

**REQUEST FOR PROPOSAL #2024-075**  
**Emotional Wellbeing & EAP Services**  
**RESPONSE ADDENDUM #01**  
**April 29, 2024**

**QUESTIONS**

1. How many employees are currently enrolled in benefits?

3,996 enrolled in medical insurance

2. How many employees are eligible for benefits?

4,428

3. How many individuals are enrolled in Retiree Medical?

1,341 are on the Alight exchange platform, 1,875 are on the Aetna Group plan.

4. How many individuals are eligible for Retiree Medical?

This number can change, however there are about 500 employees at or over age 65.

5. Pg 24, Statement 3. Please expand on the definition of “as needed” campus visits.

This has a broad definition and can include meetings with employees or the HR department.

6. Pg 24, Statement 4. Reference “The University prefers a unique toll-free telephone number just for the University.” Is a unique member services number a requirement or preference? If preference, will it impact the RFP scoring?

This is a preference, however all responses could impact RFP scoring.

7. FSA Questionnaire (line 14) – “VM for employees/former employees when representative is not available”. This is not a common requirement. If email or alternative option available, is this acceptable?

Please answer with yes/no and the RFP response will be scored accordingly.

8. Retiree Billing Questionnaire, #9 – is the vendor expected to create the OE package or just distribute the package that UMS creates?

Distribute package that UMS creates.

9. How many HR locations are responsible for COBRA Administration?

1.

10. How many insured employees?

3,996 on medical plan.

11. What was the number of insured employees in 1/1/23 & 1/1/22?

2022- 4,186

2023 – 4,056

12. What is the average number of new hires per month?

42

13. What is the average number of terminations per month?

57

14. How many COBRA qualified plans are there within the scope of the RFP? Please list their renewal dates.

4 and all are 1/1 renewal dates.

15. How many insurance carriers provide plans to UMS?

5

16. Confirm EBPA is your COBRA administrator?

Confirmed.

17. Who is the current HRIS/Benefits administrator?

Peoplesoft (Oracle). Moving to Oracle Cloud effective 1/1/25

18. Is the UMS seeking a single provider for all requested services?

Yes.

19. Will the awarded vendor conduct open enrollment as part of their implementation?

Yes.

20. Please provide the following additional dates to your RFP timeline.

- a. Presentation date(s) – End of May/early June 2024
- b. Implementation dates – July 2024
- c. Fiscal year start & end dates -7/1-6/30

21. What does the relationship look like between the University of Maine System and the six universities? Are they set-up as divisions under? Do they have the same plan set-up for FSA, COBRA and Direct Bill?

There are different plan set-ups by collective bargaining unit.

22. Within UMS - FSA Bid Forms, Tab Employer RFP overview: Can you please share how the 52 employers work within the University of Maine Systems? Can you also confirm that there are indeed 3,160 Medical FSA enrollments between these 52 employer groups?

Please disregard that tab.

23. Who is the current FSA, COBRA and Direct Bill Administrator?

EPBA

24. What is the reason the University is marketing these lines?

Due diligence.

25. Is the University looking to keep their current COBRA pricing strategy of per event pricing or would they be welcome to seeing pricing on per covered employee per month?

Please refer to the Fee worksheet row 3.

26. Is the University open to seeing HSA pricing included in our Administrative Proposal?

No.

27. What are the key decision factors for the University?

Please refer to bid forms and bid scoring information within RFP.

28. Who does the University use for Medical, Dental and Vision providers?

Cigna, Northeast Delta Dental and EyeMed.

29. Is the University open to using the selected Vendor's Legal Agreements, with the ability of the University to redline these documents?

This may be negotiated with finalists.

30. Please provide the average number of attendees from the University's previous OE Fairs?

Low attendance for the occasional OE fair.

31. Is attending the University's OE fairs a mandatory requirement?

On an as-needed basis, however these resources are generally not requested.

32. How many Initial General Notices were sent out in 2023? What is the average number of GIN sent out for University of Maine?

This is an optional service that EBPA provides that UMS has not taken advantage of. Please ensure that you have the ability to administer Initial General Notices, however UMS reserves the right to not take advantage at this time.

33. How long has the University of Maine utilized the current vendor?

Since 2006.

34. What is the \$0.60 additional PPM fee for on the FSA?

Debit card fee

35. Performance Guarantees

- a. What is the current FSA program's service level agreement (SLA) for all member services?
- b. Are there financial penalties should the current FSA contractor(s) not meet the SLAs? If yes, what are they?

There are currently none in place.

