Office for People With Developmental Disabilities

KATHY HOCHUL
Governor
WILLOW BAER
Commissioner

OPWDD Contract Management Unit on behalf of:

Developmental Disabilities State Operations Offices - Statewide

2025 -2030 OPWDD Statewide Medication Regimen Review Services

OPD 071525

Invitation for Bid

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ADDITIONAL REQUIRED FORMS (MUST BE SUBMITTED WITH BID OR WITHIN 3 BUSINESS DAYS OF REQUEST BY OPWDD. FAILURE TO SUBMIT THESE FORMS WILL RESULT IN BID DISQUALIFICATION):

ATTACHMENT 1: References
ATTACHMENT 2: Vendor Responsibility Questionnaire

REFERENCE MATERIAL

Contract Template with Appendix A & Supplement

1. Introduction

The New York State Office for People with Developmental Disabilities (hereinafter "OPWDD") has the authority to provide care, treatment, rehabilitation, education, training and support services to developmentally disabled persons. OPWDD is also empowered to take all actions necessary, desirable, and proper to carry out its purposes and objectives within budgetary amounts made available by appropriations. Statewide Developmental Disabilities State Operations Offices (hereinafter "OPWDD") are agencies of OPWDD.

OPWDD contracts with numerous organizations to provide these required services and other physical benefits. Such contracts may be with not-for-profit or for-profit organizations as well as with other governmental organizations.

2. Designated Contact Person(s) For Inquiries & Submission

Jennifer Vallely, Contract Management Specialist 1 for
Christopher Davis, Contract Management Specialist 2
Laura Pushkarsh, Associate Director of Contracts
Deborah Klase, Associate Director of Contracts
OPWDD Contract Management Unit
26 Center Circle
Wassaic, New York 12592-2637
Phone: 845-877-6821 ext. 3333 Fax: 845-877-3004
eny.nyc.li.contracthub@opwdd.ny.gov

3. Timetable of Proposal Due Dates

IFB Release Date	6 June 2025
Pre-bid Conference Call*	**1:00 PM, 18 June 2025**
Final Date for Receipt of Questions	24 June 2025
Official Responses to Questions By	30 June 2025
Proposal Due Date – Bid Opening*	**1:00 PM, 15 July 2025**
Evaluation & Selection	23 July 2025
Notification of Awards	23 July 2025
Contract start date (subject to change)	1 October 2025

*Please See Page 4, Section 6 for more details on the Pre-bid Conference Call.
*Bid Opening to be via Microsoft Teams. Please see page 6, Section 13.A. (4) for details.

OPWDD has sole discretion to change the above dates

4. Objective of this IFB

The purpose of this IFB is to contract with responsive and responsible vendors interested in performing the tasks and services described within the section of this IFB identified as "Qualifications & Scope of Work."

5. General Description of Services

This IFB is for interested bidders to submit a bid for Medication Regimen Review Services for OPWDD sites, according to the specifications, terms and conditions as enumerated in "Scope of Work" of this IFB.

6. Site Inspections

There will be a Pre-bid Conference Call at 1:00 PM on Wednesday, June 18, 2025, to discuss service requirements and expectations of Medication Regimen Review Services with Bidders that are interested in providing services to OPWDD. Bidders will have the opportunity to ask clarifying questions regarding the Scope of Work. Attendance at the Conference Call is not a requirement for bidding, <u>but it is strongly recommended</u>.

The Pre-bid Conference Call will be done via Microsoft Teams. If bidders wish to "attend", they may do so by calling: 1-518-801-9699 at 1:00 PM on Wednesday, June 18, 2025. Bidders will be asked for a PHONE CONFERENCE ID. Enter Meeting ID 806 461 668 followed by the # sign.

It is recommended that you join the Pre-bid Conference Call five to ten minutes before the actual start time to ensure you are present.

7. Notice to Potential Bidders

Receipt of these bid documents does not indicate OPWDD has pre-determined any vendor qualifications to receive a contract award. Such determination will be made after the bid opening and will be based upon an evaluation of all bid submissions and compared to the specific requirements and qualifications contained in these bid documents.

8. Term of the Contract

The term of this contract will be defined in the Contract Agreement but is anticipated to be a five-year contract, unless an amendment is mutually agreed upon by both parties and approved by the Office of the State Comptroller (OSC).

9. Payment

Metro, Bernard Fineson, Brooklyn, Staten Island, IBR, Long Island

Prices are to remain constant for the initial year of the contract. Approaching every contract anniversary date, the Contractor may request, or OPWDD give notice of, an annual price adjustment for the subsequent year. The request or notice must be submitted in writing between 30 days and 60 days prior to the contract anniversary date. OPWDD has the sole discretion in determining the rate to be approved. The adjustment shall be based upon the most recently available, "CPI-U", not seasonally adjusted, New York-Newark-Jersey City, all items, with the adjustment calculated on a 12-month percent change based on the month 60 days prior to the contract anniversary. Any price adjustment shall not exceed 3.0% per annum.

All Other DDSOOs

Prices are to remain constant for the initial year of the contract. Approaching every contract anniversary date, the Contractor may request, or OPWDD give notice of, an annual price adjustment for the subsequent year. The request or notice must be submitted in writing between 30 days and 60 days prior to the contract anniversary date. OPWDD has the sole discretion in determining the rate to be approved. The adjustment shall be based upon the most recently available, "CPI-U", not seasonally adjusted, Northeast Region, all items, with the adjustment calculated on a 12-month percent change based on the month 60 days prior to the contract anniversary. Any price adjustment shall not exceed 3.0% per annum.

10. Wage and Hours Provisions

If this is a public work contract covered by Article 8 of the Labor Law or a building service contract covered by Article 9 thereof, neither Contractor's employees nor the employees of its subcontractors may be required or permitted to work more than the number of hours or days stated in said statutes, except as otherwise provided in the Labor Law and as set forth in prevailing wage and supplement schedules issued by the State Labor Department.

Pursuant to § 8 (220-I), Contractor and its subcontractors must be registered with the New York State Department of Labor (NYSDOL) and submit their Certificate of Contractor Registration at the time of the bid submission for any Article 8 project.

Pursuant to § 9 (A), Contractor and its subcontractors must pay at least the prevailing wage rate and pay or provide the prevailing supplements, including the premium rates for overtime pay, as determined by the State Labor Department in accordance with the Labor Law.

Pursuant to § 9 (A), Contractor and its subcontractors must provide OPWDD with a certified payroll when submitting an invoice for payment.

11. Subcontracting

No Subcontracting of services is allowed with this IFB without written permission of OPWDD. For further information, please see section 14 J.

12. Insurance

The Contractor agrees that without expense to the State, insurance will be maintained during the period of the proposal and contract, insurance of the kinds and in the amounts indicated, with insurance companies authorized to do such business in the State of New York, covering all operations under this proposal and contract.

