

Response to:

Mount Diablo Unified School District
RFP #1909,
LEA Medi-Cal Claims Reimbursement Services Including
CRCS Services

Mount Diablo Unified School District
1936 Carlotta Drive
Concord, CA 94519

June 8, 2022

Presented by:
Medical Billing Technologies, INC.
525 W. Main Street, Suite 204
Visalia, CA 93291
559-627-6267
www.mbt4schools.com

Executive Summary

Medical Billing Technologies, Inc. (MBT) has more than 27 years of experience in serving K-12 school districts and county offices of education throughout California for participation in the LEA Medi-Cal Direct Billing Option Program (LEA) and Medi-Cal Administrative Activities (MAA). While partnering with our districts/COEs, MBT is proud to be described as a high-tech, high-touch organization. We strive to find the optimal balance of in-person and technical service for each of our clients.

Within the last two years, the LEA and MAA programs have had fundamental changes to how the programs are implemented and administered with the adoption of California Department of Health Care Services' (DHCS) State Plan Amendment (SPA) 15-021. MBT has worked diligently to familiarize ourselves with these changes and how they impact California educational agencies. Overall, the changes associated with SPA 15-021 are a positive change for California schools as they expand the types of services that can be reimbursed by Medi-Cal which will ultimately increase the total amount of reimbursements to MDUSD.

Some of the most critical services that MBT will continue to provide MDUSD to ensure program success include:

- Assistance in completing the quarterly Time Survey Participant (TSP) List to ensure that all MDUSD's qualified practitioners are identified and participating in the LEA program.
- Ensure that all participating practitioners understand the importance of responding to any Random Moment Time Survey that they receive from Medi-Cal and how to answer the surveys accurately.
- Train and track the billing that is completed by MDUSD's practitioners for timely reporting in MBT's customized billing system, OptiClaim.
- Completing of the annual Cost Reimbursement Comparison Schedule (CRCS) report which is the ultimate defining factor of MDUSD's total Medi-Cal reimbursements.

MBT's online solution suite includes OptiReports. OptiReports offers real-time information regarding billing status and detailed breakdowns of practitioner participation. MBT uses OptiReports throughout each school year to assist districts/COEs with attaining potentials and maximizing reimbursement opportunities.

Continued collaboration with MBT for software and consultative services for the LEA and MAA programs will allow MDUSD staff and administration to optimize funding possibilities while focusing on their student's physical, mental and emotional wellbeing.

Through this proposal, Medical Billing Technologies, Inc. expresses its interest in being awarded the contract to continue to provide an exhaustive high-tech and personalized high-touch partnership with Mount Diablo Unified School District for the LEA Medi-Cal Billing Option Program and Medi-Cal Administrative Activities. We are committed to MDUSD in attaining the goals of:

- Optimized reimbursements
- Minimized burden on district staff
- Support in the completion of all Billings, Annual reports, and Cost reports
- Confidence in program compliance

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Identification of Proposer

Founded in 1994, Medical Billing Technologies, Inc. has vast experience in working with both K-12 school districts and County Offices of Education in the LEA Medi-Cal Billing Option Program. MBT is a California-based firm specializing in serving clients throughout the state. This California concentration allows MBT to provide superior and timely service to meet our clients' individual needs, while giving us a level of expertise and program knowledge not exhibited by firms serving clients in multiple states.

Our service-based approach offers unprecedented support and accessibility to our clients. With Account Managers located throughout California, MDUSD will experience reliable and timely responsiveness to its service needs. Our corporate headquarters are in Visalia, California.

Medical Billing Technologies, Inc.
525 W. Main Street, Suite 204.
Visalia, CA 93291
Phone: (559) 627-6267

Business License Number: BLO14435
California Secretary of State Entity Number: 2385534
Tax ID: 75-2971865

For questions regarding MBT's response to this RFP, please contact Reid Stephens, President of Business Services, by phone at (559) 901-6023 or by email rmstephens@mbt4schools.com.

As an organization, MBT continually pursues expanded opportunities to demonstrate our core values of integrity, accountability, respect, and heartfelt service in the communities and associations in which we serve. In addition to consulting with California school districts and communities to access Medi-Cal reimbursements, MBT supports and is actively involved with professional organizations that advocate for health care and student success in education. Our hope is that by assisting MDUSD optimize federal reimbursement funds, the student population will benefit from enhanced educational and healthcare services.

MBT's Service Model

Experience

Founded in 1994, MBT has been involved in the evolution of the LEA program since it began in California schools. Over the past 25 years; MBT has partnered with over 130 school districts, county offices of education, community colleges, and community-based organizations to help bring Medi-Cal reimbursements to organizations and communities that need it most. Our clients can attribute to the fact that MBT is much more than just a billing consultant; we are a partner and vital part of the community. When doing business with districts, like MDUSD, our goal is to join in the effort of educating and caring for the student population you serve.

