



City of Somerville: Standard Contract Form

CONTRACT NAME: Medicaid Billing & Collection Services

This Contract, numbered 210393, is made by and between the City of Somerville, a municipal corporation organized and existing under the laws of the Commonwealth of Massachusetts, with an address of 93 Highland Avenue, Somerville, Massachusetts, acting by and through its Purchasing Department ("City") and the Vendor, defined as follows, ("Vendor"):

<b>Vendor Name:</b>	Public Consulting Group, LLC		
<b>Vendor Address:</b>	148 State Street, 10th Floor, Boston, MA 02109		
<b>Vendor Contact Name, Email, &amp; Tel./Fax #:</b>	Peter Marshall	<a href="mailto:pmarshall@pcgus.com">pmarshall@pcgus.com</a>	
	Julie Bloch	<a href="mailto:jbloch@pcgus.com">jbloch@pcgus.com</a>	
	(857) 313-3176		
	(617) 426-2026	(617) 426-4632	
<b>Contract Amount:</b>	\$ 300,000.00		
<b>Purchase Order #:</b>	20215784		
<b>Contract Term:</b>	4/1/2021 through 3/31/2024		
<b>Term:</b>	The term of this Contract shall commence on 4/1/2021 and shall end on 3/31/2024 ("Term"). The Vendor shall complete the provision of Goods and/or the performance of Services prior to the end of the Contract term (the "Completion Date"). The term of this Contract may be extended at the sole discretion of the City, through written notice to the vendor.		
<b>Procurement Type:</b>	Request for Proposals under MGL c. 30B, s. 6 (RFP #21-56)		
<b>Contracting Department:</b>	Health	<b>Project Manager:</b>	Doug Kress
<b>Scope of Work (Goods / Services):</b>	The Vendor shall provide the Goods and/or Services, as described within the attached Appendix A (Scope of Work), made part hereof.		
<b>Compensation:</b>	The City agrees to pay the Vendor a total not to exceed \$300,000.00 for Goods and/or Services rendered and accepted in accordance with the Contract Documents. Rates, units, charges, and frequencies are specified in the attached Appendix B made part hereof.		
<b>Vendor Certifications:</b>	<p>Under the pains and penalties of perjury, the Vendor agrees to perform this Contract and provide the Goods and/or Services in accordance with the City of Somerville's Standard Contract General Conditions, and Supplemental Conditions (if applicable), as set forth within the attached hereto, made part hereof.</p> <p style="text-align: center;"><input type="checkbox"/> Supplemental Conditions apply if checked</p> <p>Vendor is in full compliance with all laws of the Commonwealth of Massachusetts relating to taxes and to contributions and payments in lieu of taxes. The Vendor certifies that it has provided the City with an accurate tax identification number (TIN). In the event that the City is notified by the IRS for an incorrect TIN provided by the Vendor, the Vendor is responsible for penalties.</p> <p>TIN: The Vendor certifies that its accurate federal tax identification number as reported to the IRS is: [REDACTED]</p> <p>This Contract has been duly executed and delivered on behalf of the Vendor by its:</p> <p>Officer (President, Vice President, Treasurer, Secretary) General Partner, Trustee,</p> <p>other: _____; in full compliance with the authority granted by its organizational documents and its votes or resolutions, which authority has not been amended, modified, or rescinded as of the date hereof.</p>		

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**Appendix C: Forms (Check if Applicable; If Unchecked, Not Applicable)**

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> <b>Certificate of Authority</b>              | <input type="checkbox"/> <b>Sole Source Declaration</b>               |
| <input checked="" type="checkbox"/> <b>Evidence of Insurance</b>                 | <input type="checkbox"/> <b>Statement of Management</b>               |
| <input checked="" type="checkbox"/> <b>Bid Package Documents</b>                 | <input type="checkbox"/> <b>Vulnerable Road Users Ordinance</b>       |
| <input checked="" type="checkbox"/> <b>Somerville Living Wage Ordinance Form</b> | <input type="checkbox"/> <b>Campaign Contribution Disclosure Form</b> |
| <input checked="" type="checkbox"/> <b>Certificate of Good Standing</b>          |   |

IN WITNESS WHEREOF, the City and the Vendor have executed this Contract as a sealed instrument on

this, the        1st        day of        April,        2021

**VENDOR**

X  Vendor Signature (Duly Authorized):	Date Signed: 5/14/21
	Print Title: Manager
	Print Name: Peter Marshall

**CITY**

City Auditor's Encumbrance Statement

I hereby certify that the total contract amount is \$ 300,000.00 and that an unencumbered balance of \$ 40,000.00 is available for the current fiscal year of this contract. I further certify that a sum of \$ 40,000.00 is hereby encumbered against the appropriate account for the purposes of this contract and as funds become available, I will encumber additional sums as are required under this contract.

X  Edward Bean, City Auditor	X  Joseph A. Curtatone, Mayor
X  Angela M. Allen, Purchasing Director	X  Approved as to form: Francis X. Wright, Jr., City Solicitor
X  Douglas Kress, Director Health & Human Services	

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# CITY OF SOMERVILLE STANDARD CONTRACT GENERAL CONDITIONS

## 1. Definitions

"City" shall mean the City of Somerville, Massachusetts.

"Contract" and "Contract Documents" shall include the following documents, as applicable: City's Standard Contract Form; these Standard Contract General Conditions; City's Invitation for Bids, Request for Proposals, Request for Quotation, or other solicitation; the Vendor's response to the City's solicitation document including certifications but excluding any language stricken by City as unacceptable. Appendices are made an integral part of this Contract. The Contract documents are to be read collectively and complementary to one another; any requirement under one shall be as binding as if required by all. In the event of any conflict or inconsistency between the provisions of the City's Standard Contract Form or these Standard Contract General Conditions and any other Contract Documents or appendices, the provisions of the City's Standard Contract Form and/or these Standard Contract General Conditions shall prevail. In the event of any conflict or inconsistency between the Contract Documents and any applicable state law, the applicable state law shall prevail.

"Certify" or "Certifies" shall mean that the Vendor certifies under pains and penalties of perjury to the statement referenced.

"Vendor" shall mean the individual, corporation, partnership, or other entity which is a party to this Contract.

## 2. Performance; Time

The Vendor shall perform in accordance with all provisions of this Contract in a manner satisfactory to the City. The Vendor's performance shall be timely and meet or exceed industry standards for the performance required. It is understood and agreed that all specified times or periods of performance are of the essence of this Contract.

## 3. Acceptance of Goods or Services

Performance under this Contract shall include services rendered, obligations due, costs incurred, goods and deliverables provided and accepted by the City. The City shall have a reasonable opportunity to inspect all goods and deliverables, services performed by, and work product of the Vendor, and accept or reject same.

## 4. Compensation

The City shall pay in full and complete compensation for goods received and accepted and services performed and accepted under this Contract in an amount not to exceed the amount stated on the face of this Contract paid in accordance with the rate indicated or in accordance with a prescribed payment schedule.

The Vendor shall periodically submit invoices to the City, for which compensation is due under this Contract and requesting payment for goods received or services rendered by the Vendor during the period covered by the invoice. The invoice must agree to the rates/payment schedule as indicated in this contract. The invoice shall include the following information: vendor name, vendor remit address, invoice date, invoice number, itemized listing of goods, services, labor, and expenses and indicating the total amount due. The City shall review the invoice and determine the value of goods or services accepted by the City in accordance with the Contract Documents. Payments due to the Vendor will be made within sixty (60) days from receipt and approval of an invoice. Final invoices from the Vendor are due no later than ninety (90) days from the Completion Date. Any invoice received past the ninety (90) day date will not be paid. If this Contract is extended, invoices related to the extension period are due no later than ninety (90) days from the Extended Completion Date.

The Vendor shall furnish such information relating to the goods or services or to documentation of labor or expenses as may be requested by the City. Acceptance by the Vendor of any payment or partial payment, without any written objection by the Vendor, shall in each instance operate as a release and discharge of the City from all claims, liabilities, or other obligations relating to the performance of this Contract.

In case of an error in extension prices quoted herein, the unit price will govern (Applicable To Goods Only).

## 5. Release of City on Final Payment

Acceptance by the Vendor of payment from the City for final delivery of goods or rendering of services under this Contract shall be deemed to release forever the City from all claims and liabilities, except those which the Vendor notifies the City in writing within three (3) months after such payment.

## 6. Risk of Loss

The Vendor shall bear the risk of loss, for any cause, for any Vendor materials used for this Contract and for all goods, deliverables, and work in process, until possession, ownership, and full legal title to the goods and deliverables are transferred to and accepted by the City.

The Vendor shall pay and be exclusively responsible for all debts for labor and material contracted for by the Vendor for the rental of any appliance or equipment hired by Vendor and/or for any expense incurred on account of services to be performed or goods delivered under this Contract.

The City shall not be liable for any personal injury or death of the Vendor, its officers, employees, or agents.

## 7. Indemnification

The Vendor shall indemnify, defend (with counsel acceptable to City, which acceptance shall not be unreasonably withheld), and hold harmless the City of Somerville, its officers, employees, agents and representatives from and against any and all claims, suits, liabilities, losses, damages, costs or expenses (including judgments, costs, interest, attorney's fees and expert's fees) arising from or in connection with any act or omission relating in any way to the performance of this Contract by the Vendor, its agents, officers, employees, or subcontractors.

The extent of this indemnification shall not be limited by any obligation or any term or condition of any insurance policy. The obligations set forth in this paragraph shall survive the expiration or termination of this Agreement.



## **8. Default; Termination; Remedies**

### **A. Events of Default**

The following shall constitute events of default under this Contract: (1) The Vendor has made any material misrepresentation to the City; or (2) a judgment or decree is entered against the Vendor approving a petition for an arrangement, liquidation, dissolution or similar relief relating to bankruptcy or insolvency; or (3) the Vendor files a voluntary petition in bankruptcy or any petition or answer seeking any arrangement, liquidation or dissolution relating to bankruptcy, insolvency or other relief for debtors; or (4) the Vendor seeks or consents or acquiesces in the appointment of any trustee or receiver, or is the subject of any other proceeding under which a court assumes custody or control over the Vendor or of any of the Vendor's property; or (5) the Vendor becomes the defendant in a levy of an attachment or execution, or a debtor in an assignment for the benefit of creditors; or (6) the Vendor is involved in a winding up or dissolution of its corporate structure; or (7) any failure by the Vendor to perform any of its obligations under this Contract, including, but not limited to, the following: (i) failure to commence performance of this Contract at the time specified in this Contract due to a reason or circumstance within the Vendor's reasonable control, (ii) failure to perform this Contract with sufficient personnel and equipment or with sufficient material to ensure the completion of this Contract within the specified time due to a reason or circumstance within the Vendor's reasonable control, (iii) failure to perform this Contract in a manner reasonably satisfactory to the City, (iv) failure to promptly re-perform within reasonable time the Services or Supplies that were properly rejected by the City as erroneous or unsatisfactory, (v) discontinuance of the Services or Supplies for reasons not beyond the Vendor's reasonable control, (vi) failure to comply with a material term of this Contract, including, but not limited to, the provision of insurance and nondiscrimination; or (8) any other acts specifically and expressly stated in this Contract as constituting a basis for termination of this Contract.

### **B. Termination Upon Default.**

In the event of a default by the Vendor, the City, acting through its Chief Procurement Officer, may, at its option, terminate this Contract immediately by written notice of termination specifying the termination date.

Notwithstanding the above, in the event of a default by the Vendor, the City, acting through its Chief Procurement Officer, may give notice in writing of a default, which notice shall set forth the nature of the default and shall set a date, by which the Vendor shall cure the default, subject to approval of the City.

If the Vendor fails to cure the default, the City, in the alternative, may make any reasonable purchase or contract to acquire goods or services in substitution for those due from Vendor. The City may deduct the cost of any substitute contract or nonperformance together with incidental and consequential damages from the Contract price and shall withhold such damages from sums due or to become due to the Vendor. If the damages sustained by the City exceeds sums due or to become due, the Vendor shall pay the difference to the City upon demand.

Upon immediate notification to the other party, neither the City nor the Vendor shall be deemed to be in default for failure or delay in performance due to Acts of God or other causes factually beyond their control and without their fault or negligence. Subcontractor failure to perform or price increases due to market fluctuations or product availability will not be deemed factually beyond the Contractor's control. The City retains all rights and remedies at law or in equity.

If the Vendor fails to cure the default within the time as may be required by the notice, the City, acting through its Chief Procurement Officer, may, at its option terminate the Contract.

The parties agree that if City erroneously or unjustifiably terminates this Contract for cause, such termination shall be deemed a termination for convenience, which shall be effective thirty (30) days after such notice of termination for cause is provided.

### **C. Termination For Convenience.**

Notwithstanding any language to the contrary within this Contract, the City, acting through its Chief Procurement Officer, may terminate this Contract, without cause at any time, effective upon the termination date stated in the notice of termination. In the event of termination for convenience, the Vendor shall be entitled to be paid for goods delivered and accepted and services rendered and accepted prior to notice of termination at the prices stated in the Contract, subject to offset of sums due the Vendor against sums owed by the Vendor to the City. Any goods or services delivered after notification of termination but prior to the effective termination date must be approved in writing in advance by the City in order to be eligible for payment. In no event shall the Vendor be entitled to be paid for any goods or services delivered after the effective date of termination. The Vendor shall be entitled to no other compensation of any type. In no case shall a Vendor be entitled to lost profits.

### **D. Obligations Upon Termination.**

Upon termination of this Contract with or without cause, the Vendor shall immediately, unless otherwise directed by the City: 1. cease performance upon the stated termination date; 2. surrender to the City the Vendor's work product, which is deliverable under the Contract, whatever its state of completion; and 3. return all tools, equipment, finished or unfinished documents, data, studies, reports, correspondence, drawings, plans, models, or any other items whatsoever prepared by the Vendor pursuant to this Contract, which shall become property of the City, or belonging to or supplied by the City.

### **E. Rights and Remedies.**

The City shall have the right to: a) disallow all or any part of the Vendor's invoices not in material compliance with this Contract; b) temporarily withhold payment pending correction by the Vendor of any deficiency; c) sue for specific performance or money damages or both, including reasonable attorneys' fees and costs incurred in enforcing any Vendor obligations hereunder; d) pursue remedies under any bond provided; and e) pursue such other local, state and federal actions and remedies as may be available to the City.

Any termination shall not effect or terminate any of the rights or remedies of the City as against the Vendor then existing, or which may accrue because of any default. No remedy referred to in this subsection is intended to be exclusive, but shall be cumulative, and in addition to any other remedy referred to above or otherwise available to the City or Vendor at law or in equity. The Vendor shall not gain nor assert any right, title or interest in any product produced by the Vendor under this Contract.

## **9. Insurance**

The Vendor shall comply with all insurance requirements set out in the Contract Documents. The Vendor shall deliver to the City new certificates of insurance at least ten (10) calendar days prior to expiration of the prior insurance and shall furnish the City with the name, business address and telephone number of the insurance agent. Vendor certifies compliance with applicable state and federal employment laws or regulations including but not limited to G.L. c. 152 (Workers' Compensation), as applicable, and Vendor shall provide City with acceptable evidence of compliance with the insurance requirements of this chapter.

## **10. Governing Law; Forum**

This Contract shall be governed by the laws of the Commonwealth of Massachusetts. Any action arising out of this Contract shall be brought and

maintained in a state or federal court in Massachusetts which shall have exclusive jurisdiction thereof.

#### **11. Complete Agreement**

This Contract supersedes all prior agreements and understandings between the parties and may not be changed unless mutually agreed upon in writing by both parties.

#### **12. Amendment**

No amendment to this Contract shall be effective unless it is signed by the authorized representatives of all parties and complies with all requirements of the law. All alterations or additions, material or otherwise, to the terms and conditions of this Contract must be in writing and signed by the City, as set forth in the below section, and the Vendor.

#### **13. Conditions of Enforceability Against the City**

This Contract is only binding upon, and enforceable against, the City if: (1) the Contract is signed by the Mayor; (2) endorsed with approval by the City Auditor as to appropriation or availability of funds; (3) endorsed with approval by the City Solicitor as to form; and (4) funding is appropriated for this Contract or otherwise made available to the City.