A. The Contractor shall furnish to OPWDD a Certificate or Certificates in a form satisfactory to the Agency, showing compliance with the requirements of this section. The State of New York Office for People with Developmental Disability will be expressly named as additional insured on each policy in accordance with above. Certificates of insurance should be forwarded to the OPWDD with the signed agreement and thereafter annually on the contract anniversary date. Certificates shall state the policies shall not be changed or cancelled until 30 days written notice has been given to OPWDD. Required insurances are:

(1) A policy covering the obligations of the successful bidder in accordance with the Workers' Compensation and Disability Law. The contract shall be void and of no effect unless the successful bidder procures such policy and maintains it during the period of the contract. The Workers Compensation Board website can be found here: www.wcb.ny.gov/

(2) Policies covering bodily injury, liability and property damage of the types hereinafter specified, each with limits of liability not less than $1,000,000.00 for all damages arising out of bodily injury, including death at any time resulting there from, sustained by one person in any one accident, and subject to that limit for that person, and not less than $2,000,000.00 for all damages arising out of bodily injury, including death at any time resulting there from, sustained by two or more persons in any accident and not less than $2,000,000.00 for all damages arising out of injury or destruction of property.

a. Contractor's liability insurance issued to and covering the liability of the successful bidder with respect to all work performed by them under the proposal and the contract.

b. Protective liability insurance issued to and covering the liability of the people of the State of New York with respect to all operations under this proposal and the contract, by the successful bidder, including omissions and supervisory acts of the State.

13. Submission of Proposals

A. Submission Requirements

One (1) original Bidder **Cost Proposal Form** is required to submit a bid. All proposals in response to this IFB must be received by OPWDD no later than the proposal due date and time.

One (1) original of each additional required form, as listed on page 2 (References and Vendor Responsibility Questionnaire), must be received either by the proposal due date or within 3 business days of request by OPWDD. It is strongly recommended that these additional forms are submitted by the proposal due date. Failure to submit the forms as specified above will result in the bid being disqualified.

(1) **Overnight delivery can take a minimum of two (2) business days to be received by OPWDD. Bidders mailing their responses must allow sufficient mail delivery time to ensure receipt of their proposals by the Bid Opening Date listed on the cover page. Do not depend upon an expedited, "early AM," or similar delivery service to timely deliver to OPWDD.**

(2) All proposals should be submitted in a sealed envelope with ***the following information clearly displayed on the exterior of the packaging:*** **Bidder's name and address; "Sealed Bid" with the IFB title; Proposal Due Date**

(3) Proposals should be **mailed** or **hand delivered** to the following address:

OPWDD
Contract Management Unit – **IFB: OPD 071525**
C/O Jennifer Vallely, CMS 1
26 Center Circle, Building 58, Service Building
Wassaic, New York, 12592-2637

(4) Bid Opening will be done via Microsoft Teams following standard formal bid opening procedures. If bidders wish to "attend", they may do so by calling: **1-518-801-9699 at 1:00 PM, Tuesday, July 15, 2025**. Bidders will be asked for a PHONE CONFERENCE ID. Enter Meeting ID **913 188 317 followed by the # sign.**

All proposals and accompanying documentation become the property of OPWDD and ordinarily will not be returned.

B. References

OPWDD may request bidders to submit work references that will verify that the bidder or its principals have at least three (3) years of relevant experience to complete the work as listed in Qualifications and Scope of Work. Upon request, bidders will have 3 business days to submit such references.

C. Late Bids

Any Bid received at the specified location after the time specified will be considered a late Bid. A late Bid shall not be considered for award unless: (i) no timely Bids meeting the requirements of the Bid Documents are received or, (ii) in the case of a multiple award, an insufficient number of timely Bids were received to satisfy the multiple award; and acceptance of the late Bid is in the best interests of the Authorized Users. Delays in United States mail deliveries or any other means of transmittal, including couriers or agents of the Authorized User shall not excuse late Bid submissions. Similar types of delays, including

but not limited to, bad weather or security procedures for parking and building admittance shall not excuse late Bid submissions. Determinations relative to Bid timeliness shall be at the sole discretion of OPWDD. **No late proposals will be considered if the delay in submission results from the fault of the bidder or from any factor within the direct or indirect control of the bidder.**

14. Procurement Information, Mandatory Requirements

A. Procurement Lobbying Law Requirements pursuant to State Finance Law §§ 139-j and 139-k

Effective January 1, 2006: Pursuant to State Finance Law §§ 139-j and 139-k, this solicitation includes and imposes certain restrictions on communications between OPWDD and Bidder during the procurement process. A Bidder is restricted from making contact from the earliest Notice of Intent to Solicit Offers through final award and approval of the Procurement Contract by OPWDD and, if applicable, the Office of the State Comptroller (OSC), to other than designated staff unless it is a contact that is included among certain statutory exceptions set forth in State Finance Law § 129-j (3)(a). Designated staff, as of the date hereof, is (are) identified in this solicitation.

The designated contact person is listed in Section 2, 'Designated Contact Person(s) For Inquiries & Submission' of this solicitation. The Restricted Period for this procurement begins with the date of the advertisement in the NYS Contract Reporter and will end when the NYS Office of the State Comptroller has approved the contract. All contact during the Restricted Period regarding this procurement must be made with the OPWDD designated contact person.

OPWDD employees are also required to obtain certain information when contacted during the restricted period and make a determination of the responsibility of the Bidder pursuant to these two statutes. Certain findings of non-responsibility can result in rejection for contract award. In the event of two findings within a four-year period, the Bidder is debarred from obtaining governmental Procurement Contracts. Bidders will be informed in writing of any preliminary OPWDD finding of non-responsibility and will be afforded administrative due process prior to a final determination being made.

B. Questions Regarding this Procurement

All questions regarding this procurement must be submitted in writing, by fax, mail, or e-mail to the contact person listed in **Section 2, 'Designated Contact Person(s) For Inquiries & Submission'** of this solicitation. Questions that are emailed must be submitted via email address to eny.nyc.li.contracthub@opwdd.ny.gov, and should reference the IFB title name and number in the subject line of the email.

OPWDD will post official answers to the questions to the Contract Reporter and the OPWDD website by the date indicated in **Section 3, 'Timetable of Proposal Due Date'.**

If a bidder discovers a possible error in this IFB, immediately notify the contact person indicated in **Section 2 'Designated Contact Person(s) for Inquiries & Submission'**, of such

error and request clarification, correction or modification to this document via email address eny.nyc.li.contracthub@opwdd.ny.gov. All inquiries concerning corrections must reference the IFB title and number in the subject line of the email and cite the particular bid section and paragraph number in the body of the email. Prospective Bidders should note that any such notice must be given, and all clarification and exceptions including those relating to the term and conditions are to be resolved prior to the proposal submission deadline. If there is a substantial error, the entire bidders list will be notified and the IFB change will be posted on the Contract Reporter, as well as e-mail replies to all bidders. OPWDD shall make IFB modifications, provided that such modification would not materially benefit or disadvantage any particular bidder.