MBT's commitment to superior service motivates us to provide educational entities the tools they need to most successfully participate in the LEA program. In a time when schools were in need of a more hands-on approach, MBT hired Account Managers across the state. When the needs turned toward technology, MBT developed proprietary software to create efficiencies and lessen the burden on district staff. It is a combination of our experienced team of personalized program experts and the use of our suite of online OptiServices that allows MBT to continue to lead the industry in providing the optimal high-tech, high-touch experience for our clients.

Customer Service

MBT is dedicated to optimizing reimbursements, minimizing burden on staff, and instilling confidence in program compliance. Our team of experts manages the entire LEA reimbursement process from start to finish, so that district staff can focus on their students.

MBT's formula for success includes:

- Generating potential reimbursement figures with district staff through an annual strategic planning meeting
- Utilizing MBT's signature high-tech, high-touch service to submit, track, and report on progress toward potentials throughout the school year
- Communicating with and training district staff via in-person and online tools to meet the needs of the MDUSD
- Seamlessly collecting and reviewing data needed for the claims submittal process
- Analyzing data to ensure optimized reimbursements and meeting potentials while maintaining program compliance
- At the end of each year, work with district staff to complete the Cost Reimbursement Comparison Schedule (CRCS) in an accurately and timely manner

Each district/COE is different; therefore, MBT understands the need to tailor the training and implementation process to meet the needs of our clients. For each of our clients, we work with the administration to determine the optimal procedures in collecting and uploading student and IEP data, conducting practitioner trainings, and offering ongoing technical and program support. Our clients will tell you MBT has been thorough and reliable throughout the initial operations and fulfill the promise of excellent collaboration.

MBT follows the same staffing practices for all of our clients. MDUSD will always have a key contact Account Manager that ensures the district personnel is adequately trained and participating in submitting claims. When necessary, MBT will provide extra software support from program experts. For example, additional technical support is often necessary during the onboarding of a new client for the purpose of setting up systems for collecting staff, student, and IEP data. If there are issues with accessibility to software – which are rare- MBT is happy to provide further additional accommodations. On the backend, MBT reviews submitted claims for

accuracy and completion. MBT also has a team that reviews enrollment and Medi-Cal tape matches received from the state and completes the lengthy CRCS process. While practitioners and school administrators primary contact will be with the Account Manager, MBT has a team of dedicated individuals ensuring MDUSD is maximizing their LEA potential and is compliant with program regulations.

Software System- OptiServices

MBT began development of their OptiServices suite of applications in late 2009. OptiClaim, the application used to track school-based services and submit Medi-Cal claims, has been functional in California school districts for eight years and currently supports over 5,000 users. MBT is able to submit nearly 100,000 claims each week through OptiClaim with less than a 1% denial rate. To date, OptiClaim has performed over 50 software releases, allowing for enhanced usability and aligning with all current regulatory criteria. MBT maintains sole ownership of its software and continues to invest in development and improvements.

Within the online suite of OptiServices, clients have the ability to manage their Medi-Cal reimbursement process from beginning to end. MBT's suite of services includes: Administration, OptiClaim, File Processor, OptiReports, and OptiLearn. For most users (practitioners) only OptiClaim, File Processor, and OptiLearn will be available for them to track services and gain access to training tools. Administration and OptiReports are for individuals within MDUSD with coordinator credentials. Because all subsystems are part of the OptiSuite and are maintained by MBT, there are no additional charges or licenses necessary to access the applications.

- Administration: This system is where user information is stored – including user emails, application roles and permissions, practitioner credentials, and status. It also can be used to view and manage student information – including Medi-Cal eligibility, occupational and physical therapy treatment plans, and IEP status. This application is reserved for district personnel designated to have coordinator credentials.
- OptiClaim: This system is used by practitioners to track services and submit Medi-Cal claims. OptiClaim is industry-leading software that provides efficiency and enhanced program compliance for clients. MBT submits nearly 100,000 claims each week through OptiClaim and has a denial rate of less than 1%.
- File Processor: Practitioners can upload Excel spreadsheets or scanned documents into this secure application for billing purposes. File Processor is also where MDUSD administration will upload student enrollment files, IEP lists, and student transportation logs. The file storage system uses industry standard encryption for secure storage and logs all user access to files to assure HIPAA/FERPA compliance.
- OptiReports: This system allows MDUSD administration real-time status updates and statistical measurements of the district's performance. OptiReports is a vital tool to optimizing practitioner participation and Medi-Cal reimbursements.
- OptiLearn: This system hosts MBT's e-classroom environment. All the handouts and guides used in trainings, along with instructional videos, are available 24 hours a day. Users can find information regarding LEA program requirements and OptiClaim tutorials.