This Contract and payments hereunder are subject to the availability of an appropriation therefor. Any oral or written representations, commitments, or assurances made by any City representatives are not binding. Vendors should verify funding and contract execution prior to beginning performance.

When the amount of the City Auditor's certification of available funds is less than the face amount of the Contract, the City shall not be liable for any claims or requests for payment by Vendor which would cause total claims or payments under this Contract to exceed the amount so certified.

The City's Standard Contract Form and Standard Contract General Conditions shall supersede any conflicting verbal or written agreements or forms relating to the performance of this Contract, including contract forms, purchase orders, or invoices of the Vendor.

The City shall have no legal obligation to compensate a Vendor for performance that is outside the scope of this Contract. The City shall make no payment prior to the execution of a Contract.

#### **14. Taxes**

Purchases incurred by the City are exempt from Federal Excise Taxes and Massachusetts Sales Tax, and prices must exclude any such taxes. Tax Exemption Certificates will be furnished upon request. The City of Somerville's Massachusetts Tax Exempt Number is: **MO46 001 414**.

#### **15. Independent Contractor**

The Vendor is an independent contractor and is not an employee, agent or representative of the City. The City shall not be obligated under any contract, subcontract, or commitment made by the Vendor.

#### **16. Assignment; Sub-Contract**

The Vendor shall not assign, delegate, subcontract, or transfer this Contract or any interest herein, without the prior written consent of the City.

#### **17. Discrimination**

The Vendor agrees to comply with all applicable laws prohibiting discrimination in employment. The Vendor agrees that it shall be a material breach of this Contract for the Vendor to engage in any practice which shall violate any provision of G.L. c. 151B, relative to discrimination in hiring, discharge, compensation or terms, conditions or privileges of employment because of race, color, religious creed, national origin, sex, sexual orientation, age, or ancestry.

#### **18. Waiver**

All duties and obligations contained in this Contract can only be waived by written agreement. Forbearance or indulgence in any form or manner by a party shall not be construed as a waiver, nor in any way limit the legal or equitable remedies available to said party.

#### **19. Severability**

In the event that any provision of this Contract shall be held to be illegal, unenforceable or void, such provision shall be severed from this Contract and the entire Contract shall not fail on account thereof, but otherwise remain in full force and effect and shall be enforced to the fullest extent permitted by law.

#### **20. Notice**

The parties shall give notice in writing by one of the following methods: (i) hand-delivery; (ii) facsimile; (iii) certified mail, return receipt requested; or (iv) overnight delivery service, to the Vendor at the contact information specified on the face of this Contract; to the City addressed to: Purchasing Director, Somerville City Hall, 93 Highland Avenue, Somerville, MA 02143, Fax # 617-625-1344 with a copy to: City Solicitor, City Hall, 93 Highland Avenue, Somerville, MA 02143. Notice shall be effective on the earlier of (i) the day of actual receipt, or (ii) one day after tender of delivery.

#### **21. Captions**

The captions of the sections in this Contract are for convenience and reference only and in no way define, limit or affect the scope or substance of any section of this Contract.

#### **22. Non-Collusion**

This Contract was made without collusion or fraud with any other person and was in all respects bona fide and fair. As used in this paragraph, the word, "person," shall mean any natural person, joint venture, partnership, corporation, or other business or legal entity. The Vendor certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

#### **23. Tax and Contributions Compliance**



The Vendor certifies, under pains and penalties of perjury, in accordance with MGL c. 62C, s. 49A, that the Vendor is in full compliance with all laws of the Commonwealth of Massachusetts relating to taxes, is in good standing with respect to all returns due and taxes payable to the Commonwealth, reporting of employees and contractors, and withholding and remitting of child support and to contributions and payments in lieu of taxes. In the event that the City is notified by the IRS that the TIN provided by the vendor and the vendor name as recognized by the IRS do not match their records, the vendor is responsible for all penalties.

#### **24. Municipal Taxes, Charges and Liens**

The Vendor certifies that it has paid all accounts receivable owed to the City of Somerville, including but not limited to real estate, personal property or excise tax, parking fines, water/sewer charges, license/permit fees, fines and/or any other municipal lien charges due to the City of Somerville. Pursuant to MGL c. 60, s. 93, the Vendor agrees that the Collector/Treasurer of the City may withhold from amounts owing and payable to the Vendor under this Contract any sums owed to any department or agency of the City which remain wholly or partially unpaid. This shall include but not be limited to unpaid taxes and assessments, police details, and any other fees and charges until such sums owed have been fully paid, and the Collector/Treasurer may apply any amount owing and payable to the Vendor to satisfy any monies owed to the City.

#### **25. Compliance with Applicable Laws**

The Vendor shall comply with all applicable federal and state laws, and city ordinances and regulations, which in any manner affect performance of this Contract. The Vendor shall defend, indemnify, and hold harmless the City, its officers, agents and employees against any claim or liability arising from or based on the violations of such ordinances, regulations or laws, caused by the negligent actions of the Vendor, its agents, employees or subcontractors.

#### **26. Conflict of Interest**

The Vendor certifies that no official or employee of the City has a financial interest in this Contract or in the expected profits to arise therefrom, unless there has been compliance with the provisions of G. L. c. 43, § 27 (Interest in Public Contracts by Public Employees), and G. L. c. 268A (Conflict of Interest). The Vendor certifies that it has reviewed the Massachusetts Conflict of Interest Law, MGL c. 268A and at any time during the term of this Contract, the Vendor is required to affirmatively disclose in writing to the City the details of any potential conflicts of interest of which the Vendor has knowledge or learns of during the Contract term.

#### **27. Licenses and Permits**

The Vendor certifies that it is qualified to perform the Contract and shall obtain and possess at its sole expense, all necessary licenses, permits, or other authorizations required by the City, the Commonwealth of Massachusetts or any other governmental agency, for any activity under this Contract. The Vendor shall submit copies of such licenses and/or permits to the City upon request. If a business, the Vendor certifies that it is a duly organized and validly existing entity, licensed to do business in Massachusetts, in good standing in the Commonwealth of Massachusetts, with full power and authority to consummate the Contract, and listed under the Commonwealth of Massachusetts Secretary of State's website as required by law.

**28. Recordkeeping, Audit, and Inspection of Records** All records, work papers, reports, questionnaires, work product, regardless of its medium, prepared or collected by the Vendor in the course of completing the work to be performed under this Contract shall at all times be the exclusive property of the City. In the event of termination or upon expiration of the Contract, the Contractor shall promptly deliver to the City all documents, work papers, calculations, data, drawings, plans, and other tangible work product or materials pertaining to the services performed under this Contract, in both a physical format and electronic format. The electronic format shall be either Comma Separated Values (CSV) files along with the mapping information for each field, or Microsoft SQL (2005/2008) database with all associated Database Schemas, or such other electronic format(s) acceptable to the city. At no additional cost to the City, the Contractor shall store and preserve such records while in their possession in accordance with the requirements of the Massachusetts Public Records Law, the Commonwealth of Massachusetts record retention schedule and City of Somerville record retention schedule. The City shall have the right to at reasonable times and upon reasonable notice to examine and copy, at its reasonable expense, the books, records, and other compilations of data of the Vendor which relates to the provision of services under this Contract. Such access shall include on-site audits, review, and copying of said records.

#### **29. Debarment or Suspension**

The Vendor certifies that it has not been and currently is not debarred or suspended by any federal, state, or municipal governmental agency under G. L. c. 29, § 29F or other applicable law, nor will it contract with a debarred or suspended subcontractor on any public contract.

#### **30. Warranties (Applicable to Goods Only)**

The Vendor warrants that (1) the goods sold are merchantable, (2) that they are fit for the purpose for which they are being purchased, (3) that they are absent any latent defects and (4) that they are in conformity with any sample which may have been presented to the City. The Vendor guarantees that upon inspection, any defective or inferior goods shall be replaced without additional cost to the City. The Vendor will assume any additional cost accrued by the City due to the defective or inferior goods. The Vendor guarantees all goods for a period of no less than one (1) year, unless a greater period of time is specified in the Contract Documents.



**Appendix A**  
*Scope of Work*

**SOLICITATION FOR:**  
RFP # 21-56 MEDICAID BILLING & COLLECTION SERVICES



**CITY OF SOMERVILLE, MASSACHUSETTS**

**RELEASE DATE:** 3/3/2021  
**QUESTIONS DUE:** 3/10/2021 by 12PM EST  
**DUE DATE AND TIME:** 3/17/2021 by 2PM EST

Anticipated Contract Award	3/30/2021
Est. Contract Commencement Date	4/1/2021
Est. Contract Completion Date	3/31/2024

**DELIVER TO:**  
**City of Somerville**  
**Purchasing Department**  
**Attn:** Thupten Chukhatsang  
Procurement Analyst  
tchukhatsang@somervillema.gov  
**93 Highland Avenue**  
**Somerville, MA 02143**

Due to the COVID-19 pandemic and the City's measures to contain the spread of this virus, City Buildings are currently not open to the Public. In light of this, additional methods of submission are being provided. Please review the attached forms titled "Methods of Bid Submission" for more details.

RFP # 21-56  
**SECTION 2.0**  
**RULE FOR AWARD /**  
**SPECIFICATIONS/SCOPE OF SERVICES**

**Rule for Award**

The contract shall be awarded to the responsible and responsive proposer submitting the most advantageous proposal response, taking into consideration all evaluation criteria as well as price. The contract will be awarded within ninety (90) days after the proposal opening. The time for award may be extended for up to 45 additional days by mutual agreement between the City and the most highly advantageous and responsible offeror.

**Background**

The City of Somerville seeks a qualified contractor to recover retroactive and prospective Medicaid reimbursements. The contractor will be fully responsible for submitting applications for the Health and School Departments and following up on collections. The contractor must provide a fully implemented application and collection process that will not add to the work load of the current staff of the Health and School Departments. The contractor will develop and carry out a billing and collection process within 60 days of the date of the contract award. The contractor will remain responsible for all applications and collections through the term of the contract. The full scope of this contract includes development, implementation and operation of a documented comprehensive Medicaid reimbursement system that requires no additional resources on the part of the School Department.

**Scope of Work**

The services provided by the City of Somerville that are to be considered as reimbursable shall include, but not be limited to the following:

- Early and periodic screening and diagnosis and treatment (EPSDT) and family planning services and supplies
- Physicians Services
- Medical and other remedial care provided by licensed practitioners
- Clinic Services
- Physical therapy, occupational therapy, and services for individuals with speech, hearing and language disorders
- Prescribed drugs, dentures, prosthetic devices and eyeglasses
- Diagnostic screening, preventative, and rehabilitative services
- Transportation for the recipient by ambulance, taxicab, common carrier or other appropriate means
- Special Education services provided by therapists, aides, nurses, evaluation team members, social workers, psychologists
- Administration of the above listed services

**Specifications / Requirements**

The Evaluation Committee will review proposals from qualified vendors to provide consulting services to secure maximum reimbursement to the City of Somerville from Medicaid and other third party payers for services provided to children enrolled in the Somerville Public Schools. The vendor must use the existing software system currently being used by the Somerville Public Schools Special Education Department.

These consulting services must include, as a minimum, the following:

1. Develop a strategic plan summarizing the services to be provided to obtain payments from third party payers on a retroactive and prospective basis. In addition to a complete description of the proposer's approach to achieving these engagement objectives, the responsive proposal must include a detailed engagement work plan that highlights all process and system implementation activities and specific deadlines for billing and collecting reimbursements from Medicaid and other third party payers during the first sixty days of the contract. As part of the work plan, the proposal must include an estimate of the amount of reimbursement that the contractor expects to collect on behalf of Somerville during this period. The methodology used to develop this estimate should be described fully.
2. Provide technical assistance necessary to maintain full compliance with Federal and Commonwealth Medicaid regulations, and any other applicable Federal or state laws and regulations.
3. Guarantee full compliance with all Massachusetts Medicaid requirements in developing and implementing billing and collection operations for the Health and School Departments.
4. Identify and compile a comprehensive list of reimbursement-eligible services rendered to school children for which claims will be submitted to third party payers on both retroactive and prospective bases.
5. Develop and implement a detailed "Unit of Service" data collection process to support third party billing and collections.
6. Design and implement an automated billing and account receivable management system with which to administer ongoing operation for claiming and tracking retroactive and prospective reimbursement from third party payers.
7. Implement data collection process and billing collections system within sixty days of contract award.
8. Operate data collection process and billing and collections system through the term of the contract.
9. Preparation for transfer of the operation of the data collection process and billing and collections systems to the Health and School Departments within 12 months of the date of the contract award. Preparation of the transfer of the operation must include written documentation of the data collection process and of the billing and collections system procedures. This transfer will include the training of all applicable Health and School Department personnel by the contractor. In addition, at the time of transfer, all systems developed under this contract, including computer software, developed for this engagement must be turned over to the Somerville Public Schools and shall be the property of the Somerville Public Schools.
10. Prepare and submit claims within 60 days of the contract start date.
11. Development of high quality IEPs that are aligned with the Massachusetts Department of Education standards, customized for Somerville Public Schools and that allow information and data entry unique to each student.
12. Support: on-site teacher training built in email support, toll-free hotline.
13. Utilize technology to create efficiencies and enhance program for Administrative and direct service claiming.
14. Demonstrate vendor's responsibility to initiate and follow through on RMTS participants to assure the necessary 85% participation rate for reimbursement is met.

Please provide a detailed plan for the scope of services describing the development, implementation and operation of a comprehensive, well-documented Medicaid reimbursement system.

**Please Note:**

Vendor may not engage any other company, sub-contractor or individual in the performance of this contract without the prior written consent of the City.





Solutions that Matter

## TECHNICAL PROPOSAL

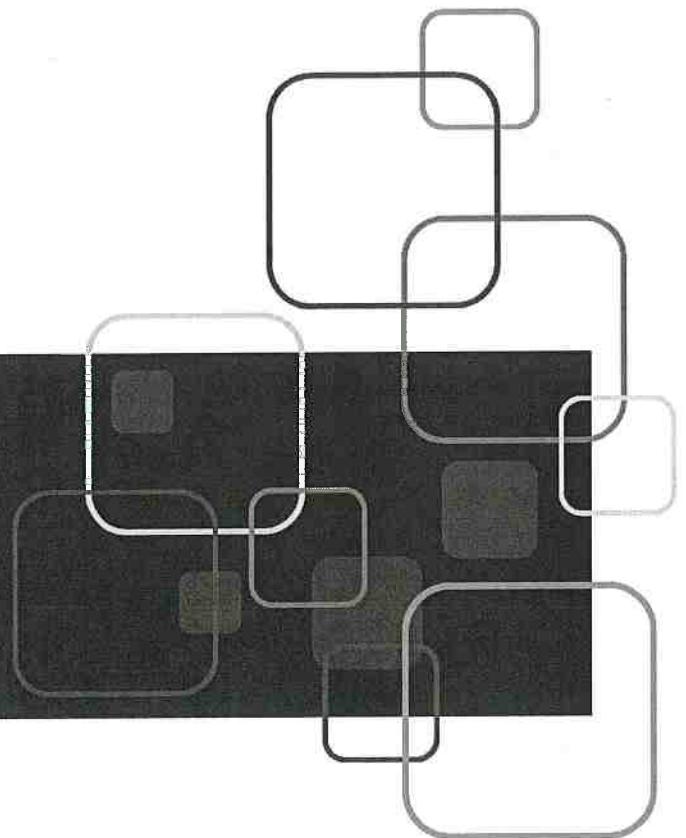
# City of Somerville Purchasing Department

Public Consulting Group Statement of Work for  
Medicaid Billing & Collection Services

RFP #: 21-56

March 17, 2021 | 2:00 PM EST

Mr. Thupten Chukhatsang  
City of Somerville  
Purchasing Department  
93 Highland Avenue  
Somerville, MA 02143



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March 17, 2021

Mr. Thupten Chukhatsang  
Procurement Analyst  
City of Somerville  
93 Highland Avenue  
Somerville, MA 02143

**RE: School Based Medicaid Program**

Dear Mr. Chukhatsang,

In response to the City of Somerville's request for proposal, Public Consulting Group, Inc. (PCG) is pleased to submit our proposal for Medicaid Billing & Collection Services. We appreciate this opportunity to continue our relationship with the City of Somerville and Somerville Public Schools.