C. OPWDD Rights

(1) OPWDD reserves the right to use any and all ideas presented in any response to the IFB. Selection or rejection of any proposal does not affect this right. OPWDD shall also have unlimited rights to disclose or duplicate, for any purpose whatsoever, all information or other work product developed, derived, documented or furnished by the Bidder under any agreement resulting from this IFB.

(2) In the event of contract award, all documentation produced as part of the contract will become the exclusive property of OPWDD. OPWDD reserves a royalty free, non-exclusive, and irrevocable license to reproduce, publish, or otherwise use such documentation and to authorize others to do so.

(3) OPWDD reserves the right to:
   a. Reject any or all proposals received in response to this IFB (Invitation for Bid);
   b. Withdraw the IFB at any time, at the agency's sole discretion;
   c. Make an award under the IFB in whole or in part;
   d. Disqualify any Bidder whose conduct or proposal fails to conform to the requirements of this IFB. Selection may also include such issues as past performance;
   e. Seek clarifications and revisions of proposals;
   f. Use proposal information obtained through site visits, management interviews and the State's investigation of a bidder's qualifications, experience, ability or financial standing, and any material or information submitted by the bidder in response to the agency's request for clarifying information in the course of evaluation and/or selection under the IFB;
   g. Bidders are cautioned to verify their Bids before submission, as amendments to Bids or requests for withdrawal of Bids received by the Commissioner after the time specified for the Bid opening, may not be considered;
   h. ***Prior to the bid opening***, amend the IFB specifications to correct errors or oversights, or to supply additional information, as it becomes available;
   i. ***Prior to the bid opening***, direct bidders to submit proposal modifications addressing subsequent IFB amendments;
   j. Change any of the scheduled dates, including start dates, stated herein upon notice to the Bidders;
   k. Eliminate any mandatory, non-material specifications that cannot be complied with by all of the prospective bidders;
   l. Waive any requirements that are not material;

m. Negotiate with the successful bidder within the scope of the IFB in the best interests of the state;
n. Conduct contract negotiations with the next responsible bidder, should the agency be unsuccessful in negotiating with the selected bidder;
o. Utilize any and all ideas submitted in the proposals received;
p. Unless otherwise specified in the solicitation, every offer is firm and not revocable for a period of 60 days from the bid opening; and,
q. Require clarification at any time during the procurement process and/or require correction of arithmetic or other apparent errors for the purpose of assuring a full and complete understanding of a bidders proposal and/or to determine a bidders compliance with the requirements of the solicitation.

D. Incurred Costs

The State of New York shall not be liable for any costs incurred by a Bidder in the preparation and production of a proposal. Any work performed prior to the issuance of a fully executed contract or delivery of an order by OPWDD to the Contractor will be done only to the degree the Contractor voluntarily assumes the risk of nonpayment.

E. Content of Proposals

To be considered responsive, a Bidder should submit complete proposals that satisfy all the requirements stated in this IFB. Proposals that do not include the listed required forms may be rejected as nonconforming.

F. Period of Validity

Each Bidder's Proposal must include a statement as to the period during which the provisions of the proposal will remain valid. All elements of the bid and proposal shall remain in effect for a minimum of 180 days.

G. Notice of Award, Debriefing and Bid Protests

(1) The successful Bidder or its agent shall not make any news releases or any other disclosure relating to this contract award without the explicit approval of OPWDD.

(2) OPWDD will notify all unsuccessful Bidders, at or about the time of bid award, of the fact that their proposals were not selected. Each unsuccessful Bidder may at that time request a debriefing by OPWDD, to be conducted by the designated contact person listed in Section 2, 'Designated Contact Person(s) For Inquiries & Submission' of this solicitation, as to why its proposal was not selected. The scope of such debriefings will ordinarily be limited to the strengths and weaknesses of the individual Bidder's proposal unless the contracts resulting from this procurement have been approved by OSC.

(3) Bidders wishing to file protest of the awarding of a bid(s) must notify OPWDD, in writing, of their intent to protest the award within ten (10) working days of their receipt of notice of non-award. The protest should identify the name and number of the IFB and the award date; indicate the bidder's interpretation as to why they feel they were

denied the award (i.e., summarize the deficiencies identified during the debriefing) and state their justification for the bid protest. Bid protests must be mailed to NYS OPWDD, Contract Management Unit, 44 Holland Avenue, 3rd Floor, Albany, New York 12229-0001.

H. Public Information Requirements / Confidentiality / Publication Rights

(1) All the proposals upon submission will become the property of OPWDD. Materials / documents produced by the Contractor in the fulfillment of its obligations under contract with OPWDD become the property of OPWDD unless prior arrangements have been made with respect to specific documents.

(2) OPWDD will have the right to disclose all or any part of a proposal to public inspection based on its determination of what disclosure will serve the public interest. Upon approval of the contract by OSC, all terms of the contract become available to the public.

(3) Prospective Bidders are further advised that, except for trade secrets and certain personnel information (both of which OPWDD has reserved the right to disclose), all parts of proposals must ultimately be disclosed to those members of the general public making inquiry under the New York State Freedom of Information Law (NYS Public Officers Law article 6) although proposal contents cannot ordinarily be disclosed by OPWDD prior to bid award.

a. Should a Bidder wish to request exception from public access to information contained in its proposal, the Bidder must specifically identify the information and explain in detail why public access to the information would be harmful to the Bidder. Use of generic trade secret legends encompassing substantial portions of the proposal or simple assertions of trade secret interest without substantive explanation of the basis therefore will be regarded as non-responsive requests for exception from public access will not be considered by OPWDD in the event of a Freedom of Information request for proposal information is received

(4) The bidder and OPWDD agree that all communications, until the effective date of the contract, shall be made in confidence, shall be used only for purposes of the contract, and that no information shall be disclosed by the recipient party except as required by Federal or State law.

(5) The bidder shall treat all information, in particular information relating to OPWDD service recipients and providers, obtained by it through its performance under contract, as confidential information, to the extent that confidential treatment is provided under New York State and Federal law, and shall not use any information so obtained in any manner except as necessary to the proper discharge of its obligations and securement of its rights hereunder. Bidder is responsible for informing its employees of the confidentiality requirements of this agreement.

(6) The Contractor may not utilize any information obtained via interaction with OPWDD in any public medium (media-radio, television), (electronic-internet), (print-newspaper, policy paper, journal/ periodical, book, etc.) or public speaking engagement without the official prior approval of OPWDD Senior Management. Contractors bear the

responsibility to uphold these standards rigidly and to require compliance by their employees and subcontractors. Requests for exemption to this policy shall be made in writing, at least 14 days in advance, to OPWDD Contract Management Unit, 44 Holland Avenue (3rd Floor), Albany, New York 12229.

