PRE-PROPOSAL MEETING
FOR
SENIOR PROJECT MANAGER FOR MEDICAID POINT OF SALE
ELECTRONIC CLAIMS MANAGEMENT SYSTEM

CONTRACT NO.: DHMH/OPASS 18-17559/m00b7400545

JUNE 15, 2017
201 West Preston Street
Room L-2
Baltimore, Maryland
9:10 a.m. - 10:00 a.m.

PRESENT FROM DHMH:
QUEEN DAVIS, Procurement Specialist
DIXIT SHAH, Task Order Manager
ATHOS ALEXANDROU, Director
JANE RUTKOWSKI, Procurement Officer
JOHN BOHNS, Senior Medicaid Project Manager
ZENA MORRIS, Assistant Medicaid Project Manager
ALEX PERALTA
LARRY VARGAS
MANGESH JOGLEKAR
AL KRISH
CHARLES SANDLER

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ALSO PRESENT:

NARAYAN ATHREYA, Icube
BRIAN ZERNHELT, Software Consortium
YVONNE ROBINSON, OTAS, Inc.
RYAN HORAN, Bith Group
DOUG SEVEC, TEK Systems
ADLY MAKARY, Makary Soft
NAGESWARA TRIPURAMALLU, Expedite Info Tech
SILVIO RENZI, Turning Point
TRACEY GARCIA, Turning Point
MARK NOBLE, Companion
JEFF WELCH, Think Systems, Inc.
SHANE JOHNSON, Apex Systems
THERESA BOYLE, APV
ELIZABETH JACKSON, APV
GREG DASH, G&RD Solutions
STACY STRATTON, Attain
NISHA BOURI, N-3 Technologies
NATE ALLERA, Automated Resource Management

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ALSO PRESENT CONTINUED:

MONICA AHUJA, Anagarai

REPORTED BY: KATHLEEN A. COYLE, Notary Public
MS. DAVIS: So good morning everyone. I’d like to welcome you all to this pre-proposal conference for the Office of Medicaid Program Medicaid management -- Medicaid -- Maryland Medicaid Pharmacy Program. I apologize. My name is Queen Davis. I am the procurement officer for this task order request for proposal, and I am here to give you a brief overview of the procurement process for this project. After I’ve completed my over, the program Dixit Shah, to my right, will give you a programmatic overview, after which we will be taking questions from you.

I want to make sure that everyone has signed in the sign-in sheet. If you have business cards, put them in the envelope that’s been provided over on the table. That way, if we have reasons to get in touch with you for any matter or to give you addendums and minutes from this meeting we’ll be able to do so readily.

I would like to thank you all for coming. I received a few questions prior to this conference.
After I’ve given my overview I’m going to go through those questions and answers that I’ve received. Those questions and answers will also be a part of the pre-proposal conference minutes that’s published through the email that I sent out, and also sent to all of you that’s in attendance this morning.

This is, DHMH is issuing this CATS TORFP to obtain a company to act as the state representative. I apologize. Before I do that, let me take the opportunity for everyone to introduce themselves. And I’m going to start on my right.

MS. RUTKOWSKI: Hi. I’m Jane Rutkowski. I’m the procurement coordinator for this procurement.

MR. SHAH: My name is Dixit Shah. I’m deputy director for Maryland Medicaid Pharmacy Program and also task order manager.

MS. DAVIS: Again, I’m Queen Davis, procurement officer for this project, from the Office of Procurement.

MR. ALEXANDROU: Athos Alexandrou, director of the Medicaid Pharmacy Program.
MR. ATHREYA: Narayan Athreya from Icube Systems.

MR. ZERNHELT: Brian Zernhelt from Software Consortium.

MS. ROBINSON: Yvonne Robinson from OTAS, Inc.

MR. HORAN: Ryan Horan, Bith Group Technologies.

MR. SEVEC: Doug Sevec, TEK Systems.

MR. DASH: Gregory Dash. I'm from G&RD Solutions. I'm a minority, everybody sitting at the table.


MR. TRIPURAMALLU: Nageswara from Expedite Info Tech.

MR. RENZI: Silvio Renzi from Turning Point Global Solutions.

MS. GARCIA: Tracey Garcia, Turning Point Global Solutions.

MR. NOBLE: Mark Noble with Companion Data
MR. WELCH: Jeff Welch with Think Systems.

