

JBWCP: Third Party Administrator Request for Proposal

RFP# HR-2021-27-DM

Transcript of the RFP Pre-Proposal Conference

Recorded October 26, 2021

1:00 PM (PST) – 2:00 PM (PST)

This transcript was system generated through Zoom. Please excuse and disregard any grammatical errors.

00:00:04.259 --> 00:05:03.330

Edward Metro (Judicial Council): As stated on the agenda we're going to begin promptly. This conference will be recorded and a copy of the transcript will be shared on a public course website. Please be cautious, of the information you do share today I will share the RFP link in the chat This is where the transcript will be posted.

<https://www.courts.ca.gov/45893.htm>

I'd like to start off by thanking all the attendees for your participation and your interest in our RFP. The purpose of this conference is to get to know the Judicial Branch Workers Compensation Program. This will be an opportunity for you to determine if this program is the right fit for your company from what you've seen in the RFP we do try to be as detailed and as transparent as possible and we share, as much of the information as we can.

On the call representing the Judicial Branch Workers Compensation Program we have the RFP selection panel. We have the program administrators who will be answering the questions which includes myself, Edward Metro, and Patrick Farrales and our consultant Michael Antonucci from Marsh will be serving as the conference facilitator.

We only have one hour, so please be respectful of everyone's time this meeting will end sharply at 2pm.

During the Roundtable Michael Antonucci will read through the chat box for our Roundtable Q and A. At this time we do ask that you use the chat box to enter your questions for the roundtable. Please also include your company's name and I will go through some of the questions we received prior to the conference.

Please keep your mics muted, you can use the raise hand feature to and unmute once you're called upon. We also may ask participants to unmute themselves to elaborate on their questions, if necessary, although optional, it is recommended that everyone turns on their cameras.

Again, we apologize in advance if we do not have the time to answer all of your questions, you can still submit questions as far as the Q and A of the RFP. These questions are due by this Thursday, October 28. Also we may not have all the answers at this time a transcript of the conference along with our responses to the items we were unable to answer today will be posted on the court's website, and this will be posted on November 5. I'll share the link in the chat box.

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JBWCP: Third Party Administrator Request for Proposal

RFP# HR-2021-27-DM

We will not be discussing or responding to questions pertaining to the current fee structure or pricing outlined in the RFP at this time. And some of the questions we received before the conference we've viewed as proprietary information to either us or current incumbent. Some of the other questions we received were about the managed care. Our loss data which was provided as attachment 10 of the RFP. And this data is comprehensive enough for you to develop your own estimate. Since this is not a managed care RFP we'd like to see what the bidders can bring to the table in their proposals.

Okay, so we received some questions prior to the conference, we also expect questions that come through the chat. To get things started, I'll read a few of the questions we received beforehand. Please rest assured that we will be posting a response to all the questions on the course website for you to review at your leisure.

All right, question one, will you be accepting bids for unbundled services? Our responses, no, we will not accept bids for unbundled service we require all services outlined in the RFP to be bundled and address under one agreement.

Another question we received. Would the JCC prefer that a new TPA would hire someone some of the existing staff from the current TPA? The answer is the RFP outlines the minimum staffing requirements as long as staffing meets the minimum requirements are preferences are satisfied.

Another question is the JCC looking to handle claims from one office or with the JCC be open to multiple offices handling claims? Our response, it is up to the TPA to determine the best method of addressing the various requirements of the program and its members.

Another question, can you describe the performance guarantees as they relate to the KPI's and how they may affect the TPA fees, including KPI's that are beyond the scope of control of the TPA. Our response we welcome your input on what you believe you can bring to the table. For performance guarantees, the current incumbent is using the criteria outlined in the audit.

Michael have we received any questions in the chat?

00:05:04.440 --> 00:05:11.940

Michael Antonucci (Marsh): Yes good afternoon everybody, we have the first question is in what instance would the TPA be required to administer claims from outside of California?

00:05:17.550 --> 00:05:48.780

Patrick Farrales (Judicial Council): I don't mind to field that one. Sure yes on occasion, it can be rare where we do have some staff so far, to my knowledge, I believe there's just one employee that's working outside of California it's a rare instance, but it is kind of an expectation that adjusters should have that ability, just in case. It doesn't happen that often. Thanks for the question.

00:05:54.450 --> 00:05:56.370

JBWCP: Third Party Administrator Request for Proposal

RFP# HR-2021-27-DM

Michael Antonucci (Marsh): There's another question, and if you'd like me to read it.