(7) The Contractor agrees that no brochure, news/media/press release, public announcement, memorandum, or other information of any kind regarding the Contract shall be disseminated in any way to the public, nor shall any presentation be given regarding the Contract without the prior written approval of the OPWDD, which written approval shall not be unreasonably withheld or delayed provided, however, that Contractor shall be authorized to provide copies of the Contract and answer any questions relating thereto to any State or federal regulators or, in connection with its financial activities, to financial institutions for any private or public offering.

I. Affirmative Action

(1) OPWDD is in full accord with the aims and effort of the State of New York to promote equal opportunity for all persons and to promote equality of economic opportunity for minority group members and women who own business enterprises, and to ensure there are no barriers, through active programs, that unreasonably impair access by Minority and Women-Owned Business Enterprises (M/WBE) to State contracting opportunities. OPWDD encourages business that are minority or woman owned, to become certified with Empire State Development.

(2) Prospective Bidders to this IFB are subject to the provisions of Executive Law article 15-A and regulations issued there under.

(3) Any contract in the amount of $25,000 or more which is awarded as a result of this IFB will be subject to all applicable State and Federal regulations, laws, executive orders and policies regarding affirmative action and equal employment opportunities.

(4) All awardees are required to comply with OPWDD's Minority and Woman-Owned Business Enterprises (M/WBE) policy. For details on requirements and procedures, including documentation required for this solicitation, please refer to the Appendix A-Supplement.

J. Prime Contractor's Responsibility

In the event the selected Bidder's proposal includes services provided by another firm, it shall be mandatory for the selected Bidder to assume full responsibility for the delivery for such items offered in the proposal. In any event, OPWDD will contract only with a Bidder, not the Bidder's financing institution or subcontractors. OPWDD reserves the right to review and approve all potential subcontractors. For subcontracts valued at $100,000 and over, the subcontractors must demonstrate financial integrity and stability. In these instances, the subcontractor must complete and execute a Vendor Responsibility Questionnaire. OPWDD shall consider the selected Bidder to be the sole responsible contact with regard to all provisions of the contract resulting from this IFB.

K. Public Officer's Law Requirements

All Bidders and their employees must be aware of and comply with the requirements of the New York State Public Officers Law, and all other appropriate provisions of New York State Law and all resultant codes, rules and regulations from State laws establishing the standards for business and professional activities of State employees and governing the conduct of employees of firms, associations and corporations in business with the State, and for applicable Federal laws and regulations of similar intent. In signing the proposal, each Bidder guarantees knowledge and full compliance with those provisions for any dealings, transactions, sales, contracts, services, offers, relationships, etc. involving the State and/or State employees. Failure to comply with those provisions may result in disqualification from the bidding process and in other civil or criminal proceedings as may be required or permitted by law. Public Officers' Law § 73 bars former State officers and employees from appearing, practicing, or rendering any services for compensation in relation to any matter before their former State agency for a period of two years from their date of termination. Additionally, there is a permanent bar against any such activity before any state agency in relation to any case, application, proceeding or transaction with which such officer or employee was directly concerned and personally participated or which was under his/her active consideration.

L. Omnibus Procurement Act

It is the policy of New York State to maximize opportunities for the participation of New York State business enterprises, including minority and women-owned business enterprises as bidders, subcontractors, and suppliers on its procurement contracts.

Information on the availability of New York State subcontractors and suppliers is available from the Department of Economic Development, Division for Small Business, Albany, New York 12245, Tel. 518.292.5100, Fax: 518.292.5884, email: opa@esd.ny.gov.

A directory of certified minority and women-owned business enterprises is available from the NYS Department of Economic Development, Minority and Women's Business Development Division, 633 Third Avenue, New York, New York 10017, Tel. 212.803.2414, email: mwbecertification@esd.ny.gov
website: http://esd.ny.gov/MWBE/directorySearch.html

M. Contract Execution

Awards are not final and the resultant contract is not considered executed and binding until approved by the New York State's Attorney General and Office of State Comptroller (OSC).

N. Vendor Responsibility Questionnaire

State agencies are required under State Finance Law § 163 (3) (a) (ii), to ensure that contracts are awarded to responsible vendors. Such requirements include, but are not limited to, the Bidder's qualifications, financial stability, and integrity. The Vendor Responsibility Questionnaire is required for contracts $100,000 and over. OPWDD will require a complete Vendor Responsibility Questionnaire with your bid proposal if the contract resulting from this procurement is valued at $100,000 and over. Vendors/not-for-profit provider agencies

are able to file the Vendor Responsibility Questionnaire (VRQ) online via the New York State VendRep System or may choose to complete and submit a paper questionnaire. To enroll in and use the New York State VendRep System, see the www.osc.state.ny.us/vendrep.

O. Health Information Portability and Accountability Act (HIPAA)

The Federal Department of Health and Human Services (HHS) established HIPAA Standards for Privacy of Individually Identifiable Health Information (The Privacy Rule). The Privacy Rule (45 CFR Part 160 and Subparts A and E of Part 164) provides the first comprehensive federal protection for the privacy of health information. The Privacy Rule is carefully balanced to provide strong privacy protections that do not interfere with patient access to, or the quality of, health care delivery. HIPAA has an impact upon how OPWDD and contractors will deal with protected health information of our consumers. Likewise, State Mental Hygiene Law § 33.13 requires disclosure of clinical records to be limited to that information necessary for health care providers to administer treatment.

P. General Duties and Additional Responsibilities

Maintain a level of cooperation with OPWDD necessary for the proper performance of all contractual responsibilities. Agree that no aspect of bidder performance under the Agreement will be contingent upon State personnel, or the availability of State resources, with the exception of all proposed actions of the bidder specifically identified in the Agreement as requiring OPWDD's approval, policy decisions, policy approvals, exceptions stated in the Agreement or the normal cooperation which can be expected in such a contractual relationship or the equipment agreed to by OPWDD as available for the project completion. Cooperate fully with any other contractor that may be engaged by OPWDD. Agree to meet periodically with OPWDD representatives to resolve issues and problems. Recognize and agree that any and all work performed outside the scope of the Agreement or without consent of OPWDD shall be deemed by OPWDD to be gratuitous and not subject to charge by the bidder.

Q. NYS Information Security Breach and Notification Act (NYS Technology Law, § 208)

"Contractor shall comply with the provisions of New York State Information Security Breach and Notification Act (General Business Law § 889-aa; State Technology Law § 208). Contractor's negligent or willful acts or omissions, or the negligent or willful acts or omissions of Contractor's agents, officers, employees, or subcontractors."