OptiServices applications are all web-based and do require an internet connection. MBT hosts, manages, and maintains all aspects of the software suite at no additional cost to MDUSD. Users of the system will need a current version of either Google Chrome or Mozilla Fire Fox.

Software Support

As questions and challenges arise, there is no doubt that MDUSD's users will need quick answers. MBT accommodates four levels of technical support:

- In-person training/workgroup: Live trainings are an essential component to MBT's implementation process; however, MBT also provides ongoing in-person technical and program support when desired. These sessions are often necessary and helpful when new district staff are hired or there are significant changes to LEA program regulations. In-person training and workgroups are available to clients at no additional charge.
- Live Chat: The ability to chat with an MBT employee is available through our website and OptiSuite portal. Clients have access to Live Chat from 8:00am – 4:30pm PST. Live Chat is the easiest and most convenient way for users to get instantaneous answers and/or assistance.
- Telephone: MDUSD personnel will have access to the districts Account Manager's direct line and MBT's helpline. Telephone help is available from 8:00am – 4:30pm PST.
- Email: If a question is not urgent, users can email support@mbt4schools.com to get an answer within 24 hours.

All support services are included in the flat fee detailed in the "Cost" section. There is no additional charge for ongoing support.

Quality Control

MBT has implemented several procedures to ensure quality control across many of our business departments.

- Customer Service: MBT staff meets regularly to discuss program changes and updates so we can provide the most current information pertaining to the LEA program to our clients. Account Managers are encouraged to meet with their assigned school districts/COEs as often as needed to ensure LEA Coordinators and Practitioners are properly trained.
- Software Development: MBT works to stay updated with the LEA program changes. Along with software updates to enhance user experience, regulatory updates are implemented in the applications quickly to allow our users to stay compliant with mandates. It is MBT's goal to create an online suite of services that streamlines the Medi-Cal reimbursement process from the user perspective and is always up to date with state and federal regulations.
- Security: Data security is of utmost importance to MBT. Several security layers are employed to protect client data:
 - Physical servers, hosted at Amazon Web Services data warehouse, are protected by security personnel
 - Web access to the production database and servers that host MBT's OptiSuite of applications is firmly protected with only a small number of software engineers holding applicable credentials
 - Communication within the OptiSuite applications is secure with HTTPS/SSL
 - Student data (first name, last name, and date of birth) is encrypted. In the event of a data leak, student identification information could not be distinguished
- Program Compliance: MBT provides comprehensive training and support that will assist MDUSD in identifying and compiling supporting documentation required to promote program compliance. A review checklist is provided so that the district that can ensure the proper documentation is stored in the event of a DHCS LEA audit.

MBT has many procedures in place to ensure quality control for all of our clients.

MBT's Staffing Resources

Leadership

MBT is a family-owned business that is dedicated to serving California students.

Reid Stephens – President, Business Operations

- Reid has been serving California schools for 12 years while providing leadership, supervision and direction to MBT staff
- BA in Communications from Saint Mary's College of California, Moraga
- Located at MBT's headquarters in Visalia, CA
- Reid is available to meet with MDUSD leadership upon request

Kelly Lingenfelter – President, Client Operations

- Kelly has been a part of the MBT team for 13 years while overseeing program compliance, legislative support and DHCS advocacy
- BA in Psychology from University of California Davis, Davis
- Located at MBT's headquarters in Visalia, CA
- Kelly is available to meet with MDUSD leadership upon request

Rocio Rivera – Director of Business Officer

- Rocio has been a part of the MBT team for 11 years while overseeing MBT's finances, human resources and client contracts
- Located at MBT's headquarters in Visalia, CA
- Rocio is available to meet with MDUSD leadership upon request

Lori Rettig – Director of Operations

- Lori has been a part of the MBT team for 14 years while overseeing MBT's customer service, billing practices and client relations
- Located at MBT's headquarters in Visalia, CA
- Lori is available to meet with MDUSD leadership upon request

Service Team

The following individuals are program experts that will be dedicated to helping MDUSD achieve optimized reimbursements, while minimizing burden on staff, and managing program compliance.

