



REQUEST FOR PROPOSALS: School Medicaid Reimbursement and Documentation Technology Platform

The Texas Association of School Boards, Inc. (TASB) requests proposals from qualified companies (Company or Companies) that currently provide, or would like to provide, School Medicaid Reimbursement and Documentation Technology Platform products and services (as explained herein) to Texas public school districts. TASB, through its School Medicaid Services division, offers a number of special population related services and is currently exploring platforms that can assist TASB in providing those services.

TASB's member school districts currently maintain approximately 9,100 educational campuses throughout the state of Texas. TASB is interested in receiving proposals from Companies that provide services related to School Medicaid Reimbursement and Documentation Technology Platform for Texas public schools and other governmental entities. This request for proposals (RFP) is intended to seek proposals from qualified firms about services available in the school Medicaid marketplace in order to explore potential opportunities with Companies to provide current, new and/or expanded services to TASB members in collaboration with the TASB School Medicaid Services program.

Organizational Background

Created in 1949, TASB is a private, voluntary, nonprofit, and statewide educational association that serves local Texas school districts. TASB's membership currently includes almost all of the boards of the 1,026 Texas school districts, as well as 20 regional education service centers, 50 community colleges, 20 central appraisal districts, 130 shared service arrangements, and 79 charter schools. TASB members represent the largest group of publicly elected officials in the state (more than 7,000 school board members) who preside over combined expenditures of more than \$69 billion annually, employ more than 745,000 people, and serve over 5.3 million Texas students. TASB has maintained more than 35 consecutive years of 99+ percent participation of Texas public school boards. TASB's mission is to promote educational excellence for Texas schoolchildren through advocacy, visionary leadership, and high-quality services. TASB provides a variety of services, including Medicaid billing solutions for Texas school districts.

TASB School Medicaid Services (SMS) is a specialized division of TASB, dedicated to supporting Texas school districts in maximizing Medicaid reimbursements through streamlined processes and expert guidance for over 30 years. SMS works closely with districts to support compliance with Medicaid regulations, reduce administrative burdens, and improve financial outcomes. With a staff that includes over 100 years of experience in school Medicaid, our embedded approach allows us to work with districts of all sizes across the state of Texas. We work with districts of 238 to over 150,000 students. With a team of experienced professionals, SMS offers tailored solutions for managing SHARS (School Health and Related Services) programs, including comprehensive training, claim processing, and data analytics.

This RFP seeks proposals from qualified vendors offering School Medicaid Reimbursement and Documentation Technology Platforms that align the requirements set forth in this RFP and align with Texas Medicaid reimbursement requirements, provide secure and scalable solutions, and integrate seamlessly with existing systems used by Texas school districts.

Note: TASB serves as administrator to multiple interlocal cooperative entities including The Local Government Purchasing Cooperative d/b/a BuyBoard®. *Please note that this request for proposals is issued by and for TASB only and is in no way a part of, nor associated with any TASB affiliated entity, including BuyBoard, or any BuyBoard proposal invitation or contract.*

Purpose of the RFP

TASB is seeking proposals to enhance its Medicaid reimbursement services by adopting a comprehensive technology platform. This platform should facilitate compliance with state and federal Medicaid requirements, streamline service documentation, and maximize reimbursement efficiency. This RFP seeks to identify innovative solutions and qualified vendors for future collaboration.

Other services — If the Company offers any other related services or products that the Company feels might be beneficial to TASB and TASB members, TASB requests information on those services as well.

Specifications/Requirements

Core Functionalities

The proposed platform should include:

- **Service Tracking and Documentation:** Tools to log provided services, ensuring compliance with Medicaid billing requirements.
- **Medicaid Billing Automation:** Integration with Texas Medicaid and SHARS programs for accurate claim submissions and tracking.
- **System Integration:** Compatibility with various Student Information Systems (SIS), Individualized Education Program (IEP) systems and Texas Medicaid & Healthcare Partnership (TMHP) Electronic Data Interchange (EDI) transaction system or other such Texas Health and Human Services Commission (HHSC) systems.
- **Data Reporting and Analytics:** Real-time dashboards, trend analysis, and customizable reporting to track program performance.
- **User Management:** Role-based access controls and audit trails to ensure security and compliance.
- **Data Security and Privacy:** Medicaid and FERPA compliance, with detailed data encryption and breach protocols.

