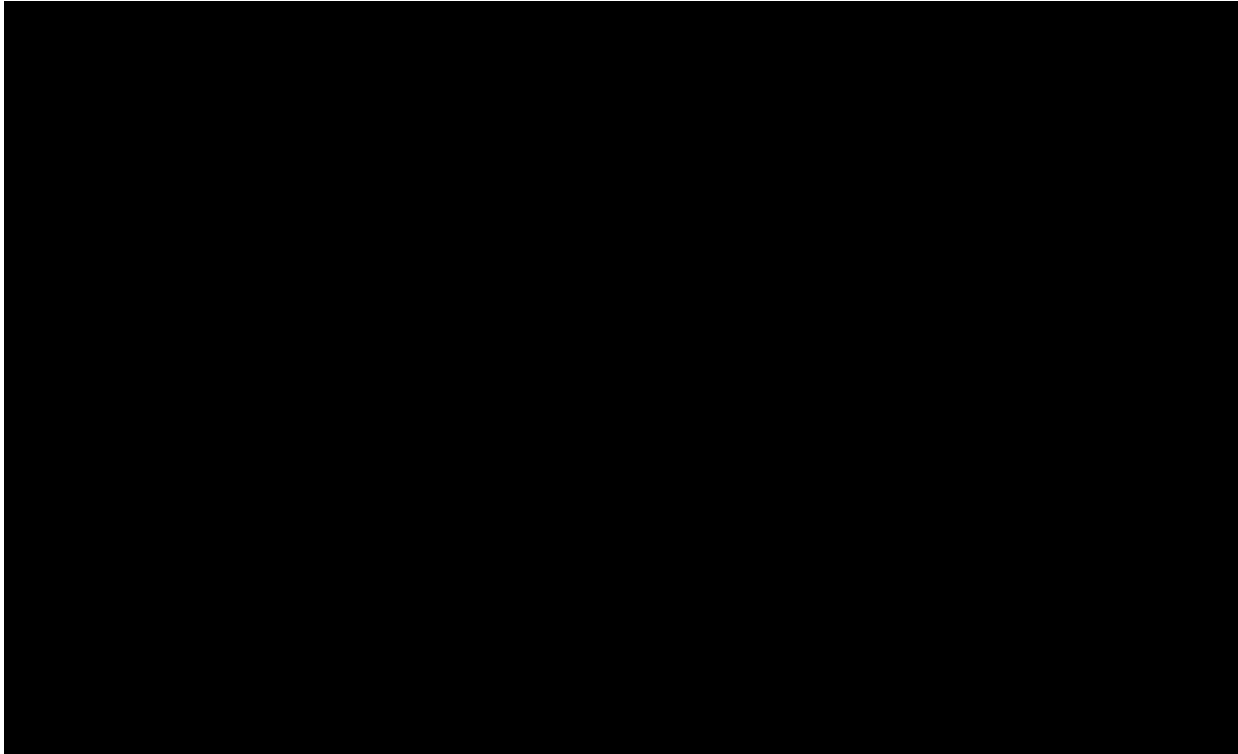
### ***Service Capture Screens***

Providers have the ability to enter services for a child or a group of children directly within the system using the Service Capture screen. This screen is configurable to show various data fields, but typically will contain the following service fields: Service Date, Service Type, Service Code, Diagnosis Code, Minutes, and Size (if a group service code).



### ***Service Approval Screen***

Depending on the District's business process, services can be routed to a Supervisor for review and approval, if necessary.



### ***Additional MAXCapture Screens***

Additional MAXCapture screens are described below:

- **Student Maintenance Screen** – Is used to maintain student demographic information, Medicaid eligibility status, and data about students' IEPs, prescriptions, and recommendations.
- **Parental Consent Screen** – Offers the capability to maintain and track the parental consent for the District to claim services to Medicaid for reimbursement.
- **Provider Data and Student Roster Screen** – Allows SSG to identify, through an electronic security process, those providers who are authorized to access the web system.
- **Provider Licensure Screen** – Captures and maintains provider license information with start and end dates of the service discipline.
- **Service Maintenance Screen** – Captures and processes service data from service providers and other sources to establish a consolidated table of services provided to students.

- **Group Service Entry Screen** – Offers a quick service entry method for services provided by the providers in a group therapy session for multiple children. This area also offers the functionality to enter the same services for multiple children performed on multiple days.

## Reporting

MAXCapture offers a number of online real-time reports to providers to review and document the services provided. Our system reports are flexible and designed to support the service detail required for providers and the District to review and verify compliance with federal and state rules. Our system also offers a number of standard reports to the District's Supervisors and Management to provide feedback and assist the providers in increasing the Medicaid revenue. Our system offers the functionality to export most of the reports to Microsoft Excel or Adobe Acrobat formats.

### *Service-Related Reports*

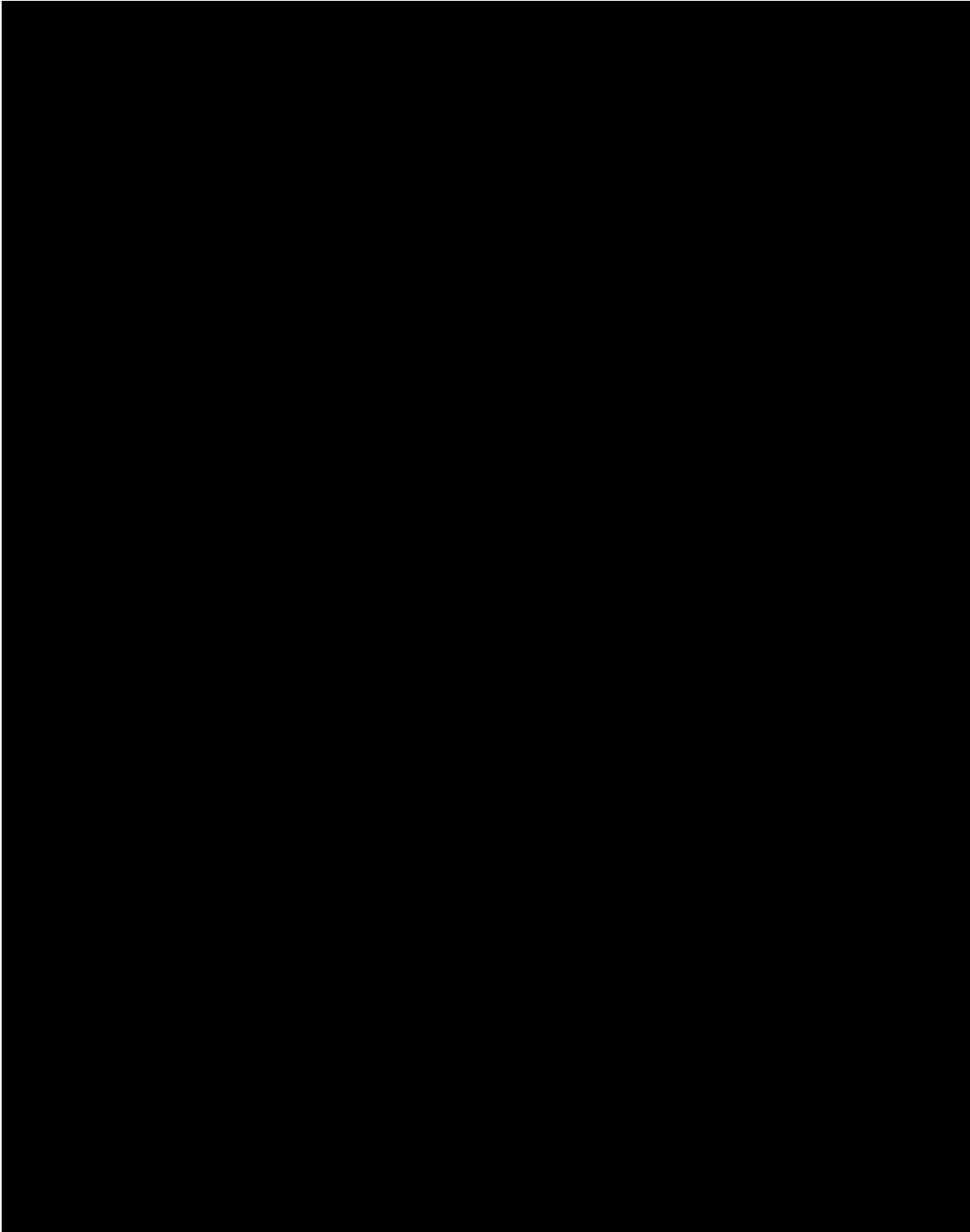
Service-related reports are available online and in real-time, and can be generated by providers, supervisors, and the District's administrators on an as-needed basis. Each service-related report offers selection of multiple parameters.

#### *Service Detail Report*

The Service Detail Report provides the complete detail of the service record entered by the provider, including the progress notes data, where providers maintain detailed notes of the student's case record and progress achieved. These notes are a critical data element required to support the compliance documentation for Medicaid claiming. All the data fields recorded by the therapist and required by state and federal policy are available in this report, including service category, service type, diagnosis code, date of service, time of service, etc.

The report can be generated for one student or multiple students for any given period of time. The providers will only have access to generate this report for the students on their roster, while supervisors can generate this report for all students that are serviced by the providers that report to them.

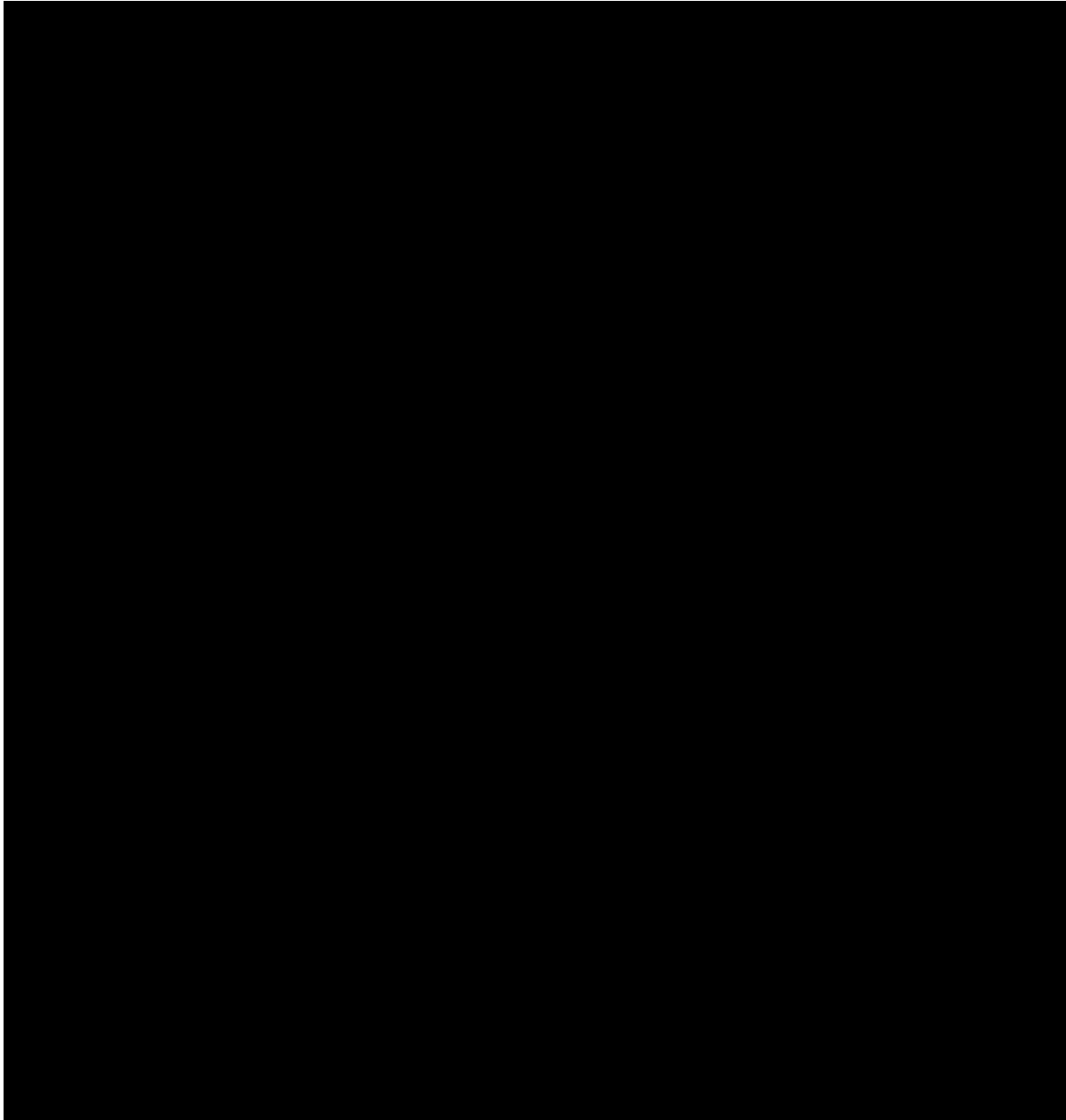
The figure below provides a sample page of the report available in the system.