Teri Goldwasser – Account Manager

Teri has been a part of the MBT team for 10 years. While serving MDUSD, Teri will be responsible for:

- Assist MDUSD in compiling a complete and comprehensive Time Survey Participant List each quarter
- Training administration in using the online OptiSuite of services to both enter services and manage users
- Training practitioners in best billing practices and using OptiClaim to submit services
- Holding annual strategic planning meetings with district administration to ensure LEA program optimization

- Meeting with the LEA program coordinators to evaluate program participation and reimbursement status
- Oversee the progress of claim capture and reimbursement amounts for the district
- Follow up with MDUSD personnel when questions arise

Tiffany Jesus – Data Analyst

Tiffany has been a part of the MBT team for 20 years. While serving MDUSD, Tiffany will be responsible for:

- Processing the student Medi-Cal tape matches for MDUSD received from DHCS
- Perform claim checks to ensure all claims submitted are valid
- Submit claims on behalf of MDUSD on a monthly basis
- Reconcile all paid claims to verify the proper reimbursements are received
- Investigate all denied claims by Medi-Cal

Mirna Ramos – LEA Financial Manager

Mirna has been a part of the MBT team for 11 years. While serving MDUSD, Mirna will be responsible for:

- Collecting financial data from MDUSD in order to oversee the completion of the CRCS each year
- Meet with district administration to ensure that all requirements are met to submit the CRCS on time
- In the event of a DHCS audit, provide necessary data and support MDUSD to meet the requirements of the audit

MBT's full organizational chart has been included in the attachment section.

Client References

Below are 5 client references varying in size and demographics.

Clovis Unified School District
Client since 2018
Susan Rutledge
Assistant Superintendent - Business Services
SusanRutledge@clovisusd.k12.ca.us
559-327-9127

Kern High School District
Client since 2001
Alan Mattlin
Site Director
Alan_Mattlin@kernhigh.org
661-827-4800

Corona-Norco Unified School District
Client since 2012
Mark Pfeiffer
Student Services Coordinator
mpfeiffer@cnusd.k12.ca.us
951-736-5083 ex 15169

Santa Clara County Office of Education
Client since 2019
Jennifer Ann
Director of Special Education
JAnn@sccoe.org
408-453-6542

Panama-Buena Vista Union School District
Client since 2007
Denita Maughan
Assistant Superintendent - Special Services
dmaughan@pbvusd.k12.ca.us
661-831-1906 ex 6525

MBT's Pricing

MBT is proud to deliver a pricing solution that reflects our commitment to serve as MDUSD's trusted, strategic partner that delivers unmatched business value and investment protection, while meeting MDUSD's strategic goals and objectives today, and in the future.

MBT is seeking an agreement for 6% of total reimbursements received by MDUSD from the LEA Medi-Cal Billing Option Program, with a not to exceed amount of \$110,000.00 for each year.

With \$59,400.00 due at the beginning of each year, and the final amount invoiced once MDUSD has received all Medi-Cal payments for each school year.

For reference, in the LEA Medi-Cal Billing Option Program MDUSD has billed for a total of \$1,579,675.17 in 19-20 and \$1,680,311.51 in 20-21.

MBT's all-inclusive pricing solution for the Medi-Cal Direct Billing Option (LEA) and Medi-cal Administrative Activities (MAA) Programs includes full-service support, our industry-leading software technology, as well as assistance in completing each year's CRCS report. Our pricing offers Mount Diablo Unified School District a combination of unmatched value and alignment with LEA and MAA program regulations.

Attachments (Including MDUSD's Forms)

Price Proposal Form

PRICE PROPOSAL FORM

PROJECT/CONTRACT NO.: RFP# 1909 – LEA MEDI-CAL CLAIMS REIMBURSEMENT SERVICES

Board of Education
Mt. Diablo Unified School District
Concord, CA 94520

The undersigned declares the Request for Proposals has been read and agrees and proposes to furnish all necessary labor, materials and equipment to provide the LEA Medi-Cal Claims including CRCS Services and complete, all in accordance with the terms, conditions, and specifications of RFP No. 1909 and will take in full payment therefore the following total lump sum amount, all taxes included:

1. The undersigned hereby certifies that this RFP is genuine and not fraudulent or collusive, or made in the interest of or in behalf of any person not herein named, and that the undersigned has not directly or indirectly induced or solicited any other Bidder to put in a fraudulent RFP, or any other person, firm or corporation to refrain from bidding, and the undersigned has not in any manner sought by collusion to secure for himself an advantage over any other Bidder. Further, the undersigned also declares under penalty of perjury under the laws of the State of California, that representations made in this RFP are true and correct.
2. The undersigned has notified the District of any discrepancies or omissions, or of any doubt about the meaning of any of the Contract Documents, and has contacted the Purchasing Department before bid date to verify the issuing of any clarifying Addenda.
3. *Receipt and acceptance of the following addenda is hereby acknowledged:*

No. Reid Stephens, Dated 06/08/2022

No. Kelly Stephens, Dated 06/08/2022

No. _____, Dated _____

Taxpayer's Identification No. 75-2971865

The Bidder is (Check One):
 Corporation
 Partnership
 Sole Proprietorship

If the Bidder is a Corporation, the bid should be signed with the name of the Corporation by an officer authorized to execute a bid on behalf of the Corporation. This Corporation is organized and existing under and by virtues of the Laws of the State of California.