Additional Requirements

- **Scalability:** Capability to expand services to additional districts and adapt to evolving Medicaid regulations.
- **Training and Vendor Support:** Expectations for tailored training sessions for end users and administrators, along with ongoing support, including updates and troubleshooting services.
- **Service Level Expectations:** Define system availability (e.g., 99.99% uptime), resolution timelines for issues, and maintenance schedules.

Technical Specifications

- **Integration Capabilities:** APIs or other integration tools to connect with existing district systems.

- **Cloud-Based Infrastructure:** Preference for platforms leveraging cloud services to ensure scalability and reliability.
- **User Accessibility:** Intuitive user interface with accessibility options.
- **Audit Features:** Comprehensive tracking of user activity and system changes.
- **Security Protocols:** Consolidated security requirements, including TLS encryption, multi-factor authentication (MFA), compliance with SOC 2 and/or ISO 27001 certifications, and comprehensive incident response plans.

Evaluation Criteria

Responses will be evaluated on the following factors:

- **Alignment with Core Functionalities:** Extent to which the platform meets core features and additional requirements.
- **Experience and Expertise:** Vendor's track record in providing Medicaid reimbursement solutions to Texas school districts.
- **Data Security and Compliance:** Adherence to state and federal standards, including evidence of prior audits.
- **Scalability and Flexibility:** Ability to adapt to future growth and evolving regulations.
- **Support and Training:** Quality of ongoing support, training resources, and documentation provided.
- **Cost Efficiency:** Competitive pricing and potential for cost savings.
- **Financial Health:** Stability and long-term viability of the vendor.
- **Key Performance Indicators (KPIs):** Ability to meet measurable benchmarks for system performance, compliance, and user satisfaction.
- Any other relevant factor or other requirement listed in this RFP.

Future Services

In addition to the current requirements, TASB seeks input on innovative features or services that vendors believe would provide significant value to Texas school districts. Examples may include:

- Advanced analytics and predictive modeling for Medicaid reimbursement trends.
- AI-driven compliance checks for SHARS documentation.
- Enhanced district-level reporting capabilities for Medicaid tracking and performance monitoring.
- Other unique or emerging technologies that align with Medicaid and education service documentation.

Vendor Collaboration

To ensure seamless collaboration, TASB expects vendors to provide a dedicated contact available during all working hours (Monday through Friday) and to participate in regular virtual review meetings and on-site visits as needed. Vendors should outline their proposed approach to working closely with TASB, including communication protocols and escalation procedures.

Submission Instructions

TASB reserves the right to reject any and all responses and will not be liable for any cost incurred in the preparation of response. TASB reserves the right to waive any or all irregularities, formalities, or other technicalities and to be the sole and independent judge of the quality and suitability of any services offered. TASB may accept or reject a response in its entirety or may reject any part of a response without affecting the remainder of that response and may award the individual items in any combination or in any way that provides the best offer to TASB, or choose to not award any items, in its sole discretion.

Deadline: February 21, 2025

Submission: Responses must be sent **via e-mail** to shars@tasb.org. Submission should be in PDF and Excel.

Response Guidelines: Responses to this RFP should follow the outline below:

- 1. Response Cover Form**—Complete the response cover form and include it as the first page of the response.
- 2. Company Background**—Provide all relevant Company information.
- 3. Company Management and Ownership** - Provide a description of Company management and ownership (public/private, minority owned, business certification, etc.)
- 4. Company Financials**—A statement that the Company is financially capable of performing the services identified in the response, including whether your Company has ever filed for bankruptcy. (Prior to entering into any agreement with a Company, TASB may require additional information related to the financial health and stability of the Company.)
- 5. Company Services**—Provide detailed information describing any of the services for which your Company is proposing to collaborate with TASB, including how long your firm has offered the service(s), Company license information (if applicable), and the types and number of clients that use the service(s) (i.e. school district, city, county, private business, etc. and numbers for each).
- 6. Company References**—For each service listed in (5), above, provide the following information for each client you wish to serve as a reference:
 - a. Client name
 - b. Name, address, and phone number of client contact.
 - c. Company team member(s) involved and nature of each team member's responsibility.
 - d. Explanation of service provided.
- 7. Business Proposal**—Provide a detailed description of how your Company would propose to collaborate with TASB in providing the service to TASB members, including the roles and responsibilities you would propose your Company having and the roles and responsibilities you would propose TASB having. Also, include any historical and future service growth projections you feel would be helpful in our evaluation.
- 8. Tables of Vendor Capabilities:** Vendors must complete (in Excel format) the tables provided with this RFP detailing vendor's compliance and capabilities related to:
 - a. Security Requirements (e.g., encryption, access controls, logging).
 - b. Technology Requirements (e.g., system integrations, performance monitoring).
 - c. Smart Legacy Comparison (e.g., claims tracking, data validation).
 - d. TMHP EDI (Electronic Data Interchange) Requirements (e.g., ANSI X12 format, secure file transfer).

- 9. Future Capabilities and Innovation:** Vision for scalability, interoperability, and future enhancements, including AI-driven analytics or compliance features.
- 10. Service Level Agreement (SLA):** Proposed metrics for performance guarantees, issue resolution, and system support.
- 11. Business Model:** Roles and responsibilities split between TASB and the vendor, including proposed implementation timelines and ongoing support arrangements.
- 12. Reporting Requirements:** Vendors must demonstrate capabilities for detailed reporting, including Medicaid eligibility, denied claims, cost report preparation, and customizable data insights. Reports must be accessible at the district level, generated by either the district or the vendor/TASB as needed.
- 13. Collaboration and Availability:** Outline your approach to working closely with TASB, including regular on-site and remote review meetings. Vendors must provide a dedicated contact available during standard working hours (Monday through Friday MST and CST).
- 14. Custom Development Options:** Specify the ability to offer customization or configurations that meet Texas school Medicaid requirements.
- 15. Disaster Recovery and Business Continuity:** Describe your disaster recovery plans, data redundancy measures, and how business continuity is ensured in the event of system outages.
- 16. Key Performance Indicators (KPIs):** Propose measurable KPIs for system performance, user satisfaction, and compliance reporting.
- 17. Testing and Pilot Program:** Outline your strategy for system testing, including user acceptance testing (UAT), and provide details on pilot program opportunities for select districts.
- 18. Post-Implementation Evaluation:** Explain your approach to post-implementation evaluations, including gathering user feedback and making necessary adjustments.
- 19. Licensing and Ownership:** Specify software licensing models (e.g., subscription vs. perpetual) and ownership of customizations or configurations made for TASB.
- 20. Vendor Roadmap and Updates:** Provide your product roadmap, including timelines for initial configuration and system deployment, future updates, enhancements, and feature rollouts.
- 21. Pricing Transparency:** Provide a detailed breakdown of all costs, including implementation, training, annual maintenance, and optional features.

Questions: TASB will respond to questions pertaining to this request for proposals submitted via e-mail to the email listed below.

Karlyn Keller, Ed.D.
Division Director, TASB School Medicaid Services
Karlyn.keller@tasb.org
512-505-2896 or 972-567-9959

TASB will post any addendum or additional information, if deemed necessary by TASB, at tasb.org/resources/rfi-shars-medicaid-billing-software, and it will be the Company's responsibility to obtain the information.

RESPONSE COVER FORM – Request for Proposals:
School Medicaid Reimbursement and Documentation
Technology Platform

Company Name

Company Address

City

State

Zip Code

Name of Company Contact and Title

Telephone Number of Company Contact

Email Address of Company Contact

Outline all Services for which Company is providing a response:

If your company is chosen to complete a presentation, what is your preference of methods?

____ In Person

____ Virtual

How many attendees will be involved? ____

The individual signing below represents that the information provided in this response is accurate and complete, and that he/she is authorized to submit this response on the Company's behalf.

Authorized Individual Signature

Authorized Individual Printed Name and Title

Signature Date