



# WELCOME

Medicaid Enterprise System  
VENDOR CONFERENCE

Innovate, Collaborate, Transform Health Care  
September 16, 2025

**NEXUS**  
OKLAHOMA'S MES MODERNIZATION

# DISCLAIMER

This presentation is based on the best available information as of the date of this event, and it contains high-level plans and estimated dates that are strategic and/or speculative in nature.

Any future procurement information presented today should not be viewed as an obligation on the part of the Oklahoma Health Care Authority (OHCA), Oklahoma's Medicaid agency. All information contained in this presentation, whether written or spoken, is subject to change.

Because of the nature and intended purpose of this presentation, only general questions will be fielded. As our effort progresses, the agency will avail itself with additional industry outreach as necessary.

Please note this event is being recorded.

# OPENING REMARKS

Kyle Janzen

Chief of Business Enterprises



# PURPOSE AND OBJECTIVES

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- Purpose

- The purpose of today's event is to provide vendors information on the strategy, high-level roadmap and upcoming procurement activities for OHCA's program to modernize its Medicaid Enterprise Systems (MES).

- Objectives

- Introduce and familiarize vendors with NEXUS, the Oklahoma MES Modernization Program, by providing current information.
- Ensure vendors know that Oklahoma is "open for business" and is looking for strategic partners who share the same goal of making NEXUS a success.
- Provide information and insight to vendors on how to do business with the State of Oklahoma, which we hope will result in a higher degree of compliant and responsive bids.

# TERMS AND DEFINITIONS

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- **Medicaid Enterprise Systems (MES)**
  - Term used to define the systems that support the mission of the Oklahoma Health Care Authority. The MES ecosystem includes but is not limited to the following systems:
    - Oklahoma Medicaid Management Information System (OKMMIS)
    - eQSuite, Oklahoma's Care Management System
    - Electronic Visit Verification (EVV)
- **Modernization**
  - Process of transforming a legacy MMIS into a more flexible, efficient system to reduce risk and deliver better services to stakeholders.
- **Modularity/Modularization**
  - Effort to replace the current OKMMIS (legacy) with a modern suite of systems that create modules to support unique and separate business function(s).
- **NEXUS**
  - Oklahoma's MES Modernization project to modularize, modernize and integrate the systems that fall under the MES portfolio.

# AGENDA

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## 1 Strategy

- Stephen Miller, Chief Technology Officer

## 2 NEXUS Overview

- Kyle Janzen, Chief of Business Enterprises

## 3 Security Strategy

- Victor Patuzzi, Director of Security Governance

## 4 Procurement Guidelines

- Leah Price, Professional Service Contracts Director
- Conner Mulvaney, Privacy Officer & Contract Attorney

## 5 Navigating the State Bidding Process

- Jeannie Troxel, OMES Supplier Relations

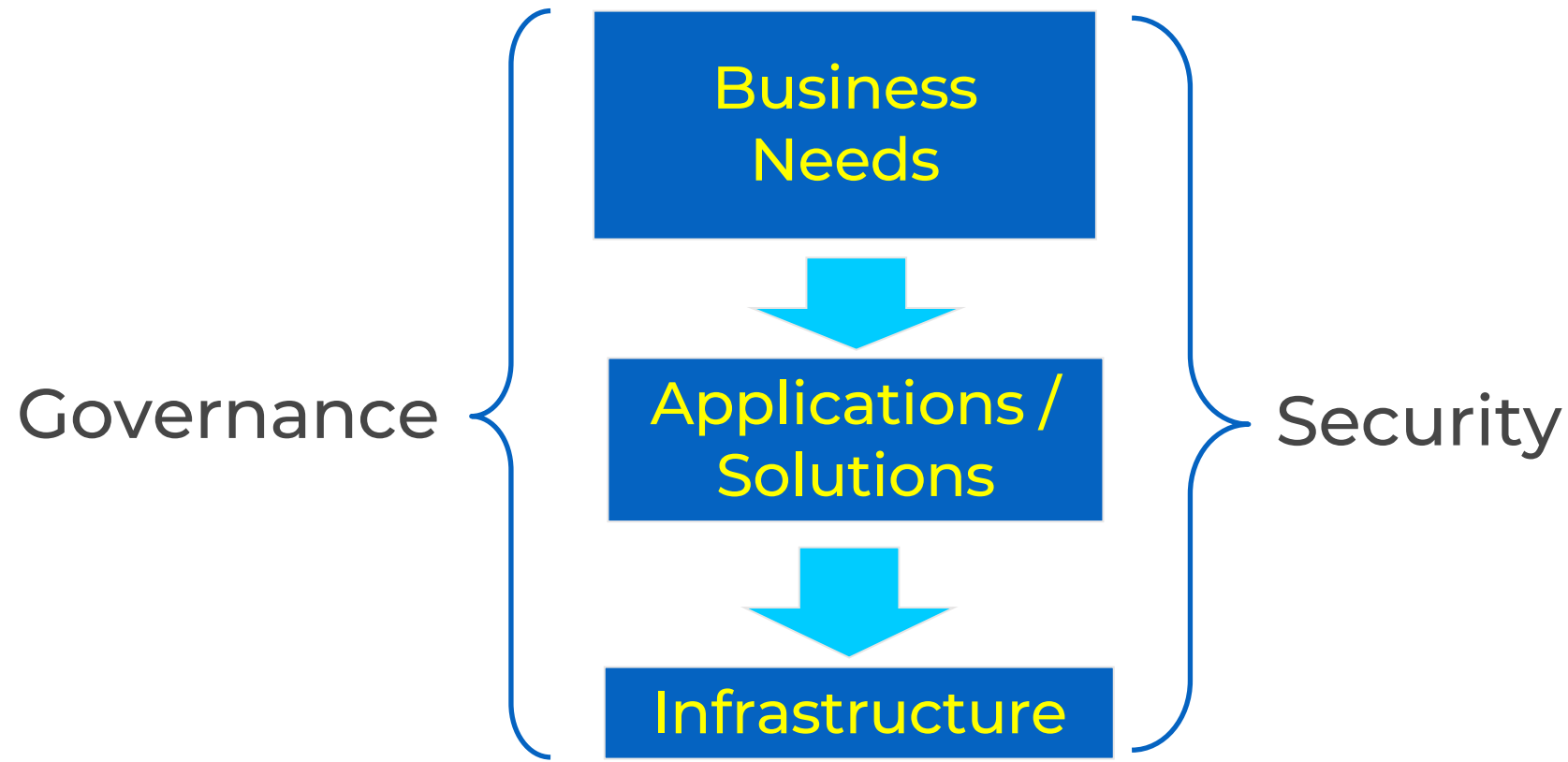
## 6 Q&A - Closing Remarks

# STRATEGY

Stephen Miller  
Chief Technology Officer



# ARCHITECTURAL CONCEPTS



**Adaptability. Usability & Ubiquitous Access**

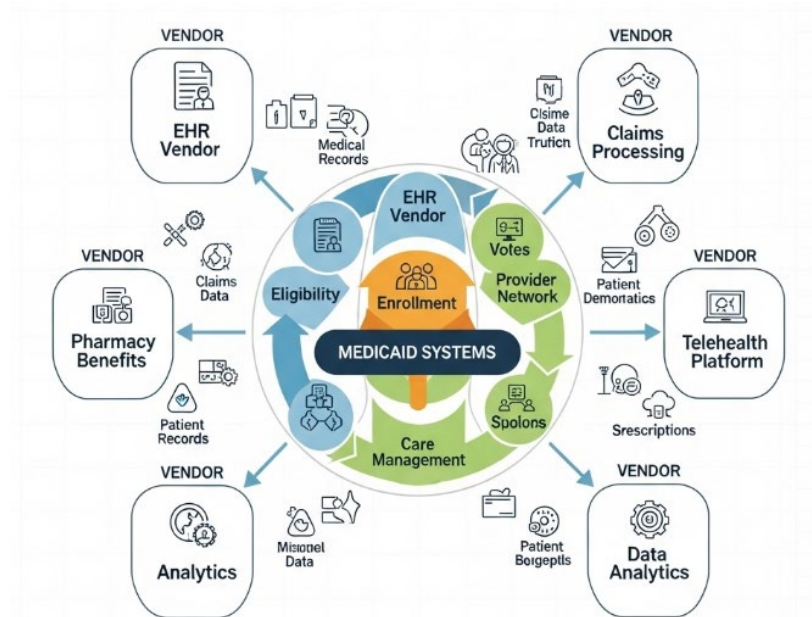
Adaptive Architecture, Usability Focused, Built on Standards  
Service Oriented & Delivered Anywhere

# INTEROPERABILITY

The ability to integrate devices and systems so that they truly act as one.

Literally to operate one from inside another, exchanging data to enable improved outcomes.

- Considerations to vendors who operate within ecosystem / reference architecture
- Have proven solutions & operate on standards
- Considered first, but not exclusively.



