



THE SCHOOL DISTRICT OF LEE COUNTY

PROCUREMENT SERVICES DEPARTMENT

Tracey N. Adams, Procurement Coordinator

ADDENDUM TO CONTRACT DOCUMENTS

ADDENDUM NO.: 3

PROJECT NAME: RFP No. R167266TA – Group Critical Illness and Group Accident Insurance

DATE OF ISSUE: May 6, 2016

The following information shall be included in the RFP documents and is hereby made part of the contract documents in the form of clarification, addition, deletion or revision to the contract specifications.

Bidders' questions/issues and District answers (District answers are italicized):

- Q1. Please describe the current method used for open enrollment.
- A1. *The District uses PeopleSoft Self Service Module attached to the Benefits Administration Module for enrollment. All employees use their unique user name and password to access PeopleSoft.*
- Q2. Will the selected vendor be allowed to conduct group meetings and meet with each employee fact-to-face?
- A2. *No.*
- Q3. Please describe any need for employee self-enrollment.
- A3. *None. See answer to question 1.*
- Q4. Please describe any need for call center enrollment.
- A4. *None. See answer to question 1.*
- Q5. Does the District anticipate any resistance to conducting face-to-face meetings on school property? If yes, please describe.
- A5. *See answer to question 2.*

Q6. Will the selected carrier be enrolling core products also?

A6. *See answer to question 1 and 2.*

Q7. We understand that the District currently has a Group Cancer plan. Do you wish to move from that plan to a Group Critical Illness with Cancer and/or Critical Illness only?

A7. *The District desires to have cancers included in the “critical illness” policy.*

Q8. Can you please provide Attachment K, Compensation for Services Form?

A8. *This is now Attachment P as referenced in Addendum 1.*

Q9. Can you please provide Attachment E, Beneficial Interest and Disclosure of Ownership Affidavit?

A9. *This is now Attachment Q as referenced in Addendum 1.*

Q10. May we include additional marketing information in our RFP response? If so, should it be included in an Appendix at the end of the proposal?

A10. *No.*

Q11. How are second year enrollments handled? Does the employee have to reelect every year, or can the product be “locked” with the only change being to cancel.

A11. *A: Enrollments are usually passive enrollments, meaning the employee is enrolled in the same plans at the same tiers for the next year unless the employee make changes. Positive enrollments are usually limited to vendor changes and or significant plan design changes. Employees have the ability to elect new coverage, change between tiers/levels of coverage or cancel coverage during the annual open enrollment period.*

Q12. Rating functionality. Can the system multiple rate tables- 5 year age bands with smoker and non-smoker rates.

A12. *The system can easily support age banded rates. The system can support multiple rate tables for smokers/non-smokers, as reported by the employee.*

Q13. Can the system collect eligibility questions- is your spouse disabled, and/or UW questions if necessary?

A13. *The system has the ability to utilize criteria for enrollment eligibility. We are unable to transmit this data to a vendor.*

Q14. Will the Critical Illness and Accident enrollment be on-ballot on the same platform as Medical?

A14. ***All benefit enrollments (or changes) are elected during the District's annual Open Enrollment period via electronic enrollment through The District's HRMS (Peoplesoft) benefit enrollment module.***

Q15. Please add annual salary to the eligible census.

A15. ***Please see Exhibit 4 attached.***

Q16. Please provide a copy of the current policy in place with the Cancer and Critical Illness Insurance plan. Is this a group plan?

A16. ***The District does not currently have a critical illness plan, only cancer and specified disease. A copy of the current plan/brochure was provided as Exhibit #3 in Addendum #1, issued April 27, 2016, question and answer #5. The current cancer/specified disease plan is offered as a group plan.***

Q17. Should commission be included in the proposal?

A17. ***Yes, the standard commissions included in the premiums should be disclosed within your response.***

Q18. Are Accident and Critical Illness enrolled along with other core benefits, or is there a separate process in place for enrolling CI and Accident?

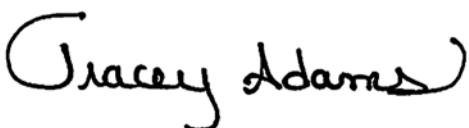
A18. ***All benefit enrollments (or changes) are elected during the District's annual Open Enrollment via electronic enrollment through The District's HRMS (PeopleSoft) benefit enrollment module.***

Q19. Will the current cancer plan be discontinued/replaced or will current insureds be able to keep current coverage?

A19. ***This has not been determined as of yet as it may depend upon responses received through the RFP.***

There are no other changes at this time. Please acknowledge this addendum via Attachment D, Addenda Acknowledgement Form.

Thank you for your interest in The School District of Lee County.



***Tracey Adams, CLGPO
Procurement Coordinator***