MR. JOHNSON: Shane Johnson with Apex Systems.

MR. PERALTA: Alex Peralta with (indiscernible).

MR. VARGAS: Larry Vargas with (indiscernible).

MR. KRISH: Al Krish (indiscernible).

MR. JOGLEKAR: Mangesh Joglekar (indiscernible).

MS. STRATTON: Stacey Stratton, Attain.

MS. JACKSON: Liz Jackson, AP Ventures.

MS. BOYLE: Theresa Boyle, AP Ventures.

MR. SANDLER: Charles Sandler, division chief, Maryland Medicaid Pharmacy Program.

MS. MORRIS: Zena Morris, deputy director procurement, OSOP.

MR. BOHNS: John Bohns, director of OSOP.

MS. DAVIS: Okay. Again, DHMH is issuing this CATS+ TORFP to obtain a company to act as the
State's representative in a replacement point of sale services implementation in accordance with the scope of work described in section three of the TORFP. Only a senior project manager is sought at this time, with the potential to obtain additional resources in support of the Pharmacy Point of Sale Electronic Claims Management Systems and associated implementation project.

The contract resulting from this solicitation will be in effect from notice to proceed for three years base period with two additional one-year option terms. And the procurement method, again, for this solicitation is task order request for proposals and TORFP for short.

Offerors minimum qualifications are listed in section two of the TORFP, under company and personnel qualifications, and that begins on page 12.

Section three of the TORFP is the scope of work, and it begins on page 13. Please carefully review this section to get a full understanding of the requirements of this task order request for proposal.

Offerers are required to submit their

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response to the TORFP in two parts. Section four, task order proposal format and submission requirements, and subsection 4.2 clearly lists the requirements for your submission. The task order proposals shall be submitted via two emails. DHMH can only accept emails that are less than or equal to 25 megabytes. If a submission exceeds this size please split your submission into two parts, two or more parts, depending upon the size, and include the appropriate part number in the subsection, e.g., part one of two, or part one of three, however many parts you have for each proposal submission. Technical and financial are submitted separately. After the subject line information above the contents please enter that information.

The task order technical proposal shall be contained in one or more unencrypted emails with two attachments. This email shall include a subject line, and the subject line should read CATS+ TORFP DHMH/OPASS 18-17559 forward slash and the task order BPL number M00B7400545. And then put after that "technical." And if it's part one you'll put part one. If it's part one
of two, put part one of two, and then the next one will be part two of two, and have "technical" proceeding that. And plus the name of the master contractor that's submitting the proposal. One attachment labeled TORFP DHMH/OPASS 18-17559 forward slash the BPO number, and technical attachments containing all technical proposal attachments. And please see section 3.3. And this is all to be signed in PDF, signed and sent in PDF format. We need one attachment labeled TORFP DHMH/OPASS 18-17559/M00B7400545 technical proposal. And that should be in Microsoft Word format. And the format needs to be 2007 or later.

The task order financial proposal shall be contained in one email containing all attachments, documents detailed in section 3.4.2, with password protection. DHMH will contact offerors for the password to open up your financials once you have been determined to be reasonably acceptable to continue in the process.

The subject line of your financial submission should read CATS+ TORFP DHMH/OPASS 18-17559/M00B7400545
financial, plus the master contractor's name. And one attachment labeled TORFP DHMH/OPASS 18-17559/M00B7400545 financial should be submitted in PDF format with all documents signed.

Let me state that there are no MBEs associated with this. This is for individual. So we will not be trying to contract a person --

The task order contractor will be selected from among all eligible master contractors within the appropriate functional area responding to this CATS+ TORFP. In making the task order agreement award determination, the task order requesting agency will consider all information submitted in accordance with section three of the task order.

Please review section five, task order award process. This section lists the task order evaluation criteria in section 5.2. And listed in section 5.3 is the selection procedures.

As written under 5.3F of the task order, the procurement officer shall make the determination recommending award of the task order to the responsible

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offeror whose task order proposal is determined to be
the most advantageous to the State of Maryland,
considering price and evaluation criteria set forth in
the task order request for proposal. In making a
selection the task order technical proposal will be
given greater weight than the task order financial
proposal.

Commencement of work in response to this task
order agreement shall be initiated only upon issuance
of a fully executed task order agreement, a non-
disclosure agreement to the contractor, a BPO to the
contractor, and a notice to proceed authorized by the
task order procurement officer. And you can see
attachment seven, notice to proceed.