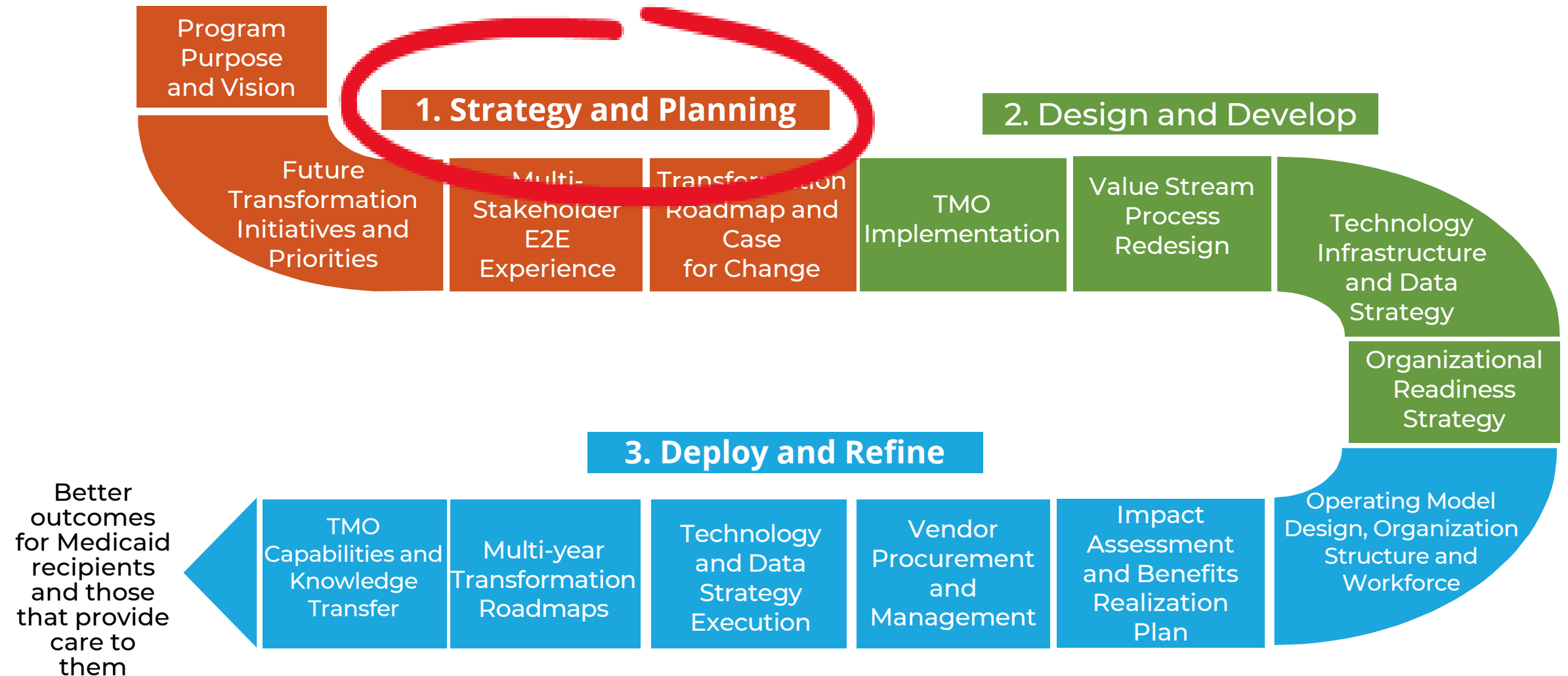
- Greater supportability
- Improved reliability
- Shared learning
- Reduced costs
- Safer more stable environment
- Increased staff, member / provider satisfaction

Total Solution Concept  
Interoperable, Functional, Supportable

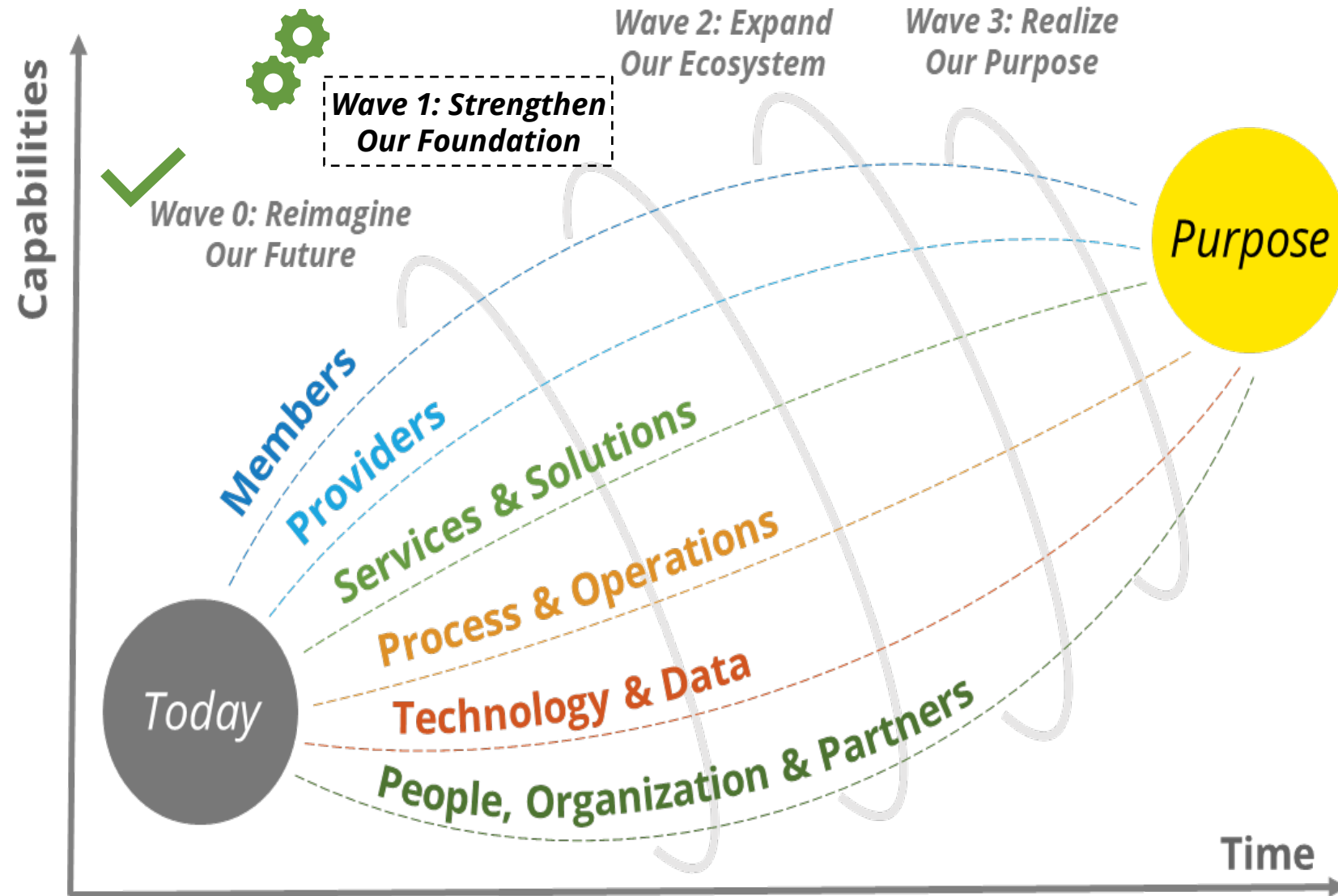
# GUIDING PRINCIPLES FOR IT SOLUTIONS

- Ensure solutions start with the end in mind.
- ROI understood.
- Clear expectation of results/benefits gained.
- What problem will it solve and how will we measure success.
- End user experience key consideration
  - **Easy to learn, hard to forget**
- Ensure fits in ecosystem/reference architecture.
- Secure and supportable!

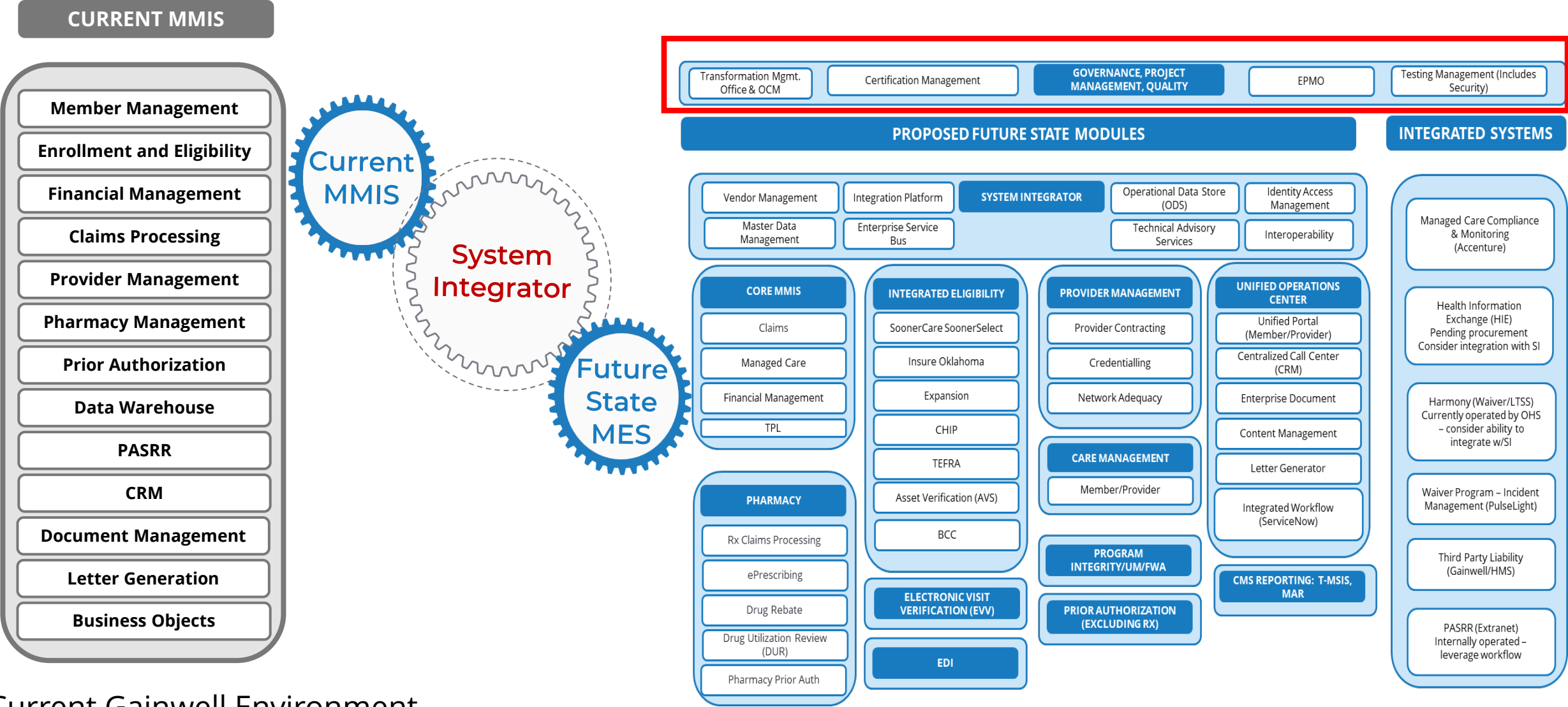
# MES MODERNIZATION ROADMAP



# MES READINESS FROM A PEOPLE PERSPECTIVE



# FROM CURRENT TO MODERNIZED SOLUTION



\*Current Gainwell Environment

**CONNECTED  
SYSTEMS  
ALREADY  
IN THE  
ARCHITECTURE**



# OHCA FOUNDATIONS - SERVICENOW PLATFORM

The screenshot shows the ServiceNow OHCA platform interface. A sidebar on the left contains a list of favorites, with 'OHCA ServiceNow Applications' highlighted by a red box. A red arrow points from this box to the 'Transformation Management Office' card in the 'Browse topics' section. The 'Transformation Management Office' card is also circled in red. Below the 'Browse topics' section, the 'My active items' section shows a task 'Approve Request' with a 'View details' button. The 'Recently used' section shows a 'Request a contract' button.

