



Appendix A: RFP Questionnaire 25-MAS-0426

Medical Benefits RFP Questionnaire Proposal Response Form

Submitting For (Check One): Fully Insured Plan Level Funded Plan

Instructions: Please complete this questionnaire in its entirety and submit it with your proposal. Incomplete forms will be deemed non-responsive. When applicable, provide narrative responses and attach supporting documentation.

Section 1 General and Member Experience

1. Will there be a dedicated customer service unit for IDEA?

Yes No

If yes, please explain (location, staffing model, hours, escalation approach):

2. Please outline your online tools and resources available to members.

Is an interactive website available to staff and members? Yes No Can employees view EOBs online?

Yes No

Please describe:

3. Data feeds and eligibility integrations

a. Do you have the capability to connect with an online benefits administration system? Yes No

b. Can you accept eligibility data files? Yes No

c. What is the cost and timeline needed for setting up the data feeds?



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4. Workday experience

Do you currently work with customers who utilize Workday? Yes No

If yes, provide details:

Do you have the capability to receive Electronic Data Interchange files from Workday? Yes No

5. Open enrollment support

Detail how your organization will provide support to IDEA during open enrollments and/or health fairs.

6. ID card turnaround time

What is the average turnaround time for supplying ID cards directly to participants or live/online access to evidence of membership?

Section 2 Claims Administration and Reporting

1. Describe the appeal process of a contested claim.

2. Are reports available online? Yes No



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3. Reporting package

What standard reports would be generated for IDEA leadership and McGriff review, and at what frequency? Please provide a sample of your standard reporting package.

4. Can you accommodate a full claims dump annually? Yes No

If no, please explain:

5. Do you currently offer online access to claims and eligibility information? Yes No

6. Provide a detailed implementation plan

Provide a detailed implementation plan outlining specific events and a timetable to ensure a smooth transition. Include expected dates for issuance of identification cards (where applicable), contracts, and Summary Plan Descriptions/Certificate booklets. If needed, attach the implementation plan as Exhibit C and note below.

7. Will you provide an implementation credit in your proposal? Yes No

If yes, describe:

8. Will you provide any wellness credits? Yes No

If yes, provide details:



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9. Does your proposal include a dedicated position for IDEA's team? Yes No

If yes, what are the available options (Behavioral Health/Counseling Navigation/Support, Care Navigation, Bill Reconciliation Support, etc.)?

10. Subcontracted services

What services proposed will be subcontracted with outside vendors (network, Rx, mental health, disease management, etc.)?

11. Please provide AM Best Rating and/or most recent published financial statement.

Attach as Exhibit: D

12. Does your proposal include a second-year rate cap? Yes No

If yes, outline details:

13. Do you have a mobile app? Yes No



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Section 3 Medical Strategy and Cost Management

1. How does your proposed medical plan design support affordability and sustainability while maintaining access to quality care?

2. What innovative plan design options (HMO, EPO, alternative plans) do you offer to reduce premiums and out-of-pocket costs?

3. Network optimization and high-performance networks

Describe your approach to network optimization and high-performance networks. How do you ensure cost savings without compromising quality?

4. Medical loan programs

Do you offer or partner with medical loan programs to assist employees with out-of-pocket medical expenses? Yes No

If yes, provide details:

5. Copay strategy and ER diversion

How do you collaborate with local providers and urgent care facilities to negotiate lower copays and reduce avoidable ER utilization?



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6. Premium trend management

Provide examples of how your solutions have successfully managed upward premium pressures in similar client environments.

7. Nurse line

Is a nurse advisory toll-free number available? Yes No

Provide hours of operation and key advantages to members and the client.

8. Fertility coverage

Does your proposal include fertility coverage? Yes No

If yes, what is covered and are there any upcharges?

9. Bariatric surgery coverage

Does your proposal include coverage for bariatric surgery? Yes No

If yes, list parameters and limits.

10. Telemedicine benefit

Does your proposal include a telemedicine benefit? Yes No



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11. Point solutions

Does your proposal include the following point solutions? If yes, provide details on each program. Indicate which are included in premium and which are additional cost.

- a. Behavioral Health Yes No Included Additional Cost
- b. Diabetes Management Yes No Included Additional Cost
- c. Fertility/Pregnancy Programs Yes No Included Additional Cost
- d. Wellness/Biometric Screenings Yes No Included Additional Cost
- e. Musculoskeletal Programs Yes No Included Additional Cost
- f. Weight Management Yes No Included Additional Cost

Program details and additional point solutions available:

12. Transition of care

Outline the process for transition of care if a member is in treatment and the provider is out of network.