00:05:56.700 --> 00:05:57.330

Edward Metro (Judicial Council): Yes please.

00:05:58.140 --> 00:06:24.030

Michael Antonucci (Marsh): Sure, it says regarding their proposal scoring and 30 points tied to quote unquote cost will these points be awarded on a sliding scale, for example, lowest cost gets all 30 highest cause zero regarding 10 points allocated to acceptance of terms and conditions. Are these points are awarded 10 parentheses full acceptance or zero parentheses for red lines not full acceptance or will partial points be awarded as well.

00:06:25.410 --> 00:06:38.310

Edward Metro (Judicial Council): For cost the points will be awarded on a sliding scale, but the methodology can vary between the evaluators and the second part that terms and conditions will be scored using the former method 10 or zero.

00:06:44.520 --> 00:06:45.660

Michael Antonucci (Marsh): Thank you for that question.

00:06:48.900 --> 00:07:34.980

Edward Metro (Judicial Council): Okay, while we're waiting for more questions I can read one of the ones we received beforehand what was the minimum data requirements, you need on a dashboard and how has a dashboard been used, historically and reducing costs. And our response is a we use the internal resources to develop a power bi dashboard which provided a limited trend analysis. We don't have a minimum requirement, but we look forward to seeing what existing dashboards proposers can offer which will help us reduce costs. Looks like we received another question in the chat Michael.

00:07:36.930 --> 00:07:45.660

Michael Antonucci (Marsh): Yes, and follow up to the out of state question is this employee covered under the self insured program or insured by a carrier.

00:07:46.950 --> 00:08:29.220

JBWCP: Third Party Administrator Request for Proposal

RFP# HR-2021-27-DM

Patrick Farrales (Judicial Council): A bit of both actually there's an out of state carrier that we're using but for the California piece of things it's covered by the self insured program but jb to the CP. we've realized throughout this whole process, especially since this is kind of the first instance where we're running into this. Is that, in addition to California coverage, there are also out of State requirements that other States require and that's why we've had to go to other carriers for that level of coverage.

Again it's rare I don't want to make it seem like this is a regular occurrence in our Program. Thank you.

00:08:31.140 --> 00:10:19.650

Edward Metro (Judicial Council): Another question we receive prior to the Conference of what has the jb w CP used for predictive analytics and what measurable success has the applicant application of these analytics been in reducing costs. Our response, the RFP is open to predictive analytics, we would like to understand what is available in the marketplace from a predictive analytic standpoint, we welcome again all input for what we believe the proposer can bring to the table.

Another question do we have a statewide mtn, the answer is yes.

We had a question regarding the excess insurance coverage. We are a self-insured retention of \$2 million dollars per occurrence.

A question regarding our approximate number of training sessions to be delivered per year, and whether they can be in person or delivered online virtually our response unfortunately it's unknown at this time. But they can be trainings can be delivered in person and online. One vendor asked if the GCC preferred that adjusting be done from a single location or a northern, southern California team approach our response, the program covers the entire state and the TPA should have a plan to provide in person claim reviews for the program's Members across the state if necessary.

00:10:35.880 --> 00:10:39.150

Michael Antonucci (Marsh): And we have another question from the chat room if you'd like to read them.

00:10:39.420 --> 00:10:39.960

Edward Metro (Judicial Council): Yes, please.

00:10:40.590 --> 00:10:51.420

Michael Antonucci (Marsh): Can you describe what is what is required required when reserve changes over \$5,000, this is a report, or is there a level of detail reporting required for each claim.

JBWCP: Third Party Administrator Request for Proposal

RFP# HR-2021-27-DM

00:10:56.940 --> 00:11:44.970

Patrick Farrales (Judicial Council): As of this moment you don't have any existing procedures as it regards to any kind of reserve changes, but you are free to review the service deadlines that we have in place that's posted on our website regarding preserving and our methodology. But we do keep in close contact with our current tk should there be a change that exceeds. kind of unexpected amount, but again, we don't have anything kind of underwriting that strictly says anything over \$5,000 you should contact us but we've enjoyed a pretty good relationship with our current TPA so that we're aware of rather significant changes as they come in. thanks for the question good.

00:11:45.360 --> 00:11:48.360

Michael Antonucci (Marsh): Great thanks Patrick we have another question that you'd like me to read that.

00:11:48.630 --> 00:11:49.620

Edward Metro (Judicial Council): Yes, please.