OHCA ServiceNow Applications

**Browse topics**  
Navigate through topics to explore our services and resources.

- Agency Requests**  
Access other agency request forms, including IT help, communications...
- Contracts Requests**  
Initiate a request for a new contract or submit an amendment to an...
- Legal Services**  
Submit a legal consultation/advisory request
- Technology Services**  
Submit a request to OHCA BE/OMES system support teams
- Transformation Management Office**  
Submit new ideas for projects or policy changes to the TMO

**My active items**

Tasks 1 >

Showing 1 of 1 tasks

Overdue 20 days

**Approve Request**

NE0001183

Short description  
CSM implementation

[View details](#)

**Recently used**

[Request a contract](#)

## ServiceNow OHCA Deployment

- ✓ OHCA FedRamp/HIPAA Secure Instance
- ✓ TMO (Transformation Mgmt. Office) (Intake)
- ✓ Project/Portfolio Mgmt. (SPM)
- ✓ Legal Workflows (PSDS)
- ✓ Technology Services Helpdesk (ITSM)
- ✓ OMES Ticket Interface
- ✓ Contracts Mgmt.
- ✓ Extensive Reporting & Dashboards
- ✓ MES Module Specific Workflows

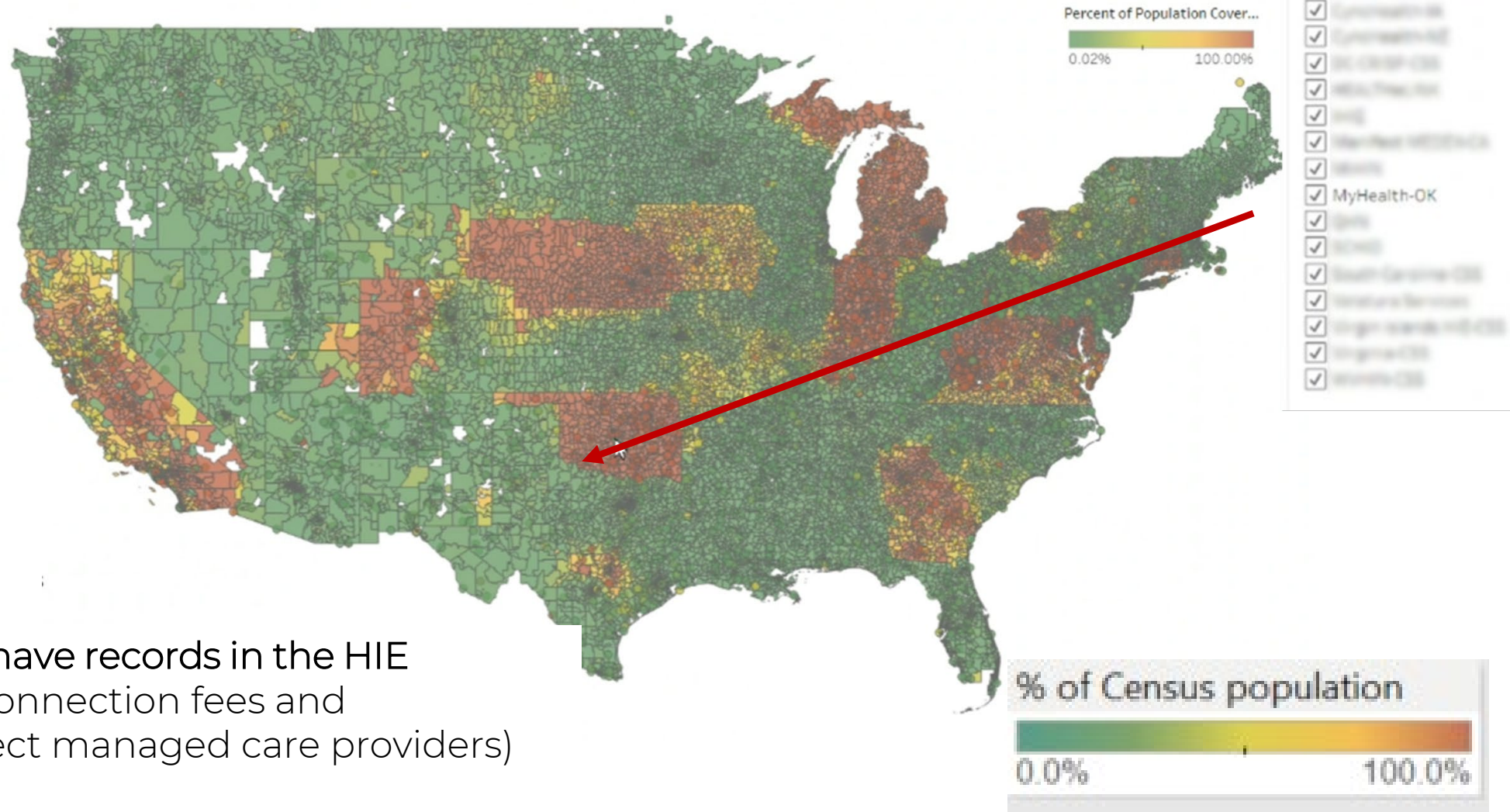
# OKLAHOMA'S HIE IS TOP 10 IN DATA DENSITY AND PROVIDER FUNCTIONS

## WHY HIE

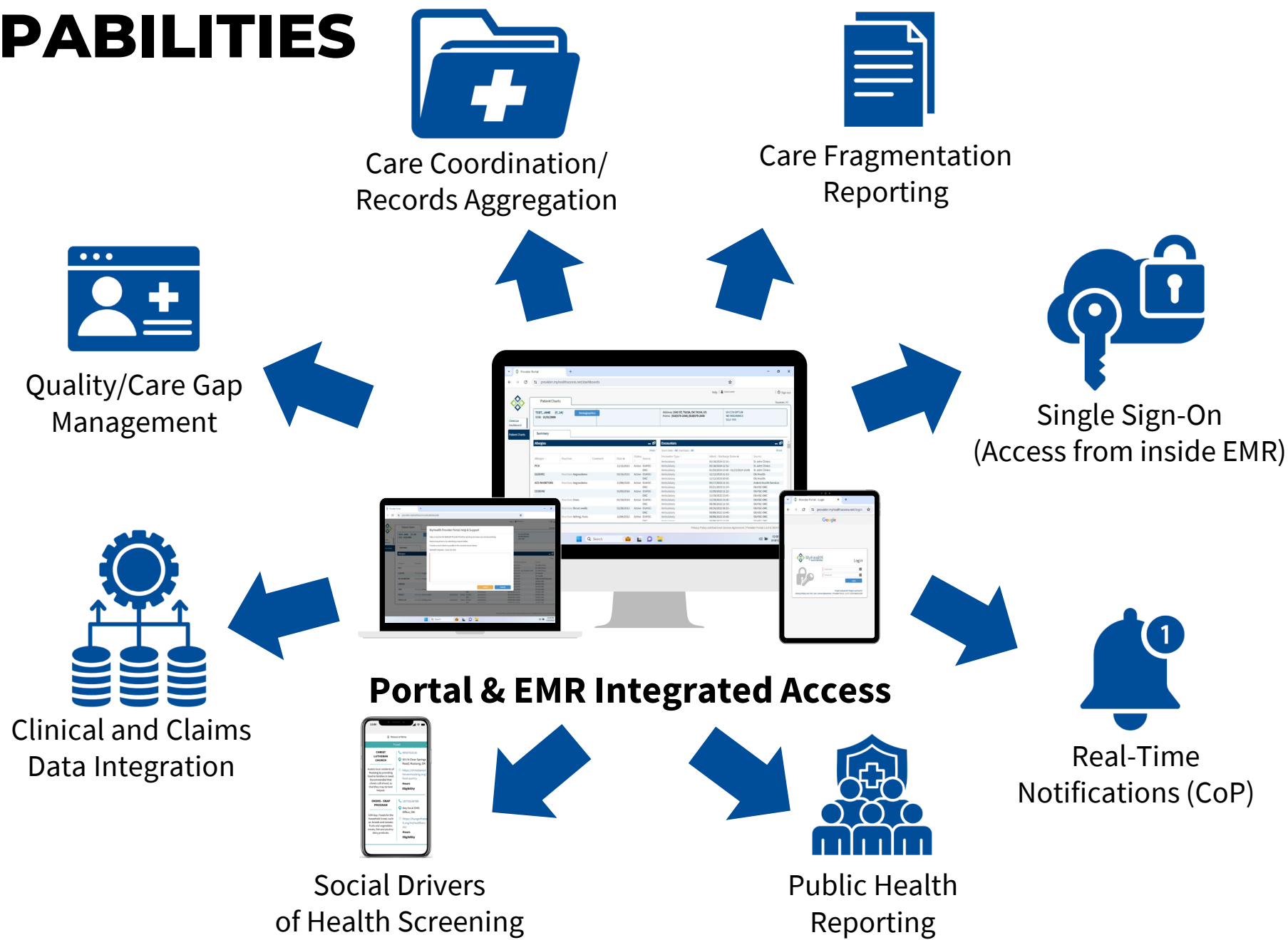
- Reduce costs due to redundant testing
- Improve care coordination
- Solve for care fragmentation

## KEY STATS

- 4.5 million identities
- 600 organizations
- Participating at 2,000+ locations
- **98% of Oklahomans have records in the HIE**
- Incentives to cover connection fees and participation (for select managed care providers)



# HIE CAPABILITIES



# OHCA'S GOOGLE CLOUD (GCP)

FedRamp Compliant/HIPAA Certified, OHCA/CMS terms  
Protecting our data, no information flows to any public AI models

**Google Cloud Data Platform**  
Secure Storage and Sharing of Data, Self Contained



Secure Data Storage



Seamless Data Sharing



Self-Contained Environment

**Dialogflow CCAI**  
Advanced telephony/call center integration with superior language understanding for customer service.