36. The University does not provide any detailed information regarding program forfeitures.

- a. Do the funds forfeited by participants transfer to the University operating budget?
- b. ERISA-based plans are pre-empted from escheatment. What is the expectation of the Plan Sponsor regarding escheatment?
- c. What is the current the University forfeiture balance?
- d. Approximately how much was forfeited from the last plan year?

- e. What was the total number of participants who forfeited money in the last plan year for the Health Care FSA?
  - i. What was the total amount of forfeited money for the last plan year for the Health Care FSA?
- f. What was the total number of participants who forfeited money in the last plan year for the Dependent Care FSA?
  - ii. What was the total amount of forfeited money for the last plan year for the Dependent Care FSA?

Decline to answer questions regarding forfeitures.

37. The University does not provide any detailed information regarding Paper Claims and/or Paperless Reimbursement Claims.

- A. For the Health Care FSA:
  - i. How many claims were submitted by paperless reimbursement by month for the last 12 months?
  - ii. How many manual claims were submitted by month for the last 12 months?
  - iii. How many claims were submitted by fax by month for the last 12 months?
  - iv. How many claims were submitted on the website by month for the last 12 months?
  - v. How many claims were reimbursed by EFT by month, or the smallest available time period, for the last 12 months?
  - vi. How many claims were reimbursed by check by month (if any), or the smallest available time period, for the last 12 months?
  
- B. For the Dependent Care FSA:
  - i. How many claims were submitted by paperless reimbursement by month for the last 12 months?
  - ii. How many manual claims were submitted by month for the last 12 months?
  - iii. How many claims were submitted by fax by month for the last 12 months?
  - iv. How many claims were submitted on the website by month for the last 12 months?
  - v. How many claims were reimbursed by EFT by month, or the smallest available time period, for the last 12 months?
  - vi. How many claims were reimbursed by check by month (if any), or the smallest available time period, for the last 12 months?

Decline to answer questions regarding claims counts.

38. The University does not provide any detailed information regarding customer service.

- i. Currently what is the average number (or overall total) of service calls per participant?
- ii. Please provide the number of participant emails, calls and appeals received each month for the most recent full plan year.

- iii. Please provide the call volume by month, or the smallest available time period, for the last full plan year.
- iv. By week, or the smallest available time period available, please provide the call volume during the last open enrollment period.
- v. By month, or the smallest available time period, please provide the number of calls serviced by an individual customer service representative for the last full plan year.
- vi. By month, or the smallest available time period, please provide the average amount of time a transaction took that was handled by a customer service representative (i.e. Average Handle Time) for the last full plan year.

Information not available.

39. Section 1.2.1.1 of the RFP references Appendix D as the University of Maine System Master Agreement. Is this the same document that is included as Section 4.0 of the RFP? If not, please provide a copy of Appendix D.

Please refer to page 17 of the RFP.

40. If Respondents have proposed modifications to the University of Maine System Master Agreement, does the University prefer a redline of the document or a narrative of the proposed changes?

Please provide both.

41. Section 1.2.1.3 c. of the RFP indicates: "Your entity agrees that the resulting Agreement will be the entire agreement between the University (including University's employees and other End Users) and Respondent and in the event that the Respondent requires terms of use agreements or other agreements, policies or understanding, whether on an order form, invoice, website, electronic, click-through, verbal or in writing, with University's employees or other End Users, such agreements shall be null, void and without effect, and the terms of the Agreement shall apply." Based on the type of services to be provided under this RFP, and the need for the University's employees to access websites and mobile apps, this may not be practical. These websites and mobile apps contain Privacy Policies, Terms of Use, Security Options, and other applicable terms and conditions associated with using these platforms. Is the University willing to remove this restriction contained in Section 1.2.1.3.c.?

This may be negotiated with finalists.

42. Section 3.1.1 indicates that for any electronic submissions Respondent's name should appear on every document page. Please confirm that requirement.

Confirmed.

43. Are proposed modifications permitted to the Riders attached to the University of Maine System Master Agreement?

This may be negotiated with finalists.

44. In the FSA Questionnaires, certain sections request that we respond with a Yes/No answer. Some of the questions require an explanation, Is that permitted?

Yes.

45. Are there any operational challenges that you'd like to improve on with your FSA, COBRA, or DB administration?

- File feeds for retirees are manual. Automation would be great.
- Retiree data requests have been subject to lengthy delays +2 weeks in recent examples. Data fields, elements, and values are inconsistent and require manual intervention to clean up. Access to real-time reporting with consistent requirements will help improve this concern.
- Collaboration and UMS approval of communications and marketing materials prior to mailing.