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PRICE PROPOSAL FORM

Federal Tax ID Number: 75-2971865

If the Bidder is a Partnership, the bid should be signed with the name of the partnership by one of the partners.

Federal Tax ID Number: N/A

If the Bidder is unincorporated and a Sole Proprietorship, the bid should be signed with the name of the Sole Proprietor by that person.

Social Security Number: N/A

Submitted herewith is our proposal to file actual and estimated LEA Medi-Cal reimbursement claims including CRCS for the Mt. Diablo Unified School District for the claim years ending June 30, 2023, June 30, 2024 and June 30, 2025.

Cost and Billing of Services:

Provide detailed information about the cost of the services. Billing and payment procedures should be clearly defined.

If you wish to submit a fee schedule based on a sliding scale, please follow these parameters:

Fee % (based on Fiscal Year Annual Gross Amount of Reimbursement from the State)		Annual Gross Amount of Reimbursement from the State
<u>6%</u>	for	\$1 to \$400,000
<u>6%</u>	for	\$400,001 to \$700,000
<u>6%</u>	for	\$700,001 to \$1 million
<u>6%</u>	for	\$1,000,001 to \$ 1,500,000
<u>6%</u>	for	\$1,500,001 to \$2,000,000
<u>6%</u>	for	over \$2 million

Time-task schedule:

Include a time-task schedule and plan showing how this time frame will be met as part of the proposal.

The services will be performed in accordance with the requirements outlined in the "REQUEST FOR PROPOSALS FOR LEA MEDI-CAL REIMBURSEMENT SERVICES" and will be performed by the personnel identified in the "Statement of Qualifications". The firm will enter into an agreement with the Mt. Diablo Unified School District in the form submitted with this Request for Proposal.

Dated this 8th day of June, 2022

Medical Billing Technologies, Inc.
Company Name

525 W. Main Street, Suite 204
Street Address

Reid Stephens
Authorized Person (Printed Name)

Visalia CA 93291
City State Zip

President, Business Operations
Title


Signature

(559) 627-6267
Phone Number

(559) 627-1022
Fax Number

Email Address rmstephens@mbt4schools.com

END OF DOCUMENT

Statement of Qualifications

MT. DIABLO UNIFIED SCHOOL DISTRICT
STATEMENT OF QUALIFICATIONS

(Submit with proposal)

PROJECT/CONTRACT NO.: RFP# 1909 – LEA MEDI-CAL CLAIMS REIMBURSEMENT SERVICES

The signatory of the Statement guarantees the truth and accuracy of all statements and of answers to all questions hereinafter made. Failure to complete and return this Statement, or any false statement therein may render a bid non-responsive at the sole discretion of the Mt. Diablo Unified School District. All portions of the Statement must be completed. Contractors who do not thoroughly or accurately complete this form will be deemed non-responsive and excluded from submitting the bid.

Firm Medical Billing Technologies, Inc.

Address 525 W. Main Street, Suite 204, Visalia, CA 93291

Telephone (559) 627-6267 Facsimile (559) 627-1022

Email rmstephens@mbt4schools.com

Submitted by: Reid Stephens Date 06/08/2022
(Name of individual completing statement)

Names of personnel, with classifications, who will be assigned to the project:

<u>NAME</u>	<u>CLASSIFICATION</u>
<u>Theresa Goldwasser</u>	<u>Account Manager</u>
<u>Lori Rettig</u>	<u>Program Compliance</u>
<u>Rocio Rivera</u>	<u>Accounting/Contracts</u>
<u>Tiffany Jesus</u>	<u>Enrollment</u>
<u>Mirna Ramos</u>	<u>CRCS</u>
<u> </u>	<u> </u>
<u> </u>	<u> </u>



1. If a corporation, please answer the following:

Date of Incorporation: 12/11/2001
In what state: California
President's Name: Reid Stephens
Vice President's Name: Kelly Stephens
Secretary's Name: Kelly Stephens
Treasurer's Name: Reid Stephens

2. If a partnership, please answer the following:

Date of Organization: N/A
General or association? _____

Name and Address of each general partner

1. _____
2. _____
3. _____

3. Number of years in business under this name: 28

4. Number of years in business under other names:

Name	Years
● <u>N/A</u>	_____
● _____	_____
● _____	_____

5. How many years experience in performing type of work called for in this RFP? 28

6. In what other lines of business do you or your organization or any partner thereof have financial interests? None

7. Have you or your organization, or any office or partner thereof, failed to complete a contract?

Yes () No (✓)

8. Has your organization been assessed any penalties for non-compliance violations of the Federal or State Labor laws and/or regulations within the last five (5) years?

Yes () No (✓)

9. Does your organization have any outstanding judgments, demands or liens resulting from violating the State Labor Code, the Business and Professions Code, Civil or Criminal decisions?