Call Center Integration



Superior Language Understanding




Enhanced Customer Service

 Project Currently Underway


 Use Cases in Considerations

## AI in State Medicaid Agencies


### Top Use Cases




**Fraud Detection**  
Utilize AI to identify and prevent fraudulent activities in claims and billing patterns.




**Eligibility & Enrollment**  
Streamline eligibility determinations and simplify the enrollment process for members.




**Member Engagement**  
Enhance outreach, personalize communications, and improve care management for members.



**Claims Processing**  
Automate claim reviews, reduce errors, and accelerate processing for efficiency.



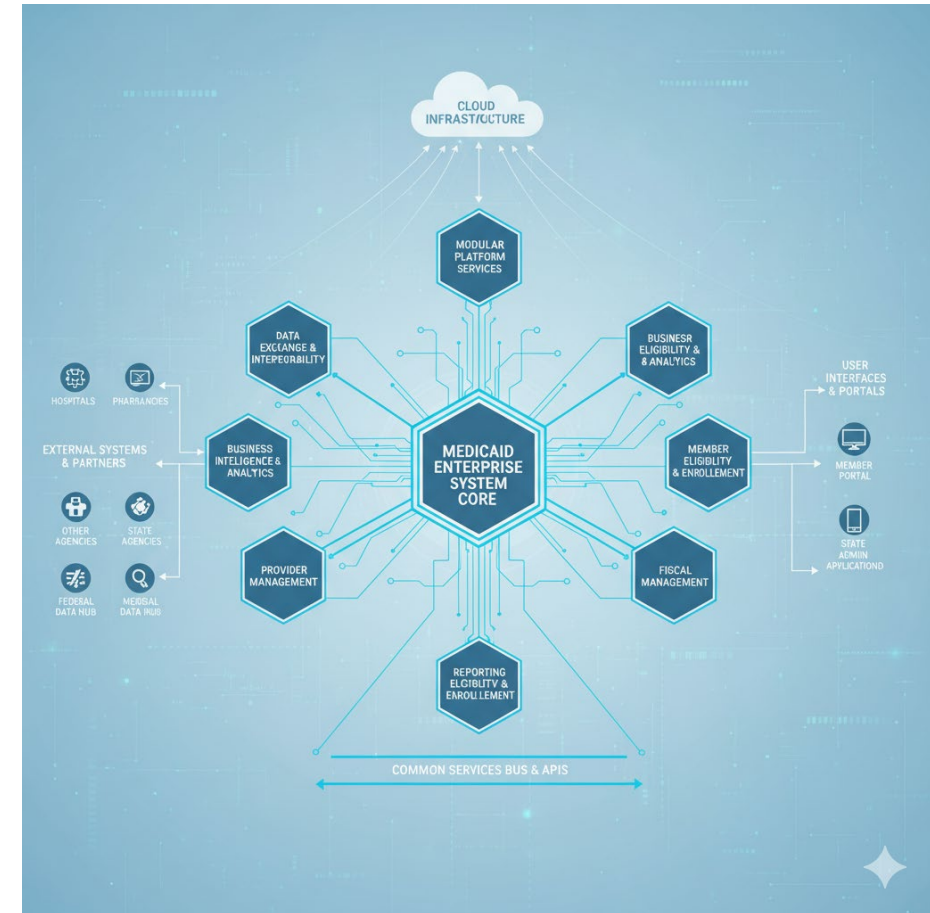
**Care Management**  
Identify high-risk patients, optimize resource allocation, and enhance care coordination.



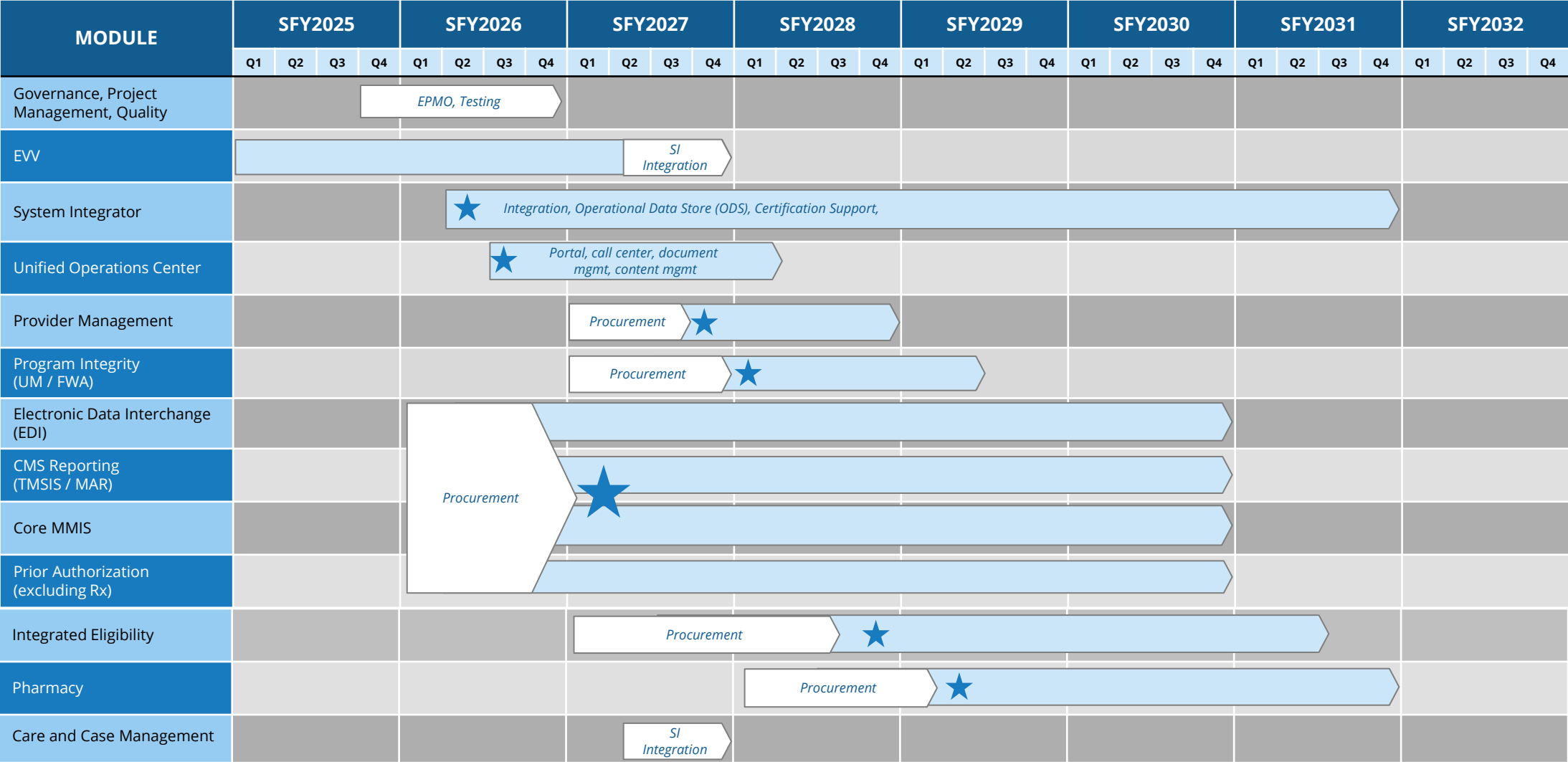
**Policy & Process Assistance**  
Quickly locate policy answers and provide real-time support to staff and constituents.

# OTHER CONNECTED SYSTEMS ALREADY IN ARCHITECTURE

- **Qualtrics**
  - Surveys and web systems usability tracking
  - Call center Performance / member & agent sentiment tracking
- **Gray Matter Analytics (Claims and Clinical)**
  - Certified HEDIS measures engine (quality)
  - Quality and provider performance scorecards
  - Utilization and care mgmt./configurable populations
  - Cost-saving opportunities
- **Incident Management System**
  - Pulselight
- **Care and Case Management System**
  - eQSuites
- **Managed Care Insights (MCI)**
  - Managed care reporting & analytics solution.
- **Closed Loop Social Needs Solution**
  - FindHelp.OK.gov
- **ServiceNow**
  - Project intake & management, workflow, incidents
- **Health Information Exchange**
  - MyHealth Access Network
- **Google AI**
  - Google Cloud Platform, CCAI, Gemini