*Service Detail Report provides a report sample with test data.*

### ***Service Summary Report by Provider***

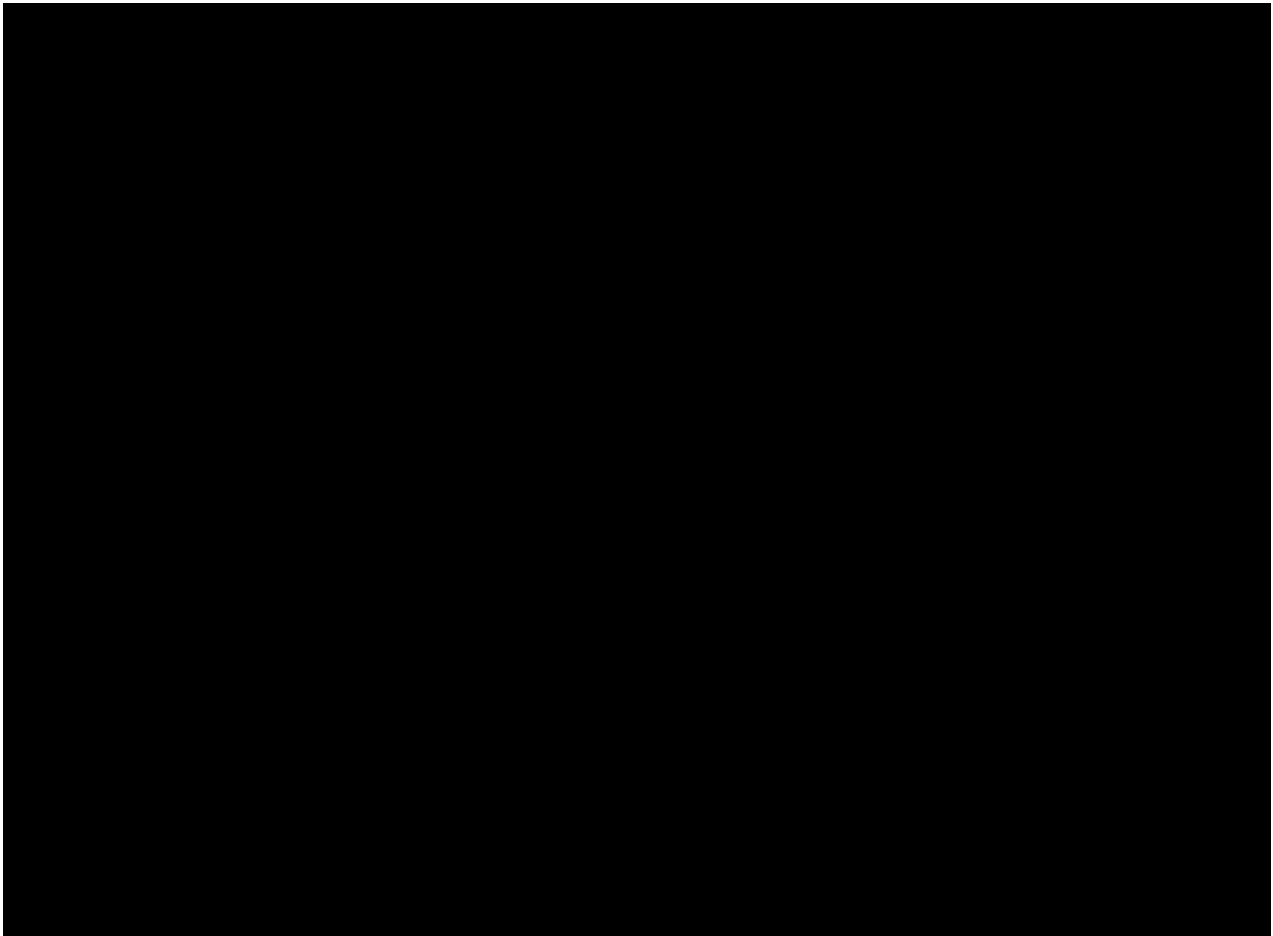
The Service Summary Report by Provider gives a summary of service counts for each student by provider. The District’s administrators often use this report to see the trend of services by provider and student. The report can be generated for an individual provider or all providers between the selected start and end dates of service. The figure below provides a sample page of the report available in the system.



*Service Summary Report by Provider provides a sample report using test data.*

### ***Reports to Show Workloads***

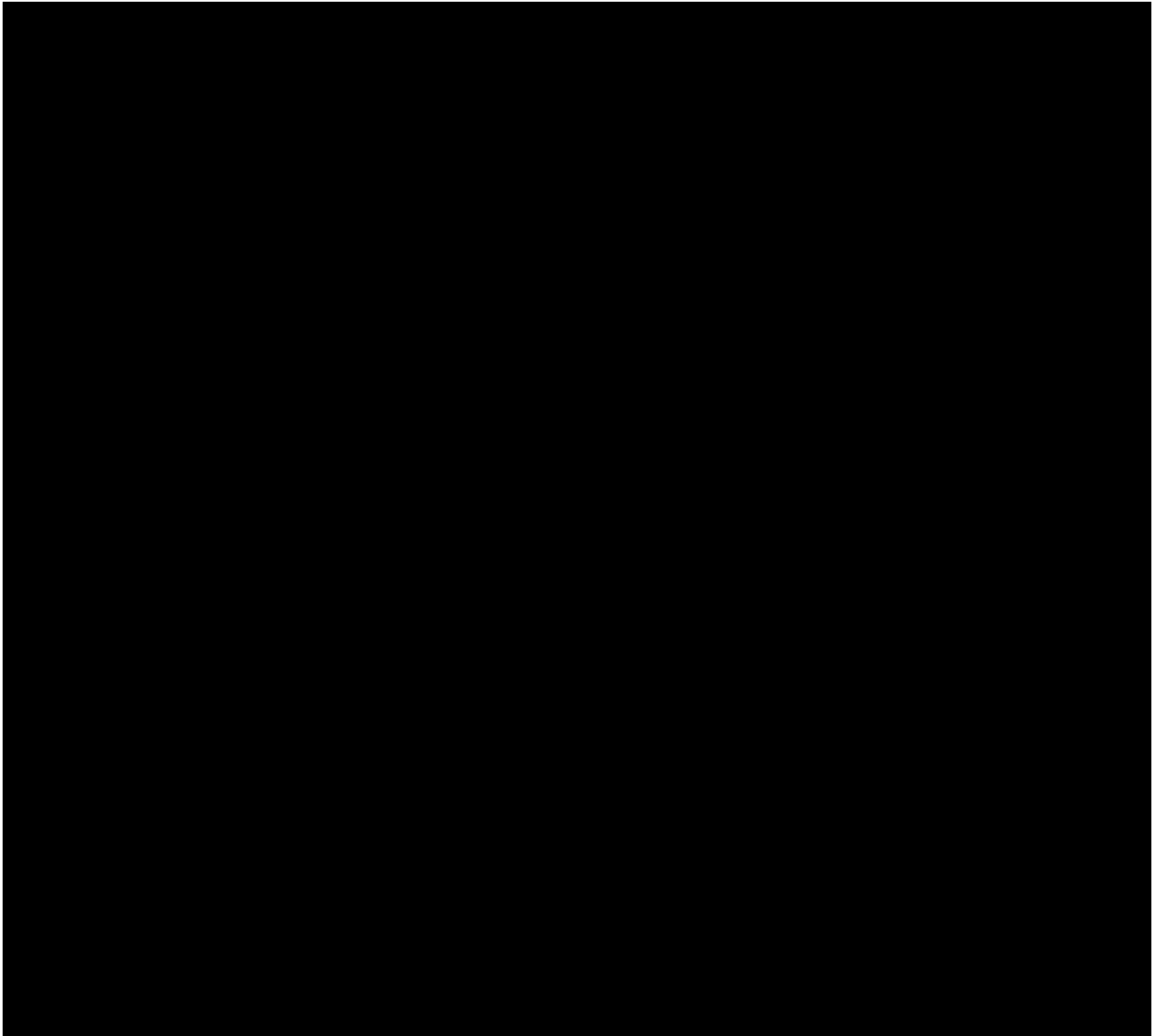
SSG’s MAXCapture system has multiple reports to show workloads. One of the reports shows required and available resource time for each provider, with options to generate reports for a specific school and/or for a service type and/or for specific providers. Another report shows required and available resource time for each service type at the school level, with the option to generate a report for one or more schools. These reports allow the District to view the workload and available time for each provider, and manage resources accordingly. The figure below provides a sample.



*Service time chart showing actual and authorized services by service type*

### ***Failed Service Report by Therapist***

The Failed Service Report by Therapist provides a summary of services that failed to convert into valid claims. The report will indicate the reason for the failure, which will assist the therapist in correcting service data and resubmitting the service for the subsequent claim processing cycle. This report is important in assisting you with to maximizing your Medicaid revenue. The figure below provides a sample page of the report available in the system.



*Failed Service Report by Therapist provides a sample page of test data.*

### ***Claim-Related Reports***

At the end of each MMIS claim processing and Remittance Advice (RA) cycle, SSG will provide the District with the remittance advice management reports, as well as an electronic version of the claims submitted.

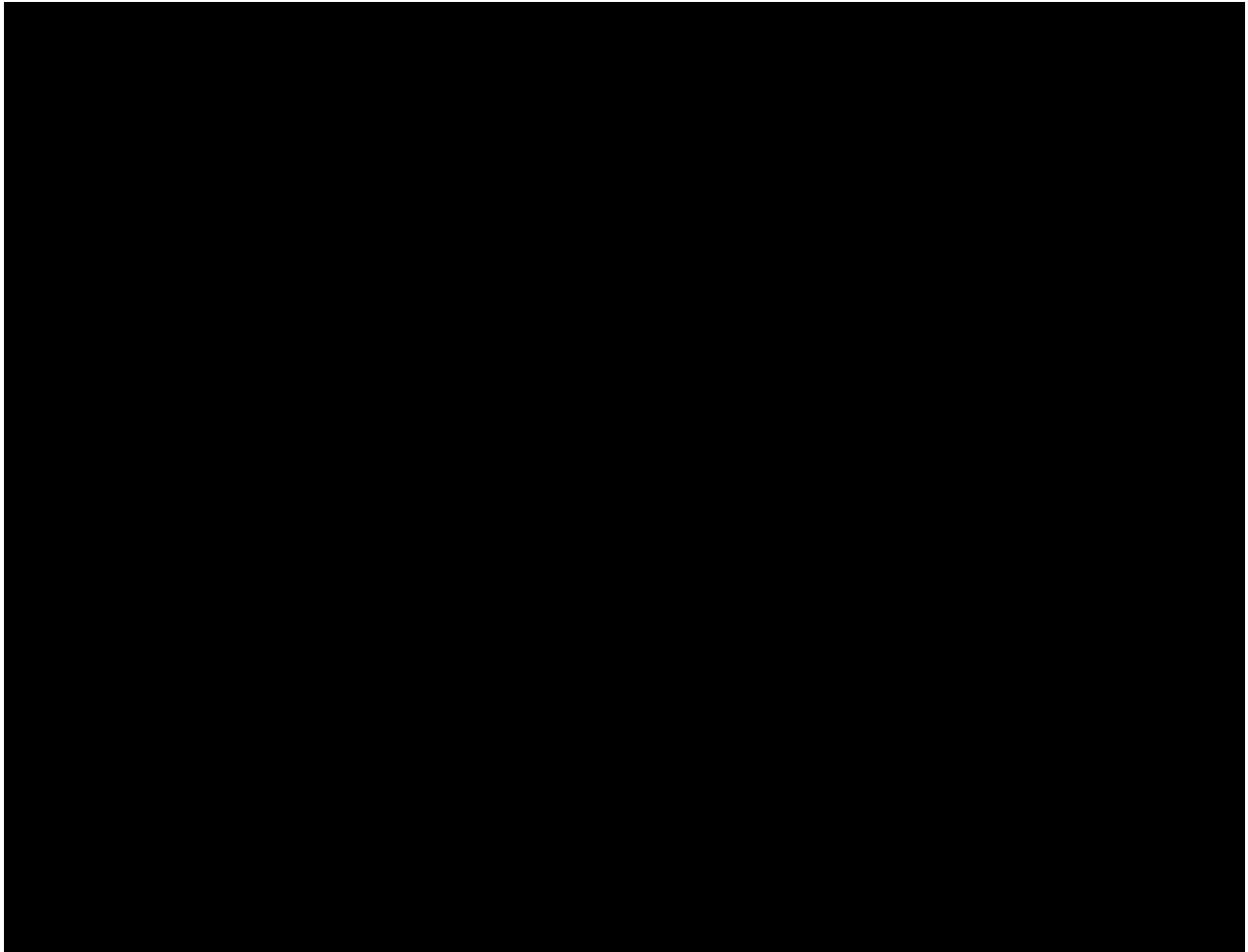
Our management reports will assist the District to:

- Monitor and ensure that program performance is proceeding according to plan;
- Identify gaps, opportunities, or bottlenecks that will improve the program performance and increase revenues; and
- Provide adequate data for analysis to expand services or make changes to the program.

MAXCapture has the ability to track and report on all claims regardless of whether or not they are billed to Medicaid. We can provide reports by client, service, non-billable reason, or other criteria defined by you, allowing you to evaluate service delivery to students by specific provider, service category, or by date of service and those that are deemed non-billable.

### ***Remittance Advice Summary Report by Service Category***

The Remittance Advice Summary Report by Service Category provides claim counts and the claims submitted, with paid amounts by service category (e.g., OT, PT, speech) and by individual therapist. This report is useful for the review of revenues recovered by therapist and by service category. The figure below provides a sample page of the report.