The "New York State Information Security Breach and Notification Act" requires entities that conduct business with New York State and own or license "private" data to notify state residents affected by any security breach that results in unauthorized acquisition of the data. "Private" data is defined as unencrypted computerized information that can identify the individual, combined with one of the following data elements: (a) social security number, (b) driver's license or non-driver identification number" or (c) financial account information such as credit card or debit cards numbers in combination with access codes or PIN numbers. (Private data is considered unencrypted when either identifying information or the data element is not encrypted or is encrypted with a key that has been acquired).

The Act authorizes the State Attorney General to sue a business violating the statute in order to recover damages for actual costs or losses, including consequential financial losses incurred by persons entitled to notification. If a business engages in knowing or reckless violations, the court can impose a civil penalty of the greater of $5,000 or $10 per instance of failed notification up to $150,000. The remedies provided by this section shall be addition to any lawful remedy available, possibly permitting private actions.

R. Nondiscrimination in Employment in Northern Ireland: MacBride Fair Employment Principles

In accordance with State Finance Law § 165, the bidder, by submission of this bid, certifies that it or any individual or legal entity in which the bidder holds a 10% or greater ownership interest, or any individual or legal entity that holds a 10% or greater ownership in the bidder interest has no business operations in Northern Ireland. If the bidder or any of its aforementioned affiliations has business operations in Northern Ireland, then they shall take lawful steps in good faith to conduct any business operations that it has in Northern Ireland in accordance with the MacBride Fair Employment Principles relating to nondiscrimination in employment and freedom of workplace opportunity regarding such operations in Northern Ireland, and shall permit independent monitoring of their compliance with such Principles.

S. Bidder's Certification of Compliance with State Finance Law § 139-k (5)

In accordance with New York State Finance Law § 139-k (5), the bidder, by submission of this bid, certifies that they are subject to the provisions of State Finance Law §§ 139-k and 139-j and all information provided to OPWDD with respect to State Finance Law § 139-k is complete, true, and accurate.

T. Bidder's Affirmation of Understanding and Agreement pursuant to State Finance Law § 139-j (3) and § 139-j (6)(b)

The bidder, by submission of this bid, certifies that it understands and agrees to comply with the procedures of OPWDD as it relates to permissible contracts as required by State Finance Law 139-j (3) and 139-j (6)(b).

U. Bidder Disclosure of Prior Non-Responsibility Determinations

New York State Finance Law § 139-k (2) obligates the Office for People With Developmental Disabilities (OPWDD) to obtain specific information regarding prior non-responsibility determinations with respect to State Finance Law §139-j. This information must be collected in addition to the information that is separately obtained pursuant to State Finance Law §163(9). In accordance with State Finance Law § 139-k, bidders must disclose whether there has been a finding of non-responsibility made within the previous four (4) years by any Governmental Entity due to: (a) a violation of State Finance Law § 139-j or (b) the intentional provision of false or incomplete information to a Governmental Entity. State Finance Law § 139-j sets forth detailed requirements about the restrictions on contacts during the procurement process. A violation of State Finance Law §139-j includes, but is not limited to, an impermissible contact during the restricted period (e.g., contacting a person or entity

other than the designated contact person(s), when such contact does not fall within one of the exemptions).

As part of its responsibility determination, State Finance Law § 139-k (3) mandates consideration of whether a bidder fails to timely disclose accurate or complete information regarding the above non-responsibility determination. In accordance with law, no Procurement Contract shall be awarded to any bidder that fails to timely disclose accurate or complete information under this section, unless a finding is made that the award of the Procurement Contract to the bidder is necessary to protect public property or public health safety, and that the bidder is the only source capable of supplying the required Article of Procurement within the necessary timeframe.

The bidder, by submission of its bid certifies that no government entity has made a finding of non-responsibility regarding the individual or entity seeking to enter into this procurement contract. If the individual or entity has had a finding of non-responsibility due to a violation of State Finance Law 139-j or due to the intentional provision of false or incomplete information submitted to a government entity, then the said individual or entity must provide a detailed statement regarding the finding.

Additionally, the bidder by submission of its bid certifies that no government entity has ever terminated or withheld a procurement contract from the individual or entity seeking to enter into this procurement contract due to the intentional provision of false or incomplete information. If the individual or entity has been terminated or withheld from a procurement contract, then said individual or entity must provide a detailed statement regarding the finding.

V. Non-Collusive Bidding Certification

In accordance with State Finance Law § 139-d, the bidder by submission of this bid certifies that they and each person signing on behalf of the bidder certifies, and in the case of joint proposal, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of his knowledge and belief:

1. The prices in this proposal have been arrived at independently, without collusion, consultation, communication, or agreement, for the purposes of restricting competition, as to any matter relating to such prices with any other bidder or with any competitor, and

2. Unless otherwise required by law, the prices which have been quoted in this proposal have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to opening, directly or indirectly, to any other bidder or to any competitor; and

3. No attempt has been made or will be made by the bidder to induce any other person, partnership, or corporation to submit or not to submit a proposal for the purpose of restricting competition.

W. Public Officers Law Certification

In accordance with Public Officers Law § 73(4)(a)(i) no State employees shall sell any goods or services having a value in excess of twenty-five dollars to any State agency, unless such goods and services are provided pursuant to an award or contract letter after public notice and competitive bidding.

By submission of this bid, the bidder certifies that no employee, owner or individual otherwise associated with the bidder was ever a New York State officer or employee, or if they were ever or currently a New York State officer or employee, their organization pursued and awarded this contract through a competitive bidding process in compliance with the Public Officers Law 73(4)(a)(i).

Public Officers Law § 73(8)(a)(i) provides that no person who has served as a State officer or employee shall, within a period of two years after termination of such service or employment, appear or practice before such State agency or receive compensation for any services rendered by such former officer or employee on behalf of any person, firm, corporation, or association in relation to any case, proceeding, or application or other matter before such agency.

By submission of this bid, the bidder certifies that no employee, owner or individual otherwise associated with the bidder was ever a New York State officer or employee, or they are formerly a New York State officer or employee and any past employment with the State occurred prior to the two-year prohibition period and as a result their organization is in compliance with the Public Officers Law (8)(a)(i).

X. Bidder's Affirmation of Understanding Pursuant to State Labor Law § 201-g

By submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid each party thereto certifies as to its own organization, under penalty of perjury, that the bidder has and has implemented a written policy addressing sexual harassment prevention in the workplace and provides annual sexual harassment prevention training to all its employees. Such policy shall, at a minimum, meet the requirements of Labor Law § 201-g.

15. Consumer Safety Information

OPWDD provides services to individuals exhibiting Pica, which is a medical disorder characterized by an appetite for largely non-nutritive substances, e.g., cigarette butts, paper, gum, etc. Attention to the sanitation and cleanliness of the areas surrounding OPWDD's state operated program sites and residential buildings is very important to the health and safety of those we serve. Please ensure care is taken to properly dispose of cigarette butts and rubbish while on OPWDD property.