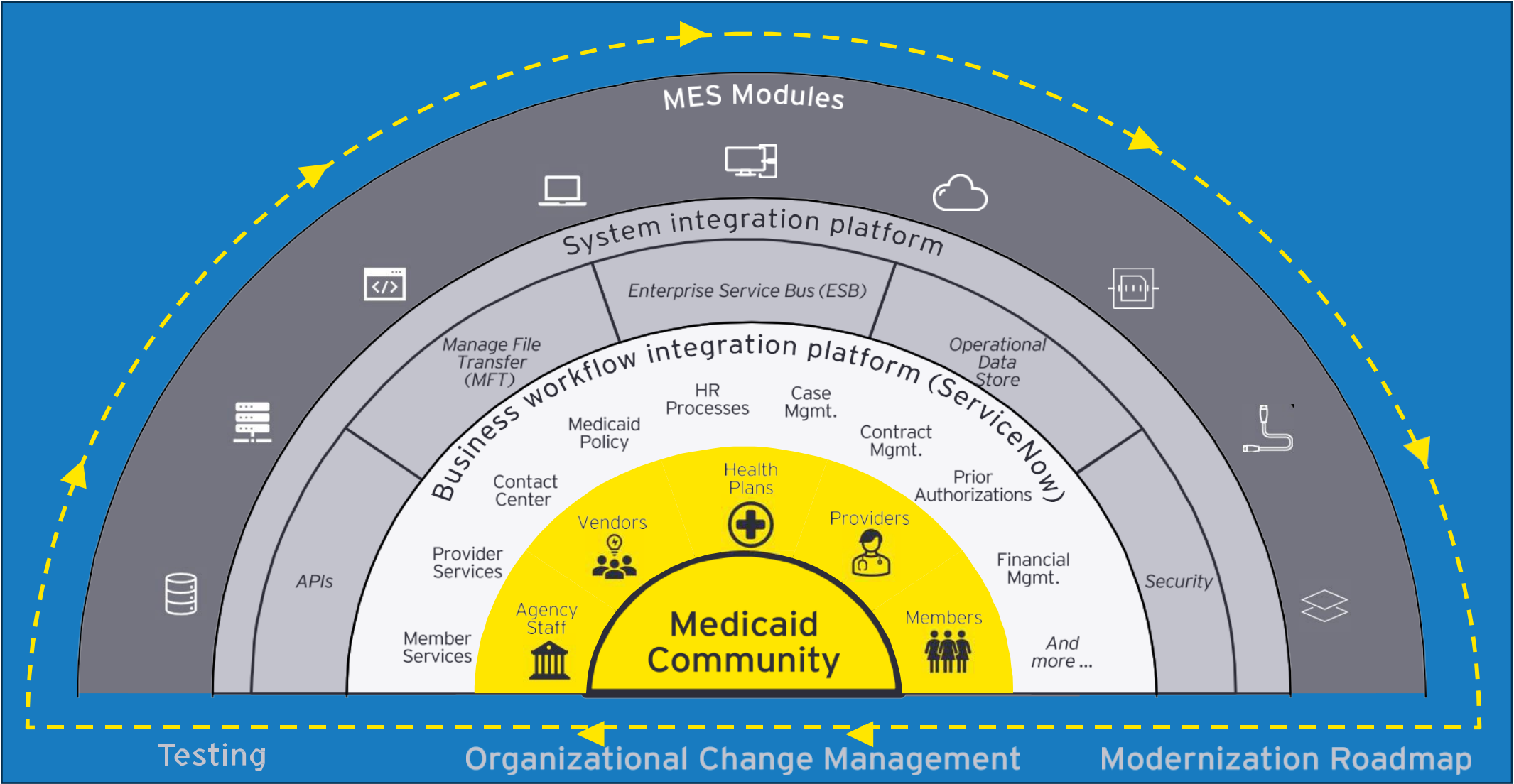
# MES TRANSITION TIMELINE (ACTUAL SCHEDULE TBD)



★ CONTRACT START DATE

ALL DATES AND MODULE IMPLEMENTATION ORDER SUBJECT TO CHANGE)

# HOLISTIC APPROACH TO MEDICAID MODERNIZATION



# HIGH-LEVEL APPROACH



- Staged implementation
- Modernized and modular where it makes sense
- Highly Integrated and interoperable
- Change the engine on the plane while flying



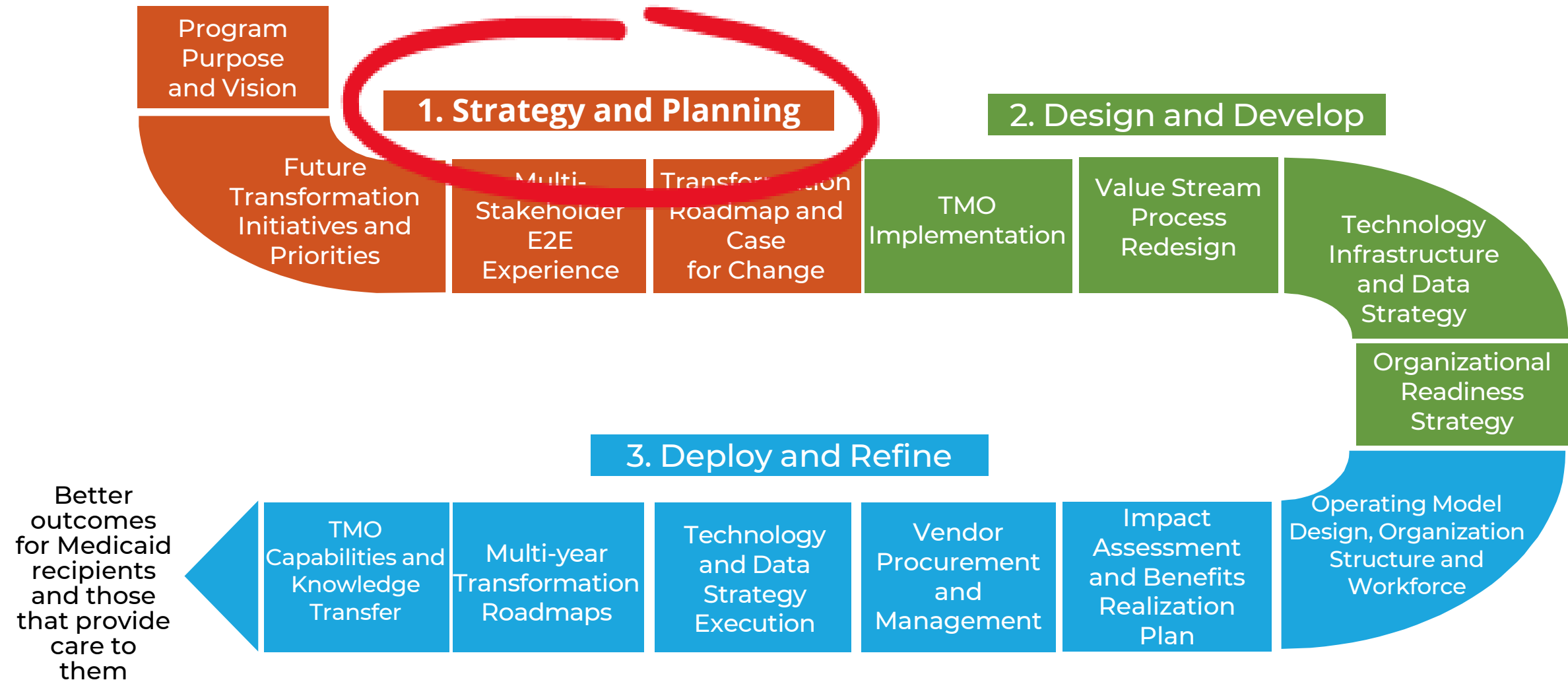
# PROJECT NEXUS

Kyle Janzen

Chief of Business Enterprises



# THE NEXUS JOURNEY




# MES OPTIMIZATION LEADING WITH PURPOSE

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## NEXUS Purpose Statement

*Why do we do it?*



“Inspiring hope and empowering lives by enabling access to quality health care and support services that improve the confidence and independence of Oklahomans.”

# OHCA MES STRATEGIC ROADMAP

Capabilities

Wave 3: Realize Our Purpose

Aspirations

Wave 2: Expand Our Ecosystem

Wave 1: Strengthen Our Foundation

**Purpose:**  
Inspiring hope and improving lives by enabling access to quality health care and support services that improve the confidence and independence of Oklahomans.