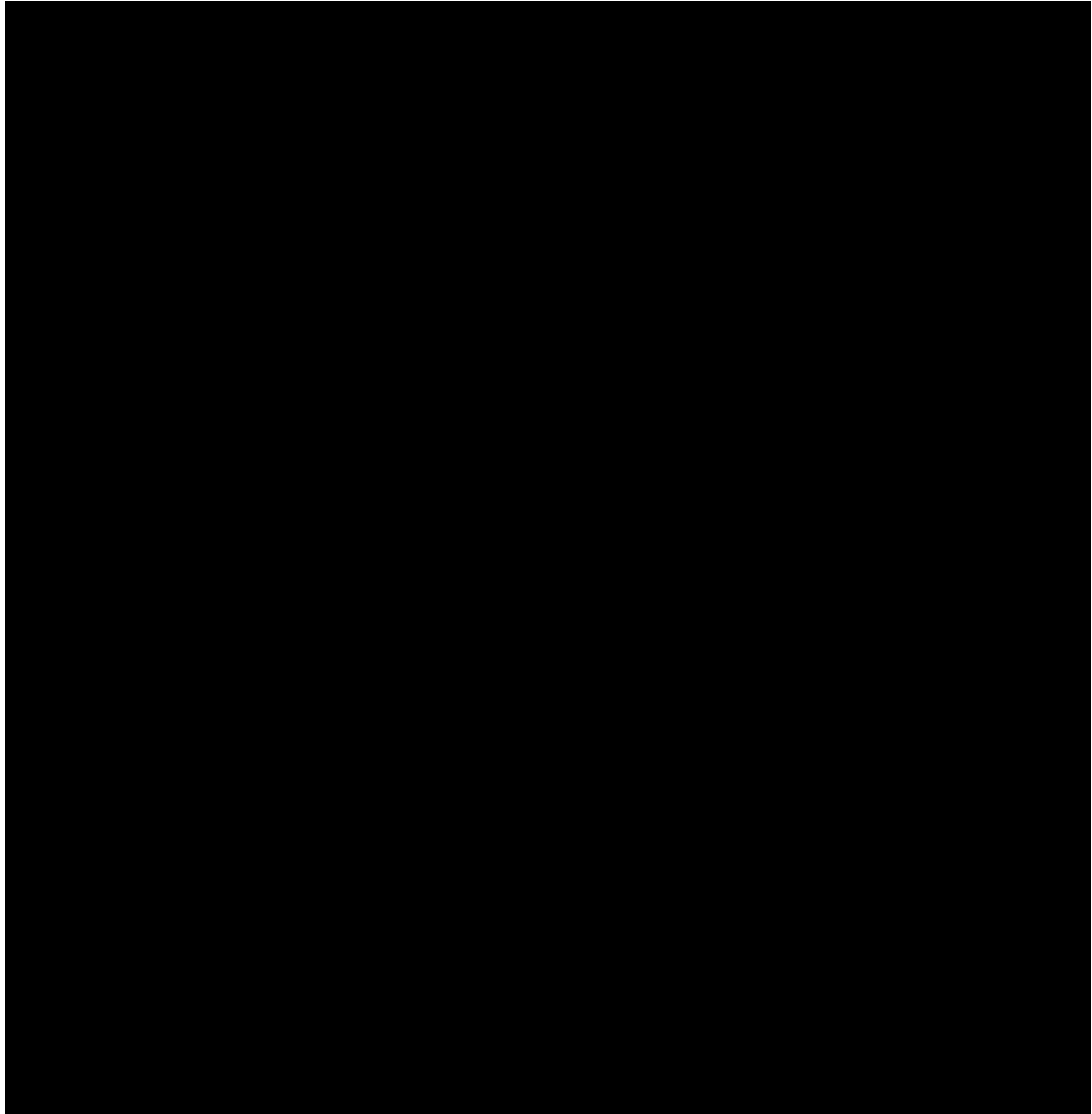


*Remittance Advice Summary Report by Service Category shows a sample report using test data.*

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### ***Remittance Advice Denial Summary Report by Reason Code***

The Remittance Advice Denial Summary Report by Reason Code provides a summary of claims that have been denied by Medicaid, grouped by denial reason. Critical in assisting with your revenue maximization efforts, this report is used to review the denial reason codes, correct the service data and resubmit claims for payment. The figure below shows a sample page of the report.



*Remittance Advice Denial Summary Report by Reason Code shows a sample page with test data.*

## **Service Provider Compliance Reports**

MAXCapture can produce management reports to assist the District with tracking service provider compliance. Integration of data that has been captured in MAXCapture, including electronic IEP solutions and other databases, will assist in the production of management reports that track service provider compliance in the following areas:

- Provider licensure/certification;
- Timely service delivery; and
- IEP authorized service delivery.

SSG will work with the District to define reports that will address your specific needs.

*c) Offeror shall describe the level of training and audit and technical support that will be offered to the District.*

## **Training, Audit, and Technical Support (Contains Confidential Information)**

### **Training and Documentation**

SSG's two decades of school-based claiming experience has proven that project success requires the understanding of all users about their role in the school-based claiming process, and how they can accomplish the objectives of that role using the MAXCapture system. To that end, SSG provides the following channels of communication:

- Training materials and a training curriculum tailored to specific user groups;
- Focus on what the school-based program is, why it is important to students in the District, and their role in the program; and
- Training materials and a training curriculum that teach:
  - Why the user is being asked to work in MAXCapture;
  - What the user is being asked to enter or view in MAXCapture; and
  - How the user can perform those functions.

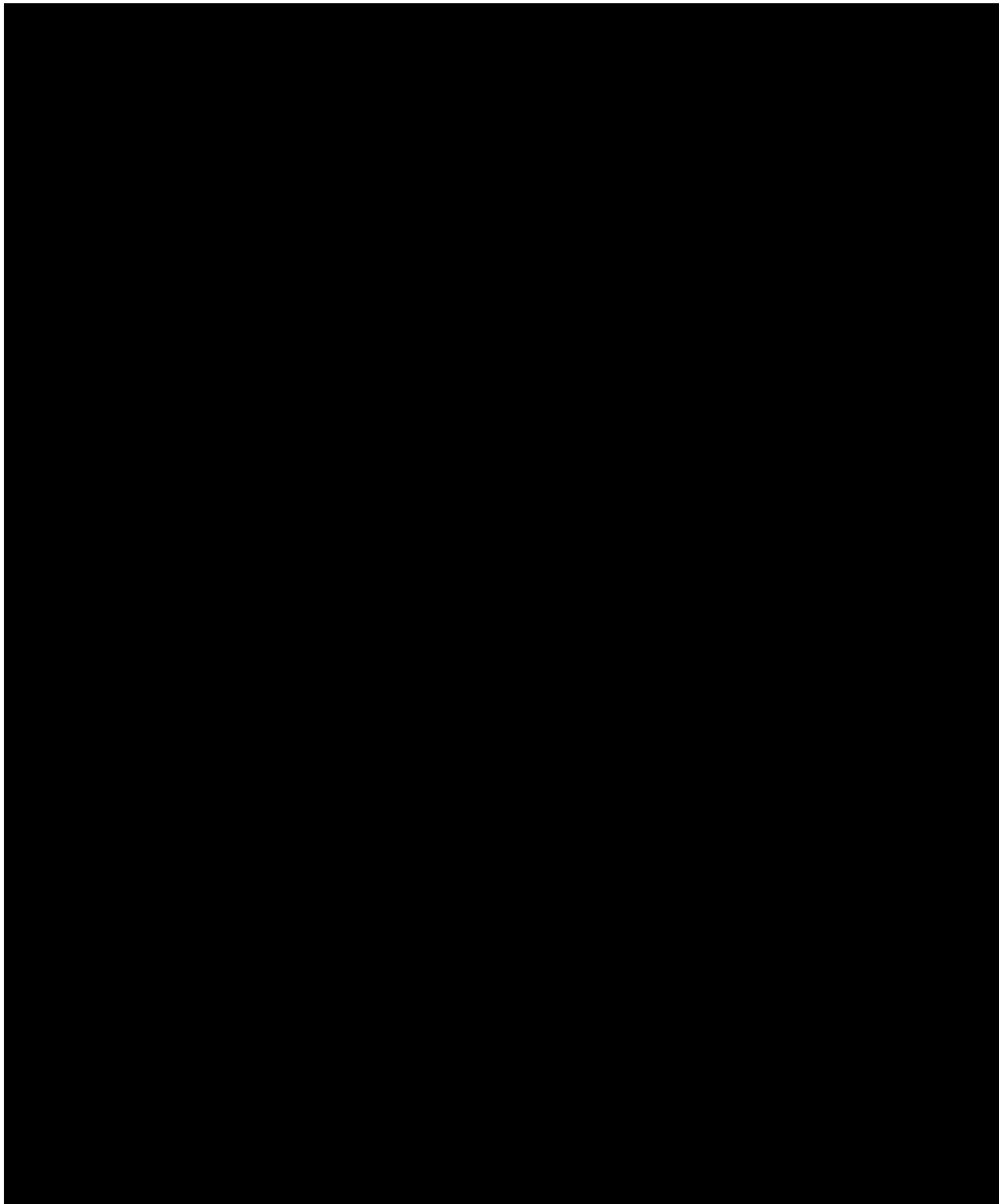
These materials are presented in a variety of methods to account for both different learning styles and the fact that busy schedules often require flexibility in how and when materials are consumed. To meet these varying needs, SSG offers written materials, live trainings, webinar trainings, and recorded lessons. While historically we have tried to perform trainings in person as much as possible, we have bolstered our virtual offerings substantially to account for the recent changes related to COVID-19.

We can safely train Administrators and staff in a wide variety of methods with the same level of knowledge transfer as was provided during in-person sessions.

### ***Written Materials***

Our written materials include user manuals, desk reference guides, and a FAQs document.

- **User Manual:** An in-depth guide to all the functionality in the system broken out by user role. This includes a step-by-step process of how to perform functions in MAXCapture with screenshots and examples.
- **Desk Reference Guide:** A short one-page document that users can have at their fingertips detailing the critical steps a user might perform on a daily basis.
- **FAQs:** This document consolidates a list of the answers to common questions we know that users tend to have when working on school-based health programs and using the MAXCapture system.



## *Live, In-Person Training*

Our live trainings are led by experienced staff onsite at District locations. These trainings include:

- **User Specific Training Slides:** A user-specific curriculum is developed for each training session and custom training slides are provided to trainees as reference tools.
- **Hands-On Exercises:** When appropriate, SSG will utilize hands-on training exercises for trainees so that they can get a feel for how to navigate and interact with the system.

## *Webinars*

Our live webinar trainings mirror much of the in-person trainings but offer the flexibility for trainees to attend from their own workspace. These webinars include:

- **Live Trainer:** The same experienced trainers who lead onsite sessions are the Trainers for our webinars, ensuring consistency across training, regardless of the delivery channel.
- **Interactive Q&A:** SSG knows the value of real-time questions and answers to the effectiveness of training. Our webinars allow for both a chat area for questions, as well as time for questions over the phone to the Trainer. Often, SSG will have two Trainers even for our webinars to ensure that chat questions are being taken care of quickly without disrupting the flow of the training for the rest of the attendees.

## *Pre-recorded*

Our pre-recorded trainings provide maximum flexibility, allowing staff to take training at their convenience or to review specific training topics as questions arise. These recordings can include:

- **Registration List:** We can track who has viewed the recorded trainings.
- **Quiz & Test:** We are able to have various knowledge checkpoints in the form of quizzes or tests to ensure that trainees comprehend the information presented.
- **Certificates of Completion:** We can generate certificates of completion for attendees if there is a need for a physical validation of course participation and mastery.

If requested, we will share attendance records with the District for your records.

## Audit Support

Providing support to the District’s Management Team during state or federal audits is essential to reducing the impact of the audit. The table below lists the tasks SSG will perform:

#	Task
1	Provide assistance to the Board in responding to any audits pertaining to Medicaid claims.
2	Support will include (but not be limited to): <ul style="list-style-type: none"><li>▪ Providing promptly information necessary to respond to audits;</li><li>▪ Compiling available supporting documentation;</li><li>▪ Drafting correspondence and responses with state and federal agencies;</li><li>▪ Attending audit meeting;</li><li>▪ Assisting with settlement negotiations; and</li><li>▪ Providing support as necessary when the claims submitted by third parties are audited.</li></ul>
3	Report findings report and action to be taken for claims revisions to the District within 30 days of the audit action.

In addition, MAXCapture provides an audit trail for all services within the system, making it easy to show reviewers the path of data and the various individual touchpoints. With this, the District will be able to see things such as the date of entry, who made a change to the service, and when approval of a service took place. This system functionality will allow SSG to quickly provide any needed information to state or federal auditors should a question arise.

## Technical Assistance

SSG will provide live technical support during regular business hour via a toll-free number for all of the District’s staff members. We will also provide chat and email support options.

The SSG Project Team and Help Desk will provide responsive and dedicated daily technical support for MAXCapture. This ongoing support includes troubleshooting issues and providing resolution, as well as workarounds if necessary. If required, Help Desk personnel will escalate an issue to either the Project Manager or the appropriate Technical Staff Team Member. If the issue is not resolved at this level, it is escalated to the Project Director, IT Lead, or Company Leadership. SSG responds to support requests within 24 hours and provides either a resolution or plan for resolution within 48 hours.