Let me give you some critical dates for you
to remember. These dates are non-negotiable. The
closing date and time for questions is June 26, 2017,
at 4:00 p.m., local time. And the closing date and
time for your submission and response to this task
order is July 20, 2017, at 2:00 p.m., local time. And
you can review the key summary information summary
sheet beginning on page two of the task order. And it lists all of the pertinent information and all contact information you will need.

Now, before I turn it over to the program form their program overview, I received, as I said earlier, 12 questions so far. I’m going to read those questions out and the response to those questions. And these questions will also be added to the minutes and will be part of the minutes posting.

So the first question is: Please let us know the education, general experience, specialized experience for stated project manager? As there is no senior project manager in CATS+ master contract, section 2.10, shall we use the following details as CATS+ master contract section 2.10.95. And that section reads, education is Bachelor’s Degree from an accredited college or university engineering, computer science, information systems, business or other related disciplines, a Master’s Degree or project management certification is preferred. That section also states that general experience is at least five years of
experience in project management, specialized
experience at least five years in managing IT related
projects, and the offeror must demonstrate a leadership
goal role in at least three successful projects that were
delivered on time and on budget. And the State’s
response is: This will be revised. The State is
seeking a senior level expertise, but the labor
category is project manager.

Question two is: What is the anticipated
start date for this work? And the Department of Health
and Mental Hygiene will be projecting somewhere near
October 2017.

Question number three is: Name of incumbent?
This is a new procurement and there is no incumbent for
this solicitation.

Question number four is: Can this
solicitation become a small business only? The answer
to that is no. It is open to all under the CATS, under
that functional area.

Question number five: Is the State seeking
just a senior project manager or an entire team to
develop the point of sale or is it more of an RFP? The
TORFP is seeking a senior project manager, per section
three. The work order process may request additional
resources. And that’s listed in section 3.9 of the
TORFP.

Question six: Does the senior project
manager currently have, must currently have a PMP or a
Master’s Degree and other project management
certifications can be used instead? In section 2.2 --
our response, in section 2.2.1, number three states, a
project management certification.

Question seven: Regarding other resources
that may be requested in the future, such as subject
matter experts, do you need information about them now
or just the pricing and the plan for acquiring them?
And we just simply need the pricing and a plan for
acquiring additional resources being the work order
process.

Question eight: Does all the work required
to be done onsite at DHMH or can some of it be done
remotely? And the answer is yes, all work is onsite at

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DHMH, except that there may be occasions that the task order manager uses their discretion to allow pre-approved remote teleworking.

Question number nine: Who is providing the current point of sales claims processing service, and what is the contract number? Currently Xerox, whose name has been changed to Conduent, is providing that service. And the number is OPASS 07-9030.

Is the processing service provided through a cloud based service or a custom design? This is a custom design project.

MR. ATHREYA: Can you repeat that contract number again?

MS. DAVIS: Sure. Contract number is OPASS 07-9030.

MR. ATHREYA: Thank you.

MS. DAVIS: And the vendor is Conduent, formerly Xerox.

Number -- I read number 10. They asked if it was cloud based or custom design? It is a custom design.
Number 11 is: Please clarify if additional resources will be procured through a work order. If so, will we be provided a sample work order as referenced in section 3.9? It says attachment 16 reads: This attachment does not apply to this TORFP. This will be corrected through an addendum. There will be work orders for this project. And an addendum will be forthcoming, probably with the minutes from this conference.

And the last question, question number 12 is:

Is there a page limit on the technical response? And there is no set page limit. However, the State expects the proposal to contain only the information necessary to demonstrate meeting requirements to ensure the review process is as efficient as possible. And as I stated earlier, we can only accept emails of 25 megabytes or less.

MR. ATHREYA: Yours says 12 megabytes.

MS. DAVIS: Oh, it says 12 megabytes. Let me -- I will correct this through the minutes. Normally it's been 12. Historically, it's been 25 megabytes,
but it has 12 megabytes in there. I’m not sure if things have changed. I’m not sure, but I will make sure that that is clear.

And that’s all I have so far as far as questions. I’m going to turn it over to Dixit Shah, the contract monitor and deputy director for this project. But I will caution you that once you ask questions can you please follow up any questions that I may not have already answered with an email submission so that we can include them in our question and answer document when it’s posted. So if there are no questions about the procurement process, I’ll turn it over to Dixit.