Today

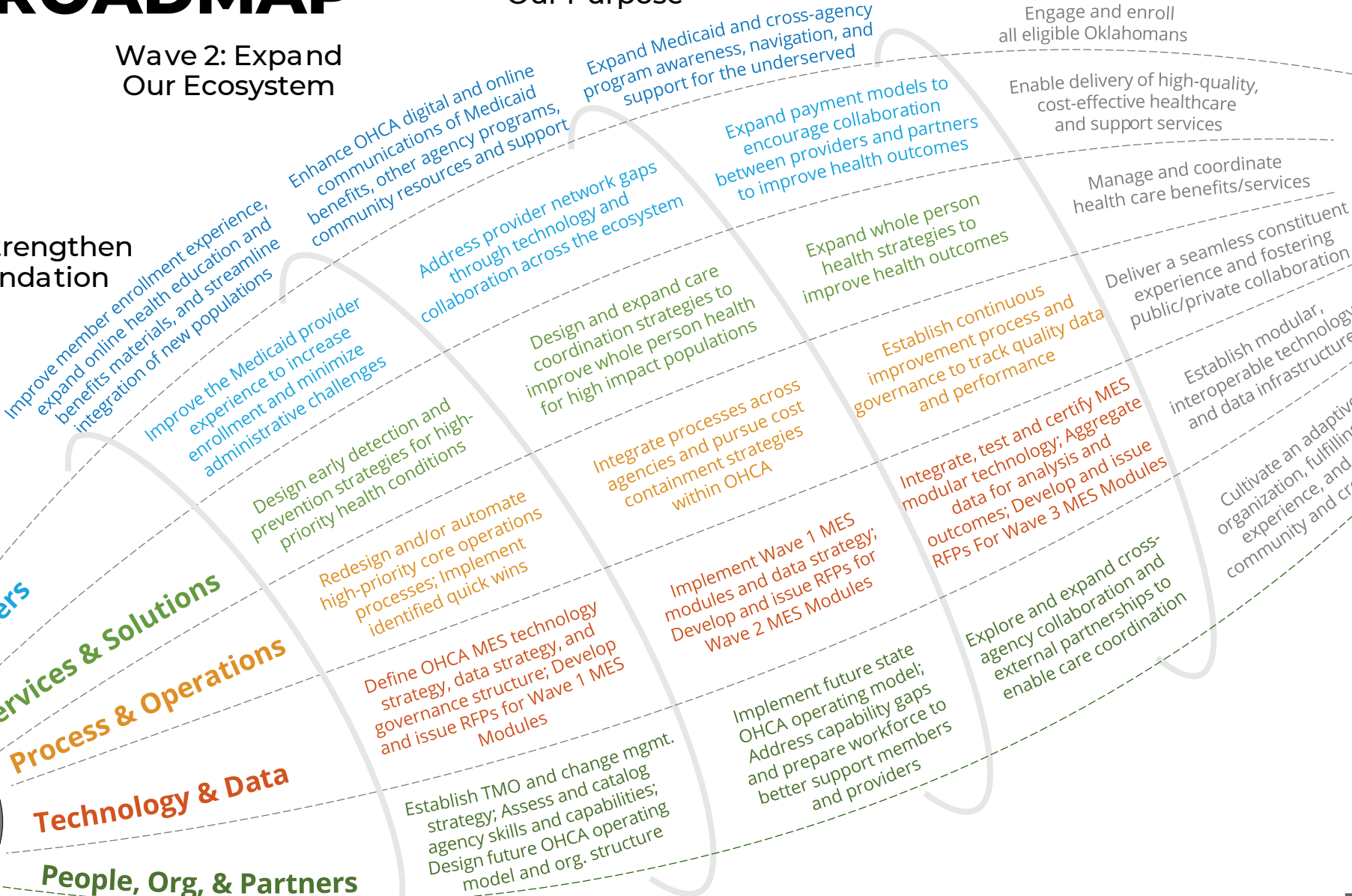
Members  
Providers

Services & Solutions

Process & Operations

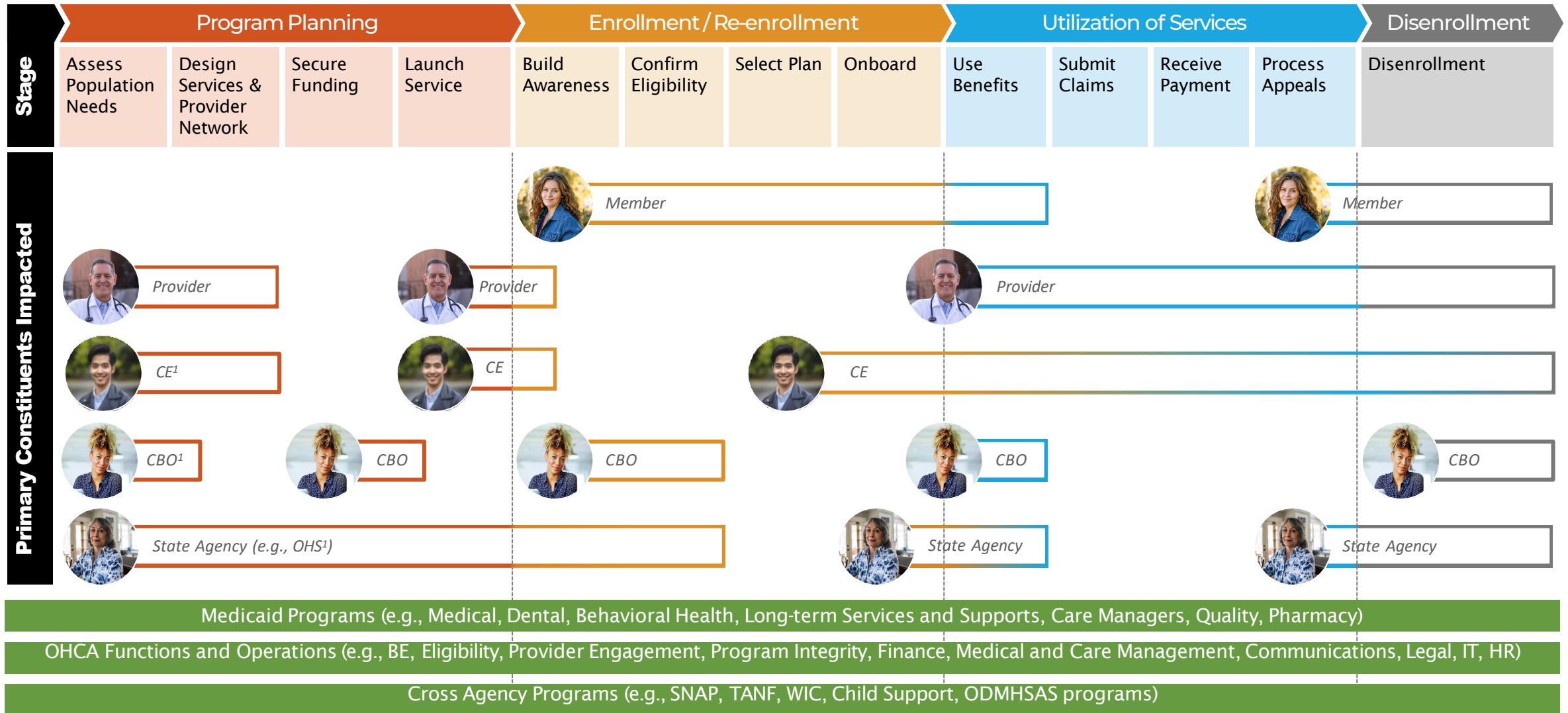
Technology & Data

People, Org, & Partners



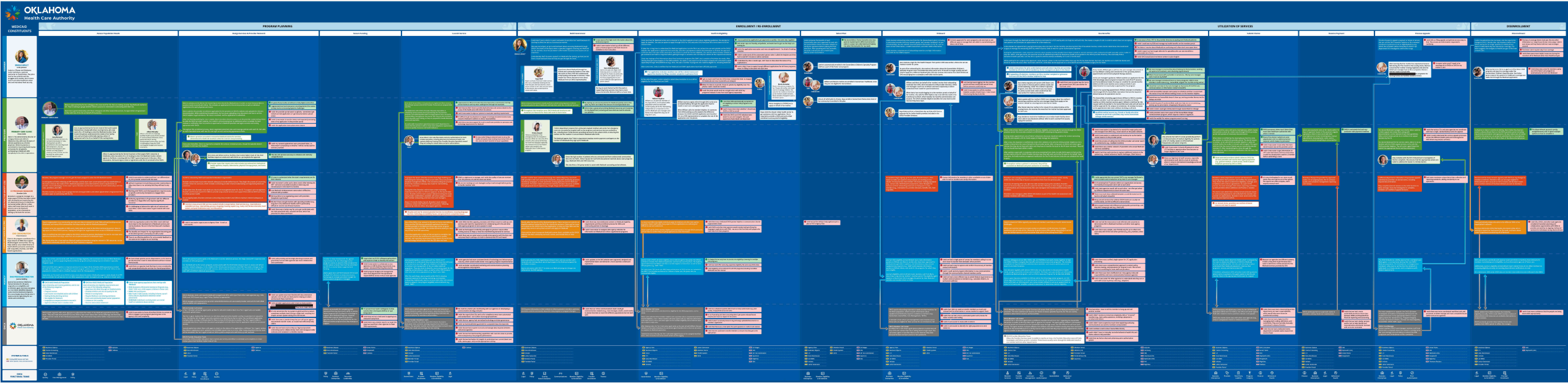
Time

# JOURNEY MAP HIGHLIGHTS FUTURE IMPROVEMENT OPPORTUNITIES

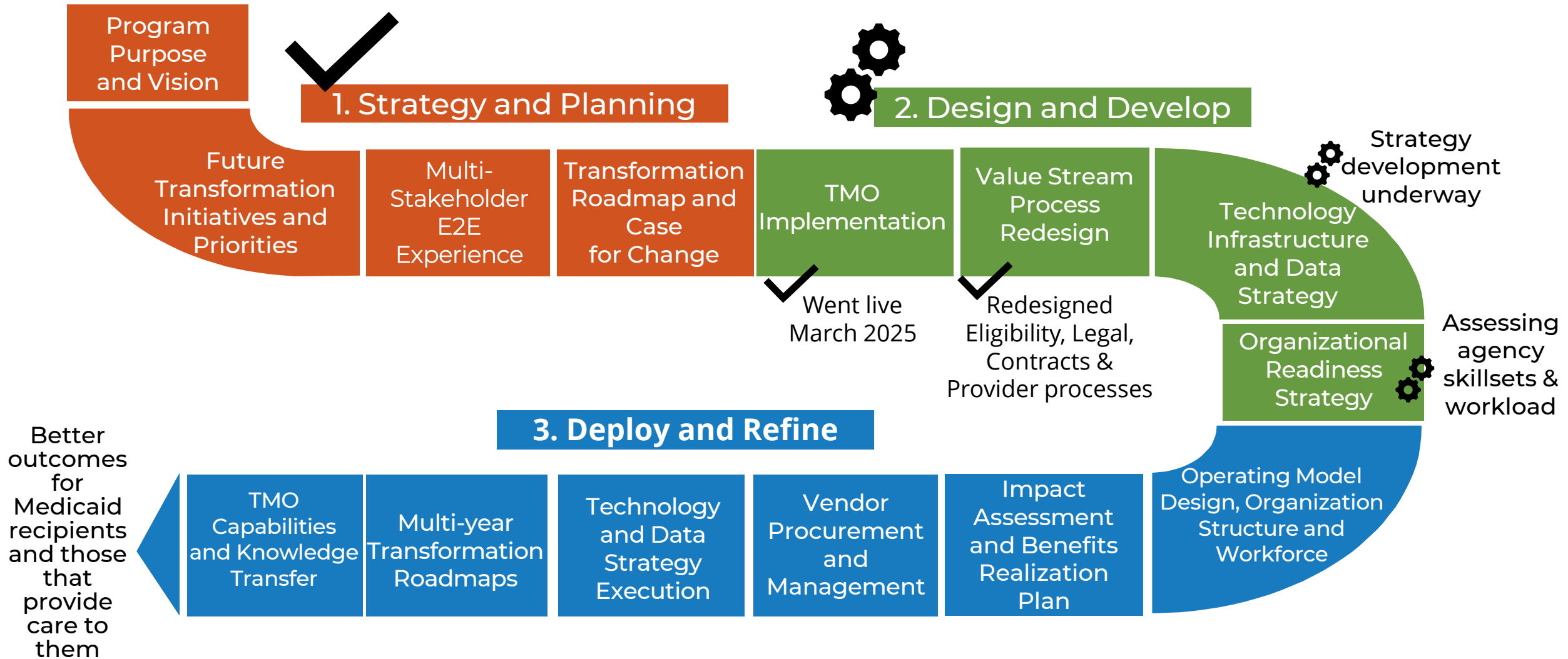


1. CE = Contracted Entity; CBO = Community-based Organization; OHS = Department of Human Services

# OHCA MEDICAID CONSTITUENT JOURNEY MAP



# WHERE WE ARE TODAY



# HOW DOES TMO WORK?

TMO is **air traffic control of OHCA projects**. The TMO helps coordinate stakeholders on project intake, planning and dependencies across the organization.



**Pilots:** Project managers and project owners manage day-to-day tasks and milestones of projects.



**Air Traffic Control:** The TMO does not execute the projects just as an air traffic controller doesn't fly the plane.

# HIGH-LEVEL TMO PROCESS

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An OHCA team member submits a project or policy request. The TMO meets with the submitter to gather initial information.



The TMO Steering Committee reviews the request and identifies stakeholders to engage in relation to the project.



The TMO facilitates stakeholder discussions to build the project business case and gather additional information.