## **Technical Support Services through the SSG Help Desk**

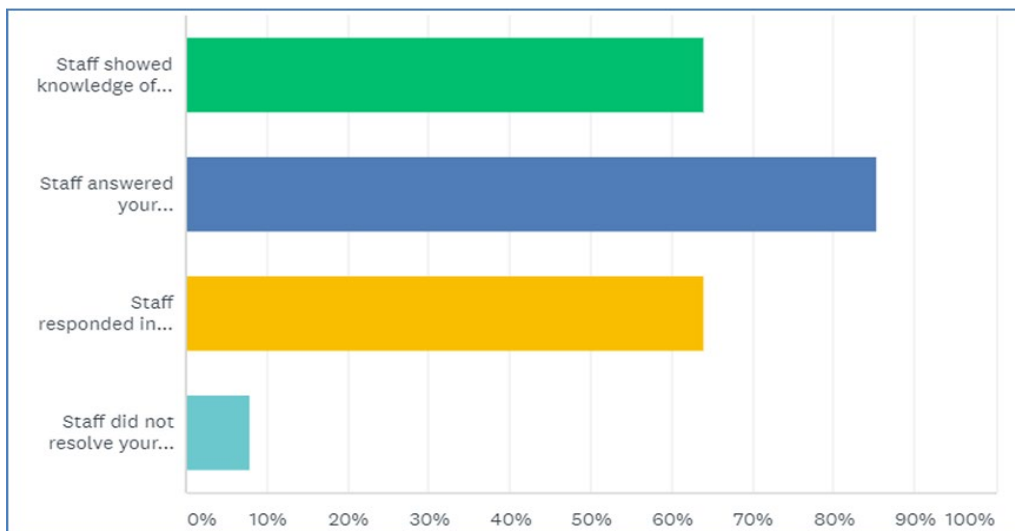
SSG will provide the following support services to the District:

- Administrative and technical support available via telephone 8 AM to 5 PM, Monday through Friday, excluding state and federal holidays;
- Dedicated support email;
- Continual updated system documentation and FAQ available online on our system home page;
- 24/7 access to the system application(s), reports, and data;
- Structured version control; and
- System security, backup and recovery procedures, and equipment to meet the District's standards.

### **SSG Offers Two Levels of Help Desk Support**

**Level 1:** For security access issues, screen navigation questions, user systems access, and basic business functions.

The SSG Help Desk/Customer Support Team will be responsible for receipt of all telephone, email, and project website inquiries. The Help Desk, located in the SSG Data Center, utilizes a toll-free telephone line with an automated answering machine for off-hours use. Typically, when a user calls for technical assistance, a Level 1 Customer Support Team Member will answer the question which might include help with simple problems or general "how-to" questions. The figure below provides illustration of the high-level of support provided to our clients.



*Annual Report Data shows just some of the data provided in our annual reports; Help Desk response satisfaction shown here.*

**Level 2:** For more complex issues.

For issues that are not resolved at Level 1, the user is transferred to the Level 2 Team Member. Level 2 questions may, for example, address advanced features, question regarding system functionality, and possible product bugs or failures. If the Level 2 Team Member cannot resolve the issue, the inquiry is escalated to a SSG Project Team member.

Additionally, our Project Manager is available anytime to provide assistance and policy advice, as needed. Our Project Team also offers expert advice and best practices based on our experience with state and federal policy changes.

***Help Desk Response Time***

During normal business hours, the SSG Help Desk will immediately answer questions and escalate to the appropriate Project Team Member, if necessary. Typically, SSG responds to all calls and email inquiries within 24 hours. A resolution or plan for resolution is provided within 48 hours.

***Escalation Process***

For any issues that arise that are beyond the control of our system and processes, we will escalate and report to the District's Project Manager. When the SSG Project Team escalates issues to the District, we will use our experience and knowledge of other state programs to provide recommendations for addressing the issue.

The table below provides a detailed description of our escalation processes by the severity of system issues. SSG defines a proposed defect severity scale for determining defect criticality and the associated defect priority levels to be assigned to any errors found in the software. These are based on the evaluation of the degree of impact on the operation of the system. Once the severity level is evaluated, we follow the response process defined below.

While we define a five-level scale of defect severity and the response requirements to each severity level, the actual resolution of the issue and releasing the change to the production environment will depend on the complexity of the issue and approval from the District.

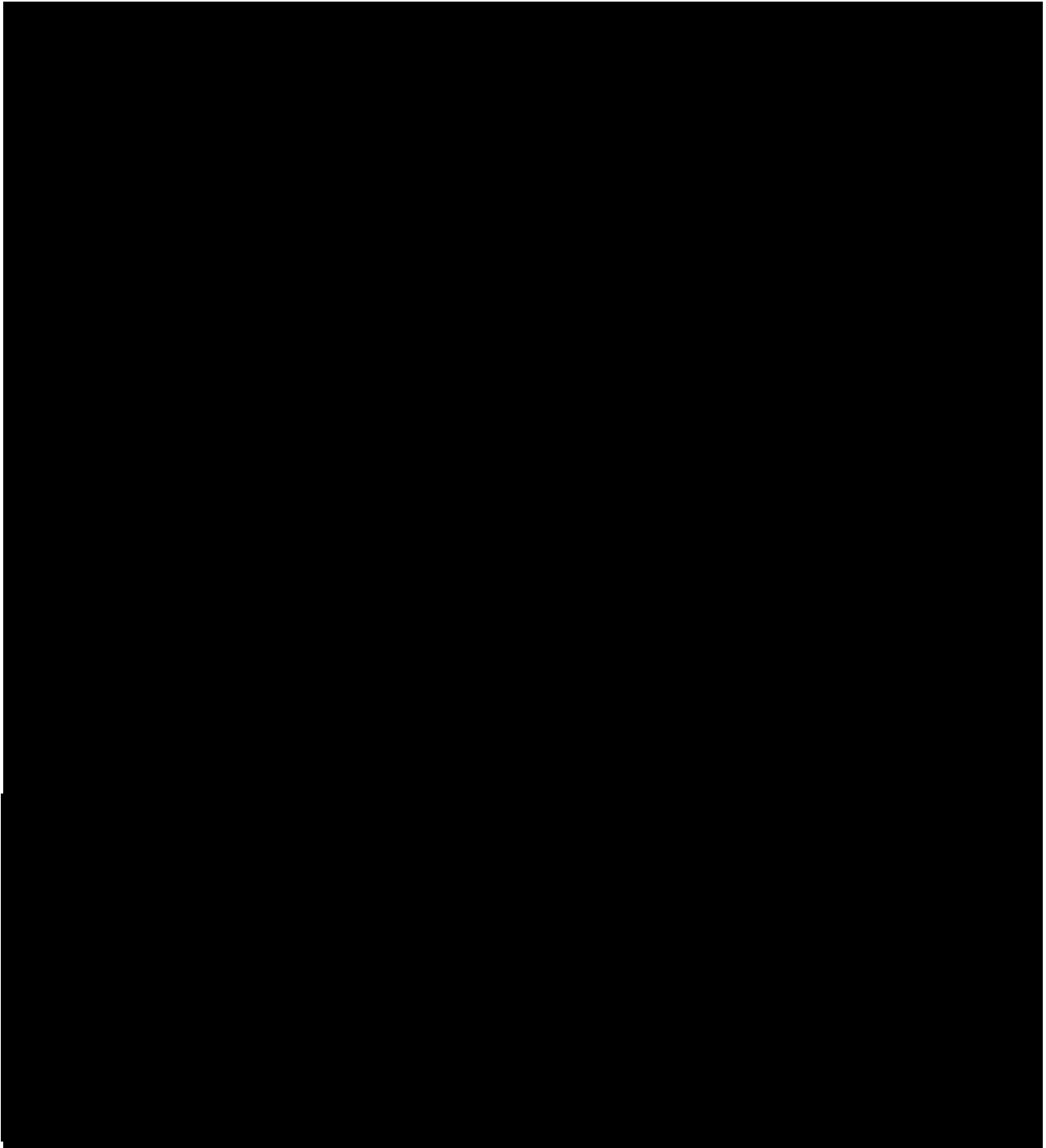
The table below contains additional information about our escalation process.