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Section 4 Pharmacy Strategy and GLP-1 Management

1. Retail pharmacy network

Describe your retail pharmacy network including its relationship to you (owned or leased).

2. Pharmacy access and network structure

Which nationally recognized pharmacies are in your network and what is the contracting arrangement?

Do you offer smaller/performance networks to lower costs? Yes No

If yes, describe:

3. List chain pharmacies excluded from your network.

4. How often do you update your formulary?

5. Formulary change communications

Describe how you notify affected members of formulary changes and assist members with alternate medications.

6. Implementation of new formulary

Describe your process for implementing a new formulary with a new client. Can you grandfather drugs? If so, how long?



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7. Drug utilization and fraud management

Describe your programs to manage utilization, identify abuse, assess over-prescribing, and detect fraud.

8. Performance guarantees

Outline performance guarantees and financial costs at risk.

9. Specialty pharmacy programs

What disease states has your specialty pharmacy-built care programs around?

10. Pharmacy carve-out options

What carve-out or alternative pharmacy management solutions do you offer within a fully insured/level-funded environment?

11. Transparency

How do you ensure enterprise-level revenue transparency across pharmacy services including rebates and admin fees?

12. Modular pharmacy approach

Describe your modular pharmacy approach and how it increases flexibility and cost control.



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13. GLP-1 controls

What controls and prior authorization protocols manage GLP-1 utilization and other high-cost medications?

14. Formulary strategy

How do you balance formulary changes between cost savings, efficacy, and member access?

15. Provide case studies/examples showing cost reductions and improved outcomes.

Section 5 Mental and Behavioral Health

1. Behavioral health ecosystem

Describe your behavioral health ecosystem compared to IDEA's current offerings including Calm, Crisis Incident Stress Management, and EAP.

2. Embedded counseling model

How do you support embedding licensed counselors within the medical carrier model? What are the benefits and challenges?



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3. Crisis support counseling services

What on-site or virtual counseling services do you provide and how do you ensure rapid response during crises?

4. Outcomes and engagement

Provide examples of how mental health solutions improved engagement and outcomes.

5. Effectiveness and utilization measurement

How do you measure effectiveness and utilization of behavioral health programs?

Section 6 Well-Being and Utilization Management

1. Wellness program support

Will you work with IDEA on wellness programs and initiatives? Yes No

Are additional services available for an additional cost? Yes No

If yes, describe and provide sample plan.

2. Case management approach

How do you handle case management?



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3. Disease management programs

Describe your disease management programs.

4. Claims-informed campaigns

How do you design and deploy claims-informed wellness campaigns that drive engagement at the moment of need?

5. Incentive plan options

Describe wellness incentive plan options. How do you propose repurposing savings into future incentives?

6. Virtual fitness programs

What virtual fitness programs do you offer including no out-of-pocket cost options and how do they integrate?

7. Personalization

How do you personalize wellness programs to meet diverse employee needs and reduce downstream claims?

8. Metrics/case studies

Share metrics or case studies demonstrating impact.



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9. Non-plan participation

Does your wellness program allow non-plan participants to participate? Yes No

Is there an additional charge? Yes No

If yes, explain:

Section 7 Family Support and High-Risk Pregnancy

1. Engagement in high-risk pregnancy programs

Strategies to increase engagement, especially during the transition of carriers/programs.

2. Fertility program offerings

Describe fertility program offerings and how they support employee needs.

3. Childcare and eldercare benefits

What childcare and eldercare benefits do you provide/support, including financial assistance options?

4. Navigation tools

How do your navigation tools assist access to family support services and what enhancements do you propose?



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5. Evidence of outcomes/cost savings

Provide evidence of improved outcomes or cost savings from family support programs.

Section 8 Crisis Response and Open Enrollment Enablement

1. Crisis response capabilities

Describe crisis response capabilities including natural disasters and extreme climate events.

2. Localized resource guides

How do you deploy localized resource guides and coordinate with EAP and external partners during crises?

3. AI-enabled open enrollment enhancements

What innovations do you offer for AI-enabled enhancements to open enrollment processes?

4. Workday AI integration

How do you plan to integrate or support future Workday AI capabilities in enrollment platform transitions?



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5. Examples and results

Provide examples where crisis response and enrollment enablement solutions improved employee experience and operational efficiency.

END OF QUESTIONNAIRE