MR. SHAH: Thank you, Queen. I appreciate it. I think there are some people who have joined after the initial announcements. So if you want to introduce yourselves who came after the original announcement.

MS. BOURI: My name is Nisha Bouri. I’m with N-3 Technologies.

MR. ALLERA: Nate Allera with Automated
Resources Management Associates.

MS. AHUJA: Monica Ahuja from Angarai.

MS. DAVIS: Could you please make sure you've signed in on our sign in sheet. Thank you.

MR. SHAH: And also, if you could provide your business cards as well. It will make life easier.

Okay. Good morning everyone. As we stated before, my name is Dixit Shah. I am a deputy director Maryland Medicaid Pharmacy Program. Thank you for attending this meeting. I will provide for you an overview of the task order proposal, which is commonly known as TORFP. The title of this TORFP is senior project manager for Medicaid point of sale electronic claims management system. I will briefly go over some of the areas of this TORFP.

As I stated before, I am also the task order manager for this TORFP.

In the TORFP, as section 1.1, this TORFP is subject overtime CATS+ master contract, as queen stated before.

As per section 1.5, the task order contract
personnel will be required to make an oral presentation to the State representatives in the form of interviews. Significant representations made by master contractor during the oral presentation shall be submitted in writing as well.

As for section two, it covers and provides information on the company and personnel qualifications.

Section three covers purpose and background, as Queen stated before, of this TORFP.

Section 3.3 provides the project background. The Maryland Medicaid Pharmacy Program's current police officers claims processor contract will end in February of 2019. And the program is in the process of procuring a new contract. The future police officers ECMS RFP, which is a major information technology develop project, MITDP, is to design, implement, administer, manage and maintain a police officers electronic claim capturing management and adjudication system.

Section 3.5 provides required policies,
guidelines, and methodologies.

Section 3.6 -- and some of this may be repetition -- provides the specific requirement of this TORFP.

Section 3.6.2 provides information on duties and responsibility of the contractor.

Section 3.7 covers information on contractor's performance and personnel.

Section 3.8 provides information on deliverables for this TORFP.

Section four provides information on the proposal format and submission requirements.

Section five discusses task order process.

Again, thank you for attending this TORFP pre-bidder's meeting. If you have any questions please state your name, the company you represent, and your questions. If you prefer, you also, as Queen stated, you also should sent those questions via email as well.

Thank you.

MS. DAVIS: Any questions?

MS. MONICA: Section 3.6, do we have to
submit resumes for additional resources?

MS. DAVIS: I think that at this time they're only asking for resumes for the senior project manager. We're not asking for any other resumes at this time.

MS. MONICA: Okay. Is there a possibility in the future?

MS. DAVIS: As I stated earlier, I think you may have come in later, that through work orders there may be additional resources required. And that will be done through the work order process.

MS. MONICA: Okay.

MR. TRIPURAMALLU: Nageswara from Expedite Info Tech. Is the current incumbent eligible to submit a proposal for this?

MS. DAVIS: Can they submit a proposal?

They’re not excluded.

MR. PERALTA: There is no --

MS. DAVIS: Oh, there is no incumbent for this project. No.

MR. PERALTA: There is the Conduent contract runs this now. But that is not the senior project
manager for this TORFP that’s requested. There is no
senior project manager in place today. There is no
incumbent to speak of.

MS. DAVIS: Exactly. But Conduent is the
incumbent for the point of sale contract that’s
currently in place.

MR. SHAH: So let me clarify a little.
Conduent or Xerox does claim processing for us. And we
are in the process of writing a new contract for future
vendor. And we need assistance SPM, senior project
manager, to help us throughout that process.

MR. PERALTA: This is not the individual
responsible for developing the next claims processing
system. This individual will support the State through
that endeavor.

MS. DAVIS: Exactly. Thank you.

MR. ATHREYA: Narayan Athreya from Icube
Systems. I have two questions. One, if the company
who wins this senior PM contract, will they be
precluded from bidding on future development contract
when that Xerox contract expires?
MS. DAVIS: They will more than likely be excluded because they are -- it will be assisting in writing the RFP for the service.

MR. ATHREYA: Okay. And do you need the technical proposal also to be password protected?