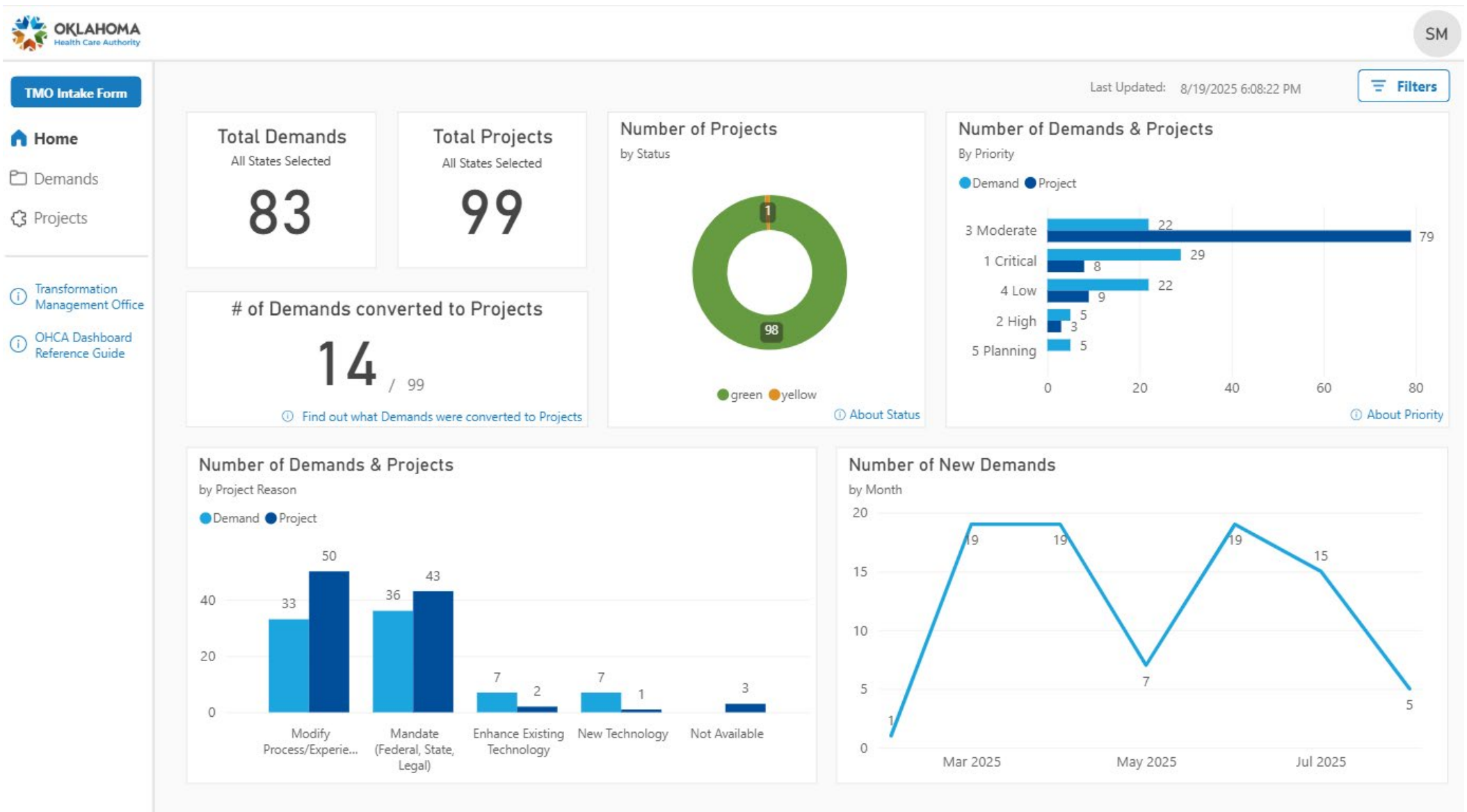


The TMO Steering Committee reviews the project business case and moves to ES for approval, if needed.



Once approved, the project manager and project team begin project activation.

# SERVICENOW TRANSFORMATION MGMT. REPORTING



# USING SERVICENOW FOR PROJECT MANAGEMENT

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## Project Workspace:

- Reflects data pulled in from the project request or “demand” stage.
- Capture business case and details about projects.
- Maintain current status of projects (green, yellow, red options) and then tracked by leadership via dashboards.



## Planning Tab:

- Ability to enter project plans by adding key project tasks and milestones.
- Leverage project templates for recurring project types.
- Import existing project plans in MS Project.




## RIDAC Tab:

- Track risks, issues, decisions, actions and request change in one centralized location.
- Standardized forms tailored for each type of RIDAC entry with options to add priority, mitigation plans and more.



# STRATEGIC PORTFOLIO MANAGEMENT (SPM) WORKSPACE

OKLAHOMA  
Health Care Authority

All

Favorites

History

Workspaces

Project Workspace

Projects

>

Transformation Management Office (TMO)

Transformation Management Office (TMO)

Priority

State

Assigned to

3 - Moderate

Work in Progress

Kennedy Patton

Details

Project Tasks (4)

Status Reports (2)

Goal/Target

Project

Project Name \*

Transformation Management Office (TMO)

Project Manager

Kennedy Patton

Project reason

Modify process/experience

Status

Green


State

Work in Progress

The details tab is pre-populated with the information from the demand phase with options to update as needed

The status field can be updated with green, yellow, and red options. These colors will then show in project workspace tile overview.

# MANAGING TO PROJECT PLANS

OKLAHOMA  
Health Care Authority

AllFavoritesHistoryWorkspaces

Project Workspace ☆

Search

Projects > Provider Enrollment Process

Provider Enrollment Process

📅

Planning

📄

Details

📊

Financials

📋

RIDAC

📈

Analytics

📁

Docs

📉

Status Reports

🔍

📅📄📊📋📈📁📉

Resource assignments

AllGridGantt

Add Task

	WBS	Short description	Q1 - 2025	Q2 - 2025	Q3 - 2025			
			Mar	Apr	May	Jun	Jul	Aug
☰ ☐ ⋮	1	> Planning (6)						
☰ ☐ ⋮	2	> Executing (2)						
☰ ☐ ⋮	3	> Delivering (5)						
☰ ☐ ⋮	4	> Closing (2)						

Apply template

Delete project

Move project

Duplicate project

Import from MS project

Export project

Export status report

Launch help video

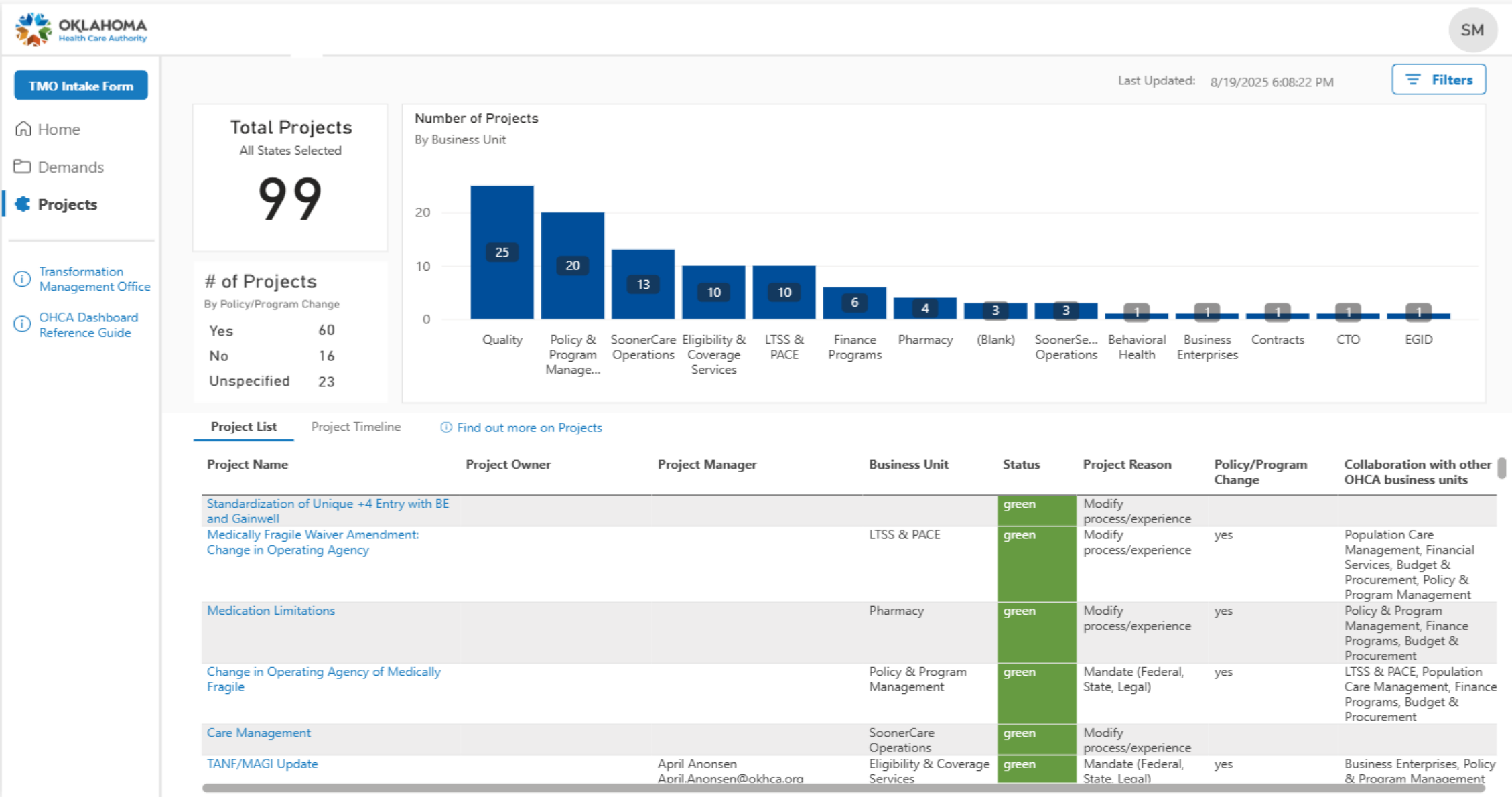
Calculate Completion Estimates

Ability to add tasks, child tasks, and more in the planning tab


Can update and organize tasks in alignment with project needs

Ability to select apply templates, import MS projects, and export a status report

# TMO DEMANDS (INTAKE REQUESTS) & PROJECTS



# TRACKING RISKS AND ISSUES




OKLAHOMA  
Health Care Authority



All

Favorites

History

Workspaces

Project Workspace 



Planning

Details

Financials

RIDAC

Analytics


Docs

Status Reports


Projects > Transformation Management Office (TMO)

Transformation Management Office (T...