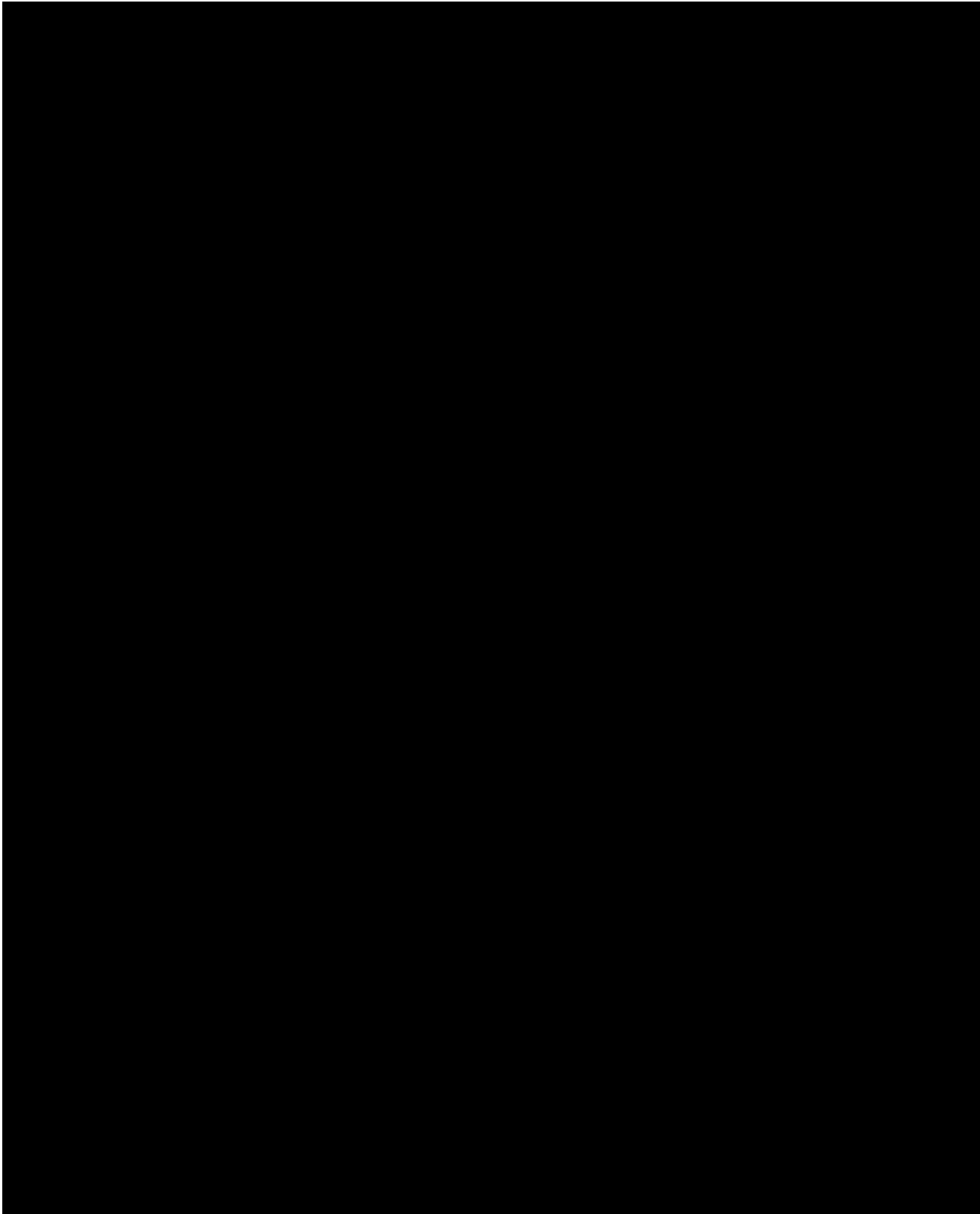
## Escalation Response Requirements

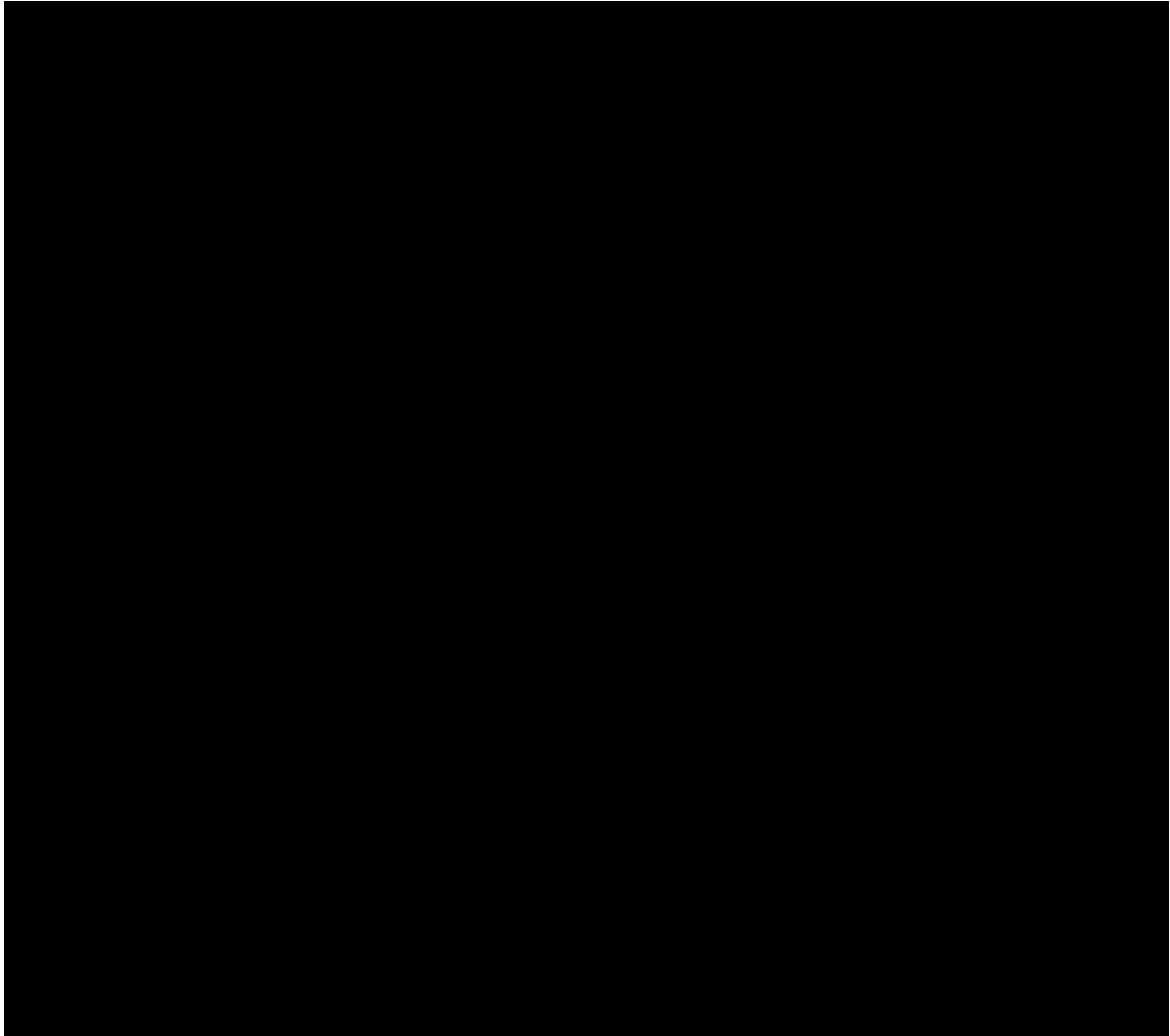
Defect Severity	Response Requirement
1. <b>Critical</b> – The defect results in the failure of the complete software system, a subsystem, or of a software unit (program or module) within the system.	<b>Resolve Immediately</b> – Further development and/or testing cannot occur until the defect has been repaired. The system cannot be used until the defect is corrected.
2. <b>Major</b> – The defect results in the failure of the complete software system, a subsystem, or of a software unit (program or module) within the system. There is no way to make the failed component(s) work; however, there are acceptable processing alternatives which will yield the desired result.	<b>High Priority</b> – The defect must be resolved as soon as possible because it is impairing operation, development, and/or testing activities. System use will be severely affected until the defect is fixed.
3. <b>Average</b> – The defect does not result in a failure but causes the system to produce incorrect, incomplete, or inconsistent results, or the defect impairs the systems usability but users can work around the defect.	<b>Normal Queue</b> – The defect should be resolved in the normal course of development activities. It can wait until a new build or version is created.
4. <b>Minor</b> – The defect does not cause result in a failure, does not impair usability, and the desired processing results are easily obtained by working around the defect.	<b>Low Priority</b> – The defect is an irritant, which should be repaired but which can be repaired after more serious defects have been fixed.
5. <b>Exception</b> – The defect is the result of non-conformance to a standard, is related to the aesthetics of the system, or is a request for an enhancement. Defects at this level may be deferred or even ignored.	<b>Defer</b> – The defect repair can be put off indefinitely. It can be resolved in a future major system revision or not resolved at all.

*d) Provide a description of the Offerors Medicaid billing process. Provide the steps used for preparation and submission of Medicaid claims.*

**Process Flow for Direct Service Claiming (*Contains Confidential Information*)**







## SECTION 3 – ORGANIZATIONAL EXPERIENCE AND CAPABILITIES

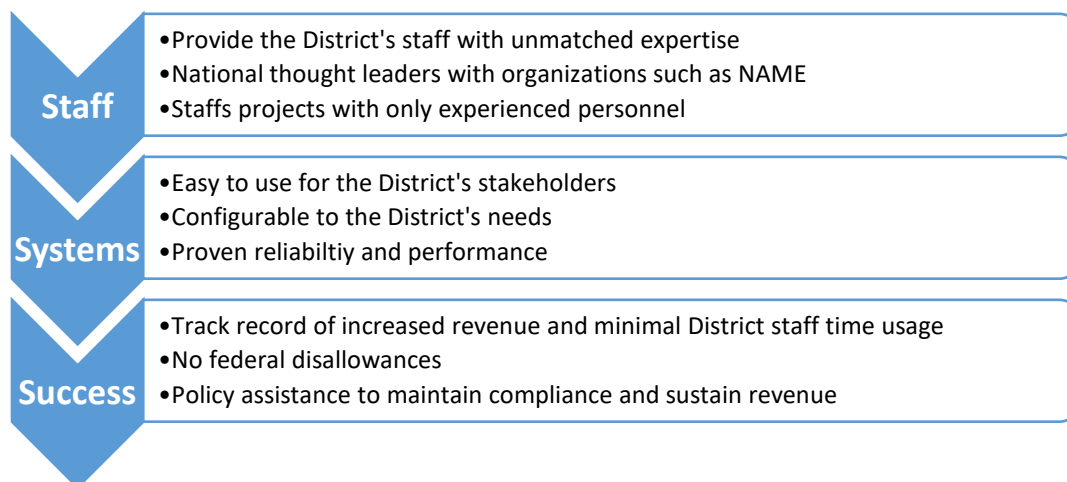
*a) Provide a comprehensive description of the firm’s experience in supplying services required by this Request for Proposal preferably within a school district setting. Offeror shall list all comparable contracts within the last three (3) years.*

### **A Uniquely Qualified Partner (Contains Confidential Information)**

SSG is a consulting firm with an esteemed national reputation in Medicaid. Our Consultants have decades of experience in support of schools managing Medicaid issues and the complex regulatory environment. We support more numerous projects in consulting services, including Fee-for-Service (FFS) and administrative claiming for schools, design and implementation of time studies, rate reimbursement, audit compliance reviews, and cost settlements. SSG offers a highly-experienced and multi-disciplinary team of U.S.-based experts to provide Medicaid consulting services.

SSG prides itself on high-quality customer service and work products, and strict adherence to laws and regulations. Each team member receives continuous, robust training in compliance with federal claiming rules.

*The philosophy of our Company is based on providing the best customer service, using the best systems in the industry, and building strong relationships with our clients. These values, combined with the quality of our service, enable SSG to gain new clients and expand services with current clients. “Service, Systems, and Growth” is our motto and our philosophy!*



*SSG’s impeccable record enables us to secure the trust and confidence of our state, county, and school district clients, as well as with our federal partners.*

## SSG Increases Revenue and Provides Best-in-Class Customer Service

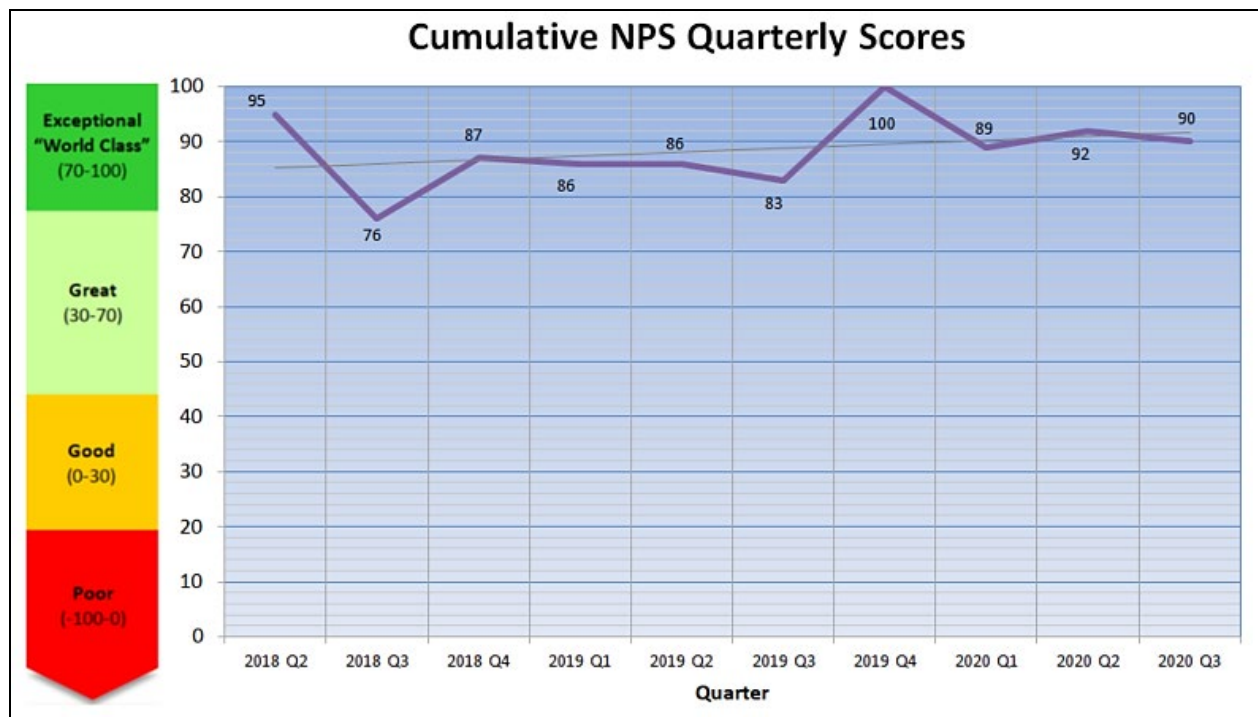
SSG has a proven track record of not only unparalleled compliance, but also increasing revenue for school districts with a high level of customer services. Each year SSG processes hundreds of million in Medicaid claims for school clients.

*SSG has processed over 60,000 paid claims for the School District 5 of Lexington and Richland Counties.*

SSG provides the District the best combination of compliance and revenue recovery. Moreover, SSG understands that to achieve these results requires a partnership with our clients and an unwavering commitment to customer service. In fact, using the Net Promoter System to gauge customer satisfaction, the District can see that we consistently are rated by our clients as being “world class” in terms of the level of service that we provide.

*SSG’s insight, responsiveness, technical assistance, and hands-on support has been critical to CFSA’s continued success in the area of federal reimbursements. CFSA’s invaluable partnership with SSG has increased Agency capacity and strengthened our claiming infrastructure. SSG’s contribution and commitment to excellence is appreciated.*

*– John Simmons; Washington DC Children, Family, Services Administration*



*A summary of corporate Net Promoter Survey results from 2018 to 2020*

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## SSG Has Proven Facilities and Resources

Our operations and information technology center houses a team of highly trained and experienced Application Developers. These Application Developers are experts in systems development and data processing operations for web-based case management systems, schools and social services federal revenue recovery, third-party liability, and other revenue enhancement projects. The SSG Team performs all application development and data processing tasks, as well as related technical services for education revenue maximization projects on behalf of state, county, and school district clients.

## Experience in Schools

SSG has extensive experience in the education K-12 practice area. Our experience in the Education Services market includes developing and managing systems and providing consulting services in the area of student information systems, special education systems, and Medicaid reimbursement billing and documentation systems. We have 21 years of experience supporting Medicaid in Schools programs using our web-based proprietary system, MAXCapture.

SSG assists clients in recovering millions of dollars annually across a wide range of programs. We support numerous projects in financing and implementation consulting services, including design and implementation of time studies, rate reimbursement, and cost settlements.