OPWDD property has special receptacles for cigarette butt disposal. Contractor and subcontractor employees shall use these receptacles and throw trash in garbage cans or dumpsters. Compliance with this policy is appreciated.

16. Consultant Disclosure

Effective June 19, 2006, contractors doing business with the State of New York in a "consulting" capacity will be required to file forms disclosing, by employment category, the number of persons employed by them and their subcontractors (if any) as a consulting firm or an individual consultant; the number of hours worked; and the monetary compensation received from the State of New York for work performed by these employees. Reporting will be required via the utilization of two separate forms – "Form A" and "Form B".

In general, however, Form A is to be completed once upon initial contract award and is used to report "planned employment". Form B is required annually and reports on "actual employment figures" for the preceding state fiscal year. The New York State fiscal year commences on April 1st and concludes on March 31st.

17. Evaluation Criteria: Method of Award

A. Contract Award

OPWDD will select the responsible and responsive Bidder that will provide the lowest Total Estimated Annual Cost per Region. There are four (4) regions; each region will be evaluated separately. Bidders may bid on one or multiple regions and multiple contracts may be awarded. All sites included in a region are to be serviced by the Bidder who is awarded the contract for that region. All bids must be submitted on an original Cost Proposal Form (pg. 26). In the event of a tie bid, the award will be determined by OPWDD based on length of experience that can successfully demonstrate proficiency conducting medication reviews for people with developmental disabilities in settings that require medication regimen reviews.

B. Right to Reject

Only proposals judged to be responsive to the submission requirements set forth in this IFB will be evaluated. An incomplete Cost Proposal Form or any alteration to the Cost Proposal Form may result in your bid not being considered. OPWDD reserves the right to reject any and all offers.

C. Mathematical Errors

If the Bidder submits a cost proposal which contains mathematical errors, the Total Estimated Annual Cost per Region will be calculated using the pricing submitted for Cost per Review (B).

D. Confirmation of Ability to Provide Service

OPWDD reserves the right to confirm any Bidder has the qualifications, experience, ability, and financial standing to perform services as outlined in the scope of work. This may include requesting information regarding equipment, workforce, suppliers, etc.

Qualifications & Scope of Work

The Office for People With Developmental Disabilities (OPWDD), a New York state agency which provides services to people with intellectual and developmental disabilities, is contracting for Medication Regimen Review Services to remain in compliance with regulation 14 CRR-NY 633.17.

There will be a Pre-bid Conference Call at 1:00 PM on Wednesday, June 18, 2025, to discuss service requirements and expectations of Medication Regimen Review Services with Bidders that are interested in providing services to OPWDD. Bidders will have the opportunity to ask clarifying questions regarding the Scope of Work. Attendance at the Conference Call is not a requirement for bidding, but it is strongly recommended.

Medication Regimen Reviews are required for people residing in certified Individual Residential Alternatives (IRA) and Intermediate Care Facilities (ICF), which are homes owned and operated by OPWDD. IRA's and ICF's are located across New York State. Medication Regimen Reviews are required for approximately 7,057 people living in IRAs and approximately 445 people living in ICF residences. ***Occupancy as of March of 2024 is 5,056 people living in IRAs and 304 people living in ICF residences, but Contractor must be able to complete all reviews should OPWDD increase to full capacity.***

Region	DDSOO	IRA Total Capacity	ICF Total Capacity	IRA Current Occupancy as of March 2024	ICF Current Occupancy as of March 2024
1	Long Island	265	98	210	86
	Bernard Fineson	161	24	134	6
	Brooklyn	157	44	134	16
	Metro	242	0	212	0
	Staten Island	258	24	194	20
2	Finger Lakes	1266	0	863	0
	Western	990	0	658	0
3	Capital District	483	0	320	0
	Sunmount	291	169	178	123
	Hudson Valley	921	0	619	0
	Taconic	480	20	286	7
4	Broome	385	66	328	46
	Central NY	1158	0	920	0
	Totals	**7057**	**445**	**5056**	**304**

Estimated reviews needed are listed in Exhibit A. Exhibit A calculations are based on total capacity.

Regulations permit registered nurses, physicians, physician's assistants, or pharmacists to conduct Medication Regimen Reviews on no less than an annual basis for an IRA. Regulations permit that a

pharmacist conduct reviews in ICFs on no less than a quarterly basis. Increased need for reviews may be required and requested in both IRA and ICF settings based on each person's medical conditions and necessities.

Medication Regimen Reviews are completed using OPWDD's Electronic Health Record System (EHR). Reviews will primarily be completed remotely unless other arrangements have been made with a specific region. Training will be provided by OPWDD, and the Contractor is expected to comply with training requirements. The Contractor is responsible for travel required for training at a time and location specified by OPWDD. Issues of connectivity not related to OPWDD's network are the sole responsibility of the Contractor. If the Contractor is unable to use the EHR system due to non-OPWDD related connectivity issues, on-site reviews must be conducted.

OPWDD will issue a laptop to each of the Contractor's employees who are to perform reviews. Laptops are not to be transferred to another employee without permission from OPWDD. The Contractor is responsible for travel required for obtaining laptops at a time and location specified by OPWDD. The laptop is the sole property of OPWDD and may only be used to conduct contracted duties. The laptop must be made available for inspection and update within one week, upon request from OPWDD. All equipment issued by OPWDD must be returned within 10 days of the end date of contractual services. Contractors will be responsible for the cost of unreturned OPWDD owned equipment. Unreturned equipment costs will be deducted from final payments. The Contractor will be issued various accesses to OPWDD systems, including but not limited to: EHR, Pulse Secure, Prescription Drug Contract Database, and Outlook. All OPWDD accesses will be terminated at the end of contractual services.

This agreement is for an independent contractor to provide contractual services for OPWDD and is not expected to lead to New York State employment. Travel, food, gas, lodging, tolls, internet access, and other miscellaneous expenses shall be the sole responsibility of the Contractor.

The Contractor agrees to provide continuous service throughout the term of the agreement and will independently ensure full compliance with regulation 14 CRR-NY 633.17 (18), medication regimen review, including any changes which may occur during the contract period.

Scheduling reviews for each site is the sole responsibility of the Contractor. The Contractor will receive monthly review assignments and must complete assigned reviews within 30 days to remain in good standing. Each review takes approximately 60 minutes to fully and thoroughly complete. The Contractor is required to respond in writing to requests or questions from OPWDD within 3 business days. Site phone numbers, email addresses, and contact information will be provided to the Contractor during contract execution. The Contractor will comply with all applicable rules and regulations, and actively communicate with members of each persons' healthcare team related to questions or concerns regarding the medication regimens.