To meet the challenges of a large urban school district, Somerville requires a firm with the experience, knowledge, and resources to support this project. With that in mind, PCG's expertise and commitment to excellence makes us the best suited vendor for this project. PCG understands the flexibility needed to meet the goals of the largest and most diverse school districts in the United States. Over the last 25+ years, PCG has proven this point through the following documented results.

***PCG has generated more Medicaid revenue for school districts than any other vendor in the nation.***

PCG has worked with thousands of school districts, including current contracts with **21 of the 25 largest urban U.S. schools**, replicating success in each one. PCG has also developed the technical and operational systems and human resources needed to provide superior assistance to our clients. PCG has generated over **\$8.6 billion dollars** in federal School-based Medicaid reimbursement for our clients.

Most importantly, our clients, due to the integrity of PCG's work and our adherence to compliance, have retained this revenue after state and federal audits.

***PCG has generated more Medicaid revenue for school districts in Massachusetts than any other vendor.***

Public Consulting Group, Inc. (PCG) has been assisting Massachusetts public school systems since 1992 to obtain federal Medicaid reimbursement for health-related services. Throughout this

period, we have continually managed to meet or exceed the revenue targets and project goals, optimize allowable revenue, and drive toward compliance with state and federal laws and regulations. ***To date, Massachusetts public school districts have received over \$614 million in federal Medicaid reimbursement.***

Additionally, PCG played a significant role in the initial development of the program, working with the state to craft the model for school-based reimbursement to be realized. In 1997, PCG led the state's efforts to be approved for school-based reimbursement for Administrative Activities (AOC) guiding the

state on the process and nuance of carefully, and compliantly, realizing these reimbursements. More recently, PCG played a major role in the approval of reimbursement for ABA services, a growing need in school districts, further showing that PCG is different than a 'billing' vendor whose sole focus is on operations and efficiencies.

***PCG has significant experience with large urban districts***

The recovery efforts required for large urban districts differ substantially from those required for smaller districts. The complexity of this environment includes instituting a rigid process as well as the required political and functional buy-in from stakeholders, the relationship with the state Medicaid agency, the staff training requirements, and the coordination with district technical staff. PCG is committed to and capable of delivering uninterrupted revenue flow to Somerville. PCG's expertise in Massachusetts and with other large urban district illuminates a path to success. ***Historically, PCG has invested in its people, its processes, and its technology to allow our product and service offerings to continue to grow with our clients' needs. We remain committed to doing this in the future.***

If our people, processes or technology are lacking, the project is put at risk. Each of these components are crucial and their impact, great. PCG's investments in these areas include:

***People*** - This is the first and most important aspect. PCG has continued to invest in the expansion of our team of experts. Over the last decade, PCG has recruited experienced individuals including former Special Education Directors and Administrators, former teachers, legal and regulatory experts, compliance experts, technology experts, and implementation consultants.

***People:*** for this engagement, PCG employs staff focused in areas such as operations, programmatic changes, enhancements, and other opportunities. Additionally, working on the project will be PCG staff who have worked in Massachusetts for years and will bring consistency.

***Process:*** specifically, for this engagement, PCG will review the impact of program changes on Somerville's reimbursement in an effort to expand the number of reimbursable services not currently submitted. This may include 504 services, evaluations and other services provided in school districts where precedence exists for reimbursement.

***Processes*** - PCG has successfully implemented a large number of projects. Over the last 28 years, we have honed our processes to focus on compliance, optimize revenue, and conduct efficient implementations. Our processes are not the same as they were 10 years ago. 5 years ago or even last year. As the regulatory environment changes, our processes change too.



**Technology** - PCG utilizes a robust, web-based application in our Medicaid recovery efforts - EasyTrac. Tens of millions of Special Education services have been entered using EasyTrac. It is the most established and effective service documentation tool in the country.

As your needs continue to expand, our services will grow with you. PCG will help to move Somerville beyond the phase of collecting data and documenting Medicaid services to using comprehensive service documentation data to make data-driven decisions, reach compliance benchmarks, and better plan for success.

**Technology:** PCG proposes to utilize EasyTrac and import data from your current student information system and IEP system to eliminate duplication of effort, minimize the risk of data entry errors, and optimize potential reimbursement through cross checking of the data.

### **Key Considerations**

PCG is the most qualified vendor for this engagement. In order for Somerville to secure all allowable reimbursement, it is critical to select a vendor that has a full understanding of all opportunities available to Massachusetts public schools. Vendor who are not experienced in the Massachusetts Medicaid program represent a risk for Somerville. The selection of a new vendor represents a possible interruption in revenue, lost revenue, and audit risk for Somerville. Any of these would impact the City negatively. PCG is based in Boston and incorporated in Massachusetts, providing the City with direct experience and a locally based firm. With the impending changes to the program, Somerville will want to have the best positioned vendor to help in this transition. By working with PCG, Somerville will have a vendor with:

- ▶ The most Massachusetts experience
- ▶ Expertise in the fee-for-service model
- ▶ Expertise in Medicaid Administrative Claiming
- ▶ A track record of increased Medicaid revenue and full compliance with IDEA and Medicaid regulations
- ▶ Cost Settlement expertise
- ▶ Comprehensive quality assurance processes
- ▶ A proven electronic system with built in compliance checks
- ▶ A knowledgeable Boston-based team

### **Experience**

Since inception, PCG has provided high-quality revenue management and consulting services to public sector clients, including many different school districts both nationally as well as in Massachusetts. During this time, we have developed a broad background in state, county, and local special education regulations and in healthcare reimbursement. PCG has earned a reputation for high quality professionalism, thoroughness, and "getting the job done." PCG has also developed the technical, operational, systems, and human resources needed to provide superior assistance to our clients.

Nationally, our clients include some of the largest districts and states in the country, including:

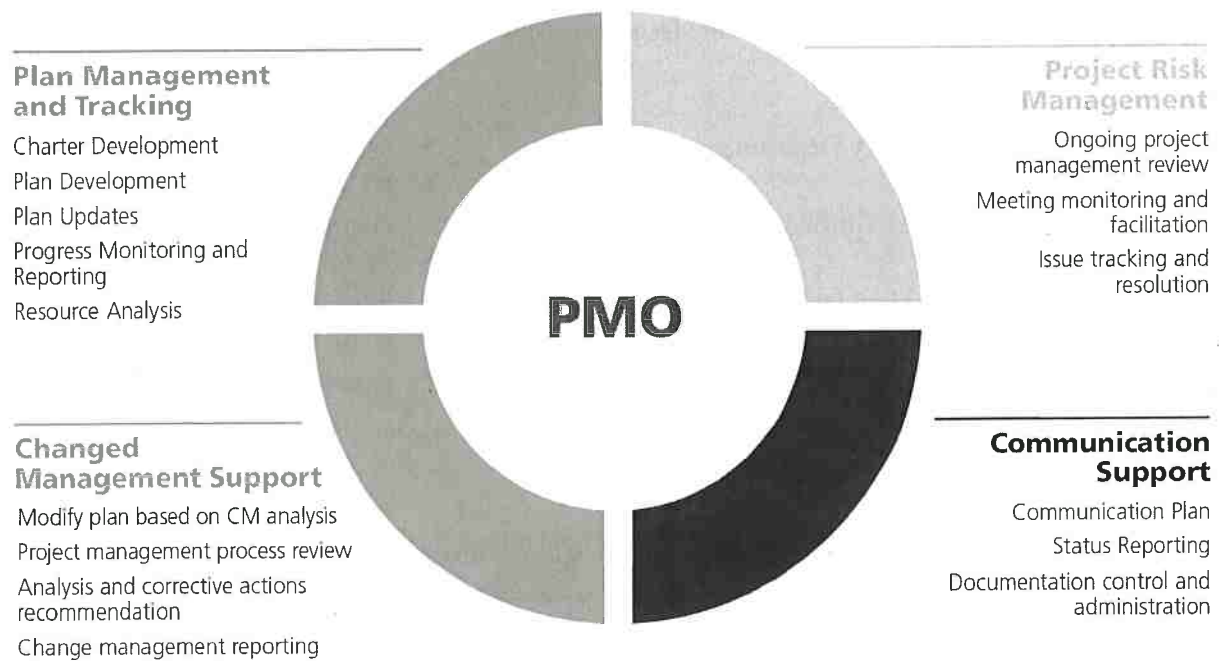
- ▶ New York City Department of Education
- ▶ Los Angeles Unified School District
- ▶ Charlotte-Mecklenburg Schools
- ▶ School District of Philadelphia
- ▶ Houston Independent School District
- ▶ Memphis City School District
- ▶ Providence Public School District
- ▶ Wake County Public School System
- ▶ Clark County School District
- ▶ Seattle Public Schools

PCG's current Massachusetts schools clients include large, urban districts such as ***Boston, Brockton, Cambridge, Lynn, and Lowell***, as well as smaller districts such as ***Arlington, Medford, Pentucket, and Quincy***.

Our Massachusetts-specific experience allows us to keep the burden to a minimum on Somerville staff and optimize revenue and operational improvements. Several key reasons for hiring PCG for Medicaid billing and revenue maximization and data management services are below:

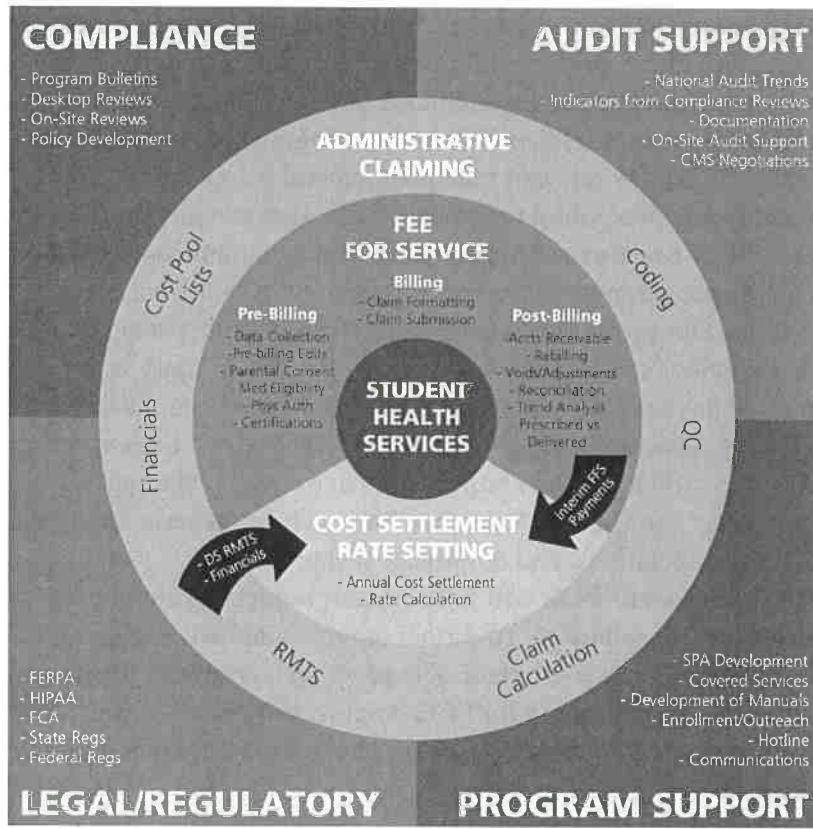
- ▶ Uninterrupted cash flow
- ▶ Familiarity with Somerville's data, policies, and procedures to minimize burden on staff and expedite roll-out
- ▶ Staff size and expertise permitting the flexibility to allow us to concentrate on all areas which may increase reimbursement to the City
- ▶ National and Massachusetts-specific experience in both Medicaid Claiming and Special Education

Based on our extensive experience in contracting with school districts, PCG has developed a reliable project management approach that we feel best suits school district needs.



***Staff Expertise & Ability to Increase Revenue***

The project team assembled for this engagement includes many recognized leaders in large, multi-faceted revenue management projects. Together, these professionals will provide the Somerville with programmatic and technical experience in key areas needed for this project:



- ▶ Project management
- ▶ Federal, legal, and regulatory expertise
- ▶ Administrative claiming and cost allocation
- ▶ Rate-Setting and Cost Settlement
- ▶ Information Technology
- ▶ Training and hands-on provider support

*In this regulatory climate, it is imperative that school districts do not leave themselves vulnerable to compliance problems by working with inexperienced or careless vendors.*

PCG 's project approach provides the safeguards needed so that the project complies with all state and federal law, regulation, and policies, including the Health Insurance Portability and Accountability Act (HIPAA). To that end, PCG 's approach includes the following elements:

- ▶ **Regulatory and Compliance Staff** - PCG has developed significant legal and regulatory resources to provide advisory services to assist our clients and to help our team in building strong project operations. These experts work with our implementation team for each project to review all relevant laws and policies, identify requirements, and structure our approach and system to meet those requirements. *PCG has added additional legal and regulatory staff to our project team to reflect the demands of the current legal and regulatory environment.*



- ▶ **Regulatory Review of Project Workplan** - During the development and execution of the work plan for this project, our team will review relevant tasks with our regulatory and compliance staff. In addition, when Program requirements change (as it appears they will in the coming year), our Legal and Management team will review relevant state plan, federal policy, and regulatory changes to identify any procedural modifications needed to maintain full compliance.
- ▶ **Detailed Procedures Manual** - Another important component of a good compliance program is the development of and adherence to a detailed procedure manual. Our project team has prepared a procedures manual for this engagement that specifies relevant work steps and how they comply with regulation. This manual has been reviewed and approved by our Compliance Officer, Mark Kmetz.
- ▶ **Quality Assurance Plan** - Another key feature of PCG's approach is our Quality Assurance Plan. For this project, we have developed a specific set of quality measures. The Quality Assurance Plan includes criteria for validating data, reports, claiming operations, and remittance reconciliation.
- ▶ **Audit Support** - PCG will fully support Somerville during any audit period.
- ▶ **Internal Compliance** - To further assure compliance and quality, PCG has an internal compliance program. The program is overseen by Mark Kmetz and provides an opportunity for PCG employees to anonymously submit questions regarding compliance and ethics in relation to issues within the firm or external to the firm.

### *Commitment to Client Satisfaction and Success*

Lastly, the most critical component of PCG's success is our commitment to exceeding our client's expectations. We are not satisfied until our clients are satisfied, and we are constantly evaluating our progress through their eyes. PCG wants to stress that we have the experience to successfully work through all issues and will respond as the national and state picture continues to change.

PCG is excited at the possibility of working in Somerville and to assist Somerville in Medicaid revenue recovery efforts and special education data management. There are several key factors currently impacting the recoveries, including:

- ▶ State-issued Random Moment Time study
- ▶ State assuming the Medicaid matching process
- ▶ Federal Parental Consent guidelines

With these factors pending, PCG wants to stress that we have the experience to successfully work through such issues and will continue to respond as the national and state picture continues to change. PCG further agrees to all requirements of this RFP and will honor this submission for a period of at least 90 days.

If you have any questions or require further clarification regarding our submission, please feel free to contact me at (617) 426-2026.

Sincerely,

A handwritten signature in cursive script that reads "Peter Marshall".

Peter Marshall  
Manager

## Qualifications and Experience

### ABOUT PCG

Public Consulting Group, Inc. (PCG) was founded in 1986 and has operated in the school-based Medicaid space for 33 years. PCG's success in school-based Medicaid reimbursement engagements in 29 states including Rhode Island, Massachusetts, New York, New Jersey, Pennsylvania, and West Virginia, demonstrates our understanding of the staffing, operations, and systems required for school-based health services and data management projects. Our work in these states includes direct-service claiming (per diem and fee-for-service), administrative claiming (data collection and Time Study (TS) administration), health service documentation, transportation claiming, rate setting, audit support, and web-based and automated data collection.