MS. DAVIS: Not the technical, just the financial. Just the financial is to be password.

MR. ATHREYA: So technical proposal password protected only?

MS. DAVIS: The technical should not be password protected. Only the financial should be password protected. I apologize for that.

MR. ATHREYA: Section four.

MS. DAVIS: Section four states that the technical is password. And that is not required. Just the financial. I apologize for that error.

MR. PERALTA: So Queen will be submitting --

MS. DAVIS: I will do an addendum to correct that error as well.

MR. ATHREYA: Thank you.

MS. DAVIS: Anymore questions?
MS. ROBINSON: OTAS, Yvonne Robinson. Under your scope of work, 3.1, you put in bold that the offerors must have expertise in the area of pharmacy POS implementation. And I was just a little concerned with that because that is such a small universe, I think, to have expertise in that area. So I was wondering if there was a way to kind of broaden that a little. I mean, you’re really honing in on just a person that’s been in it. And I don’t know, I just think that that’s a little difficult to get. So I’m looking at just broadening that, not expertise, but just knowledge of point of sale systems.

MR. PERALTA: Is it -- just a clarity. Is it the Pharmacy piece of that that’s concerning you?

MS. ROBINSON: Yeah. The pharmacy. Yeah. That’s a very specific --

MR. PERALTA: So your request would be that we open it up so that it’s just expertise in the point of sale systems?

MS. ROBINSON: Right.

MR. PERALTA: I just want to make sure I’m --
MS. ROBINSON: That’s what I’m asking.

MS. DAVIS: That can be discussed. And if it’s going to be changed, it can be clarified, do an addendum as well.

MS. ROBINSON: And then another question.

Is there like a specific budget for this project?

MS. DAVIS: There’s no available budget at this time.

MS. ROBINSON: Okay. All right.

MS. DAVIS: It is a large project, but we don’t have an available budget. Anymore questions?

MR. ZERNHELT: Brian Zernhelt, Software Consortium. Does the candidate have to have Medicaid experience, and how much Medicaid experience?

Understanding that it has to have POS systems with pharmacy, but how much involvement with Medicaid?

MS. MORRIS: Queen, we should --

MS. DAVIS: Yeah. That’s another subject that probably needs to be discussed. I’m sure they’re going to need some Medicaid experience, because it is Medicaid claims processing.
MR. ALEXANDROU: Can you identify where in the RFP we reference Medicaid experience?

MR. ZERNHELT: Just because of the fact that

MR. JOHNSON: The title is Medicaid point of sale.

MR. ALEXANDROU: It's the title because this is a project under Medicaid. But I just want to make sure that you identify where we ask that. I want to address it appropriately.

MS. DAVIS: I don't think that's one of the minimum requirements.

MR. PERALTA: There's no requirement. But, obviously, any Medicaid experience would be beneficial to the individual coming in.

MR. ZERNHELT: If we have people that have done it with the State, with different states and different POS systems, but --

MS. DAVIS: Yeah. But it's not --

MR. ALEXANDROU: The requirement was pharmacy point of sale system, because you could be
working in the PDM, in the private, public, Medicaid, no Medicaid. That’s why I was asking if you -- was that something in there about Medicaid.

MR. ALEXANDROU: That’s not one of the mandatory requirements. That’s not a minimum requirement.

MS. STRATTON: Stacy Stratton, Attain. Can you please explain how, if at all, this RFP relates or interacts to the Maryland bank initiatives?

MR. SHAH: It does not.

MR. MAKARY: Adly Makary, Makary Soft. So we’re talking about for project management are you expecting from the senior project management to lead the project later on for that point of sale when it gets, like for the procurement afterwards. So my understanding is you’re moving from Xerox or we are going to be putting that RFP out there, whether it’s Xerox or someone else. Are you expecting that project manager to help with the procurement up until that point or leading the project or the implementation?

MR. ALEXANDROU: Both.
MR. PERALTA: Just to clarify, leading the implementation from the State’s perspective, just so we’re clear.

MR. ALEXANDROU: Right. It’s the expectation that the project manager -- that the feeders for the point of sale contract, right, once they’re selected they will have their own project manager to manage all of the deliverables, implementation. And the senior project manager we’re asking will be on our side to help us make sure that everything that is required under the point of sale contract for implementation and all that, including certification by CMS, that, you know, it’s done by the whoever gets the contract.