The Medication Regimen Review shall include at a minimum:

A. A review of all medications the person has taken during the review period (since the previous review), including routine, PRN, over the counter, STAT, herbal, topical, time-limited, and discontinued medications.

B. A review of the person's medication records for potential adverse reactions, allergies, interactions, contraindications, or irregularities.
C. A review of any related laboratory work.
D. An assessment of the person's response to medication therapy to determine if the medication is achieving the desired effect(s).
E. Recommendations to the primary, and/or consulting prescriber, of any indicated changes in the person's medication regimen.
F. A determination of the need for a more frequent review dependent upon the person's medical status.
G. Documentation of the review, findings, and any recommendations made by entering all results into EHR utilizing a template within this system. A copy of the EHR Medication Regimen Review Template is attached as Exhibit B. This is for reference only. All results of the review must be entered electronically into EHR by the Contractor.

Requirements:

A. Based on extensive medical records and the limitations of EHR, each review takes approximately 60 minutes to fully and thoroughly complete. Contractors should account for this time requirement when placing their bids.
B. A current NYS license and registration (if applicable). The Contractor is responsible for ensuring that they remain current and in compliance throughout the contract term. Renewed documents must be forwarded to OPWDD.
C. At least 3 years of experience that can successfully demonstrate proficiency conducting medication reviews for people with developmental disabilities in settings that require medication regimen reviews.
D. Completion of all required trainings for contractors, as per NYS Mental Hygiene Law Part 633.8 regulations.
E. The Contractor **must not** have a current contract with the New York State Office of General Services to provide or dispense pharmacy drugs to NYS agencies or be a subcontractor of a current contract holder, due to potential conflicts of interest.
F. The Health Insurance Portability and Accountability Act of 1996 (HIPAA) mandates the confidentiality of all information and records included and related to the policies, procedures, and records of a facility or site and compliance with all future rules and regulations of HIPAA. The Contractor must have the ability to become HIPAA compliant and sign a Business Associate Agreement prior to the execution of the contract.

Accounting:

A. Prevailing Wages do not apply to this contract.
B. Invoices must indicate Invoice number, PO# OPD01- , Contract number, list the DDSOO and sites reviewed and the date of service. A separate invoice must be submitted for each DDSOO. Invoices are to be submitted for payment within thirty (30) days of service to:

OPWDD _____ DDSOO
Unit ID: 36602__
C/O NYS OGS BSC Accounts Payable Building 5, Fifth Floor
1220 Washington Ave.,
Albany, NY 12226-1900

DDSOO	Unit ID
Bernard Fineson	3660231
Brooklyn	3660232
Broome	3660230
Capital District	3660233
Central NY	3660234
Finger Lakes	3660235
Hudson Valley	3660236
Long Island	3660237
Metro	3660238
Staten Island	3660239
Sunmount	3660240
Taconic	3660241
Western	3660242

The State of New York may require the Contractor to submit billing invoices electronically. Information regarding eInvoicing may be found at: https://bsc.ogs.ny.gov/nys-vendors

C. Payments will be made based on actual services rendered. Payment for invoices submitted by the Contractor shall only be rendered electronically unless payment by paper check is expressly authorized by the head of the State Agency, in the sole discretion of the head of such State Agency, due to extenuating circumstances. Such electronic payment shall be made in accordance with OSC's procedures and practices to authorize electronic payments. The Contractor is responsible for correcting inaccurate invoices to reflect actual services received within 10 days of notification from OPWDD. Payment will not be released without accurate invoicing.

D. Contractor Liability: In the event the Contractor fails to provide services as stated in the Scope of Work, within the time frames specified, and OPWDD is required to procure services from another vendor, the Contractor will be held liable for any costs over and above the contractual price for the site(s) involved. In such a situation, the additional cost for these services will be billed to the Contractor or payment will be reduced for the additional costs incurred.

EXHIBIT A

Region 1				
DDSOO	NYS Counties Covered	Estimated IRA Reviews	Estimated ICF Reviews	Estimated Review Total per DDSOO
Long Island DDSOO	Nassau, Suffolk	265	392	657
Bernard Fineson DDSOO	Queens	161	96	257
Brooklyn DDSOO	Kings	157	176	333
Metro DDSOO	Bronx, New York	242	0	242
Staten Island DDSOO	Richmond	258	96	354
			Total Estimated Annual Reviews Region 1	**1843**
Region 2				
DDSOO	NYS Counties Covered	Estimated IRA Reviews	Estimated ICF Reviews	Estimated Review Total per DDSOO
Finger Lakes DDSOO	Chemung, Livingston, Monroe, Ontario, Schuyler, Seneca, Steuben, Wayne, Wyoming, Yates	1266	0	1266
Western NY DDSOO	Allegany, Cattaraugus, Chautauqua, Erie, Genesee, Niagara, Orleans	990	0	990
			Total Estimated Annual Reviews Region 2	**2256**
Region 3				
DDSOO	NYS Counties Covered	Estimated IRA Reviews	Estimated ICF Reviews	Estimated Review Total per DDSOO
Capital District DDSOO	Albany, Fulton, Montgomery, Rensselaer, Saratoga, Schenectady, Schoharie, Warren, Washington	483	0	483
Sunmount DDSOO	Clinton, Essex, Franklin, Hamilton, Jefferson, St. Lawrence	291	676	967
Hudson Valley DDSOO	Orange, Rockland, Sullivan, Westchester	921	0	921
Taconic DDSOO	Columbia, Dutchess, Greene, Putnam, Ulster	480	80	560
			Total Estimated Annual Reviews Region 3	**2931**
Region 4				
DDSOO	NYS Counties Covered	Estimated IRA Reviews	Estimated ICF Reviews	Estimated Review Total per DDSOO
Broome DDSOO	Broome, Chenango, Delaware, Tioga, Tompkins, Otsego	385	264	649
Central NY DDSOO	Cayuga, Cortland, Herkimer, Lewis, Madison, Oneida, Onondaga, Oswego	1158	0	1158
			Total Estimated Annual Reviews Region 4	**1807**

EXHIBIT B
EHR Medication Regimen Review Form

*The tabs at the top are read-only and will display the existing Medications, Lab Results, Vital Signs, Immunizations, Medication Allergies and Diagnoses.