Established in Massachusetts in 1986, Public Consulting Group, Inc. (PCG) is a management consulting firm offering strategic planning and implementation, operations improvement, policy development, financial management, systems development, rate setting, reimbursement optimization, and other management advisory services to government and private health and human services providers. As a privately held company, PCG has the flexibility to properly serve our public sector clients with the highest level of customer service. More than 95% of PCG's clients are public sector agencies or agency providers such as school districts, county offices of education, state departments of education, state and county departments of mental health, developmental disabilities, Medicaid, social services, public welfare, county governments and multicounty entities, cities, and municipalities.

PCG is comprised of distinct but collaborative divisions: Education, Health, Human Services, Technology Consulting, and Consumer Direction of Care. This structure allows PCG to address, with substantial expertise, a broad range of public sector needs. It also allows the firm to assemble multidisciplinary teams when required, taking advantage of the specialized knowledge and experience of each area to address the multidimensional objectives of public sector agencies. We have the financial stability, resource depth, and strategic expertise to support the quality and applicability of our services to the Somerville Public Schools. As of March 2021, PCG has 2,644 employees worldwide, across multiple subject areas.

### *About PCG Education*

In 1992, PCG began providing education consulting services and products to Boston Public Schools to modernize school-based Medicaid billing and to provide an easy and innovative approach for clinicians to document services. In the last 23 years, PCG has developed considerable expertise and has achieved numerous successes working with school districts, state departments of education, and Medicaid agencies since our initial work in New England. Our areas of expertise include:

- ▶ Data Warehousing and Longitudinal Data System Services
- ▶ Program Evaluation and Audit Services
- ▶ Special Education and At-Risk Student Data Management
- ▶ Education Analytics and Data Capacity Services
- ▶ Response to Intervention (RTI) and Education Plans Solutions

- ▶ Professional Development and Coaching on district and school-level use of data
- ▶ Literacy and Learning
- ▶ Strategic Planning and School Improvement
- ▶ School-Based Medicaid Reimbursement Services
- ▶ Operations Improvement and Financial Consulting Services

PCG has over 28 years of national experience with school-based Medicaid engagements. In total, PCG has generated more than \$8.6 billion in Medicaid reimbursement and currently has school-based Medicaid engagements with more than 5,600 state departments and school districts including the school districts of Philadelphia, Boston, Miami, Brockton, Cambridge, Somerville, Cranston, Lynn, Lowell, and New York City.

The current number of school-based Medicaid customer support employees at PCG across the country is 240. At any given time, over ten employees will be working with on the engagement with Somerville. This breakdown is further described in Additional Proposal Submission Documents A: Primary Point of Contact and Project Staffing.

As a result of extensive experience in the marketplace, a highly knowledgeable staff, and leading edge technologies, PCG has maintained numerous high-profile client relationships for many years. This is due to understanding clients' needs, efficiently fulfilling our contractual obligations, and continually exceeding client expectations. PCG's track record demonstrates the ability to improve outcomes for clients resulting in long-term relationships, contract extensions, and re-awards.

### *PCG's Customer Focus*

Public Consulting Group believes that our expertise is only as valuable as our ability to transfer ownership of decision-support tools and techniques to customers themselves. To best understand the needs of our clients, PCG offers hands-on consultation and face-to-face interaction to the greatest extent possible. PCG's customer focus incorporates the following standards of service:

- ▶ Our clients are viewed as partners in every consulting engagement.
- ▶ PCG believes that the client's perspective is where every project engagement should begin. PCG therefore spends time getting to know the client and the operating environment.
- ▶ Over the course of an engagement, document confidentiality, storage and accessibility are imperative to the success of the project. PCG provides these services to all clients.
- ▶ PCG abides by and strives to exceed current standards for confidential data, including extensive compliance training and documentation on FERPA, HIPAA, and other laws and regulations concerning client and record confidentiality.
- ▶ PCG recognizes that most clients are looking for fresh approaches to difficult problems; however, innovation is only useful when it can meet the challenging implementation requirements of the public environment. PCG brings a wide body of national experience to every engagement, tailoring our expertise to local and state needs.

PCG has a proven record of success in making the initial investments in time, capital, and other resources critical to high quality projects. This investment includes spending sufficient time on-site with clients and detailed up-front work planning for each step of the project.



## *Product Offerings*

Offering integrated consulting services to school district, state departments, and other education agencies, PCG provides data warehousing, rate-setting, Internet-based solutions, revenue consulting services, and information technology consulting services to education communities. Combining knowledge, technology, and the highest level of client service to solve client challenges, PCG service and product offerings include:

- ▶ EasyTrac™ – Web-based solution for the documentation of health-related services provided to students.
- ▶ Medicaid Consulting – Claiming for direct health services (Fee-For-Service), transportation, targeted case management, tuition expenditures, and Medicaid administrative outreach activities.
- ▶ Reimbursement Optimization – Identifying and quantifying reimbursement opportunities for school districts.
- ▶ PCG’s Data Warehousing – State of the art data warehouse which enables districts to analyze data and predict which factors will lead to greater longitudinal and latitudinal student success.
- ▶ Project Management – Assisting education systems in identifying risks within projects and implementing program to prevent project failures, including implementation of Student Information Systems (SIS) in education settings.
- ▶ Information Technology Consulting Services – Assessment, data integration, data quality management including implementation of School Interoperability Framework (SIF) infrastructure.
- ▶ Program Outcome Evaluation and Literacy Services - Using advanced relational database technology, PCG professionals and researchers prepare Outcome Evaluation Reports that profile student progress, summarize program outcomes, and map areas for program improvement.
- ▶ EDPlan™ – Internet-based solution to help districts meet the data and accountability requirements of No Child Left Behind, including RTI implementation, and special education data management through the EasyIEP™ system.

PCG has extensive and varied experience with school districts and state agencies. All projects require the highest levels of customer service, as well as depth of staff resources and talent, including technology, training, and project management skills, to complete engagements with the best possible results for clients. PCG is committed to its clients, and has experience with numerous large projects demonstrating our ability to manage complex engagements.

## *PCG National Experience*

Combining management consulting experience with significant K-12 educational domain expertise, PCG offers consulting solutions that help schools, school districts, and state education agencies/ministries of education promote student success, improve programs and processes, and optimize financial resources. Together with its state-of-the-art technology, PCG’s consulting approach helps educators make effective decisions by transforming data into meaningful results. PCG has current projects in 40+ states and four Canadian provinces and serves 18 of the 25

largest U.S. school districts. Its special education management systems – including EasyIEP, GoalView™, and iep.online™ – serve more than 1.6 million special education students across the U.S.

Public Consulting Group has strived to provide the most complete and comprehensive services to all of our clients. The revenue reimbursement programs that are managed by PCG, and the annual revenue generated, are an important component in the budgets of our clients. Our approach and focus are on optimizing the reimbursement available to the schools, and doing so in a manner that is complete, comprehensive and closely monitored for audit and compliance standards. These efforts have resulted in client reimbursement of over \$7 billion.

In the following pages, we present more detailed information regarding PCG's project work. To give you an idea of the depth and breadth of PCG skills, we have included:

- ▶ School Billing Projects
- ▶ Other Claiming and Reimbursement Optimization Projects

#### *Other Claiming and Reimbursement Optimization Activities*

In addition to our work with schools, PCG has also developed and implemented Medicaid Reimbursement Claiming Programs with several other state and municipal agencies. These include Child Welfare, Public Health, Developmental Services, and Mental Health among others. The following are examples of the work we have done in this area.

#### *PCG Advantages*

Public Consulting Group offers an unparalleled level of staff expertise and experience both nationally and in the state of Massachusetts to meet the unique demands of Somerville Public School's Medicaid Administrative Activity Claiming (AAC) program. PCG's proven track record of delivering the highest quality client service, data collection, claim development and quality assurance methodology support first day success on processes, protocols, and procedures. This leads to our ability to optimize revenue and reimbursement to school districts. Our distinctive approach to project management provides the unique ability to leverage our resources while developing other initiatives to continue to improve and enhance processes utilized in the AAC program in Somerville.

PCG's success with school-based engagements in states like Arizona, Colorado, Delaware, Georgia, Indiana, Kansas, Michigan, New Jersey, New York, West Virginia, and Wisconsin, Massachusetts, North Carolina, Tennessee, and Rhode Island demonstrates the effectiveness of our approach to and staffing for school-based Medicaid billing projects.

Our work in these states includes claiming for direct health services based on FFS and Per Diem rates, as well as administrative case management and Medicaid outreach based on time studies. We also provide our clients with rate setting, cost allocation, and audit support. We have experience in implementing and fully operating school-based programs, as well as transitioning districts to fully independent claiming programs. We provide the data and financial analyses necessary to enhance the districts' ability to effectively manage their billing programs. PCG offers this full complement of services and is committed to conducting this project without added

staffing or financial burdens to Somerville Public Schools. In fact, PCG believes the advanced features available within our AAC methodology will reduce the level of resources required from Somerville. Our legal and regulatory experts have extensive experience in working with state and federal Medicaid agencies to identify and resolve potential program and reimbursement issues before they become problems for our clients thus continually improving practices and protocols.

### **Security of Technology**

PCG holds the security of technology systems as a high priority. Steps we have taken to secure our information systems include:

- ▶ Hiring a national consulting firm to review all of our system security
- ▶ Hiring a second firm to conduct project Risk Assessments to assess key systems risk areas in each PCG Practice Area, including Education
- ▶ Implementing recommendations from both firms to increase the physical and electronic security of all information systems, from both man-made risks as well as natural events and disasters
- ▶ Hiring as full-time Compliance Officer who monitors all policies and procedures manuals, including our Automated Systems Manual

### **Program Quality and Claims Integrity**

PCG will implement an Administrative Activity Claiming program that will produce accurate claims through rigorous quality assurance that meet all state and federal requirements, while exceeding requirements in terms of claim documentation and support. The federal government has put into place a structure that requires intensive review and audit of school-based Medicaid claiming protocols and practices, as Somerville is well aware. The stakes are too high for Somerville Public Schools to not select a contractor with a consistent history and unparalleled track record of claiming accuracy and integrity.

PCG's commitment to quality is best exemplified by the positive results of the various audits and reviews our clients have undergone over the years. The audit success of our clients is attributable to our aggressive compliance program. We believe that compliance and quality assurance must extend from the top; PCG's dedicated Compliance Office, through to the lowest level of AAC involvement, the individual staff member completing a time study moment. We update our compliance manuals as CMS or state standards evolve. Each project has a Quality Assurance Manager. Because of our national presence we are able to incorporate lessons learned and best practices from a large number of school districts and states. This intense focus on quality results in a strong track record during audits, increased revenue to stakeholders, and greater efficiency for all involved.

Not only do we have the expertise to operate high quality AAC programs but we have extensive expertise in writing and implementing state Medicaid oversight plans. Specifically, PCG has experience in preparing staff to participate in audits and reviews. Additionally, we do on-site and desk side audits of the financial data collection process. We also monitor other essential aspects of a quality Medicaid reimbursement program, such as ensuring there is no duplication of claiming between the FFS and AAC programs. PCG puts a strong emphasis on quality assurance



protocols throughout each component of the claim development process. PCG commits substantial project and firm resources to overseeing our internal operations. This same attention to detail will be found in our Quality Assurance Plan as implemented in support of Somerville Public Schools' AAC program.

### **Medicaid Administrative Claiming in Schools Approach**

Our experience with time study methodology in Massachusetts, Michigan, West Virginia, Pennsylvania, Delaware and North Carolina will be an asset to Somerville Public Schools. The process of developing of an automated web-based time study system has allowed PCG to develop a technical knowledge base with regard to time study methodology. The web-based time study system developed by PCG has significantly increased the efficiencies of the program in those municipalities. The technology has reduced the data collection workload that districts must manage for participation in the program, while allowing opportunities for them to continue to optimize the return on their efforts in the reimbursement they have received. The decrease in work of the staff members has led to increased compliance and minimized or reduced some of the perceived barriers that have prevented districts from participating in the past. In states where the program reimbursement has been decreased due to implementation of new program methodologies, PCG's increased operational efficiencies have allowed districts to continue to participate in the program where the methods used by their previous contractor would have made participation no longer cost efficient.

Over the past ten years, we have developed and refined an approach that will enhance and streamline the methods used by Somerville Public Schools to deliver the Medicaid Administrative Activity Claiming in Schools Program. Our strategy for project implementation is based upon our understanding of the following key factors:

- ▶ The value of a contractor capable of ensuring compliance with federal and state Medicaid regulations, policy, and law through the continual development of operational processes and procedures
- ▶ The need for meaningful management information to allow appropriate monitoring of program success on all levels
- ▶ The importance of utilizing a contractor with proven ability to achieve successful project implementation of new systems and programs, while at the same time developing, implementing, managing, supporting, improving, and offering alternative operational solutions to create a more effective program in the long-term
- ▶ The value of a contractor with experience in developing and managing the substantial training initiatives and programs needed to complete the AAC Program claiming process with optimum success in a limited amount of time
- ▶ The necessity of having a contractor that has complete knowledge of the issues facing local school districts and the constraints that they have
- ▶ Our approach is tailored to optimize allowable reimbursement and meet the needs of Somerville Public Schools. Our years of experience give PCG a thorough understanding of the Administrative Claiming process and how it fits with school operations. Our detailed understanding of not only how this program operates within schools, but its necessity as a companion program to Fee for Service billing, means that we are able to



offer an unique and holistic approach to managing the delivery of the AAC Program. PCG believes that the dissemination of information regarding the outreach services provided by the school districts will not only increase the quality in the delivery of those outreach activities, but may also result in the overall improvement of the schooling experience for students. Our management and quality assurance practices which are essential components of our operating practices address all of the activities critical to project success.

### **Quality Assurance & Audit Support**

In the current climate of intensive scrutiny of school-Medicaid programs, the area of Quality Assurance and Audit is more important than ever. PCG has built into our operations a set of internal Quality Assurance (QA) and audit procedures that help monitor and gauge progress toward full compliance. These processes are reviewed by our regulatory and compliance team to provide ongoing oversight of our work.

### **Quality Assurance Measures**

PCG understands that Somerville expects all project work to be accurate and complete, and we are committed to total quality. In the discussion of other project steps, we have described a number of Quality Review and Assurance measures. We additionally address this topic here to emphasize our commitment to this area.

A comprehensive Quality Assurance plan is particularly important in this type of engagement because

- ▶ The project requires a firm technical understanding of all current State and Federal law and policy, as well as ongoing attention to relevant regulatory changes
- ▶ Claiming programs rely on a high volume of detailed data, which must be constantly monitored for accuracy and complete reporting

In order to meet these demands, PCG performs a number of quality assurance measures not taken by most vendors. First, we design our systems to screen for data anomalies. This automated function prevents our team from utilizing problem information. Second, we employ a set of quality assurance measures that screen information as it is received by our staff. This takes the form of visual and automated review of service documentation. In addition, our “import” routines that move automated files received from each district into our system includes a number of data verification steps that allow information to be stored and updated appropriately. Records that trigger questions will be reviewed by our staff and reported to each district as needed. Third, we investigate proper documentation of all scheduled services by doing a comparison of IEP schedules to actual documentation. During this process we will select a sample of IEPs to review from the student roster and compare them to documented services, identifying any significant differences. In other cities this process has identified that there are services that are not routinely documented unless this type of follow-up procedure is in place. Our team will also review a sample of services documented to make sure that any required authorizing documentation (e.g. IEP, Physician authorization, etc.) is in place and codify audit trails. We will compile our results of both surveys and share with school staff.

**Monitor Compliance**

PCG will review school operations on an ongoing basis so that it meets all federal and state requirements. We will also make recommendations where necessary to change operations when legal or regulatory conditions require it.

**Provide Full Audit Support**

In the event of an audit, PCG will provide full support. As noted in the previous case study, we have seen many vendors neglect to support clients during audits, especially after contract termination. PCG has successfully guided a number of our clients through audits, including providing all necessary documentation, participating in meetings and interviews, and providing draft correspondence. Our commitment to compliance is evident in how we approach our work, and should any claims be audited, PCG’s thorough review and comprehensive procedures mean that our client will be in full compliance. Should any disallowances occur for claims associated with PCG’s contract term, PCG will return relevant fees paid by Somerville Public Schools.