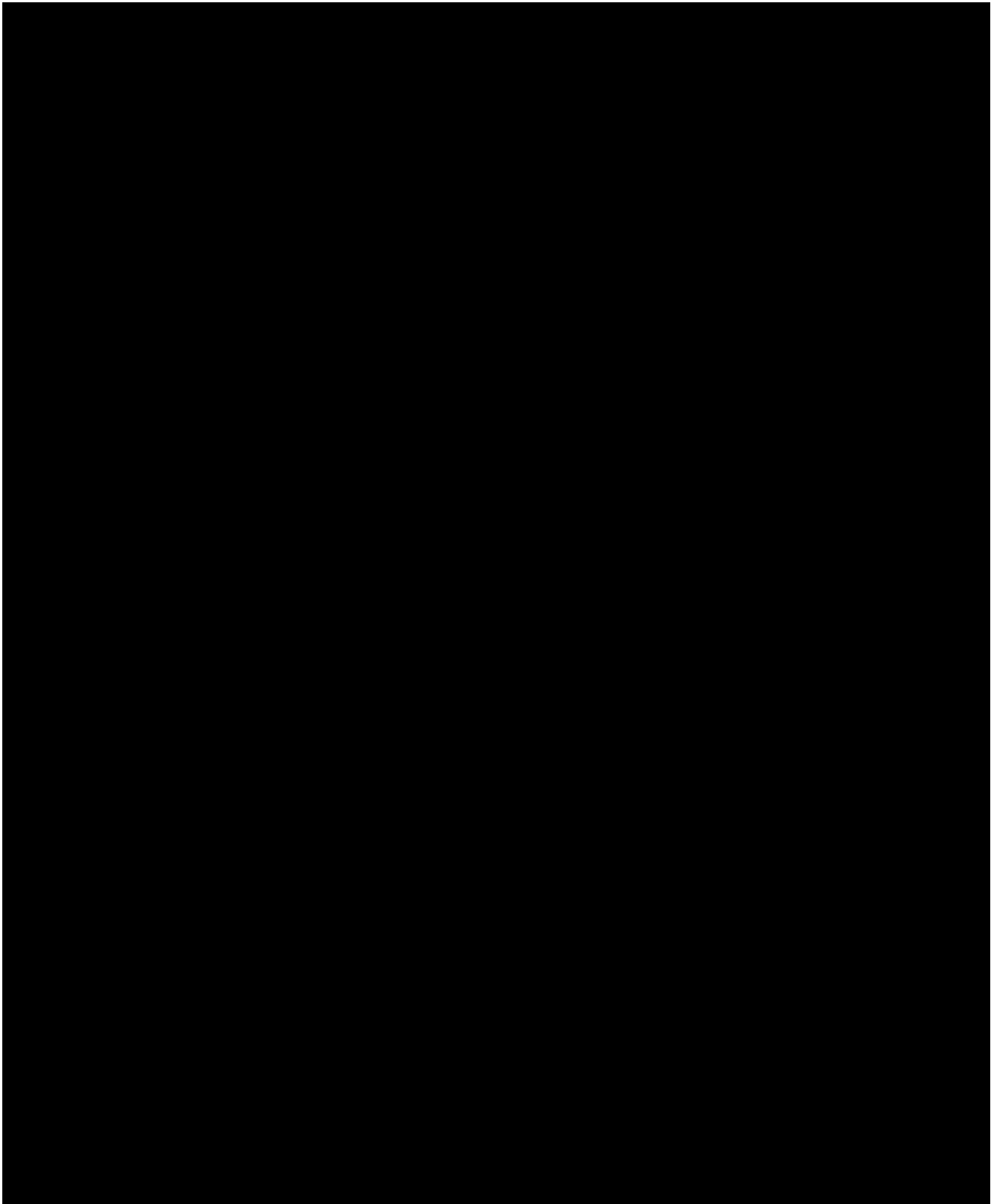
**K-12 Education Market** includes systems development, process management, and consulting services in the areas of student information systems, special education systems, and Medicaid reimbursement billing and documentation systems. This practice includes the collection and billing of direct services; review of existing Medicaid benefit packages and rates; recordkeeping training for school district staff and direct-service providers; and the reporting needed to support service billing.

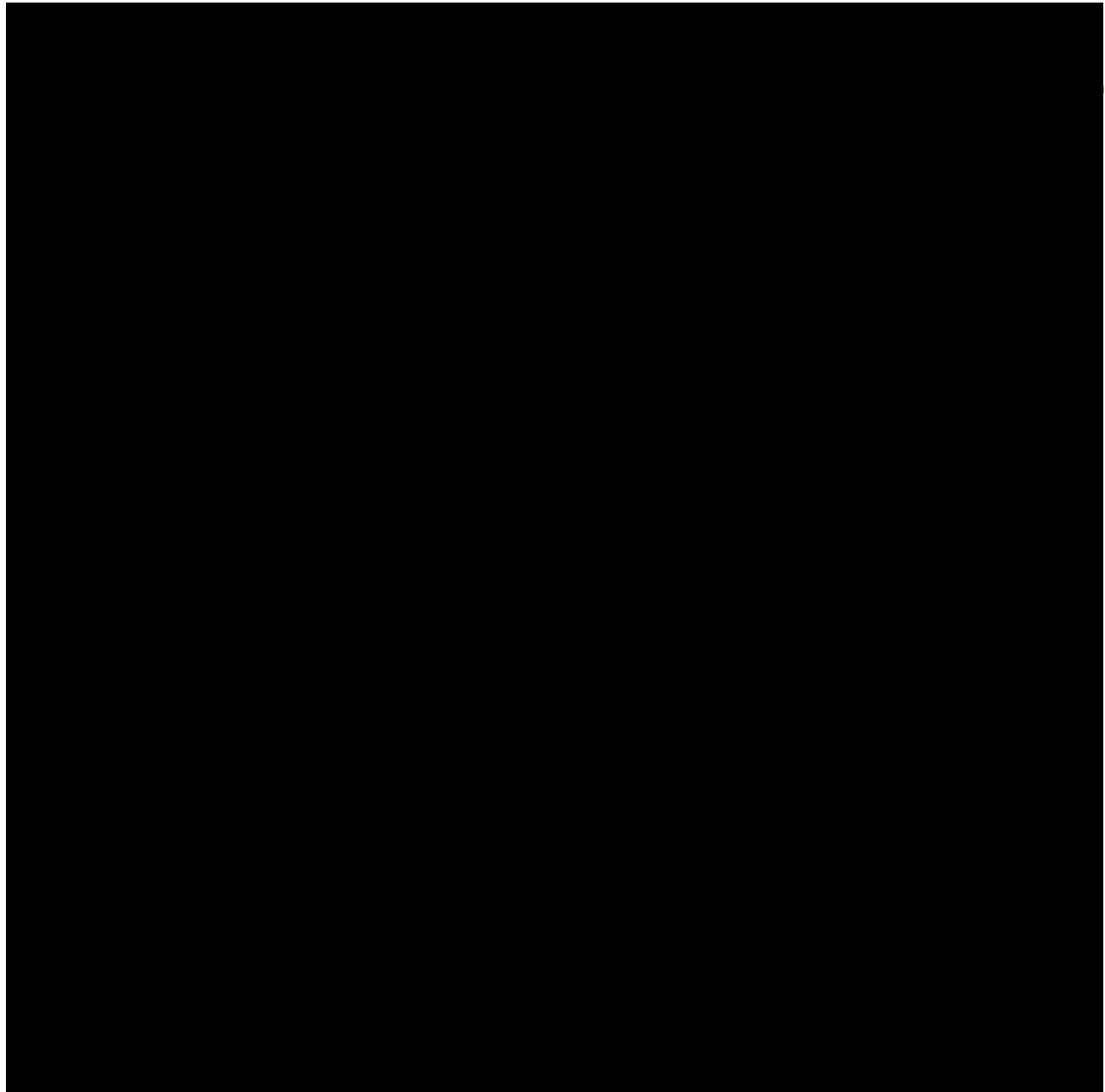
## School District Medicaid Services Projects

SSG has delivered healthcare related financial and consulting services to state and local governments for more than 21 years. This includes school districts similar to the District in size and/or project scope from the past three years.

The table below highlights our related project experience for Medicaid claiming services in schools.

## Related Project Experience





***b) Provide resumes or Business Experience Summary of Project Manager, Project Staff and other parties who will provide services for the project. The resumes shall include experience relevant to the RFP.***

### **The SSG Team *(Contains Confidential Information)***

*SSG supports our clients with staff members who are exceptionally experienced with various types of time studies and federal claiming support, as well as training, service documentation and audit services.*

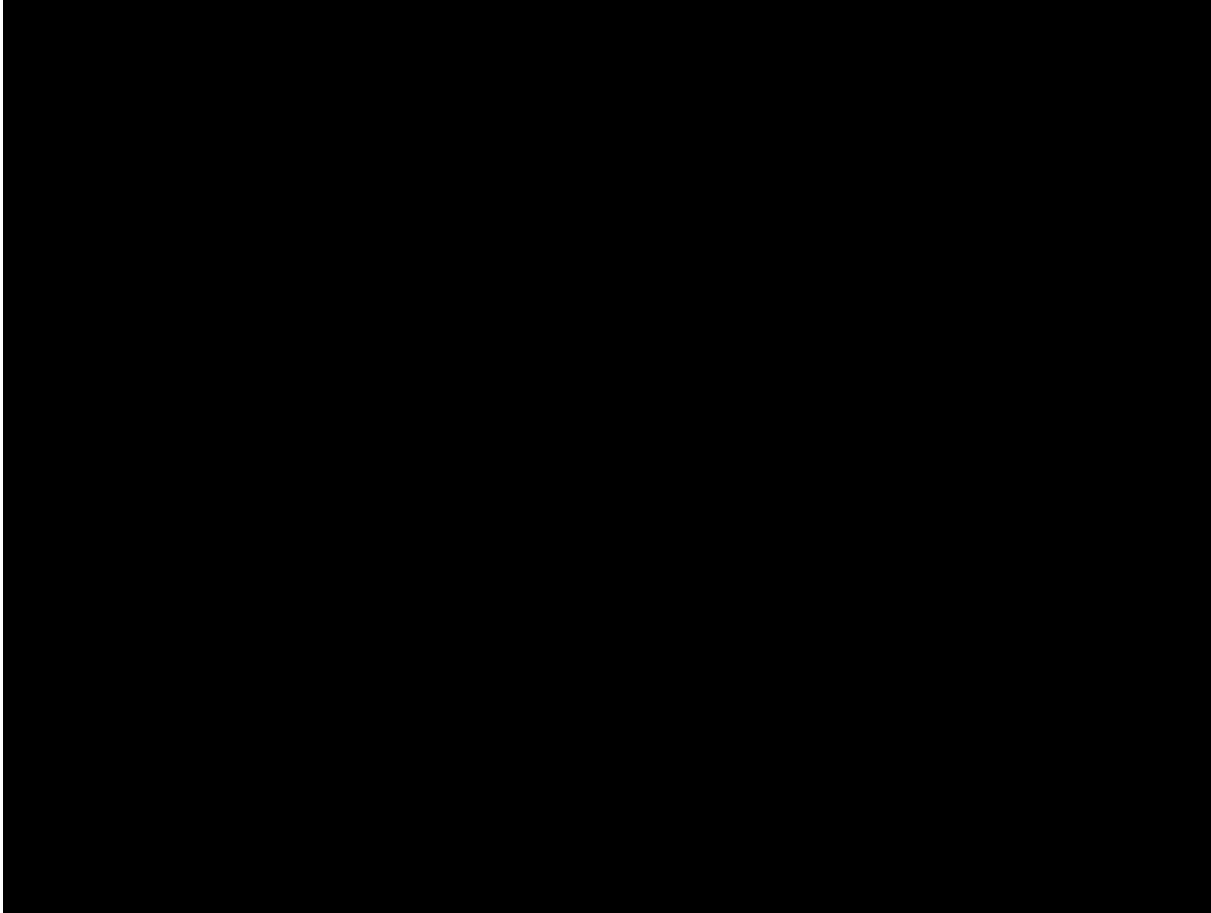
All members of SSG’s Education Services staff are well-qualified in Medicaid cost recovery for schools across the country. SSG offers the best team with a staff experienced in Medicaid claiming and support, as well as in training, service documentation, and audit monitoring services. Our staff members have successfully worked on projects of similar size and scope as the District, as evidenced by our excellent references and long-term client contracts.

It is critical that the District selects a partner with the experience and knowledge required to ensure successful implementation of a Medicaid solution. SSG’s Staffing Plan brings together top Consultants from our Education and Systems practices. These team members are well-versed in Medicaid cost recovery for schools across the country. They possess institutional expertise in the collection and billing of direct services, review of existing Medicaid benefit packages and rates, training of school district staff and direct services providers on record keeping, and the reporting necessary to support service billing.

***The SSG Project Management Team offers extraordinary skills, diversity, and experience to meet the District’s project objectives.***