00:11:50.010 --> 00:12:03.570

Michael Antonucci (Marsh): Sure, it is my understanding, there may be currently nine examiners assigned to the account is based on caseload Max requirement we can have less examiners, if necessary, or can we have less examiners if necessary.

00:12:08.580 --> 00:12:50.850

Patrick Farrales (Judicial Council): Go man, I can answer that as well, let me know if i'm talking too much. Really defer to you on some of these questions as well, I think I think it's going to depend on you as the proposer. To put in what you think the staffing requirements will be needed, as long as you can handle kind of the minimum of a maximums that we've laid out in the RFP we don't want to get too involved in staffing for tps and resulting employment issues as as you might say. But definitely take a look at the RFP there is no requirement in terms of the number of examiners I think the requirement is there for the case loads.

00:12:55.530 --> 00:13:04.140

Michael Antonucci (Marsh): Thank you. And if there's more questions pre submitted questions, while we wait for more go ahead.

JBWCP: Third Party Administrator Request for Proposal

RFP# HR-2021-27-DM

00:13:09.270 --> 00:13:33.300

Edward Metro (Judicial Council): I believe there's one more. And it's regarding again multiple offices handling claims is the GCC looking to handle claims from one office or would it be open to multiple offices again this is up to the TPA to determine the best methodology of addressing the various requirements of the program and its members.

00:13:35.040 --> 00:13:57.360

Michael Antonucci (Marsh): Yes I guess sort of related to that, and thanks ED is a question of our question influences around staffing, what is the current staffing model makeup. So I don't know if you wanted to expand on that or if you're just looking for the respondents to offer up what they think is the best sort of approach based on their organization and what they see your requirements, has been.

00:13:58.140 --> 00:14:09.210

Edward Metro (Judicial Council): Absolutely, please refer to that RFP. And we're open to. See how you your you'll be able to meet the requirements of what's outlined in the RFP.

00:14:11.310 --> 00:14:22.590

Michael Antonucci (Marsh): Great thanks ED another question the expectation that the workers COMP cta will attend hearings or if there was a Defense attorney is that sufficient to meet the requirements of the RFP.

00:14:25.260 --> 00:14:26.370

Edward Metro (Judicial Council): Patrick do you want to take that one.

00:14:29.610 --> 00:15:21.600

Patrick Farrales (Judicial Council): I think it's going to depend on the situation where you feel like you need kind of that that kind of legal backup or if you feel like you, the Defense attorney can. kind of handle that case on his or her own by all means, but at the same time just know there'll be are looking at. associated legal costs across the program and we do want to be able to have the ability to have adjusters or the TPA kind of handle these things on their own, for the most part, you know where were necessary. Before i'm kind of reaching out to attorneys. But again, the staffing model visa the attorneys we're hoping to see how you as our proposer puts that information together in your proposals. Thank you, that was a good question.

JBWCP: Third Party Administrator Request for Proposal

RFP# HR-2021-27-DM

00:15:28.560 --> 00:15:36.450

Michael Antonucci (Marsh): Thank you any more questions. And i'm not sure if you have any more there, but while we wait for some more questions in the chat room.

00:15:39.900 --> 00:16:33.660

Edward Metro (Judicial Council): I have a question regarding the premise system. used by the. current incumbent that's been to. Another question regarding the case look requirements arm is the case, live requirement applicable to all claim types and done any future medical medical only, or is it and then, then the only the answer is all claim types. Believe that's all the questions we received prior to the conference that we're able to answer at this time. Does anyone have any other questions for the Roundtable.

00:16:38.340 --> 00:16:50.550

Michael Antonucci (Marsh): Yes another question just came in, or file reviews handled. or I guess claim reviews, is that I think that's what the carmela you might be referring to his claim reviews.

00:16:53.010 --> 00:16:54.120

Edward Metro (Judicial Council): Patrick you want to take that one.

00:16:54.720 --> 00:17:52.500

Patrick Farrales (Judicial Council): Yes sure I think in the past, some claims reviews were handled in person, you know now during the pandemic there's kind of been a reliance on having these clean reviews done remotely via zoom or teams, or what have you. In terms of frequency I am seeing some claim reviews happen, you know with each of our individual Members once or. twice in a given period it really depends on the Member and their preference we've made it so that the program is somewhat flexible. And can be accommodating to the needs of our Members, so if some Members require more clean reviews than others that's something that the tps have to be open to. get a lot of these claim reviews are also stated frequency requirements are also in our service guidelines that posted on the website that that eddie linked.