**SIMILAR ENGAGEMENTS**

PCG has worked closely with the Commonwealth since 1990 to develop and implement a fully operational Municipal School Services Medicaid program. PCG’s work with the Medicaid agency assisted the State in designing and later refining legislation and rate methodologies for covered services. Because the firm was instrumental in recommending critical enhancements to the program, PCG’s clients were among the first in the nation to gain reimbursement under a per diem claiming process. PCG is committed to exploring new revenue opportunities for our clients. Several years ago, the firm assisted the Massachusetts Medicaid Agency to implement our administrative claiming methodology for all the school districts in the state. Our clients were the only cities in Massachusetts to receive reimbursement for the first time period allowed.

**PCG has gained more reimbursement on behalf of Massachusetts schools than any other contractor, generating over \$614 million in revenue. Our current clients include the cities of Arlington, Boston, Brockton, Cambridge, Chelsea, Gloucester, Lowell, Lynn, Pentucket, Quincy, and Somerville, along with Excel Academy.**

The following table illustrates PCG’s Massachusetts school-based municipal Medicaid clients, as well as the length of time PCG has done work with the District:

<b>School District</b>	<b>Length of Service</b>
<b>Arlington Public Schools</b>	15+ years
<b>Boston Public Schools</b>	25+ years
<b>Brockton Public Schools</b>	20+ years
<b>Cambridge Public Schools</b>	25+ years
<b>Chelsea Public Schools</b>	25+ years
<b>Gloucester Public Schools</b>	15+ years
<b>Lowell Public Schools</b>	25+ years
<b>Lynn Public Schools</b>	25+ years

<b>Pentucket Regional School District</b>	10+ years
<b>Quincy Public Schools</b>	25+ years
<b>Somerville Public Schools</b>	5+ years

In addition to our Massachusetts school-based Medicaid clients, PCG has over 3,000 school-based Medicaid clients.

### *School-Based Billing Projects*

#### **Boston, MA and other Massachusetts Districts**

PCG has worked closely with the Commonwealth since 1990 to develop and implement a fully operational Municipal School Services Medicaid program. PCG's work with the Medicaid agency assisted the State in designing and later refining legislation and rate methodologies for covered services. Because we were instrumental in recommending critical enhancements to the program, our clients, including Boston, were among the first in the nation to gain reimbursement under a per diem claiming process. PCG is committed to exploring new revenue opportunities for our clients. Most recently, Massachusetts transitioned from a per diem claiming program to a Fee for Service (FFS)/cost reporting model, and PCG was instrumental in helping school districts and the State prepare for this change. Several years ago, PCG assisted the Massachusetts Medicaid Agency to implement its Administrative Claiming methodology for all the school districts in the State. PCG's clients were the only cities in Massachusetts to receive reimbursement for the first time period allowed. PCG has gained more reimbursement on behalf of Massachusetts schools than any other contractor, generating over \$614 million. Our current clients include the cities of Arlington, Boston, Brockton, Cambridge, Chelsea, Excel Academy Charter School, Gloucester, Lowell, Lynn, Pentucket, Quincy, and Somerville.

#### **Providence, RI**

PCG replaced the existing vendor of the Medical Assistance program for School-Based Medicaid Claiming in June 2003 for Providence Public School District. Within six months, PCG had implemented HIPAA-compliant electronic claiming of Fee-For-Service activities for both in-district schools, as well as Per Diem-based tuition payments for students attending out-of-district day and residential programs. In addition, PCG collaborated with Providence Special Education personnel to implement EasyTRAC, PCG's innovative web-based product for the documentation of health-related services as prescribed in students' Individualized Education Plans (IEP). This creative use of technology significantly reduced the burden on school personnel for data collection, and also enhanced project management capabilities for district administrators.

Working closely with the Center for Medicaid and Medicare Services (CMS) and the Rhode Island Department of Human Services (DHS), PCG strengthened program compliance with Federal and State regulations. PCG was able to identify several areas for each client, including service documentation, where process improvements were made to mitigate risk in the event of future audits. Additionally, PCG successfully advocated on Providence's behalf with CMS and DHS to substantially decrease the impact of the Office of the Inspector General (OIG) audit of claiming activities conducted by the previous vendor.



## **Cranston, RI**

PCG replaced an internal school district process for school-based Medicaid claiming in July of 2011. Since the beginning of the contract PCG has worked with Cranston to move a mostly paper claiming system to online logging in the district student information system. This has increased cash flow, increased compliance, and lessened the stress on district staff in preparing the claims. PCG also performed analysis of past claims from before the work on the project was initiated finding \$100,000 in unclaimed services to the district. Working through Rhode Island's Office of Health and Human Service, PCG was able to process these old claims to generate the previously lost revenue.

### ***New York City Department of Education, NYC Private Schools***

In late 2012, Public Consulting Group, Inc. (PCG) worked with the New York City Department of Education (NYC DOE) and their contracted private schools on a pilot of EasyTrac. The purpose of the pilot was to determine if EasyTrac would meet the needs for all private schools in NYC for collecting data for Medicaid claiming. The pilot included five institutions, representing 1,800 enrolled students and 350 staff. PCG coordinated Steering Committee check-in meetings with pilot institutions on a weekly basis to receive feedback on system functionality and address any obstacles institution staff members found utilizing the module. Since each state implements their Medicaid program in a different way, it is important to engage stakeholders at all levels so that services and other data are being captured in a compliant way. In August 2012, PCG and NYC DOE met with representatives from the Department of Health (DOH) as well as the State Education Department (SED) to review the EasyTrac site. The intent was to gain feedback from DOH and SED on the overall system. During the meeting all components of the system were reviewed.

### ***Texas Education Agency (TEA) and Health and Human Services Commission (HHSC)***

As part of the Statewide Reimbursement Optimization contract with the State of Texas, PCG identified both retroactive and prospective opportunities to increase the Medicaid reimbursement rates under the School Health and Related Services (SHARS) program. PCG performed a comprehensive Revenue Opportunity Assessment identifying the errors that excluded allowable costs and other modifications, then implemented the opportunity to bring additional Federal Financial Participation (FFP) to the participating school districts. Additionally, PCG has identified and has begun to implement other revenue generating opportunities with TEA. To-date PCG has:

- ▶ Identified and completed a 2-year retroactive rate correction that claimed over \$13M in additional FFP
- ▶ Rebased current rates prospectively that will yield an increase of nearly 20% of current SHARS service rates
- ▶ Identified an opportunity to remove an unnecessary requirement of a physician prior approval for Speech Therapy and Occupational Therapy services that could increase FFP by 30%



- ▶ Developed a new SHARS service reimbursement rates including group rates and delegated service rates
- ▶ Developed Revenue Opportunity Assessments for enhanced Medicaid Administrative Claiming (MAC) compliance to new CMS guidance while maintaining revenue performance

### ***School District of Philadelphia***

PCG has partnered with the School District of Philadelphia (SDP) since 2003, when SDP selected PCG to review its processes in special education in order to improve compliance and implement a web-based special education management system. PCG's efforts with SDP include optimizing processes for special education management, developing and implementing a comprehensive training program, providing comprehensive management reports with compliance indicators, and creating an interface with the existing student information system database. Implementation of the web-based system has significantly reduced staff IEP development time and provided special education administrators with critical management data and information.

### **PCG'S PROPOSED APPROACH**

Through our work with cities like Boston, Brockton, Lowell, Lynn, Cambridge, Providence, New York City, Philadelphia, and many others, PCG has developed a proven claims submission process approach. We clearly understand all of the tasks needed to collect information and generate claims under the Municipal Medicaid program. Our services and approach have been effective because they incorporate "best practices" identified in similar engagements.

PCG's operations and systems encompass all steps necessary to collect, maintain, and process the information associated with Medicaid claiming. PCG has developed an automated process for preparing claims that integrates claims checking and editing routines prior to claim submission. All of SPS's Medicaid claims are generated using PCG's proprietary billing system, the Universal Billing System (UBS). The UBS fulfills all requirements necessary to successfully submit a compliant Medicaid claim on behalf of SPS. Our billing system is built to meet all HIPAA guidelines and to perform a series of pre-billing checks, including IEP dates, Medicaid eligibility, Parental Consent and service limits among others. These built-in compliance measures, coupled with the compliance checks in EasyTrac at the point of data collection, allow us to monitor if claims meet all federal and state guidelines. Our team reviews the functionality and performance of our claiming system on an ongoing basis. This review encompasses input from regulatory advisors, operations staff, data entry personnel, and the quality assurance team and monitors the ongoing accuracy and effectiveness of our system.

Any service record that does not contain all of the information required by Medicaid is excluded from the billing process and PCG's billing system specifies the reason(s) that the record was not billed (e.g. lack of eligibility, missing parental consent, etc). Our system then generates

**Exception Reports** that itemize the unbilled services. These reports are used by our team to identify those services that may qualify for reimbursement if certain information can be collected and/or corrected. ***In some instances, this review and follow-up process has enabled our clients to claim reimbursement for many allowable services that did not qualify during the initial billing cycle.***

Once claims have been prepared, PCG will submit them electronically to the state and post them to the accounts receivable file. We will monitor the processing of all claims submitted to track when they are adjudicated by Medicaid.

Our system is designed to verify all data elements, apply appropriate claiming logic, prepare valid claims and manage accounts receivable. PCG has implemented EasyTrac, for Somerville which supplemented or replaced the previously used paper service documentation process. The EasyTrac system has been implemented in large and small school districts and state-wide systems throughout the country and is flexible in accommodating changes to federal or Massachusetts state-specific requirements. Additionally, to monitor the accuracy of individual claims submitted in EasyTrac, PCG has worked to build in rules of completion and error checks to notify service providers as services are being documented. Lastly, all historic actions within EasyTrac can be accessed for the purposes of an accurate audit trail.

The EasyTrac Service Logging Wizard shown above provides a means of documenting related service hours for the purpose of Medicaid reimbursement and allows users to enter specific information about the service provided.

- 1. Develop a strategic plan summarizing the services to be provided to obtain payments from third party payers on a retroactive and prospective basis. In addition to a complete description of the proposer’s approach to achieving these engagement objectives, the responsive proposal must include a detailed engagement work plan that highlights all process and system implementation activities and specific deadlines for billing and collecting reimbursements from Medicaid and other third-party payers during the first sixty days of the contract. As part of the work plan, the proposal must include an estimate of the amount of reimbursement that the contractor expects to collect on behalf of Somerville during this period. The methodology used to develop this estimate should be described fully.**

As Somerville's current Medicaid reimbursement vendor, PCG is committed to ensuring that Somerville Public Schools and the City of Somerville do not experience any gap or decrease in Medicaid reimbursement. Given the structure of the Medicaid reimbursement methodology currently in place in Massachusetts, the bulk of the reimbursement that Somerville will receive is based upon the end-of-year Cost Report, due annually. PCG has created cost report methodologies for multiple states and fully understands the costs that Somerville must include in this report to support maximum potential reimbursement levels. No vendor is more experienced in cost reporting methodologies than PCG. It is our goal to sit down with The City of Somerville stakeholders to review allowable costs so that all costs are included and reimbursement to the City is optimized.

Below is a brief description of our entire consulting and systems approach to the City of Somerville Medicaid billing, collections, and revenue maximization project. A detailed work plan including specific tasks associated with this Medicaid billing initiative is presented below.

Under the fee-for-service claiming methodology, Somerville Public Schools (SPS) is eligible to receive reimbursement for costs associated with the services provided to the special education population. PCG will continue to provide the following services to the SPS related to Massachusetts Medicaid billing:

- ▶ Trainings
- ▶ Data Collection
- ▶ Claim Creation and Submission
- ▶ Reimbursement Optimization

### ***Trainings***

In order to optimize revenue received from the school-based Medicaid program, PCG will work to optimize service documentation by providers. One way this is accomplished is by providing the necessary training and information sessions for providers. PCG will provide refresher user trainings on the EasyTrac™ system at no additional cost to the district should the district find it necessary. These sessions will allow providers to be updated on the fee-for-service methodology and provide a forum for questions.

### ***Data Collection***

In order to help streamline the Direct Service data collection process, SPS will continue to employ PCG's EasyTrac™ module, an integrated electronic service documentation solution that helps streamline the burdens of data collection and processing associated with Fee for Service claiming. EasyTrac is built, hosted, and maintained using industry best practices, as detailed below.

EasyTrac can streamline the data collection and processing burdens associated with Medicaid reimbursement. EasyTrac is integrated with PCG's IEP system or can be supplied with data from any IEP system with data transfers of information such as prescribed services, frequency/duration, and goals and objectives and delivery/attendance tracking for Medicaid

claiming. EasyTrac provides quick and reliable documentation and tracking of service delivery via the web.

EasyTrac was designed to operate as a service documentation tool that enables seamless processing of Medicaid claims. The primary focus of this software is on service documentation, not Medicaid billing. Staff no longer need to complete double documentation in order to bill for allowable activities. Medicaid claims are automatically captured from the data staff are already entering into EasyTrac to document services provided to a child.

The EasyTrac module captures all data elements required in order to claim for reimbursement for direct services such as:

- ▶ Student demographic information
- ▶ User Information
- ▶ IEP Information
- ▶ Related Service information
- ▶ Parent consent to bill Medicaid
- ▶ Treatment Plans, either through a customizable module or external document upload

#### Parental Consent

A crucial part of the data collection process is collecting parental consent data. One of the requirements for receiving reimbursement is that the student must have parental consent to the release of information. PCG will continue to work with SPS to determine the best process for capturing consent information. PCG has extensive experience working with districts to successfully capture consent data by implementing methodologies such as requesting parent signature during the referral process, including the consent form in school registration packets, sending the letter home with students, sending out a mass mailing, and others.

#### *Claim Creation and Submission*

##### Eligibility

Claims are only reimbursable if the services were provided to MassHealth-enrolled members between three and 22 years of age who are eligible for federal reimbursement for non-emergency services. PCG will use the state-provided Student Medicaid Eligibility Matching verification system quarterly to identify Somerville's MassHealth-enrolled students and calculate the district's Medicaid penetration factor used in Administrative Activity Claiming (AAC) and in the annual Direct Service Claiming (DSC) cost report.

##### Random Moment Time Study

The School-Based Medicaid Program (SBMP) reimburses LEAs based on actual costs incurred for reimbursable services and administrative activities through the DSC and AAC Programs. To quantify the proportion of reimbursable staff time, for the purpose of allocating staffing costs, a method called the Random Moment Time Study (RMTS) is used. PCG, on behalf of Somerville, will submit RMTS information to the SBMP during the school year.



Annually – Starting a New School Year

- ▶ PCG will collect and input school district calendars and staff work schedule information for each school year.

Quarterly – Before the Quarter Starts

- ▶ PCG will collect and input school district staff for whom they will seek direct service and/or administrative reimbursement for the quarter.
- ▶ PCG, in partnership with Somerville, will complete and certify participant lists, including identifying correct staff for each pool, providing required demographic information, and assigning staff to accurate work schedules to ensure that staff are selected for moments when they are scheduled to work.
- ▶ The deadlines for this data collection are as follows:

Time Study Quarter	RMTS List Submission Date
Q1: July 1- September 30	First Friday of June
Q2: October 1–December 31	First Friday of September
Q3: January 1–March 31	First Friday of December
Q4: April 1–June 30	First Friday of March

During the Quarter

- ▶ If necessary, PCG reminds RMTS participants are to answer their moment, and their supervisor and the LEA RMTS Coordinator are copied to remind them of the RMTS deadline.
- ▶ PCG communicates with Somerville regarding missed or rejected moments, requesting and processing information regarding leaves of absence and other changes in employment status.

Fee for Service

PCG will use the data collection method of choice for its partner districts to collect information on Direct Services provided to students. Somerville uses EasyTrac for this purpose, as documented above. For services to be reimbursable, the following five requirements must be met. PCG will assist Somerville in monitoring that the inputted service documentation meets the following requirements for reimbursement:

- ▶ Practitioner RMTS participation
- ▶ Practitioner qualifications
- ▶ Medicaid medical necessity
- ▶ Service authorization
- ▶ Service documentation

PCG will pull direct service information and submit to the state on a monthly basis, with no actionable due date for Somerville. Payment for interim direct service claims is made quarterly.

