



## Department of Health

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ASSISTANT SECRETARIAT FOR THE COORDINATION OF SERVICES AND HEALTH ASSISTANCE  
Division of Medical Assistance (Medicaid)

### **NOTIFICATION OF NEED OF PROFESSIONAL SERVICES 2024-PRMP-NNPS-PACSS-002 PROFESSIONAL ACCOUNTING AND CONSULTING SUPPORT SERVICES FOR THE PERIOD OF JANUARY TO SEPTEMBER 2025**

Pursuant to Executive Order 2021-0291<sup>1</sup>, Circular Letter 013-2021<sup>2</sup>, Administrative Order No. OA-5813<sup>3</sup>, and 45 CFR 74.327-329, the Puerto Rico Medicaid Program (PRMP) is soliciting proposals for professional services in the field of accounting and consulting support services.

#### **BACKGROUND**

The Puerto Rico Department of Health (PRDoH) is the State Medicaid Agency (SMA) of the Commonwealth of Puerto Rico. Within PRDoH, the Puerto Rico Medicaid Program is responsible for the management of the Medicaid and Puerto Rico Medicaid Enterprise System (PRMES), both of which are multi-vendor, multi-agency environments. The Puerto Rico Health Insurance Administration (PRHIA) created the *Administración de Seguros de Salud* (ASES), which has a Memorandum of Understanding (MOU) with PRMP and is responsible for contracting with, and monitoring services provided by the Managed Care Organizations (MCOs) and other carriers.

The PRMP seeks to fulfill general accounting needs that may arise during the length of the contract. However, PRMP has special needs due to the management of federal funds and subsidies that transpire through the program. PRMP works with several federal grants and subsidies for which the program requires aid managing and reconciling, along with budget analysis and compilations of data to help streamline processes in the program. The specific needs of PRMP are further detailed in the scope of work. This notification of need for professional services seeks to award the contract to a vendor who can fulfill these needs for the duration of the January-September period in 2025 with the option for two (2) extensions of one (1) year each.

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<sup>1</sup> Issued by the Governor of Puerto Rico.

<sup>2</sup> Issued by the Office of Management and Budget of the Government of Puerto Rico.

<sup>3</sup> Issued by the Department of Health of Puerto Rico.

## **SCOPE OF WORK**

The purpose of the notice is to publicize that PRMP has a need for services that will potentially result in the contracting to provide the following:

1. Aid with the reconciliation of subsidies regarding Medicaid Assistance Payment (MAP), Children's Health Insurance Program (CHIP), Medicaid Management Information System (MMIS), Eligibility & Enrollment (E&E), and other federal subsidies received during the period of January through September 2025 with the option for two (2) extensions of one (1) year each.
2. Technical assistance and consulting in the analysis, revision and validation of data reported in Forms CMS-64 and CMS-37 for the federal trimesters of the applicable fiscal period and changes required to previous periods.
3. Formulate analysis, give assistance and recommendations for the implementation of processes that streamline assignments and reports related to the fiscal department of the program.
4. Provide technical support in the analysis, reconciliation, preparation and compilation of data related to budgets for federal subsidies and state matching allocations administered by the program.
5. Assist and provide technical support in budget analysis, projections, and reports required by the agency.
6. Provide technical support in creating the responses and conformity reports required by the Financial Oversight and Management Board (FOMB), and other state and federal government entities.
7. Provide technical assistance with the required analysis, creation, and changes for the accounting of federal subsidies administered by the program.
8. Provide technical training to the fiscal personnel in the utilization of tools that streamline and enhance the quality of their work.
9. Support the program with the accounting closing of federal subsidies and the corresponding state matching.
10. Create visualizations of data and dashboards and other continuous reports to better understanding, management, and decision-making regarding the utilization of program funds.
11. Create metrics for execution that allow management to measure performance and efficiency in the realized fiscal tasks.
12. Assist in the coordination and support reporting offices within the Health Department.
13. Support and assistance in the revision, analysis and recommendations for auditing hearings and other processes received in the program.
14. Assist in the analysis and interrelation of the financial and accounting systems to streamline fund accounting.
15. Perform any other task in relation to those aforementioned as solicited or agreed upon by the parties.

## **REQUIREMENTS**

To participate in this process, proponents must meet the following minimum requisites:

1. Submit a timely proposal with all the required documentation to demonstrate compliance with all minimum requirements.
2. Demonstrate that the person in charge of the account has at least five (5) years of experience in public accounting, finance and/or grant management, experience in all the service areas required in this Notice and possess a bachelor's degree in finance or accounting, and being duly authorized to practice public accounting in Puerto Rico (CPA required).
3. The vendor must have experience and provide evidence of working with and managing federal funds. Additionally, demonstrate knowledge and experience working with and in the use and applicability of the Puerto Rico Government Accounting Act (Act No. 230 of July 23, 1974, as amended).
4. Demonstrate experience working with CMS 64 and CMS 37 reports.
5. In the event that the proponent is a legal entity, the proposal must include evidence that it is legally authorized to conduct business in Puerto Rico and is in "Good Standing", the name, marital status, profession, and place of residence of the person authorized to sign the contract, the resources available, the curriculum vitae of each resource that will offer direct services and the costs (per hour) of each resource.
6. Certification of the Single Registry of Professional Service Providers ("RUP" for its Spanish acronym) issued by the Puerto Rico General Services Administration ("Administración de Servicios Generales de Puerto Rico" or "ASG" for its Spanish acronym).
7. Have a unique identification number "UEI Number" and maintain an active registration status in SAM.Gov. It must include evidence of active registration and SAM expiration date. If it is in the process of acquiring one or renovating its registration, provide evidence of the current status of the process.
8. Certify whether the proponent has or not a contractual relationship with another agency or entity of the Government of Puerto Rico. If in the affirmative, identify with which agency or entity.
9. The proponent shall indicate whether any aspect related to service under this proposal creates an actual or potential conflict of interest. The conflict should be explained in sufficient detail. Warning PRMP reserves the right to reject a proposal or impose additional conditions on proponents based on its best interests and at its sole discretion.