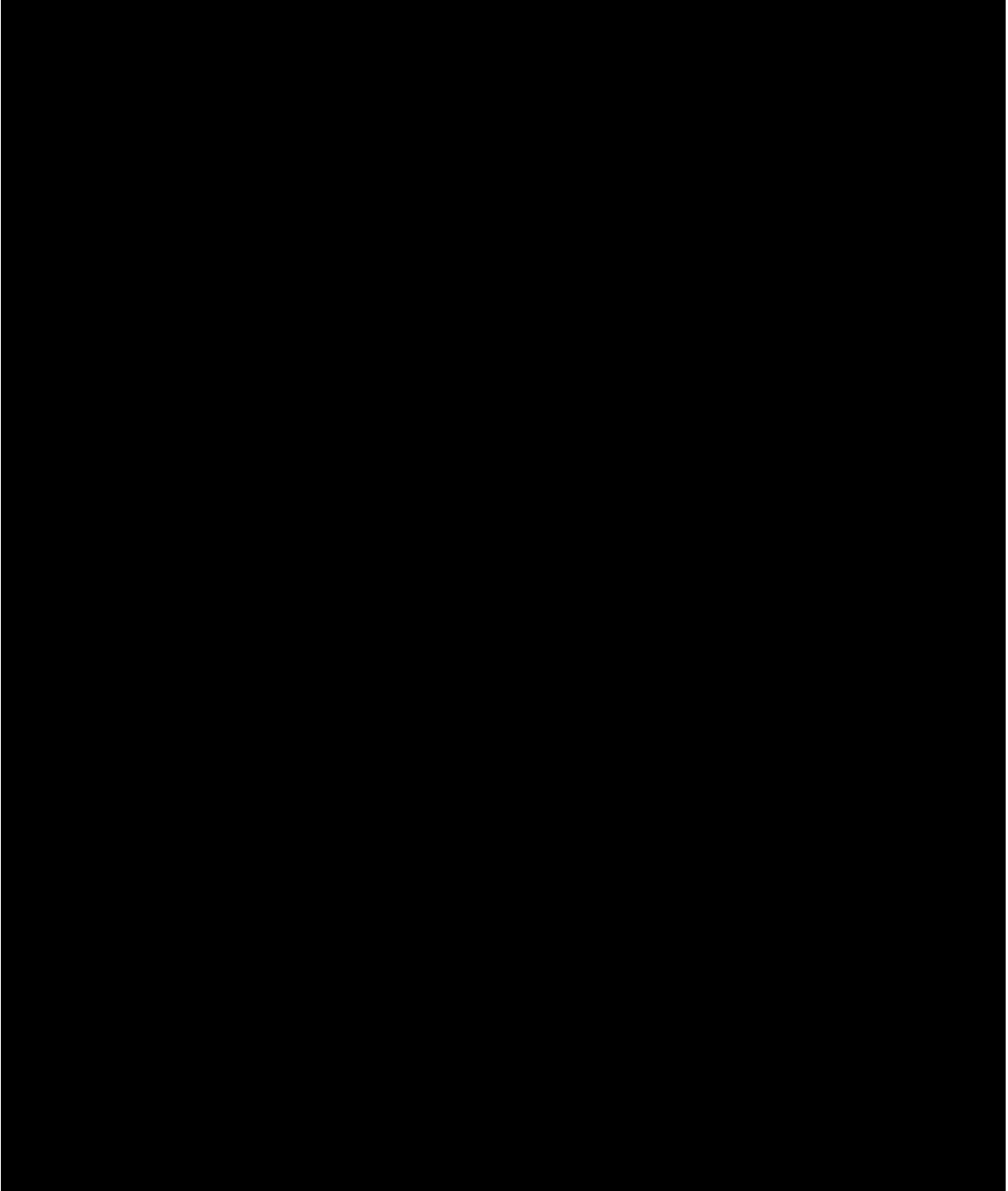
## Organizational Chart

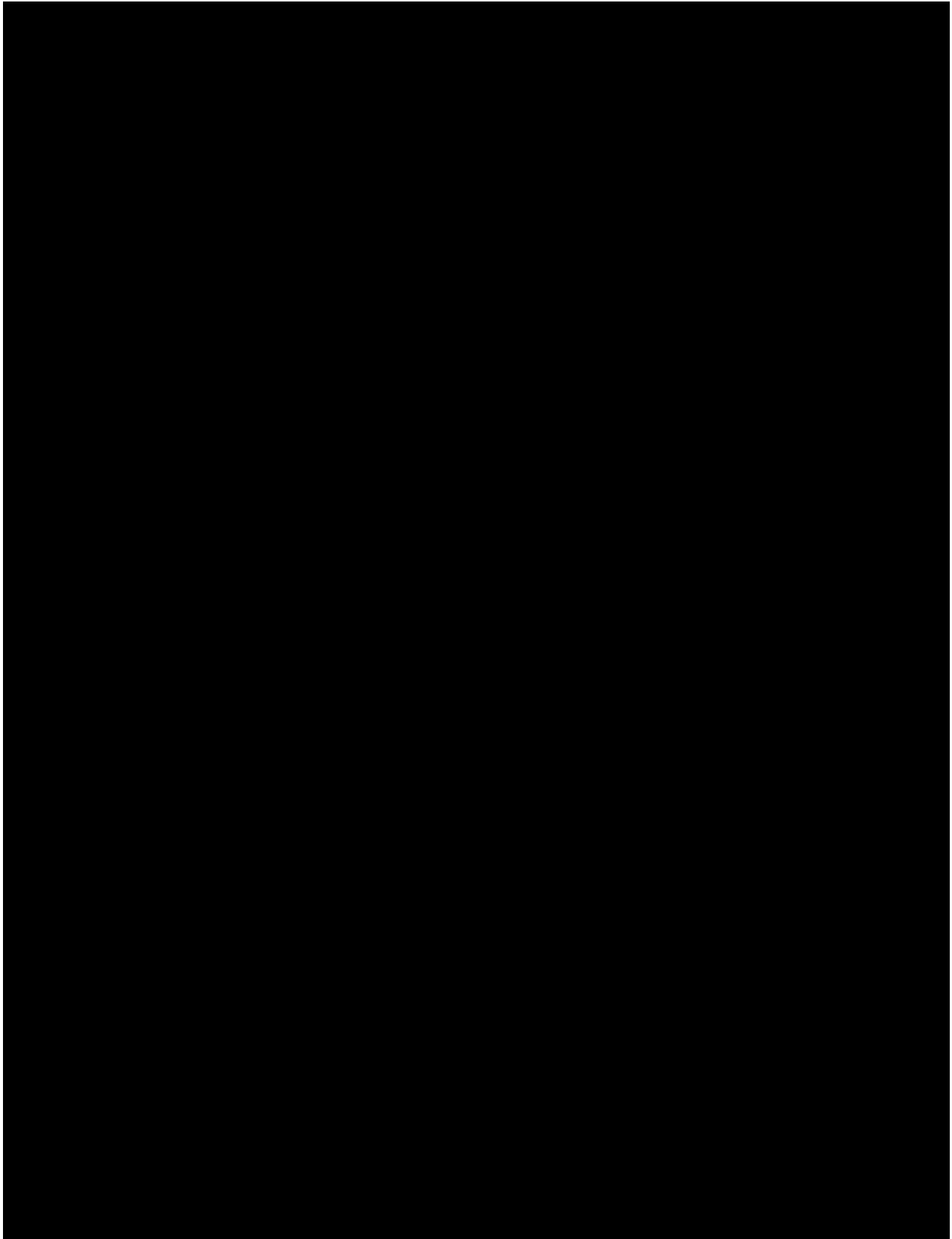
The figure below illustrates our organization structure supporting the District.

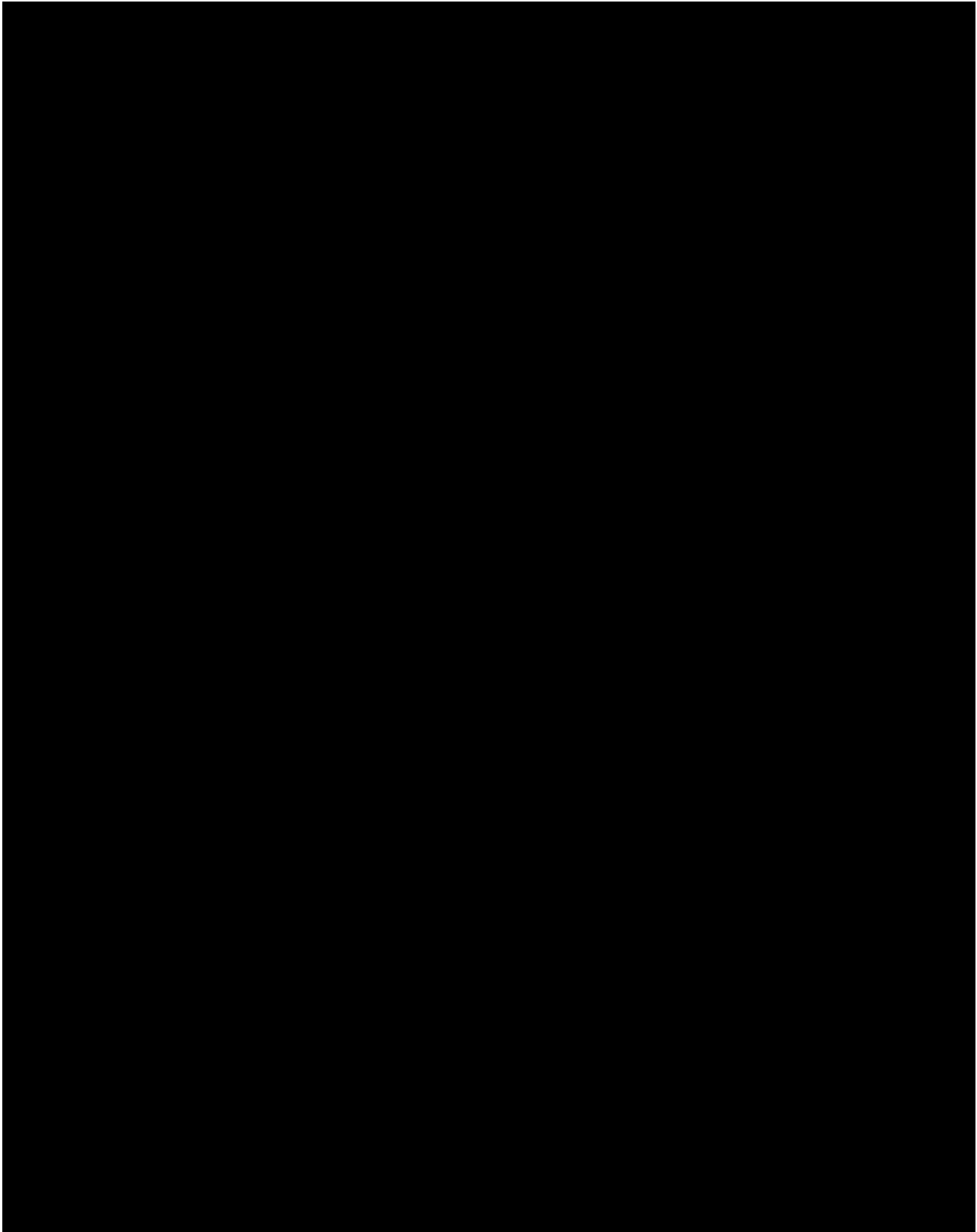


## Qualifications at a Glance

The qualifications of our key team members are summarized below.







## Resumes

To learn more about our proposed team, please see *Appendix C: Team Member Resumes*.

*c) Provide letters of commendation and/or letters of reference.*

## References **(Contains Confidential Information)**

Please see below for *Attachment C: References*.

**ATTACHMENT C**

**REFERENCES**

**Instructions:** Provide three references of customers that you have provided similar services for Medicaid Direct Billing Services as is described in this solicitation. The list of References shall be completed in its entirety and submitted with the bid response.

Company/School Name: [REDACTED]  
Address: [REDACTED]  
Contact Person: [REDACTED]  
Phone Number: [REDACTED]  
Type of Service: [REDACTED]

Company/School Name: [REDACTED]  
Address: [REDACTED]  
Contact Person: [REDACTED]  
Phone Number: [REDACTED]  
Type of Service: [REDACTED]

Company/School Name: [REDACTED]  
Address: [REDACTED]  
Contact Person: [REDACTED]  
Phone Number: [REDACTED]  
Type of Service: [REDACTED]