All claims adjudicated through MMIS and approved for payment are accumulated quarterly and payments are disbursed to LEAs approximately 90 days after the close of each quarter.

### Administrative Activity Claiming

Quarterly, SBMP requires that districts report the following costs in order to be reimbursed for their administrative costs associated with running the program:

- ▶ **Employee and Contractor:** salary and benefit costs of employed and contracted staff members who are eligible to be included in the claim.
- ▶ **Out of District Tuition Payments:** quarterly tuition expenditures to Approved Special Education Schools and Special Education Collaboratives.
- ▶ **Transportation:** Specialized Transportation expenditure and student statistics
- ▶ **Capital:** annual building, fixed assets, major movables, and net interest amounts.
- ▶ **Non-Personnel:** quarterly expenditure for supplies and purchased services.

PCG will work with Somerville to gather these costs in a timely manner and submit them to the state, along with the signed certification form from the district. To lessen the burden on Somerville, PCG will:

- ▶ Interpret new rules and regulations as they are announced, providing actionable guidance to Somerville regarding any pertinent changes.
- ▶ Support all staff in their efforts to gather the above cost information, including trainings, meetings, screen shares, and step-by-step guidance.
- ▶ Compare current submissions to previous submissions and alert the district to any possible discrepancies.
- ▶ If discrepancies occur, process amendments for previous quarters for Somerville.
- ▶ Respond to all SBMP questions that PCG has sufficient data to speak to.

Due dates associated with the Administrative Activity Claims are below:

AAC Quarter	Claim Submission Date
Q1: July 1- September 30	January 15 <sup>th</sup>
Q2: October 1–December 31	April 15 <sup>th</sup>
Q3: January 1–March 31	July 15 <sup>th</sup>
Q4: April 1–June 30	October 15 <sup>th</sup>

### Cost Report

As part of the fee-for-service methodology, districts will be required to submit a cost report each year that lists out all costs incurred during that year such as salary, benefit, specialized transportation, and tuition costs. The state will use this report to reconcile the total reimbursement the district received for the fiscal year with what the district actually spent. PCG will compile all necessary costs, prepare the cost report, and submit it to the state on behalf of the district.

Cost reports for the previous fiscal year are due on December 20<sup>th</sup> of every year.

### ***Reimbursement Optimization***

On a regular basis, PCG will share a report of the data errors found while processing Fee for Service data for the monthly claiming cycle. These errors will be distributed along with suggestions for resolution, so that Somerville is able to address them and receive payment for services within the 90-day timely filing window. Examples of errors reported include:

- ▶ Errors in First Name, Last Name, and School Code
- ▶ Age Not Appropriate
- ▶ IEP Missing
- ▶ Parental Consent either missing or denied
- ▶ Service Limits Exceeded (the duration of service is longer than is claimable for this service)
- ▶ Service on a Non-School Day

Quarterly, PCG will share an analysis comparing Somerville's RMTS Roster and Fee for Service Claims for the previous and current quarters. This allows the district to view any discrepancies between the Time Study roster for the district and Fee for Service (FFS) claims sent to the district. This is sent in advance of the close of any timely filing window to claim services and allows Somerville to continue to include all service types allowable in its Administrative Claiming process, optimizing reimbursement.

For each Related Service, PCG will share:

- ▶ The amount of RMTS Providers given
- ▶ The amount of FFS Paid Providers
- ▶ The amount of Students provided the Related Service
- ▶ The reimbursement amount for the Related Service for the quarter

Along with the following possible analyses:

The RMTS and FFS data for this Related Service match, no concerns at this time.
There are providers in your RMTS Roster for this Related Service, but no services in this category have been claimed yet for the quarter. Services must be entered to meet timely filing requirements and avoid a possible disallowance of these providers on your Administrative Claim.
There are no providers in your RMTS Roster for this Related Service, but services in this category have been claimed for the quarter. Consider adding any relevant providers to next quarter's RMTS Roster to optimize Administrative Claiming reimbursement.

### ***Projection***

PCG has the privilege of having worked with Somerville in pursuit of Medicaid reimbursement for almost 10 years. As such, the company is able to utilize pre-COVID and current Medicaid

reimbursement data to project forward Somerville’s reimbursement for FY22 and the two option years after that.

The below projection shows an anticipated rebound and increase for Administrative Activity Claims (AAC). This is due to a projected recovery from the pandemic and an increased optimization of Somerville’s AAC claiming. Somerville has room to optimize claiming for Non-Personnel and Capital costs and PCG is excited to help in that effort.

Direct Service Claiming (DSC) will be slower to recover post-pandemic due to the large amount of Compensatory Services that will be required from Somerville through FY22. As Compensatory Services are delivered and Somerville returns to its standard operations, DSC reimbursement will recover and increase as Somerville begins to claim for 504 services.

	FY19	FY20	FY21*	FY22**	FY23**	FY24**
<b>AAC</b>	\$414,384	\$268,995	\$228,646	\$250,000	\$275,000	\$300,000
<b>DSC</b>	\$563,871	\$402,585	\$365,890	\$400,000	\$550,000	\$850,000
<b>Total</b>	\$978,255	\$671,580	\$594,536	\$650,000	\$825,000	\$1,150,000

\*Projection, FY21 is still in process

\*\*Projections

**2. Provide technical assistance necessary to maintain full compliance with Federal and Commonwealth Medicaid regulations, and any other applicable Federal or state laws and regulations.**

As a PCG customer, the City of Somerville has access to our national legal and regulatory compliance department. Through this department SPS is notified of any pending changes to methodology or Federal Medicaid laws. PCG’s experience as the national leader in school-based Medicaid claiming enables SPS to rest assured that PCG will be out in front of any pending changes that will impact compliance or reimbursement.

**3. Guarantee full compliance with all Massachusetts Medicaid requirements in developing and implementing billing and collection operations for the Health and School Departments.**

Once data collection is complete, PCG will process Medicaid claiming data into the format required by the state and creates files for submission. The claim preparation process is critical so that:

- ▶ All reimbursable services are claimed
- ▶ Services claimed meet compliance requirements

PCG has developed an automated process for preparing claims that integrates claims checking and editing routines prior to claim submission. All of SPS Medicaid claims are generated using PCG’s proprietary billing system, the Universal Billing System (UBS). The UBS fulfills all requirements to successfully submit a compliant Medicaid claim on behalf of SPS. Our billing system is built to meet all HIPAA guidelines and to perform a series of pre-billing checks, including IEP dates, Medicaid eligibility, Parental Consent, and service limits, among others.



These built-in compliance measures, coupled with the compliance checks in EasyTrac™, guarantee that claims meet all Federal and State guidelines. In addition to the added compliance, the UBS can be adapted and customized to meet all billing requirements specific to Massachusetts Medicaid and the district.

Once claims have been prepared, PCG will submit them electronically to the state and post them to the accounts receivable file. We will monitor the processing of all claims submitted to report when they are adjudicated by Medicaid.

**4. Identify and compile a comprehensive list of reimbursement-eligible services rendered to school children for which claims will be submitted to third party payers on both retroactive and prospective bases.**

Please refer to number 5. for a list of services that are reimbursable per MassHealth's regulations.

**5. Develop and implement a detailed "Unit of Service" data collection process to support third party billing and collections.**

Through PCG's EasyTrac module, providers are able to log into this web-based system, enter the amount of time spent on a service for a particular day, and provide additional data related to the session. Per MassHealth's regulations, services that providers render that are reimbursable include:

- ▶ Physical therapy, occupational therapy and other therapies, including services provided by audiologists and services for individuals with speech, hearing and language disorders, performed by, or under the direction of, service providers who meet the qualifications set forth at 42 CFR § 440.110
- ▶ Nursing services coverable under 42 CFR § 440.80 and 42 CFR § 440.60 ordered by a licensed physician and performed by a registered nurse or licensed practical nurse
- ▶ Nursing services provided on a restorative basis under 42 CFR § 440.130 (d), including services delegated to individuals who receive appropriate teaching, direction, and supervision from a registered nurse or licensed practical nurse
- ▶ Personal care services coverable and performed by individuals qualified under 42 CFR § 440.167
- ▶ Services performed by licensed practitioners within the scope of their practice for individuals with behavioral health (mental and substance abuse) disorders, as defined under state law, and coverable as medical or other remedial care under 42 CFR § 440.60
- ▶ Diagnostic, screening, preventive and rehabilitative services covered under 42 CFR § 440.130
- ▶ Assessments, as necessary to assess or reassess the need for medical services in a child's treatment plan, and performed by any of the above licensed practitioners within the scope of practice (School-Based Medicaid Program User Guide).

- ▶ Under M.G.L. c. 112, §163, services performed by Applied Behavior Analysts or professional employees that meet the requirements of the state agency's licensing standards and serve under the state definition of applied behavior analysis.
- ▶ All above services performed as directed by a section 504 accommodation plan pursuant to 34 C.F.R. § 104.36.

**6. Design and implement an automated billing and account receivable management system with which to administer ongoing operation for claiming and tracking retroactive and prospective reimbursement from third party payers.**

Through the PCG accounts receivable functions, our team can monitor if all valid claims are adjudicated and paid status by the Medicaid program. These steps provide valuable information that allows our team to generate useful management reports and to identify potential areas for improvement in our operations and systems.

Post Payments: Upon receipt of remittance information our claiming team loads this information into our systems and posts payments. This process includes verification and checks to verify that information posted reconciles with Medicaid's remittance summary.

Follow-up on Denied Claims: Although our claims denial rate for this project has been very low, we carefully review denial patterns for our clients. We will analyze the reasons that claims are denied and determine whether any denials represent problems that are correctable. For claims identified as correctable, we will determine the steps necessary to correct and resubmit the claim.

**7. Implement data collection process and billing collections system within sixty days of contract award.**

PCG's web-based billing collection system is already implemented for Somerville. Continuing this engagement with PCG will allow Somerville's school-based revenue schedule to remain consistent and the cost savings achieved with **not** having to re-train staff and implement another tool will be very advantageous for Somerville.

**8. Operate data collection process and billing and collections system through the term of the contract.**

The data collection process forms the backbone of our direct service, administrative, and cost reconciliation claiming processes. Since all claiming relies upon complete and accurate information, our activities focus both on collecting the many types of information needed and on reviewing the information both for accuracy and to collect the information necessary to withstand an audit. Our commitment to this approach means that no information is overlooked or assumed.

In addition to the collection of data, PCG is committed to data security. All EasyIEP™/EasyTrac™ access is restricted to those users provided access through Somerville Public Schools. Examples of data security policies include:

- ▶ All users of EasyIEP™ / EasyTrac™ access the secure web interface with a unique username and password combination. This password may only be reset by an administrator in Somerville Public Schools, preventing unauthorized access to sensitive student information.
- ▶ For the calculation of Medicaid eligibility rates for quarterly administrative claims, Somerville Public Schools provides a file detailing student enrollment information via a secure FTP (File Transfer Protocol) method, which is password-protected and is protected by PCG's enterprise-level security practices.

PCG and Somerville will continue to work together so that these data security policies are enforced and applied throughout the implementation. Specific timelines for data gathering for Medicaid claims processing is listed in the work plan above.

PCG is Somerville's current Medicaid billing vendor and is prepared to continue these services through March 31, 2024.

- 9. Preparation for transfer of the operation of the data collection process and billing and collections systems to the Health and School Departments within 12 months of the date of the contract award. Preparation of the transfer of the operation must include written documentation of the data collection process and of the billing and collections system procedures. This transfer will include the training of all applicable Health and School Department personnel by the contractor. In addition, at the time of transfer, all systems developed under this contract, including computer software, developed for this engagement must be turned over to the Somerville Public Schools and shall be the property of the Somerville Public Schools.**

PCG will transition this project, including documentation and software developed under this contract, to the City of Somerville in the event that the City or School System chooses to discontinue the contract. If Somerville chooses to end its contract with PCG in favor of a different vendor or "in-house" operation, PCG will begin to effect the transition immediately. We stand by the policy that all data stored in EasyTrac is the property of the City of Somerville.

- 10. Prepare and submit claims within 60 days of the contract start date.**

As Somerville's current Medicaid claiming vendor, PCG is fully committed to preventing any loss of reimbursement to Somerville. PCG will continue to prepare and submit monthly fee-for-service claims for Direct Service reimbursement, quarterly Administrative claims for Administrative Outreach reimbursement, and annual Cost Reports for reconciliation of interim fee-for-service reimbursement. PCG is prepared to continue submitting claims in a timely manner so that the City of Somerville will not suffer any loss of reimbursement or any discontinuity of revenue.

For a detailed plan of work, including project dates, please see Section 1 above.

- 11. Development of high-quality IEPs that are aligned with the Massachusetts Department of Education standards, customized for Somerville Public Schools and that allow information and data entry unique to each student.**

Somerville Public Schools currently uses EasyIEP™, PCG's special education case and data management system, to create and manage IEPs and all associated compliance documentation for its special education program. PCG's proposal includes the continued maintenance and development of EasyIEP™, support for Somerville's users, continuous and rigorous research into state and federal regulations so that the system is as up-to-date and compliant as possible, and the highest level of customer support available. EasyIEP™ is unique among other products in both its ease of use for special educators as well as its stringent compliance requirements; EasyIEP™ makes writing high quality IEPs a streamlined, intuitive process, while minimizing errors and noncompliant data.

## **12. Support: on-site teacher training built in email support, toll-free hotline.**

PCG's training is supplemented by an on-going support network designed not only to resolve current issues quickly but also to continually educate users in order to proactively prevent problems and identify more efficient means of utilizing the system. PCG provides support through the following channels:

- ▶ Phone support through Helpline: Designed to provide immediate assistance and resolution. Support via a toll-free number is provided 8:30 am to 5:30 pm Monday through Friday. The helpline is fully staffed by analysts and consultants who have a strong technical understanding of EasyTrac™ and are aware of special education policies and procedures in Massachusetts.
- ▶ Online Message Board: Users have the option to send messages directly through the EasyTrac™ message board system. Users can send messages any day of the week, 24 hours a day for PCG staff to respond. When a PCG contact responds to a message board post, the user who asked the original question is sent an email alert of the response. It is PCG policy to respond within 48 hours of posting.
- ▶ On-Line Help Screens: Built within the application is an extensive help selection that includes an overview of the entire system, extensive how-to instructions and links to related web sites.
- ▶ Bug Reports: Bug reports provide users a unique support option that allows both PCG and the user to "re-trace" the actions immediately preceding the problem. When users encounter a problem they cannot resolve, bug reports recreate all of the keystrokes entered by the user from the time they logged on for their current session.
- ▶ On-Site Support: Provides quick response in those instances where problem resolution can only be achieved through an on-site presence.
- ▶ E-mail support: PCG client representatives currently work closely with Somerville administrators on all aspects of special education data and Medicaid claiming, and PCG is prepared to continue this high level of service with Somerville.
- ▶ Online Webinars: Provides live training and support without a PCG staff having to be in the room with Somerville staff. Somerville staff can join from a location that is convenient for them and be able to speak directly and follow along with a PCG trainer.