Yes () No (✓)

Please explain all questions answered "yes" in questions nine (8) and nine (9) above on a separate sheet of paper along with this Statement.

10. List five (5) references where work comparable to that called for on the bid has been performed:


A. School District Santa Clara County Office of Education
Address 1290 Ridder Park Drive, San Jose, CA 95131
Telephone Number (408) 453-6542
Contact Person Jennifer Ann
Date of Work 07/01/2019
Contract Award 07/01/2019

B. School District Clovis Unified School District
Address 1450 Herndon Avenue, Clovis, CA 93611
Telephone Number 559-327-9127
Contact Person Susan Rutledge
Date of Work 07/01/2018
Contract Award 07/01/2018

C. School District Kern High School District
Address 5801 Sundale Avenue, Bakersfield, CA 93309
Telephone Number (661) 827-4800
Contact Person Alan Mattlin
Date of Work 07/01/2001
Contract Award 06/30/2001

- D. School District Panama-Buena Vista Union School District
 Address 4200 Ashe Road, Bakersfield, CA 93313
 Telephone Number (661) 831-1906 ex 6525
 Contact Person Denita Maughan
 Date of Work 07/01/2007
 Contract Award 06/27/2007

- E. School District Corona-Norco Unified School District
 Address 2820 Clark Avenue, Norco, CA 92860
 Telephone Number (951) 736-5083 ex 15169
 Contact Person Mark Pfeiffer
 Date of Work 07/01/2012
 Contract Award 05/01/2012

Signed  Date 06/08/2022

END OF DOCUMENT



Workers' Compensation

WORKERS' COMPENSATION INSURANCE CERTIFICATE
RFP #1909
(Submit with proposal)


PROJECT/CONTRACT NO.: RFP# 1909 – LEA MEDI-CAL CLAIMS REIMBURSEMENT SERVICES

TO: THE MT. DIABLO UNIFIED SCHOOL DISTRICT

I am aware of the provisions of Section 3700 of the Labor Code that requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code. I will comply with such provisions before commencing the performance of the work under this contract and submit the necessary evidence of workers' compensation to Mt. Diablo Unified School District.

Company: Medical Billing Technologies, Inc.

Business Address: 525 West Main Street, Suite 204, Visalia, CA 93291

Signature: 

Name of Signing Official: Reid Stephens

Title of Signing Official: President, Business Operations

Date: 06/08/2022

Company Seal:

END OF DOCUMENT

Confidentiality Agreement

CONFIDENTIALITY AGREEMENT
RFP #1909
(Submit with proposal)

PROJECT/CONTRACT NO.: RFP# 1909 – LEA MEDI-CAL CLAIMS REIMBURSEMENT SERVICES

The undersigned, a duly authorized officer of Medical Billing Technologies, Inc. does hereby represent, warrant and agree to the following statement:

"All financial, statistical, personal, technical or other information relating to the District's operation which are designated confidential by the District and made available to the undersigned shall be protected by the undersigned from unauthorized use and disclosure"

Date: 06/08/2022

Firm Name: Medical Billing Technologies, Inc.

By: 
Signature of Authorized Officer

END OF DOCUMENT

Vendor Representation

VENDOR REPRESENTATION AND CERTIFICATION
RFP #1909
(Submit with proposal)

PROJECT/CONTRACT NO.: RFP# 1909 – LEA MEDI-CAL CLAIMS REIMBURSEMENT SERVICES

The undersigned hereby affirms that:

1. He/she is a duly authorized agent of the vendor (corporate or other authorization confirmation may be requested prior to final contract execution).
2. The offer is being offered independently of any other Vendor's and is in full compliance with the collusive prohibitions of this State. The vendor certifies that no employee of its firm has discussed, or compared the proposal with any other vendor or District employee, and has not colluded with any other vendor or District employee.
3. The vendor will accept any awards made to it as a result of this solicitation if the acceptance is made within 90 calendar days after the proposal due date.

I hereby certify that I am submitting the following offer as my firm's proposal. I understand that by virtue of executing and returning with this proposal this required response form, I further certify full, complete and unconditional acceptance of the contents of this Solicitation (except as may be noted in the offer). I also agree to be bound by any and all specifications, terms and conditions, contract document, accepted offer and other documents of the Solicitation.

Submitted by: Reid Stephens

Title: President, Business Operations

Company Name: Medical Billing Technologies, Inc.

Address: 525 West Main Street, Suite 204, Visalia, CA 93291

Phone: (559) 627-6267 Fax: (559) 627-1022

By:  Date: 06/08/2022

Manual Signature of Agent(s)

END OF DOCUMENT



Non-Collusion Declaration

NON-COLLUSION DECLARATION

Public Contract Code § 7106

(TO BE EXECUTED BY BIDDER AND SUBMITTED WITH RFP) PROJECT/CONTRACT NO.:

PROJECT/CONTRACT NO.: RFP# 1909 – LEA MEDICAL CLAIMS REIMBURSEMENT SERVICES

The undersigned declares:

I am the President, Business Operations

Of Medical Billing Technologies, Inc.

the party making the foregoing Contract.