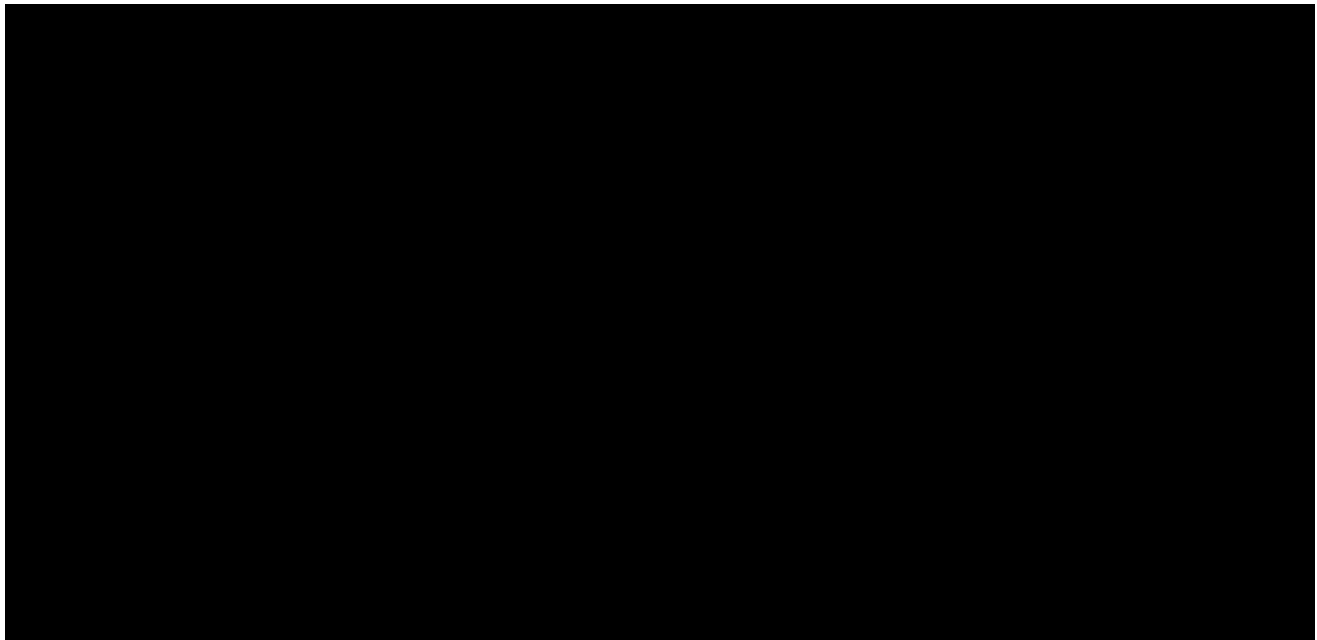
## SECTION 4 – ADDITIONAL OPTIONAL DATA

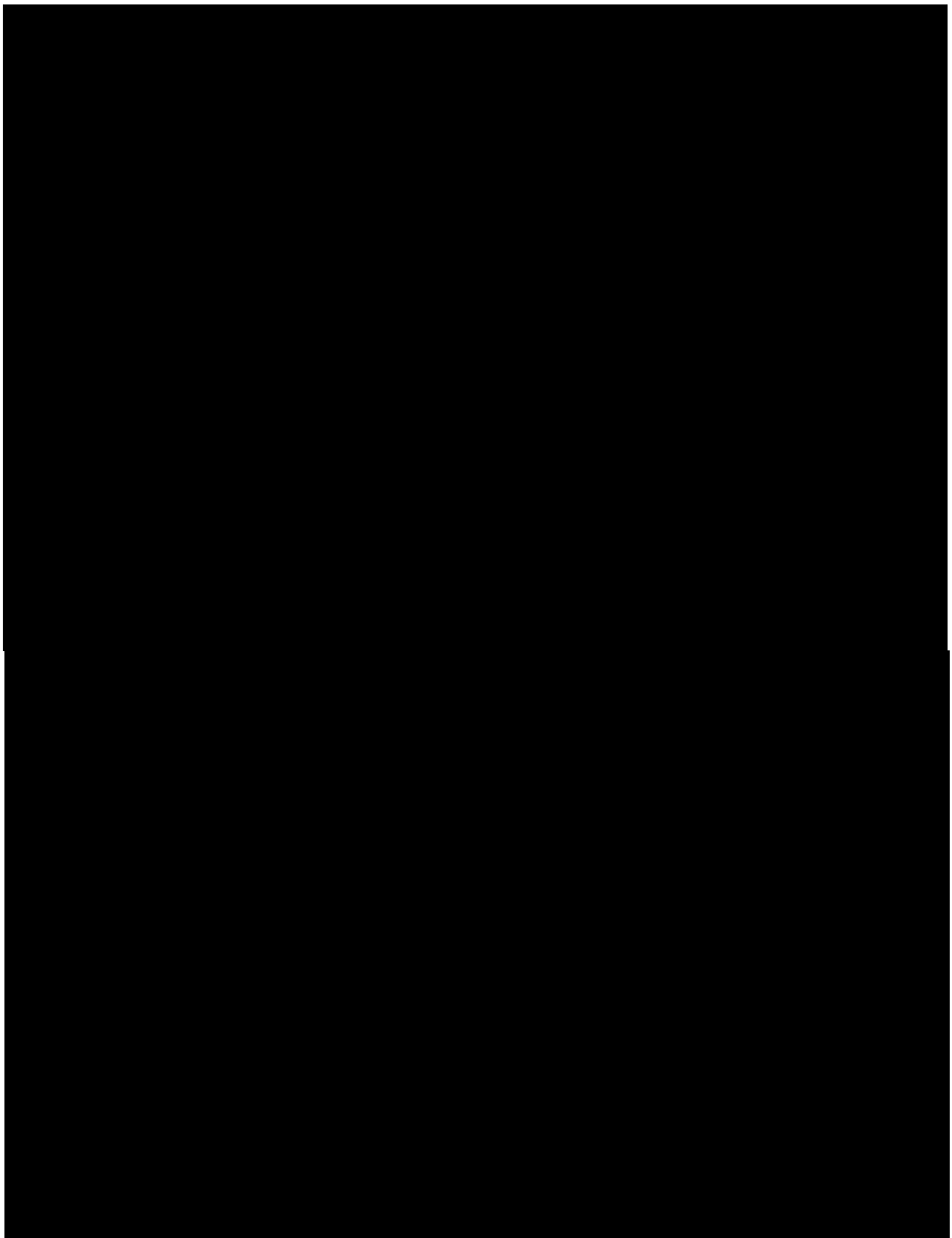
*a) Provide any additional information considered essential to the proposal which has not been specifically requested.*

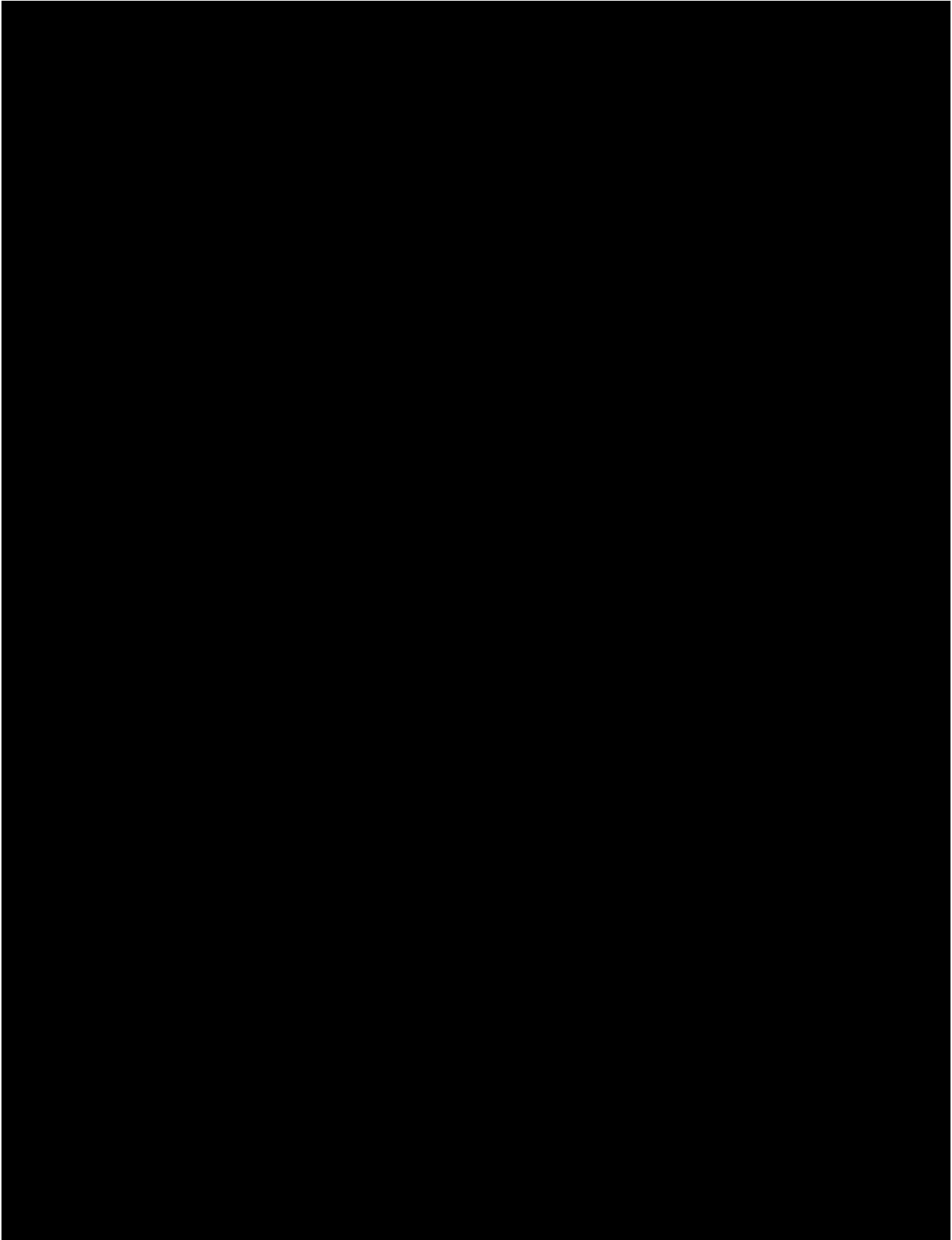
SSG is honored to have been the school-based Medicaid billing provider for the District since 2015. We have been a proven partner to the District, successfully demonstrating a strong track record of Medicaid billing and revenue enhancement. Moreover, we have worked in partnership with the District through numerous issues such as processing Third-Party Liability services, Tele-therapy services due to COVID19, and providing 835 files for Nursing claims submitted by another vendors, to name a few. We believe that no other vendor can offer the District the same level of historical knowledge, proven experience, and low cost to meet the scope of this project.

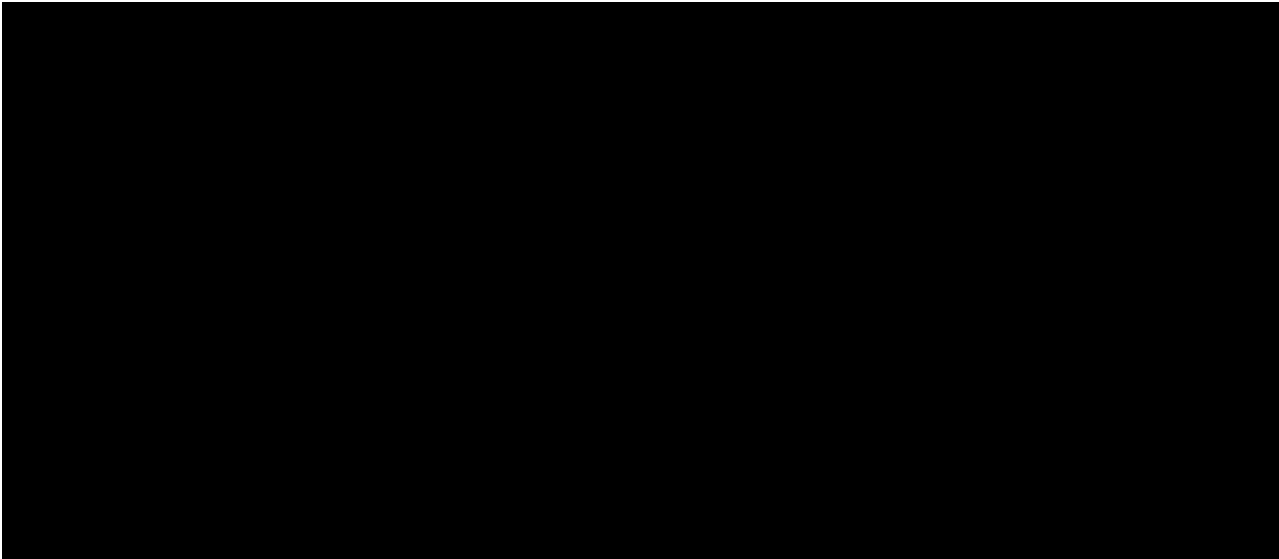
*b) Describe any additional optional services that may benefit the District that (must) follow the general scope of the project. Please limit statements to one page per service.*

### Health Office Module *(Contains Confidential Information)*









***c) Describe any other benefits the District will realize through a contract with your firm.***

The District will realize a host of benefits by renewing their partnership with SSG including:

- The most experienced staff working with your Medicaid claims;
- Knowledge of South Carolina Medicaid policy;
- No implementation time or learning curve;
- Best return on investment;
- Proven system;
- High-quality training; and
- Quick configurations to meet changing policy requirements.

## **APPENDIX A: MINORITY PARTICIPATION AFFIDAVIT**

Please see below for *Attachment A: Minority Participation Affidavit*.

**ATTACHMENT A**

**MINORITY PARTICIPATION AFFIDAVIT**

Is the bidder a South Carolina Certified Minority Business?  Yes  No

Is the bidder a Minority Business certified by another governmental entity?  Yes  No

If so, please list the certifying governmental entity: \_\_\_\_\_

Will any of the work under this contract be performed by a SC certified Minority Business as a subcontractor?  Yes  No

If so, what percentage of the total value of the contract will be performed by a SC certified Minority Business as a subcontractor? \_\_\_\_\_

Will any of the work under this contract be performed by a minority business certified by another governmental entity as a subcontractor?  Yes  No

If so, what percentage of the total value of the contract will be performed by a minority business certified by another governmental entity as a subcontractor? \_\_\_\_\_

If a certified Minority Business is participating in this contract, please indicate all categories for which the Business is certified:

- Traditional minority
- Traditional minority, but female
- Women (Caucasian females)
- Hispanic minorities
- DOT referral (Traditional minority)
- DOT referral (Caucasian female)
- Temporary certification
- SBA 8 (a) certification referral
- Other minorities (Native American, Asian, etc.)

(If more than one minority contractor will be utilized in the performance of this contract, please provide the information above for each minority business.)

The Department of Administration, Division of Small and Minority Business Contracting and Certification, publishes a list of certified minority firms. The Minority Business Directory is available at the following URL: <http://osmba.sc.gov/directory.html>  
[04-4015-3]

## APPENDIX B: CERTIFICATE OF LIABILITY INSURANCE

Please see below for SSG's *Certificate of Liability Insurance*.





**ADDITIONAL REMARKS SCHEDULE**

AGENCY Willis of New Jersey, Inc.		NAMED INSURED Solix, Inc. 10 Lanidex Plaza West, Suite 300 Parsippany, NJ 07054	
POLICY NUMBER See Page 1		NAIC CODE See Page 1	
CARRIER See Page 1		EFFECTIVE DATE: See Page 1	

**ADDITIONAL REMARKS**

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,  
 FORM NUMBER: 25 FORM TITLE: Certificate of Liability Insurance

The District and its officers, officials, employees and volunteers are included as Additional Insureds as respect to General Liability.

General Liability policy shall be Primary and Non-Contributory with any other insurance in force for or which may be purchased by the Additional Insureds.

Waiver of Subrogation applies in favor of the Additional Insureds with respect to General Liability.

Coverage for Contractual Liability is provided under the General Liability policy.

INSURER AFFORDING COVERAGE: ACE American Insurance Company NAIC#: 22667  
 POLICY NUMBER: D95609363 002      EFF DATE: 11/04/2020      EXP DATE: 11/04/2021

TYPE OF INSURANCE:	LIMIT DESCRIPTION:	LIMIT AMOUNT:
Cyber Liability	Each Claim/Aggregate	\$10,000,000
	Deductible	\$75,000

## **APPENDIX C: TEAM MEMBER RESUMES (*CONTAINS CONFIDENTIAL INFORMATION*)**

Please see the pages below for the resumes of our key project team members.