### 13. Utilize technology to create efficiencies and enhance program for Administrative and direct service claiming.

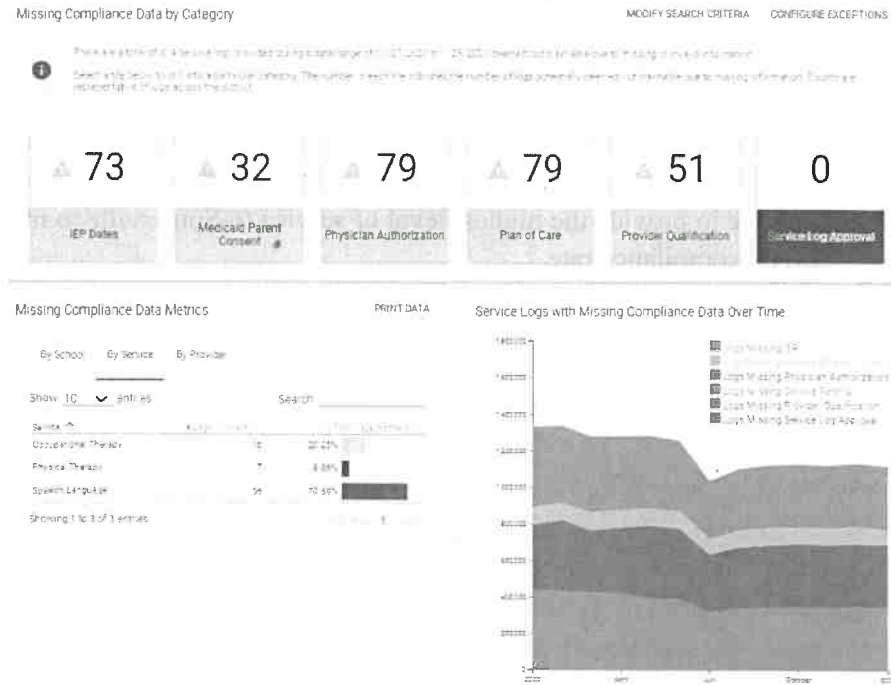
PCG strives to make the Administrative claiming data collection process as smooth as possible. By working closely with Somerville's finance, student data, and special education offices, PCG has been able to collect all required data for administrative claiming and prepare each quarterly claim in a timely and efficient manner. By utilizing a secure FTP system for student data transfers, PCG is able to efficiently calculate Somerville's Medicaid eligibility rate, a key component to administrative claiming.

For Direct Service claiming, PCG's EasyTrac™ system makes the process of service documentation streamlined and efficient for special educators. By using EasyTrac™, related service providers are able to quickly and conveniently document services provided to students in the same system used to create students' IEPs, reducing the training time for utilizing multiple systems, the staff burden for maintaining multiple competencies, and the administration's costs for maintaining separate documentation and IEP creation processes. EasyTrac™ makes the process of data collection for Direct Service claiming straightforward and intuitive.

There are several key features and wizards in EasyTrac™ that allow for faster, easier, and more convenient logging of services. These features move the providers step-by-step through the logging process:

- ▶ ***The Monthly Logging Wizard*** allows providers to view and log the services provided for an entire month for each student. This saves providers time and energy by allowing for documentation of multiple services on one screen. In addition, it provides a quick snapshot and summary of the services already logged for each month.
- ▶ ***The Group Logging Wizard*** assists providers who see groups of students at the same time by allowing them to document certain information for a whole group of students. To use the group logging wizard, the user will select the group of students they worked with, enter the information that is the same for each student (items such as group size, service type and areas covered), and then enter individual progress and comments for each student if necessary. This presents a faster and more efficient method for providers to log their services.
- ▶ ***The pre-fill feature*** allows service documentation information to be pre-populated for a service based on the last service information that was entered for the specific student. This saves time for users when logging multiple therapy sessions consecutively since they will only need to update certain fields, such as the Date of Service, which change for each encounter.
- ▶ ***The Smart LogBook Application*** provides clinicians a method to easily view all logs that they've entered into the system. This helps providers to easily organize and review the services they have provided. Additionally, users are able to select certain criteria such as date range and student name to easily sort data appropriately.
- ▶ ***EasyTrac Exception Dashboard*** is a new feature developed to allow for quick and easy access to service exceptions. A common example is when a service is

documented, but there is not a Medicaid Parent Consent on file covering the date of service. In real time, Somerville can review and manage information through a color-coded, tiled online dashboard that highlights where action is needed. This allows districts to address issues in a proactive manner, drive reimbursement optimization by adding or updating information directly within the EasyTrac Dashboard.



PCG is committed to improving efficiency and reducing the burden on administrators, staff members, and special educators wherever possible. Throughout the engagement with Somerville, we will continuously work to improve the service documentation and data collection process to maintain the highest level of data integrity with the greatest ease of use and convenience for Somerville’s special education department.

**14. Demonstrate vendor’s responsibility to initiate and follow through on RMTS participants to assure the necessary 85% participation rate for reimbursement is met.**

As Somerville’s current Medicaid billing vendor, PCG has supported Somerville towards an RMTS completion rate that has been above the 85% compliance threshold each quarter. PCG will continue to coordinate closely with the Somerville administration so that this compliance metric is met each quarter. PCG will also continue to discuss and implement compliance strategies to reduce the burden on Somerville staff for completing RMTS moments and on administrators for following up with staff on overdue moments.

As part of the management of the statewide random moment time study, PCG will continue to provide the following services to the district:

- ▶ **Tracking of Federal and State Regulations:** PCG will review and update processes based on any revisions to Federal and State regulations concerning the time study process.
- ▶ **Compile Time Study Participants:** PCG will continue to work with Somerville to identify all appropriate participants to take part in the time study. Participants selected will meet the criteria established by Massachusetts DMA. Roster will be updated for new employees and job classifications as they become known, and sent to MassHealth on a quarterly basis or as needed.
- ▶ **Follow-Up with Participants:** PCG will monitor each of the moments selected for Somerville staff. If a moment has passed without any action taken by the participant, PCG will contact the appropriate district contact in order to support the participant with the information they need to complete their moment. PCG will continue to provide the highest level of service to Somerville to maintain the 85% RMTS compliance rate.

## QUALITY REQUIREMENTS

QUALITY REQUIREMENTS		YES	NO
1.	The proposer must be able to design, develop and implement a plan to adhere to the most recent changes in the current claiming methodology, and to any future changes that may be directed by the Centers of Medicare and Medicaid Services (CMS) over the course of the next three years – the potential duration of this contract.	X	
2.	Bidder has been in the business of third party reimbursement maximization services for at least five years in Massachusetts, and has a minimum of 5 years' experience in the claiming methodology currently used in Massachusetts	X	
3.	Bidder has successful experience developing third party billing, collection and management reporting systems for health services in at least 3 cities or school systems, similar in size to Somerville, within the last five years. Successful means having clients who have received cash payments from third party payers, particularly Medicaid and private insurance. (If yes, see following section regarding references. The proposer must state the name of each client, telephone number, the address, dates of service, brief description of services provided, dollar amount received, size of school district, and contact person. The City of Somerville Health Department and School Departments may, at its option, investigate and evaluate such references.)	X	
4.	Optional: Are you a Mass. Supplier Diversity Office MBE/WBE certified minority or woman owned business? Additional minority designations may be submitted by attaching supporting documentation.		X



## References

**Bidder:** Public Consulting Group

**BID#/ Title:** RFP # 21-56 Medicaid Billing & Collection Services

Reference #1			
<b>Reference</b>	City of Boston	<b>Contact</b>	James Williamson, Deputy Budget Director
<b>Address</b>	1 City Hall Square Room 813	<b>Phone</b>	617-635-3870
	Boston, MA 02201	<b>Email</b>	james.williamson@boston.gov
<b>Description and date(s) of supplies or services provided</b>			
Since 1992, PCG has partnered with Boston Public Schools and the City of Boston to optimize Medicaid reimbursement for the district. This engagement has spanned all of PCG's School-Based Medicaid Offerings and resulted in \$298,526,711 in reimbursement since 1998.			

Reference #2			
<b>Reference</b>	Cambridge Public Schools	<b>Contact</b>	Claire Spinner, Chief Financial Officer
<b>Address</b>	159 Thorndike Street	<b>Phone</b>	(617) 349-6429
	Cambridge MA 02139	<b>Email</b>	cspinner@cpsd.us
<b>Description and date(s) of supplies or services provided</b>			
Since 1994, PCG has partnered with Cambridge Public Schools to optimize Medicaid reimbursement for the district. This engagement has spanned all of PCG's School-Based Medicaid Offerings and resulted in \$29,255,623 in reimbursement since 1998.			

Reference #3			
<b>Reference</b>	Brockton Public Schools	<b>Contact</b>	Aldo Petronio, Chief Financial Officer
<b>Address</b>	43 Crescent Street	<b>Phone</b>	(508) 580-7000
	Brockton MA 02301	<b>Email</b>	aldoepetronio@bpsma.org
<b>Description and date(s) of supplies or services provided</b>			
Since 1998, PCG has partnered with Brockton Public Schools to optimize Medicaid reimbursement for the district. This engagement has spanned all of PCG's School-Based Medicaid Offerings and resulted in \$30,704,289 in reimbursement.			

# **Additional Proposal Submission Documents**

## **A: PRIMARY POINT OF CONTACT AND PROJECT STAFFING**

March 17, 2021

Mr. Thupten Chukhatsang  
 Procurement Analyst  
 City of Somerville  
 93 Highland Avenue  
 Somerville, MA 02143

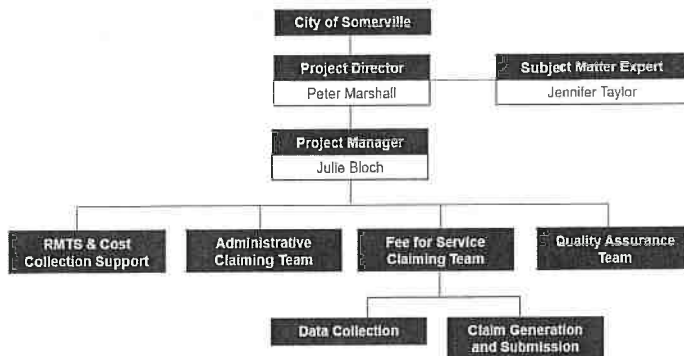
**RE: School Based Medicaid Program**

Dear Mr. Chukhatsang,

Please accept this letter as confirmation that, upon receipt of the proposed contract, the following individual who will act both as project manager and the primary point of contact with the City:

<b>Name</b>	Julie Bloch
<b>Title</b>	Senior Project Manager
<b>Telephone</b>	(857) 313-3176
<b>Email</b>	jbloch@pcgus.com
<b>Mailing Address</b>	148 State St., 10 <sup>th</sup> Floor Boston, MA 02109
<b>Fax</b>	(617) 426-4632

This contact will be part of the larger project team, as depicted below:



If you have any questions or require further clarification regarding this or other aspects of our submission, please feel free to contact me at (617) 426-2026.

Sincerely,



Peter Marshall  
 Manager

**Appendix B**  
*Cost Details*

- ▣ **Service rate(s): Per Details Below**
- ▣ **Supply rate(s): Per Details Below**
- ▣ **Number of payments: Per Details Below**
- ▣ **Payment upon completion of deliverables: Per Details Below**
- ▣ **Fixed fee: Per Details Below**
- ▣ **Other: Per Details Below**

The Vendor shall periodically submit invoices to the City, for which compensation is due under this Contract and requesting payment for goods received or services rendered by the Vendor during the period covered by the invoice. The invoice must agree to the rates/payment schedule as indicated in this contract and must include the applicable Purchase Order number. The invoice shall include the following information: vendor name, vendor remit address, invoice date, invoice number, itemized listing of goods, services, labor, and expenses and indicating the total amount due.





**PUBLIC**  
CONSULTING GROUP

Solutions that Matter

## PRICE PROPOSAL

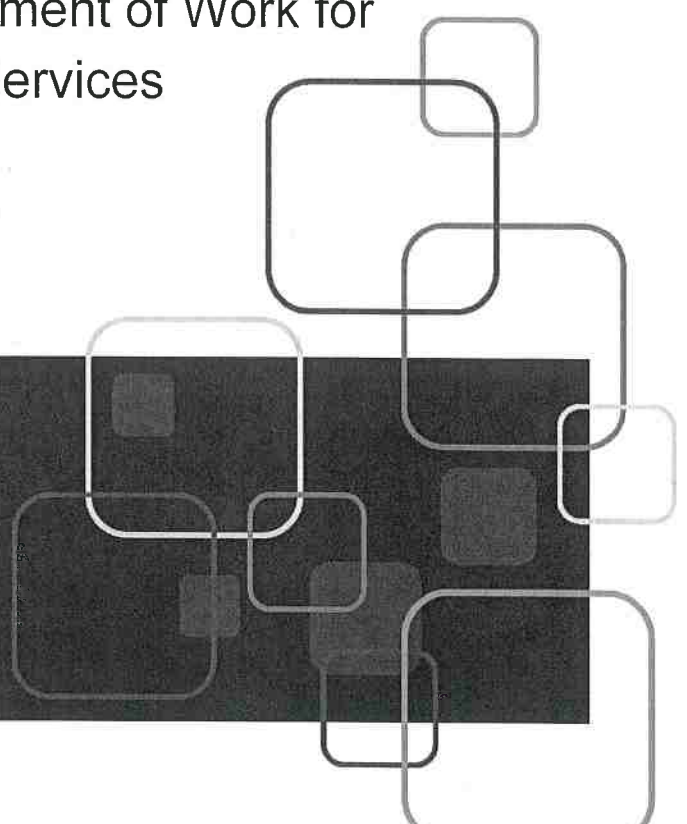
# City of Somerville Purchasing Department

Public Consulting Group Statement of Work for  
Medicaid Billing & Collection Services

RFP #: 21-56

March 17, 2021 | 2:00 PM EST

Mr. Thupten Chukhatsang  
City of Somerville  
Purchasing Department  
93 Highland Avenue  
Somerville, MA 02143




**RFP # 21-56**  
**SECTION 3.0**  
**PRICING**

By signing this Price Form, the Proposer certifies the following bulleted statements and offers to supply and deliver the materials and services specified below in full accordance with the Contract Documents supplied by the City of Somerville entitled: **MEDICAID BILLING & COLLECTION SERVICES**

- The proposals will be received at the office of the Purchasing Director, Somerville City Hall, 93 Highland Avenue, Somerville, MA 02143 no later than **3/17/2021 by 2PM EST**
- If the **awarded** vendor is a Corporation a "Certificate of Good Standing" (produced by the Mass. Sec. of State) must be furnished with the resulting contract (see Section 4.0.)
- **Awarded Vendor** must comply with Living Wage requirements (see Section 4.0; only for services)
- **Awarded Vendor** must comply with insurance requirements as stated in Section 4.0.
- The Purchasing Director reserves the right to accept or reject any or all proposals and/or to waive any informalities if in her/his sole judgment it is deemed to be in the best interest of the City of Somerville.
- The following prices shall include delivery, the cost of fuel, the cost of labor, and all other charges.
- This form to be enclosed in sealed proposal package.

The following prices are fixed for each year of this contract and reflect the net reimbursement of Medicaid revenues collected:

	FIXED PERCENTAGE	FIXED PERCENTAGE (in words)
<b>YEAR ONE:</b>	April 1st, 2021 through March 31st, 2022	
Annual Cost:	3.75 %	Three point seven five percent
<b>YEAR TWO:</b>	April 1st, 2022 through March 31st, 2023	
Annual Cost:	3.99 %	Three point nine nine percent
<b>YEAR THREE:</b>	April 1st, 2023 through March 31st, 2024	
Annual Cost:	4.25 %	Four point two five percent

<b>Name of Company/Individual:</b> Public Consulting Group, Inc.	
<b>Address, City, State, Zip:</b> 148 State St., 10th Floor, Boston, MA 02109	
<b>Tel #</b> (617) 426-2026	<b>Email:</b> pmarshall@pcgus.com
<b>Signature of Authorized Individual</b> 	
Please acknowledge receipt of any and all Addenda (if applicable) by signing below and including this form in your proposal package. Failure to do so may subject the proposer to disqualification.	
<b>ACKNOWLEDGEMENT OF ADDENDA:</b>	
Addendum #1 <input checked="" type="checkbox"/> #2 <input type="checkbox"/> #3 <input type="checkbox"/> #4 <input type="checkbox"/> #5 <input type="checkbox"/> #6 <input type="checkbox"/> #7 <input type="checkbox"/> #8 <input type="checkbox"/> #9 <input type="checkbox"/> #10 <input type="checkbox"/>	

## Price Submission

- ▶ All prices on the proposal price form in this solicitation contain the unit rate as requested.
- ▶ All prices include delivery, the cost of fuel, the cost of labor, and all other charges related to the services listed.
- ▶ Prices will remain fixed for the contract period of performance.