## TERMS AND CONDITIONS

1. Services will commence from contract signature date until the last day of the federal fiscal year 2024-2025, subject to the availability of funds with the option of two (2) extensions of one (1) year each.
2. By submitting a proposal, the proponent acknowledges that: (a) Has the power to bind and comply with all parameters and requirements applicable to government procurement of professional services; (b) all information submitted is true and verification may be requested, and (c) The proposal containing any false or incorrect information will be disqualified.
3. Proposals that fail to meet one or more of the requirements will be disqualified.
4. If the selected proponent is a legal entity, as part of the documents to be delivered prior to the formalization of the contract, a certification will be required in which the names of all the owners, shareholders and officers of the corporation to be hired are declared.
5. Proponent certifies, by signing and submitting a proposal, that their company, any subcontractors or principals are not suspended or debarred by the federal or a state government.
6. At its sole discretion, PRMP may contact individuals and/or firms that submit proposals to clarify doubts or coordinate presentations or interviews.
7. PRMP reserves the right to accept or reject one or all proposals, as well as to cancel this process.
8. The selected proponent must comply with the entire government procurement process and requirements.
9. The proposed SLAs will be included in a separate Attachment (B).

## SELECTION CRITERIA

Bids will be evaluated by the Evaluation Committee appointed by the Secretary of the PRDoH. Vendors will be evaluated according to the following factors and relative importance (1 being the lowest; 5 being the highest). It is expected that vendors will express in depth their approach to these subjects in their proposal.

**Table 1**

| REQUIREMENTS                             | MAXIMUM POINTS |
|--|----------------|
| a) Overview                              | 5              |
| b) Experience providing similar services | 20             |
| c) Staffing plan                         | 10             |
| d) Key staff resumes/references          | 20             |
| <b>Cost (15%)</b>                        | 10             |

Cost Formula:

$$\frac{\text{lowest offeror's cost}}{\text{the offeror's cost being scored}} \times \text{the maximum number of cost points available}$$

**Specifications:**

The vendor's proposals must demonstrate the following provisions, since the criteria in Table 1 shall be evaluated with the information obtained from them. The provisions are:

1. Demonstrate the availability of sufficient resources to perform the tasks described in this Notice in a time-sensitive manner.
2. The proposal should describe the total scope of the service and the hourly rate for the professional services it offers and potentially provide.
3. The proponent must submit with the proposal a section describing its business history, capacity and technical expertise and experience.
4. The vendor must have experience and provide evidence of having performed work similar in scope as required by this NNPS.
5. The person in charge of the account must provide references that demonstrate at least five (5) years of experience in public accounting, finance and/or grant management, experience in all the service areas required in this Notice and possess a bachelor's degree in finance or accounting and currently holds a Puerto Rico CPA status and licensing.
6. Demonstrate that the resources to be provided have experience in healthcare and government affairs, federal regulations in the field of healthcare, public accounting, grant management of federal funds, and finance in the government sector.
7. Vendors must demonstrate their staffing structure via diagram.

**Award:**

The award will be given to the responsible bidder whose bid, conforming with all the material terms and conditions of this Notice, scores the highest amount of points out of a possible 65. Vendors must comply with all applicable laws and regulations. An award notification should be expected by December 9, 2024.

For further details regarding the Department of Health Notices of Necessity of Professional Services, see DOH Administrative Order No. 58, Section Two, 1-5, available on: [salud.pr.gov/CMS/DOWNLOAD/8381](http://salud.pr.gov/CMS/DOWNLOAD/8381).

## PROPOSAL SUBMISSIONS

Proposals must be submitted to PRMP Central Office at the below address in sealed envelopes on or before 3:00 pm (AST) on Monday, November 4, 2024. Both the proposal and the cost proposal (Attachment A) must be handed in an envelope separately. The envelope for the proposal and cost proposal must contain one original printed proposal, one printed copy, and one copy in an electronic format (USB Flash Drive). The envelope must include in the subject line the reference number of this Notice (2024-PRMP-NNPS-PACSS-002) and be addressed to the attention of **Nereida Montes Melendez, Solicitation Coordinator**. PRMP will not accept proposals received outside of the established date and time. PRMP physical address is:

Puerto Rico Department of Health  
Medicaid Program  
Attn: Nereida Montes Melendez  
268 Luis Muñoz Rivera Ave.  
World Plaza – 5th Floor (Suite 501)  
San Juan, PR 00918

## QUESTIONS

All questions and concerns regarding this request must be made exclusively in writing to the attention of Nereida Montes Meléndez, Solicitation Coordinator, at the email address [medicaid.procurement@salud.pr.gov](mailto:medicaid.procurement@salud.pr.gov) and include the reference number of this Notice (2024-PRMP-NNPS-PACSS-002) in the subject line. The questions must be submitted by Thursday, November 10, 2024. Questions made by the vendors will be answered by Wednesday, November 16, 2024.