MR. MAKARY: The second question is:

Regarding the certification, PMP certified or like Master’s in project management or certificate in project management?

MR. SHAH: It’s stated on the RFP what’s required, minimum qual. So you need to meet those.

MR. ALEXANDROU: I think Queen mentioned
before.

MS. DAVIS: PMP, was preferred.

MR. ALEXANDROU: And the requirement is, it has to be a project management certificate.

MR. PERALTA: So I think the gentleman’s question is: There are several project managers --

MS. DAVIS: Yes.

MR. PERALTA: We will consider all of them as part of this proposal.

MR. SHAH: Correct.

MR. MAKARY: Last question. Regarding the Department, will experience in claim management process for pharmacy with current State projects that work with Xerox (indiscernible) would these be considered as a plus in this case?

MR. ALEXANDROU: Can you elaborate?

MR. MAKARY: Sure. So currently Xerox, and before Xerox there was (indiscernible) for managing the whole lab pharmacy. So for claim management systems that were working with them, like for other state programs, would managing those projects for that would
be considered to be a plus --

MR. ALEXANDROU: Can you give us an example?

MR. MAKARY: Keeping this program, for example, like a sub Medicaid program and then working with -- they receive all of their pharmacy claims through Xerox. And then they process it afterwards to actually keep it. So currently Xerox does not release it to be paid through FMIS.

MR. ALEXANDROU: We’re not talking about payment. We’re talking about claim certification. So if I understand your question correctly, can it be used in different vendor to pay their claims? Xerox process their claims for KDP use the same way they process for Medicaid and other programs. But the State MMIs does not process the KDP payment. They have another vendor that does that. That is not point of sale claims adjudication for us. We don’t consider that point of sale claims adjudication. It’s just payment. And that’s not what’s required here. I mean, going back to the question whether the bolder section can be opened up a little bit. But for us, point of sale, it means
claim comes in from the pharmacy, gets processed by an entity, determines if the claim should be approved or denied, or pending, or whatever, and then sent back to the pharmacy whether the response or the disposition, and, therefore, the patient can get their medication or not get. Right. That's what we consider as far as the claims process, which ultimately includes sending to the State for Maryland a file, like it's MMIS for Medicaid, or KDP whatever the vendor takes that, but that's up to -- no payment.

MR. MAKARY: Okay.

MR. ALEXANDROU: Now, if someone has A to Z including payment, we'll take that as well.

MR. MAKARY: Thank you.

MR. ZERNHELT: So the State is really utilizing or has more of a need of a subject matter expert than a project manager expert?

MR. SHAH: We are asking for SPM.

MS. DAVIS: Yes. We're asking for a project manager.

MR. ALEXANDROU: With subject matter
expertise in point of sale.

MR. ZERNHELT: Got it.

MR. PERALTA: But the project management is important. This individual will be reviewing plans, schedules, et cetera.

MR. ATHREYA: Narayan from Icube Systems. On section 2.1.1, paragraph three it says master contractor shall propose one key personnel in response to this TORFP a SPM, and this position may not be used as evidence of fulfilling company qualifications. You’re only wanting a candidate here (indiscernible) right?

MR. PERALTA: What section is that, sir?

MR. ATHREYA: Page 12, section 2.1.1, paragraph three.

MR. SHAH: Correct. We are. So we will have to update that statement.

MR. ALEXANDROU: What is it that we need to update?

MR. ATHREYA: Just before 2.2 there is a --

MR. SHAH: Company qualifications.
MR. ATHREYA: And then the second part of the sentence it states position may not be used as evidence of fulfilling company qualifications.

MS. DAVIS: On 2.1.1?

MR. ATHREYA: On 2.1.1, paragraph three.

MS. DAVIS: Oh, okay. This position may not be used as evidence of fulfilling company qualifications. We’ll update that.

MR. ATHREYA: Okay. Thank you.

MR. BOHNS: I’m going to ask to submit that question.

MS. DAVIS: Yes. And let me repeat, anyone that has asked a question, please submit your question in writing so that we’re not missing anything.

MS. ROBINSON: Yvonne Robinson, OTAS. This is in regards to optional personnel that you have in here. And because I’m assuming or envisioning that this project manager will be able to have his own little group to work on this project. By you having this optional personnel and then stating that we can propose additional personnel. So I guess I’m just
trying to understand what is the meaning behind that, if any?