**Appendix C**  
*Forms*





Solutions that Matter

### CERTIFICATE OF AUTHORITY

The undersigned Mark R. Kmetz, Assistant Secretary of Public Consulting Group LLC, a Delaware limited liability company (hereinafter "the Company"), does hereby certify that Peter Marshall, a Manager of the Company, is authorized to execute on behalf of the Company the accompanying proposal to the City of Somerville for Medicaid Billing & Collection Services (RFP # 21-56), and any related contract, agreement, or other legally binding document relating to the proposal, and to do and perform all acts necessary or appropriate to carry out the terms of such contract or agreement, pursuant to authority confirmed by the Company Board of Directors at a meeting held remotely via Microsoft Teams on May 21, 2020, and that such authority has not subsequently been amended or modified, and continues to be in full force and effect as of this date.

IN WITNESS WHEREOF, the undersigned officer has executed this Certificate on this 17<sup>th</sup> day of March 2021.

A handwritten signature in blue ink, appearing to read "Mark Kmetz", is written over a horizontal line.

Mark R. Kmetz  
Assistant Secretary



William Francis Galvin  
Secretary of the  
Commonwealth

*The Commonwealth of Massachusetts*  
*Secretary of the Commonwealth*  
*State House, Boston, Massachusetts 02133*

April 29, 2021

TO WHOM IT MAY CONCERN:

I hereby certify that a certificate of registration of a Foreign Limited Liability Company was filed in this office by

**PUBLIC CONSULTING GROUP LLC**

in accordance with the provisions of Massachusetts General Laws Chapter 156C on **February 18, 2021**.

I further certify that said Limited Liability Company has filed all annual reports due and paid all fees with respect to such reports; that said Limited Liability Company has not filed a certificate of cancellation or withdrawal; that there are no proceedings presently pending under the Massachusetts General Laws Chapter 156C, § 72 for revocation of said Limited Liability Company's authority to transact business in the Commonwealth; and that said Limited Liability Company is in good standing with this office.

I also certify that the names of all managers listed in the most recent filing are:  
**STEPHEN SKINNER, JOHN SHAUGHNESSY, GRANT BLAIR, KATHLEEN FALLON, DANIEL T. HEANEY, MARK R. KMETZ, WILLIAM S MOSAKOWSKI, TONY MCLEAN BROWN, PUBLIC CONSULTING GROUP HOLDINGS, INC.**

I further certify that the name of persons authorized to act with respect to real property instruments listed in the most recent filings are: **NONE**



In testimony of which,  
I have hereunto affixed the  
Great Seal of the Commonwealth  
on the date first above written.

*William Francis Galvin*

Secretary of the Commonwealth

**INSURANCE SPECIFICATIONS**

**INSURANCE REQUIREMENTS FOR AWARDED VENDOR ONLY:**

Prior to commencing performance of any work or supplying materials or equipment covered by these specifications, the contractor shall furnish to the Office of the Purchasing Director a Certificate of Insurance evidencing the following:

A. GENERAL LIABILITY - Comprehensive Form

Bodily Injury Liability.....\$ One Million

Property Damage Liability.....\$ One Million

B. PROFESSIONAL LIABILITY.....\$ 1,000,000.00

C. COVERAGE FOR PAYMENT OF WORKER'S COMPENSATION BENEFIT PURSUANT TO CHAPTER 152 OF THE MASSACHUSETTS GENERAL LAWS IN THE AMOUNT AS LISTED BELOW:

WORKER'S COMPENSATION.....\$ Statutory

EMPLOYERS' LIABILITY.....\$ Statutory

D. AUTOMOBILE LIABILITY INSURANCE AS LISTED BELOW:

BODILY INJURY LIABILITY.....\$ STATUTORY

1. A contract will not be executed unless a certificate (s) of insurance evidencing above-described coverage is attached.

2. Failure to have the above-described coverage in effect during the entire period of the contract shall be deemed to be a breach of the contract.

3. All applicable insurance policies shall read:

**"CITY OF SOMERVILLE" as a certificate holder and as an additional insured** for general liability only along with a description of operation in the space provided on the certificate.

**Certificate Should Be Made Out To:**

**City Of Somerville  
c/o Purchasing Department  
93 Highland Avenue  
Somerville, Ma. 02143**

**Note: If your insurance expires during the life of this contract, you shall be responsible to submit a new certificate(s) covering the period of the contract. No payment will be made on a contract with an expired insurance certificate.**



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

5/6/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Hays Companies Inc. 133 Federal Street, 4th Floor Boston MA 02110	CONTACT NAME: Courtney Mitchell	
	PHONE (A/C, No. Ext): FAX (A/C, No): E-MAIL ADDRESS: cmitchell@hayscompanies.com	
INSURED Public Consulting Group LLC 148 State Street 10th Floor Boston MA 02109	INSURER(S) AFFORDING COVERAGE	NAIC #
	INSURER A: Great Northern Insurance Company	20303
	INSURER B: Federal Insurance Company	20281
	INSURER C: Allied World Assurance Co (U.S.) Inc	19489
	INSURER D: ACE American Insurance Company	22667
	INSURER E: INSURER F:	

COVERAGES CERTIFICATE NUMBER: 21-22 PCG Master REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	X		35855036	4/1/2021	4/1/2022	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ Included Employee Benefits \$ 1,000,000
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			73540440	4/1/2021	4/1/2022	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			0311-2674	4/1/2021	4/1/2022	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input type="checkbox"/>	N/A	71724811	12/31/2020	12/31/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
D	Professional/Cyber Liability Claims Made			D95159837 Retroactive Date 2/27/1997	4/1/2021	4/1/2022	Each Claim/Aggregate: \$10,000,000 Retention: \$500,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Re: Medicaid Billing & Collection Services 180052

City Of Somerville is included as additional insured as respects to General Liability where required by written contract, subject to policy terms and conditions.

## CERTIFICATE HOLDER

## CANCELLATION

City Of Somerville c/o Purchasing Department 93 Highland Avenue Somerville, MA 02143	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE James Hays/CEMITC

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**Addendum No. 1 to RFP #21-56**



**CITY OF SOMERVILLE, MASSACHUSETTS**  
**Department of Purchasing**  
**JOSEPH A. CURTATONE**  
**MAYOR**

To: All Parties on Record with the City of Somerville as Holding **RFP #21-56**  
Medicaid Billing & Collection Services

From: Thupten Chukhatsang, Procurement Analyst

Date: 3/11/2021

Re: Questions & Answers

**Addendum No. 1 to RFP #21-56**

Please acknowledge receipt of this Addendum by signing below and including this form in your proposal package. Failure to do so may subject the proposer to disqualification.

NAME OF COMPANY / INDIVIDUAL: Public Consulting Group, Inc.

ADDRESS: 148 State St., 10th Floor

CITY/STATE/ZIP: Boston, MA, 02109

TELEPHONE/FAX/EMAIL: (617) 426-2026 / (617) 426-4632 / pmarshall@pcgus.com

SIGNATURE OF AUTHORIZED INDIVIDUAL: *Pat Marshall*

ACKNOWLEDGEMENT OF ADDENDA:

Addendum #1 X #2 \_\_\_\_\_ #3 \_\_\_\_\_ #4 \_\_\_\_\_

Form: \_\_\_\_\_  
Contract Number: \_\_\_\_\_

CITY OF SOMERVILLE

Rev. 05/04/2020



**SOMERVILLE LIVING WAGE ORDINANCE CERTIFICATION FORM**  
**CITY OF SOMERVILLE CODE OF ORDINANCES SECTION 2-397 et seq.**

**Instructions:** This form shall be included in all Invitations for Bids and Requests for Proposals which involve the furnishing of labor, time or effort (with no end product other than reports) by vendors contracting or subcontracting with the City of Somerville, where the contract price meets or exceeds the following dollar threshold: \$10,000. If the undersigned is selected, this form will be attached to the contract or subcontract and the certifications made herein shall be incorporated as part of such contract or subcontract. **Complete this form and sign and date where indicated below on page 2.**

**Purpose:** The purpose of this form is to ensure that such vendors pay a "Living Wage" (defined below) to all covered employees (i.e., all employees except individuals in a city, state or federally funded youth program). In the case of bids, the City will award the contract to the lowest responsive and responsible bidder paying a Living Wage. In the case of RFP's, the City will select the most advantageous proposal from a responsive and responsible offeror paying a Living Wage. In neither case, however, shall the City be under any obligation to select a bid or proposal that exceeds the funds available for the contract.

**Definition of "Living Wage":** For this contract or subcontract, as of 7/1/2020 "Living Wage" shall be deemed to be an hourly wage of no less than **\$15.29** per hour. From time to time, the Living Wage may be upwardly adjusted and amendments, if any, to the contract or subcontract may require the payment of a higher hourly rate if a higher rate is then in effect.

**CERTIFICATIONS**

1. The undersigned shall pay no less than the Living Wage to all covered employees who directly expend their time on the contract or subcontract with the City of Somerville.
2. The undersigned shall post a notice, (copy enclosed), to be furnished by the contracting City Department, informing covered employees of the protections and obligations provided for in the Somerville Living Wage Ordinance, and that for assistance and information, including copies of the Ordinance, employees should contact the contracting City Department. Such notice shall be posted in each location where services are performed by covered employees, in a conspicuous place where notices to employees are customarily posted.
3. The undersigned shall maintain payrolls for all covered employees and basic records relating hereto and shall preserve them for a period of three years. The records shall contain the name and address of each employee, the number of hours worked, the gross wages, a copy of the social

\* Copies of the Ordinance are available upon request to the Purchasing Department.

Form: \_\_\_\_\_  
Contract Number: \_\_\_\_\_

CITY OF SOMERVILLE

Rev. 05/04/2020

security returns, and evidence of payment thereof and such other data as may be required by the contracting City Department from time to time.

4. The undersigned shall submit payroll records to the City upon request and, if the City receives information of possible noncompliance with the provisions the Somerville Living Wage Ordinance, the undersigned shall permit City representatives to observe work being performed at the work site, to interview employees, and to examine the books and records relating to the payrolls being investigated to determine payment of wages.

5. The undersigned shall not fund wage increases required by the Somerville Living Wage Ordinance by reducing the health insurance benefits of any of its employees.

6. The undersigned agrees that the penalties and relief set forth in the Somerville Living Wage Ordinance shall be in addition to the rights and remedies set forth in the contract and/or subcontract.

**CERTIFIED BY:**

Signature: *Sally Marshall*  
(Duly Authorized Representative of Vendor)

Title: Manager, Education

Name of Vendor: Public Consulting Group, Inc.

Date: 3/17/2021

Form: \_\_\_\_\_  
Contract Number: \_\_\_\_\_

CITY OF SOMERVILLE

Rev. 05/04/2020

**INSTRUCTIONS: PLEASE POST**

**NOTICE TO ALL EMPLOYEES  
REGARDING PAYMENT OF LIVING WAGE**

Under the Somerville, Massachusetts' Living Wage Ordinance (Ordinance No. 1999-1), any person or entity who has entered into a contract with the City of Somerville is required to pay its employees who are involved in providing services to the City of Somerville no less than a "Living Wage".

The Living Wage as of 7/1/2020 is \$15.29 per hour. The only employees who are not covered by the Living Wage Ordinance are individuals in a Youth Program. "Youth Program" as defined in the Ordinance, "means any city, state or federally funded program which employs youth, as defined by city, state or federal guidelines, during the summer, or as part of a school to work program, or in any other related seasonal or part-time program."

For assistance and information regarding the protections and obligations provided for in the Living Wage Ordinance and/or a copy of the Living Wage Ordinance, all employees should contact the City of Somerville's Purchasing Department directly.



Form: \_\_\_\_\_  
Contract Number: \_\_\_\_\_

CITY OF SOMERVILLE

Rev. 08/01/12



**Non-Collusion Form and Tax Compliance Certification**

**Instructions:** Complete each part of this two-part form and sign and date where indicated below.

**A. NON-COLLUSION FORM**

I, the undersigned, hereby certify under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person.

As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Signature: *Saty Manshull*  
(Individual Submitted Bid or Proposal)  
Duly Authorized

Name of Business or Entity: Public Consulting Group, Inc.

Date: \_\_\_\_\_

**B. TAX COMPLIANCE CERTIFICATION**

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support, as well as paid all contributions and payments in lieu of contributions pursuant to MGL 151A, §19A(b).

Signature: *Saty Manshull*  
(Duly Authorized Representative of Vendor)

Name of Business or Entity: Public Consulting Group, Inc.

Social Security Number or Federal Tax ID# [REDACTED]

Date: 3/17/2021



CITY OF SOMERVILLE  
PURCHASING DEPARTMENT  
REQUEST FOR PROPOSALS  
RFP 21-56



The City of Somerville, through the Purchasing Department, invites sealed proposals for:

Medicaid Billing & Collection Services

A RFP package may be obtained online at <http://www.somervillema.gov/departments/finance/purchasing> or from [www.bidexpress.com](http://www.bidexpress.com) on or after Wednesday, March 3, 2021. Sealed proposals will be received at the Purchasing Department, Somerville City Hall, 93 Highland Ave., Somerville, MA, 02143 or via Bid Express until 2:00 PM, Wednesday, March 17, 2021. The Purchasing Director reserves the right to reject any or all proposals if, in her sole judgment, the best interest of the City of Somerville would be served by so doing.

The City of Somerville seeks a qualified contractor to recover retroactive and prospective reimbursements from third party payers, particularly the Federal Medicaid Program and private insurance companies, for medical services which it has provided to school children enrolled in the Somerville Public Schools. The successful proposer will provide an automated special education system combining individualized education programs (IEPs) with Medicaid billing and collections.

The contract term shall be for a period of one (1) year with two (2) one-year options to renew. The City reserves sole discretion to exercise renewal options.

Please email [tchukhatsang@somervillema.gov](mailto:tchukhatsang@somervillema.gov)

for more information.

Thupten Chukhatsang Procurement Analyst 617-625-6600, x3400

Somerville News Weekly 3/2/2021



**William Francis Galvin**  
Secretary of the Commonwealth of Massachusetts



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## Goods and Services submission confirmation

**The following Goods and Services submission was successfully received.**

Planned date of publish is 3/1/2021

### Awarding Agency

Agency Name and Address: City of Somerville 93 Highland Avenue Somerville, MA 02143

Bid Number: RFP 21-56

### Contact Information

Name: Thupten Chukhatsang

Title: Procurement Analyst

Phone: 6176256600 Fax: 6176251344

Email Address: tchukhatsang@somervillema.gov  
Notify email address listed when final publish date assigned.

Address:  
(if different from above)

### Description

Medicaid Billing & Collection Services: The City of Somerville seeks a qualified contractor to recover retroactive and prospective reimbursements from third party payers, particularly the Federal Medicaid Program and private insurance companies, for medical services which it has provided to school children enrolled in the Somerville Public Schools. The successful proposer will provide an automated special education system combining individualized education programs (IEPs) with Medicaid billing and collections.

### Contract Information

Estimated Rate:      Duration: 1 year with 2 renewals

Bid Release Date:      Release Time:

Bid Deadline Date: 03/17/2021      Deadline Time: 2:00PM

Additional Information

This page can be printed for your records.

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William Francis Galvin, Secretary of the Commonwealth of Massachusetts  
[Terms and Conditions](#)  
[Accessibility Statement](#)

Bid Opening Date: 03/17/2021 02:00 PM  
 Printed: 03/03/2021 11:28 AM

**BID SOLICITATION**

Description: RFP 21-56 Medicaid Billing  
 & Collection Services

Bid Number <b>BD-21-1166-COS01- COS01-59353</b>
Alternate ID <b>RFP 21-56</b>
Requisition Number

Item	Class-Item	Quantity	Unit	Unit Price	Total
1	RFP 21-56 Medicaid Billing & Collection Services	1	EA	_____	_____
				<b>TOTAL:</b>	_____

THIS IS NOT AN ORDER, AND DOES NOT COMMIT THE PURCHASING ENTITY TO PURCHASE ANY GOODS OR SERVICES.

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**PURCHASED**

By: Thupten Chukhatsang

Phone#: (617) 625-6600

Email: tchukhatsang@somervillema.gov

**BUYER**