The RFQ is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The bid is genuine and not collusive or sham. The bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid. The bidder has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or to refrain from bidding. The bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder. All statements contained in the bid are true. The bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof, to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a bidder that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the bidder.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on the following date:

Date: 06/08/2022

Proper Name of Bidder: Medical Billing Technologies, Inc.

City, State: Visalia, CA

Signature: *Reid Stephens*

Print Name: Reid Stephens

Title: President, Business Operations

END OF DOCUMENT

DRUG-FREE WORKPLACE CERTIFICATION

PROJECT/CONTRACT NO.: RFP# 1909 – LEA MEDI-CAL CLAIMS REIMBURSEMENT SERVICES

between Mt. Diablo Unified School District (the “District” or the “Owner”) and
Medical Billing Technologies, Inc. (the “Contractor” or the “RFPder”) (the “Contract” or the “Project”).

This Drug-Free Workplace Certification form is required from the successful RFPder pursuant to Government Code sections 8350 et seq., the Drug-Free Workplace Act of 1990. The Drug-Free Workplace Act of 1990 requires that every person or organization awarded a contract or grant for the procurement of any property or service from any state agency must certify that it will provide a drug-free workplace by doing certain specified acts. In addition, the Act provides that each contract or grant awarded by a state agency may be subject to suspension of payments or termination of the contract or grant, and the contractor or grantee may be subject to debarment from future contracting, if the contracting agency determines that specified acts have occurred.

The District is not a “state agency” as defined in the applicable section(s) of the Government Code, but the District is a local agency and public school district under California law and requires all contractors on District projects to comply with the provisions and requirements of Government Code sections 8350 et seq., the Drug-Free Workplace Act of 1990.

Contractor shall certify that it will provide a drug-free workplace by doing all of the following:

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited in the person’s or organization’s workplace and specifying actions which will be taken against employees for violations of the prohibition;
2. Establishing a drug-free awareness program to inform employees about all of the following:
 - a. The dangers of drug abuse in the workplace.
 - b. The person’s or organization’s policy of maintaining a drug-free workplace.
 - c. The availability of drug counseling, rehabilitation, and employee-assistance programs.
 - d. The penalties that may be imposed upon employees for drug abuse violations.
3. Requiring that each employee engaged in the performance of the contract or grant be given a copy of the statement required above, and that, as a condition of employment on the contract or grant, the employee agrees to aRFPe by the terms of the statement.

I, the undersigned, agree to fulfill the terms and requirements of Government Code section 8355 listed above and will publish a statement notifying employees concerning (a) the prohibition of controlled substance at the workplace, (b) establishing a drug-free awareness program, and (c) requiring that each employee engaged in the performance of the contract be given a copy of the statement required by section 8355(a), and requiring that the employee agree to aRFPe by the terms of that statement.

I also understand that if the District determines that I have either (a) made a false certification herein, or (b) violated this certification by failing to carry out the requirements of section 8355, that the Contract awarded herein is subject to termination, suspension of payments, or both. I further understand that, should I violate the terms of the Drug-Free Workplace Act of 1990, I may be subject to debarment in accordance with the requirements of section 8350 et seq.

I acknowledge that I am aware of the provisions of Government Code sections 8350 et seq. and hereby certify that I will adhere to the requirements of the Drug-Free Workplace Act of 1990.

Date: 06/08/2022

Proper Name of Contractor: Medical Billing Technologies, Inc.

Signature: 

Print Name: Reid Stephens

Title: President, Business Operations

END OF DOCUMENT

Equal Employment Opportunity

EQUAL EMPLOYMENT OPPORTUNITY COMPLIANCE CERTIFICATE

To be Submitted with RFP

PROJECT/CONTRACT NO.: RFP# 1909 – LEA MEDI-CAL CLAIMS REIMBURSEMENT SERVICES

Equal Opportunity Clause

Unless exempted by rules, regulations or orders of the Secretary of Labor issued pursuant to Executive Orders 10925, 11114 or Section 204 of Executive Order 11246 of September 24, 1965, during the performance of each contract with the Mt. Diablo Unified School District, the Contractor agrees as follows:

1. The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, gender, national origin or political affiliation. The contractor will take affirmative action to ensure that applicants are employed and that employees are treated during employment, without regard to their race, color, religion, gender, national origin or political affiliation. Such action shall include, but not be limited to the following: employment upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.
2. The contractor will, in all solicitations or advertisements for employees, placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, gender, national origin or political affiliation.
3. The contractor will send to each labor union or representative of workers with which he as a collective bargaining agreement or other contract or understanding, a notice to be provided by the agency contracting officer, advising the labor union or the workers' representative of the contractors' commitments under Section 202 of Executive Order 11246 of September 24, 1965, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.
4. The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965, and the rules, regulations and relevancy orders of the Secretary of Labor.
5. The contractor will furnish all information and reports required by Executive order 11246 of September 24, 1965, and by the rules, regulations and relevant orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations and orders.
6. In the event of the contractor's non-compliance with the non-discrimination clauses of this subcontract or with any of such rules, regulations or orders, this subcontract may be canceled, terminated or suspended, in whole, or in part and the contractor may be declared ineligible for further government

contracts in accordance with the procedures authorized in accordance with Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation or order of the Secretary of Labor, or otherwise provided by law.

7. The contractor will include the provisions of Paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations or orders of the Secretary of Labor issued pursuant to Section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each Subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase order as the contracting agency may direct as a means of enforcing such provisions including sanctions for non-compliance. Provided, however, that in the event the contractor becomes involved in, or is threatened with litigation with a subcontractor or vendor as a result of such direction by the contracting agency, the contractor may request the United States to enter into such litigation to protect the interest of the United States.

Certification on Non-Segregated Facilities

The contractor hereby certifies that it does not or will not maintain segregated facilities not permit its employees to work at locations where facilities are segregated on the basis of race, color, religion, gender, national origin or political affiliation.

Medical Billing Technologies, Inc.

Name of Firm



Authorized Signature

06/08/2022

Date

END OF DOCUMENT

Insurance Certificates



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
05/31/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER

Gary Campbell(9518391)
130 N Akers St Ste B

CONTACT NAME:

PHONE (A/C, NO, EXT): 559-627-8700

FAX (A/C, NO): 559-624-0648

E-MAIL ADDRESS: gcampbell@farmersagent.com

Visalia CA 93291-5121

INSURED

MEDICAL BILLING TECHNOLOGIES, INC
PO BOX 709

VISALIA CA 93279

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A: Truck Insurance Exchange	21709
INSURER B: Farmers Insurance Exchange	21652
INSURER C: Mid Century Insurance Company	21687
INSURER D:	
INSURER E:	
INSURER F:	

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED (NAME ABOVE) FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDTL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY LXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER	Y	N	602186454	07/06/2022	07/06/2023	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea Occurrence) \$ 100,000 MED EXP Any one person \$ 10,000 PERSONAL & ADY INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	AUTOMOBILE LIABILITY ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/>		N	602186454	07/06/2022	07/06/2023	BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB EXCESS LIAB OCCUR CLAIMS-MADE DED RETENTIONS			60261 68 92	07/06/2022	07/06/2023	EACH OCCURRENCE \$ AGGREGATE \$ 8,000,000 PER STATUTE <input checked="" type="checkbox"/> OTHER \$ E.I. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR, PARTNER, EXECUTIVE OFFICER, MEMBER EXCLUDED (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	A1950 31 44	01/01/2022	01/01/2023	

DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
MOUNT DIABLO UNIFIED SCHOOL DISTRICT LISTED AS ADDITIONAL INSURED.

CERTIFICATE HOLDER

MOUNT DIABLO UNIFIED SCHOOL DISTRICT
1936 CARLOTTA DR

CONCORD CA 94519

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE: *Gary Campbell*

ACORD 25 (2016/03)
31-1769 11-15

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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
05/31/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Gary Campbell Insurance 130 N AKERS ST STE B VISALIA INSURED	CA 93291-5121	CONTACT NAME: Paula Bruton PHONE (A/C, No, Ext): (559) 627-8700 E-MAIL ADDRESS: paula@garyinsurance.com FAX (A/C, No): (559) 624-0648	INSURER(S) AFFORDING COVERAGE INSURER A: Landmark American Insurance Company INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:	NAIC #
MEDICAL BILLING TECHNOLOGIES INC 525 W Main St Ste 204 & 205 Visalia CA 93291-6116	CA 93291-6116			

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input type="checkbox"/> OCCUR <input type="checkbox"/> GEN'L AGGREGATE LIMIT APPLIES PER POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$
	AUTOMOBILE LIABILITY ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/>					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y/N <input type="checkbox"/> N/A If yes, describe under DESCRIPTION OF OPERATIONS below					PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L EACH ACCIDENT \$ E.L DISEASE - EA EMPLOYEE \$ E.L DISEASE - POLICY LIMIT \$
A	Professional Liability		LCY843611	06/06/2021	06/06/2022	Each Occurrence \$2,000,000 Aggregate \$2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

Mount Diablo Unified School District
1936 Carlotta Drive
Concord, Ca 94519

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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MBT Org Chart