MR. SHAH: So what we’re trying to do is, SPM will come on. And we’re asking for the work order process they could submit additional resources that may be used in the future. If we need them, then we will go through the work order process.

MS. ROBINSON: Okay.

MR. SHAH: But the expectation is only SPM would come on.

MR. PERALTA: It is very probable and possible that they do not execute any work orders.

MS. ROBINSON: Okay. Even the proposed personnel that we’ve proposed?

MR. PERALTA: Right. We will take the proposal and say these other resources would be of value, but again, the contact is for one resource.

MS. DAVIS: And that’s why it says optional, because once the SPM coming on, they may say to the program that, you know, if we bring in this subject matter expert, this will help us get to your end
solution quicker, and they will consider it, and they’ll have the option to do it. But that’s not part of the initial award process.

MR. PERALTA: Because, again, understanding the point of sale vendor is expected to have an entire team for that interface. And you’d be working together with that group.

MS. ROBINSON: Now, I didn’t see anything about the vendor. Is there one already that you’re using?

MR. PERALTA: There was only Conduent.

MS. ROBINSON: So you are going to continue with Conduent?

MR. PERALTA: That contract will be re-competed.

MR. ALEXANDROU: Conduent will be allowed to bid on it for, not for the project management piece of work being bid here, but for the system for claims adjudication system.

MS. ROBINSON: So you might continue to use their system? That’s what I’m --
MR. ALEXANDROU: We are -- if they win --

MR. SHAH: Let me take a step back.

Currently, Conduent is our claim processor. And we are in the process of procuring the new vendor. Who would that be? We do not know. Anyone could apply for --

MR. ALEXANDROU: New contract.

MR. SHAH: New contract I should say. And we need SPM to help us through that process.

MS. ROBINSON: Well, what system is that?

MR. SHAH: That’s their own --

MR. PERALTA: It’s their proprietary point of sale system.

MS. ROBINSON: Okay.

MR. SEVEC: Doug Sevec, Tek Systems. So section 4.4.1 for the technical proposal, that starts on 30, but if you go to 31D, the master contractor and subcontractor experience and capabilities, are like your past performance that you’re looking for. If you go down to “E” it says, you know, current master contractor team personnel who participated on the engagement. You want those resumes, you want a little
synopsis of those team members that participated in our past performs? If so, is it okay to include, if they need resumes, to scrub their names off the resumes; what are the expectations for that?

MS. DAVIS: This is for "E?"

MR. SEVEC: For D1E. What are your expectations there?

MR. PERALTA: This is one, Queen, we should probably --

MS. DAVIS: We will revisit this and we will respond later.

MS. STRATTON: Stacy Stratton from Attain. Similar to your earlier question. Provide clarification on what I thought I heard before, which was the State is looking for a plan on how to potentially acquire additional people or would the State like to see bios or resumes of these potential additional people?

MS. DAVIS: We’re not asking for resumes for anyone except for the senior project manager at this time.
MS. STRATTON: Okay.

MS. DAVIS: On the financial form there are optional categories, labor categories that you can put your pricing in. In the event that there’s a work order, those price will be -- and they will ask for resumes at that time. But for this specific solicitation, right now we’re just asking for the senior project manager’s resume.

MS. STRATTON: Okay. Thank you.

MS. DAVIS: And the company’s experience.

MS. STRATTON: And as a follow up, the State will then provide the clarification on page 31D?

MS. DAVIS: Yes.

MS. STRATTON: Okay. Thank you.

MR. DASH: Greg Dash, G&RD Solutions. I just got a question on -- you might have answered this as well. I’m not sure. But do you have a projected date for the point of sales RFP that will be coming out?

MS. DAVIS: Our projected date is October.

MR. SHAH: At this time we do not have --

MS. DAVIS: Oh, not at this time. Yeah. Not
at this time for that.

MS. MONICA: Monica from Angarai. Going back to the resume, additional resources question. Would we need them to be available at the project start?

MR. SHAH: Only when requested.

MS. AHUJA: Only when requested.

MR. BOHNS: The key personnel will be required as far as notice to proceed. I just want to make sure everybody understands that the key project manager, where it says senior project manager shall, when you propose your key personnel, just make sure they meet those requirements that are in the RFP.