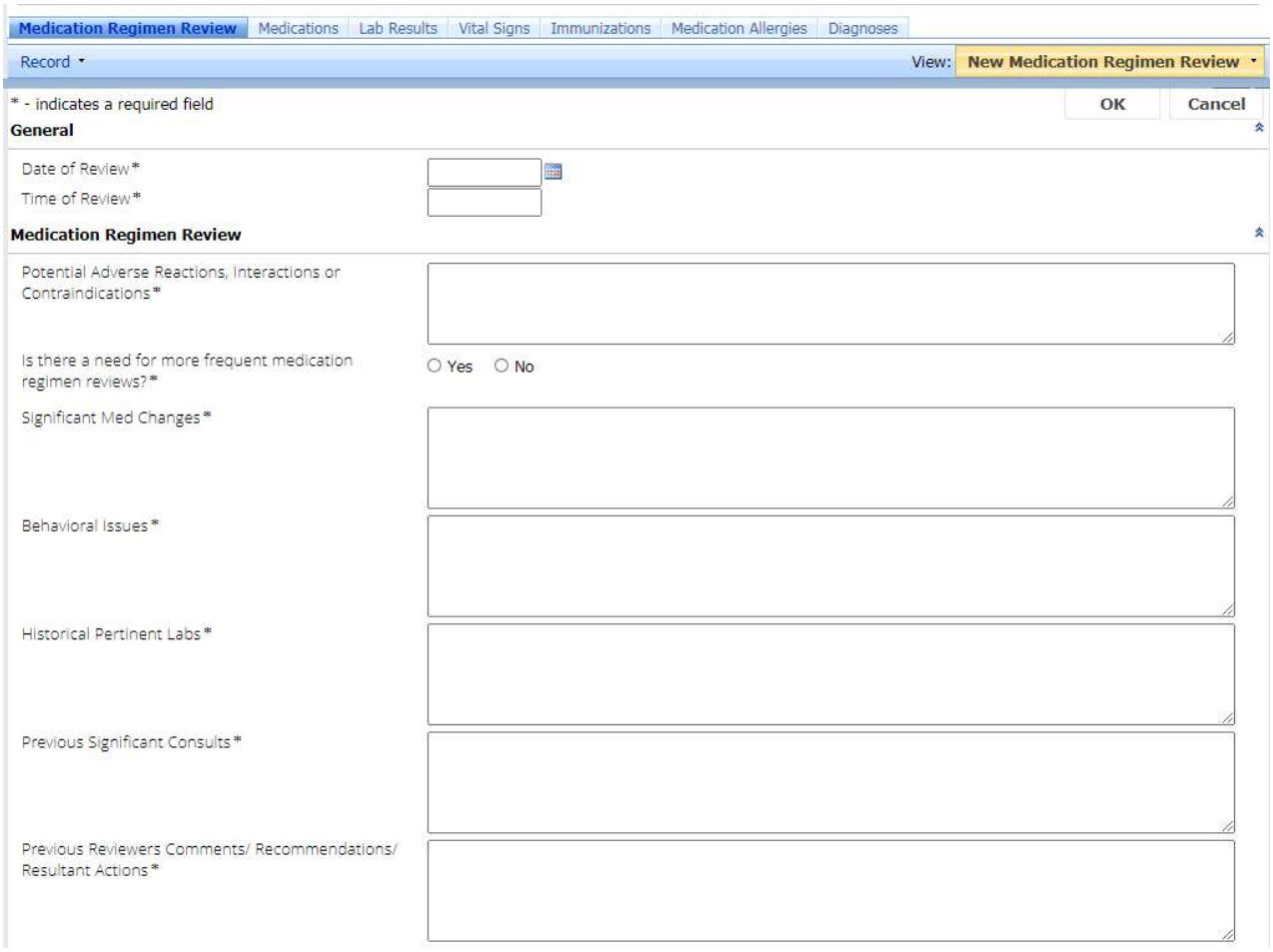

EXHIBIT B continued

Findings

I have *

- ☐ Reviewed complete list of medications that this person has taken during the review period including routine, PRN, over-the-counter, topical, time-limited, and discontinued medications.
- ☐ Reviewed the person's medication record for potential adverse reactions, allergies, interactions, contraindications, unnecessary medications, or irregularities (e.g. medications not taken in accordance with the usual recommendations).
- ☐ Reviewed any related lab work.
- ☐ Reviewed the rationale, reason or purpose for the medication(s).
- ☐ Assessed this person's documented response to medication therapy to determine if the medication is achieving the desired (effects).

Findings *

- ○ No significant findings - Medication regime is achieving desired effects without potential adverse reactions, interactions, contraindications, irregularities
- ○ Continue current monitoring
- ○ Determination of the need for a new review depending upon the person's medical status

Recommendations

Recommendations - Please provide additional comments *

- ☐ Labwork
- ☐ Medication Administration Change (change in time, form, instructions)
- ☐ Potential adverse interaction or contraindication
- ☐ Potential for allergy or sensitivity
- ☐ Continued monitoring of EPS/TD/AIMS
- ☐ Duration of therapy
- ☐ Therapeutic duplication concerns
- ☐ Medications with the potential to induce dry mouth and subsequent chocking hazard (particularly anticholinergic agents)
- ☐ Other

Action

Action *

- ☐ No action needed
- ☐ Recommendations send to prescriber
- ☐ Recommendations send to interdisciplinary team

* - indicates a required field

OK Cancel

Cost Proposal Form

OPWDD will select the responsible and responsive Bidder that will provide the lowest Total Estimated Annual Cost per Region. There are four (4) regions; each region will be evaluated separately. Bidders may bid on one or multiple regions and multiple contracts may be awarded. All sites included in a region are to be serviced by the Bidder who is awarded the contract for that region. Please note, each review takes approximately 60 minutes to fully and thoroughly complete. In the event of a tie bid, the award will be determined by OPWDD based on length of experience that can successfully demonstrate proficiency conducting medication reviews for people with developmental disabilities in settings that require medication regimen reviews. See page 18, Section 17. Evaluation Criteria: Method of Award for more information.

To calculate the Total Estimated Annual Cost per Region, enter your Cost per Review (B) for each region you wish to bid, then multiply the Estimated Annual Reviews (A) by the Cost per Review (B) to equal the Total Estimated Annual Cost per Region (A x B).

Regions	Estimated Annual Reviews (A)	Cost per Review (B)	Total Estimated Annual Cost per Region (A x B)
Region 1	1843	$	$
Region 2	2256	$	$
Region 3	2931	$	$
Region 4	1807	$	$

_____ _____

Bidder Signature | Print Name & Title

This bid is valid for _____ days (Bids shall be valid for not less than 180 days)

Name of Company:	
Address:	
Federal ID Number:	Telephone:
Date:	Email:

No-Bid Form

Bidders choosing not to bid are requested to complete and return only this form.

☐ We do not provide the requested services. Please remove our firm from your mailing list.

☐ We are unable to bid at this time because:

_____

_____

_____

_____

_____

_____

_____

☐ Please retain our firm on your mailing list.

_____
(Firm Name)

_____ _____
(Signature) (Date)

_____ _____
(Print Name) (Title)

_____ _____
(E-mail) (Telephone)

Failure to respond to bid invitations may result in your firm being removed from our mailing lists.