00:17:54.540 --> 00:18:12.810

Michael Antonucci (Marsh): So sort of another question I think it's sort of related to that is does each location, for example, I guess court etc have specific. claim handling response requirements with special needs, so I guess really is there some is there any differentiation African add you know amongst the different locations within your program as far as special handling instructions.

JBWCP: Third Party Administrator Request for Proposal

RFP# HR-2021-27-DM

00:18:14.670 --> 00:18:56.760

Patrick Farrales (Judicial Council): I can take that one, yes, there are. And that's going to have to be discussed with each individual Member I can't list all 57 plus a month at the moment, right now, but I think that's also just part of the general relationship building, as you get to know our program a little bit better. you'll get kind of informed about what some Members prefer versus what others don't again, we like to keep this program fairly flexible. So that it kind of needs and complies with a specific members kind of their own requirements so yes. Good question.

00:19:07.410 --> 00:19:10.410

Edward Metro (Judicial Council): Does anyone have any other questions that you'd like to enter into the chat.

00:19:25.920 --> 00:20:14.340

Patrick Farrales (Judicial Council): This is so it's a good sign, we try to be as transparent as possible with our information in our proposal. We posted all of our documentation and even kind of sample last runs for you to review i'm hoping that you'll see that our RFP is somewhat kind of. standard in terms of what other RPS were requesting similar services across the board, I think what's important to know is. You know what makes you as a proposal kind of stand out and if this is really the right fit for you in terms of our program because that's also the whole purpose of this this call, and this. This meeting. So if you have any questions feel free to just type it in the chat but we definitely want to ensure a right fit going into this.

00:20:17.070 --> 00:20:26.850

Edward Metro (Judicial Council): And again attachment 10 that's our last data. And that's an accurate snapshot it's actual last data with identifying characteristics removed.

00:20:28.620 --> 00:21:10.260

Patrick Farrales (Judicial Council): Yes and the added information that we have out there, that may not necessarily be part of the RFP but it's something that we provide to the public. This this program reports to an advisory committee and all of those advisory committee minutes and meeting notes and presentations are also posted on our public website. Those are also good ways to kind of discern the culture and the decisions and the goals that we kind of put forth out there for the rest of the program so. Alright turn it over to you at next steps.

JBWCP: Third Party Administrator Request for Proposal

RFP# HR-2021-27-DM

00:21:10.590 --> 00:22:14.370

Edward Metro (Judicial Council): I will share the other courts website where our information be found regarding the workers COMP Program. Alright, well, there are no further questions I like to thank Michael for your help, facilitating today. Just reminder that, if you do have questions, you will need to submit them by Thursday this Thursday October 28 all questions and answers, as well as this transcript all responses to anything we received regarding the RFP. will be posted on the course website by November 5. And if you are interested in submitting a proposal in response to this RFP the latest date to submit a proposal is November 22 by 1pm Pacific time. Again, thank you for your attendance and your interest in our RFP We look forward to seeing your proposals.

<https://www.courts.ca.gov/jbwcp.htm>

00:22:15.360 --> 00:23:42.960

Patrick Farrales (Judicial Council): And, if I may add one more thing Eddie before we kind of part ways I just wanted to add also our sample terms and conditions are located on the are part of the RFP as well. I recommend that you review those carefully I think what we found in the past with prior solicitations is that we've had kind of vendors. review our terms and conditions, and then it comes up again as an issue later on, after something is awarded so take the time work with your contracts team or your legal teams. to review the current term sample terms and conditions and make sure that it kind of complies with you know what you have your own organization because that's a huge part outside of all the other. proposals and the services that were requesting because we're a State Agency, we have to abide by certain rules and regulations and so you'll find those rules in our terms and conditions. So definitely take some time and putting your proposal together and make sure that these terms and conditions work best for your organization. Great.

And before any scientists off I do want to thank everyone i'm so glad that there's interest in this RFP I'm happy to see all of you kind of participate in this discussion, and if there are any more questions we'd be happy to answer them, but if not I will turn it over to me.

00:23:47.460 --> 00:23:55.350

Edward Metro (Judicial Council): All right, well with that there are no further questions this concludes our pre-proposal conference Thank you again for your interest.

00:23:57.420 --> 00:23:58.200

Michael Antonucci (Marsh): Thank you.