MR. MAKARY: Adly Makary, Makary Soft. So the last question regarding the format for the resumes. I believe you want it to go, you must fill in the template only, no other resumes, formats or anything else?

MR. SHAH: Correct.

MR. VARGAS: I’m seeing there’s a lot of questions about the personnel. I just want to clear it up. When you look at the financial proposals there are
a couple of tables that have the business consultant and project specialist or subject matter expert. We expect to see rates for each one of those. And in the table below that, if there’s any other type of personnel that you feel would be conducive to this type of work, whether it be a technical writer, or things of that nature, or master scheduler, that’s where you put those people that you might think and then with their associated rates. And that’s what we’re looking for for that. And then when we need those personnel, then we’ll ask you for your (indiscernible).

MS. MORRIS: Just to be clear. That is not an evaluation factor. Only the senior project manager will be evaluated.

MS. DAVIS: Exactly.

MR. ALEXANDROU: And just to piggyback onto what Larry said. That other table where you’re supposed to, where you could propose additional, that will be based on your experience. We don’t want you guys to come up and say, hey, you know what, here’s another 30 or whatever else. It’s based on actual
experience from similar engagement. Hey, you know what, he mentioned technical writer, I don’t know, whatever else it is. We wanted to go that route because this group, this is the first time we are going to get a project manager to engage on our behalf through a POS implementation. So we thought of some categories, but we left them there so company “A” may propose technical writer, company “B” may propose a programmer, for example. I don’t know.

MR. NOBLE: So to clarify. On the -- that information is not evaluated as far as the senior project manager. So company “X” says, I’m not going to proposed anyone. And company “Y” says, yeah, but you’re also going to need, based on our experience, dah, dah, dah, dah, dah. You go wow. So you’re not evaluating that company’s providing that senior manager based on that staff plan, you’re just looking for assistance, and help, and guidance, and recommendations that you might want to consider?

MS. DAVIS: Let me just answer that the evaluation criteria is clearly laid out in section five
of the TORFP. And that’s how we will be evaluating the senior project manager. That’s the only evaluation criteria we will using at this time. Those other optional labor categories are based on your plan that you’re submitting. But that will not -- those categories will not be evaluated. Just your plan and your senior project manager.

MR. SHAH: And if you review the attachment one price sheet on page 36, it clearly states -- 36 and 37 -- what’s evaluated and what’s not evaluated.

MS. ROBINSON: So in fact (unintelligible) ends up being led by in your decision making, led by a company that puts all these different positions, and looks like they’ve, you know, they’ve done it before. So they’ve submitted the technical writer, and so, and so, and so. And another company that did not, I mean, in fact could that be kind of --.

MR. SHAH: So again, I think we just answered the question. What’s evaluated and what’s not evaluated.

MS. ROBINSON: All right.
MR. SHAH: I think we're pretty clear on that.

MS. ROBINSON: All right. I just want to make sure.

MS. AHUJA: Monica from Angarai again. In the section 4.4.1, under section A.5, it states "Tools the master contractor owns and proposes for use to meet any requirements." Can we use the tools from the contractor to meet these requirements?

MR. PERALTA: Which subcontractor are you referring to?

MS. AHUJA: Any part of the contract under the contract.

MS. DAVIS: We're not asking for any subcontract participation. We're asking for one senior project manager.

MS. AHUJA: Okay.

MS. DAVIS: Anymore questions?

(No response.)

MS. DAVIS: Let me stress to you again that all the questions you've asked here, if they haven't --
even if they have been answered to your satisfaction, just submit them to the question email address that’s provided in the information summary sheet on page two so that we can make sure we are responding to all your concerns. And if there are no more questions, I thank you all for coming. And this conference is adjourned.

(Whereupon, at 10:00 a.m., the meeting was adjourned.)
CERTIFICATE OF NOTARY

I, KATHLEEN A. COYLE, Notary Public, before whom the foregoing testimony was taken, do hereby certify that the witness was duly sworn by me; that said testimony is a true record of the testimony given by said witness; that I am neither counsel for, related to, nor employed by any of the parties to this action, nor financially or otherwise interested in the outcome of the action; and that the testimony was reduced to typewriting by me or under my direction.

This certification is expressly withdrawn upon the disassembly or photocopying of the foregoing transcript, including exhibits, unless disassembly or photocopying is done under the auspices of Hunt Reporting Company, and the signature and original seal is attached thereto.

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**John Behrns**

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