Grouped by: 

Type 

[Clear](#)

	> Group 	Type	Number	State	Priority	
	> Action (29)					
	> Decision (11)					
	> Issue (1)					
	> Risk (2)					

Ability to add risks, issues, decisions, actions and request changes with standard form options



Add Risk 

Add Issue

Add Decision

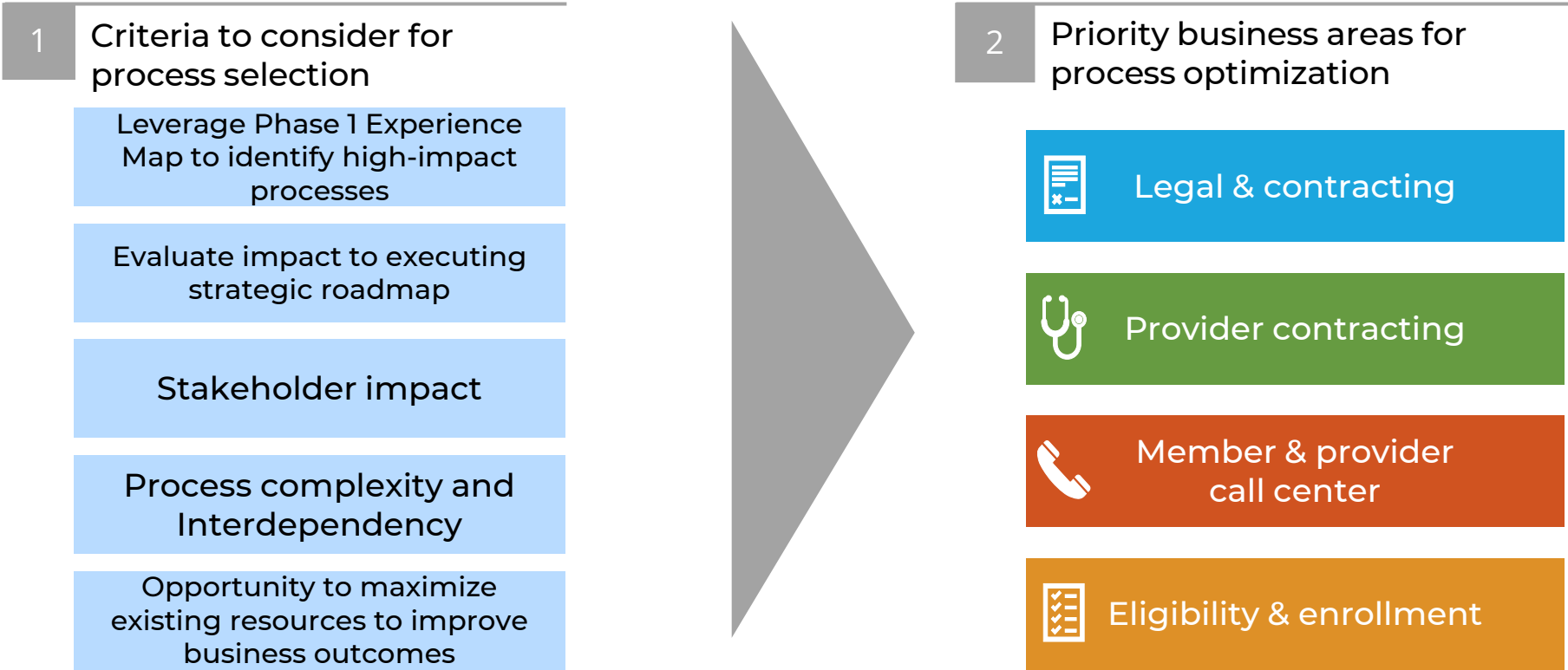
Add Action

Add Request Change






The RIDAC options are grouped by type with the option to add priority and more information in each

# PRIORITY BUSINESS AREAS FOR PROCESS OPTIMIZATION

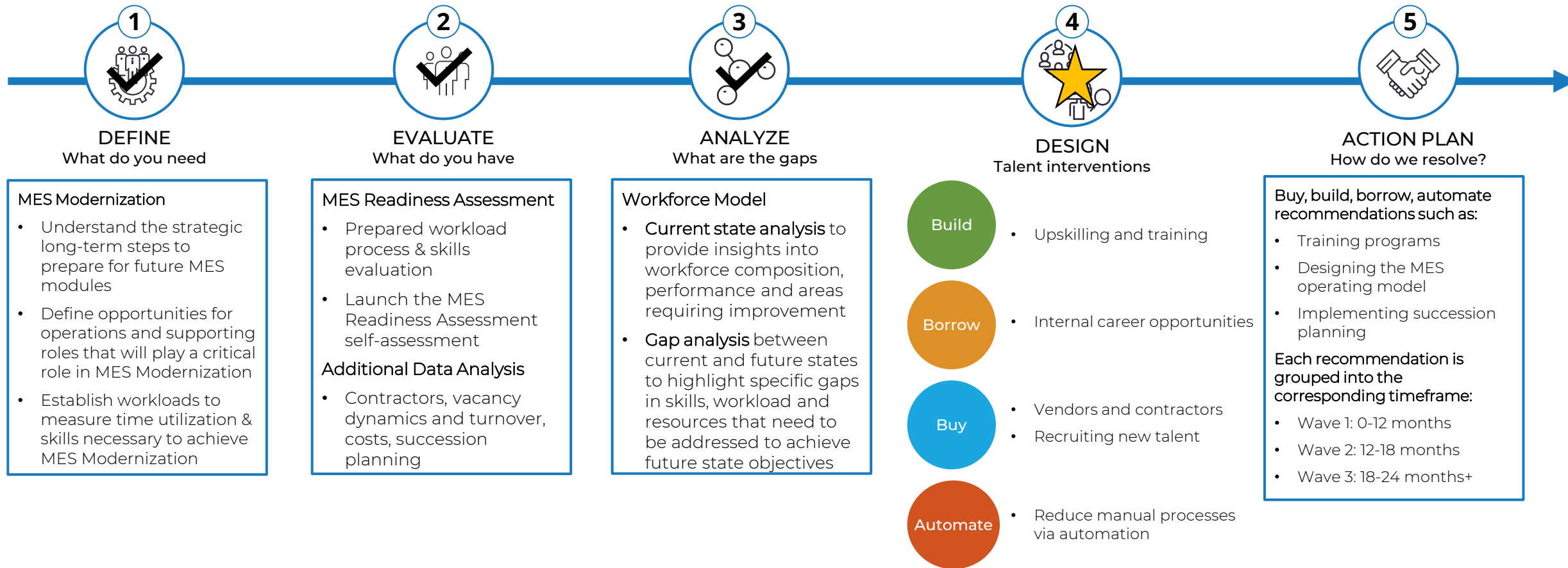


## Current State Assessment Metrics

-  **25** Processes assessed, encompassing **125** sub-processes
-  **52** Observation sessions with frontline workers and managers
-  **17** Validation sessions with business leadership and MES team
-  **200+** Improvement opportunities identified for future state design\*

\*Supplemented with Robotic Process Automation

# MES ORGANIZATION READINESS



**Partnership  
is Critical!**



# SECURITY

Victor Patuzzi

Security Governance Director



# SECURITY – PROGRAM EXPECTATIONS

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- OHCA has adopted the CMS Acceptable Risk Controls for ACA, Medicaid and Partner Entities (“ARCAMPE”) as a baseline control standard. This flows down to our partners so as to cover federal funding obligations and compliance.
  - Supporting documentation is available on CMS zONE application. The control set and basic System Security & Privacy Plan (SSPP) template should be found in the bidder’s library. We do not require a specific format or template be used unless you are part of the Affordable Care Act (ACA) program.
  - ARCAMPE is the new name for the MARSE with 402 controls and modeled after NIST 800-53r5 with CMS ARS standards.
  - Note: direct CMS references are for OHCA only with our partners working through us to achieve the objective standards.
- Dedicated and skilled security staffing must be maintained. Knowledge and familiarity with NIST SP 800 series and control maintenance can be very important to success.
- OHCA security is kept up to date with a current security/privacy point of contact.

# SECURITY – CERTIFICATIONS

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- General Systems (contains sensitive data)
  - ARCAMPE with SAR/SAW, HiTrust r2, FedRamp Moderate, StateRamp Moderate.
  - SSPP - table of contents for initial submission, content should be covered via audits.
  - Vulnerability Scans – quarterly monitoring.
  - Penetration Test – annual monitoring.
  - POAMs – quarterly monitoring (high & critical).
- Contracts that do not manage OHCA systems or sensitive data
  - ISO 27001/27701, ARCAMPE, NIST SP 800-171, NIST CSF, SOC 2 Type 2 (5 Trust Services Criteria), HiTrust r2/i1, FedRAMP, and StateRamp.

# SECURITY – CERTIFICATIONS

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- Other Certifications
  - OHCA may approve other certs at our discretion.
  - These will likely need an additional audit to cover the determined control gaps.
  - SOC 2 does not map well to federal controls by itself and often find vendors only employ a few of the five criteria, usually leaving out one of the most important, privacy.
- ACA Compliance Systems
  - Strict program for compliance monitored by CMS and not flexible.
  - Will maintain documentation in accordance with ARCAMPE process and templates.
  - Will work closely with OHCA security program to continuously monitor program and maintain a central repository for all controls.
  - Annual audits are coordinated by OHCA and contracted auditor. Vendor must support schedule.

# SECURITY – CERTIFICATIONS

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Main categories of data with additional requirements: ACA/FDSH, SSA, State of OK, Equifax, HIPAA.

- Each of these has their own certification requirements and audit cycles that you may be responsible for supporting prior to a go live and for renewals. Multiple may apply.
- State of Oklahoma is managed by OMES. Generally, a two-year renewal questionnaire cycle, but can vary based on risk tier. OMES Authority To Operate (ATO) does not automatically mean OHCA security approval. This is a two-tier structure as we have additional federal requirements we must meet.
- Social Security Administration (SSA) has some additional control requirements. We can share the SSA Technical Systems Security Requirements (TSSR) as needed. There is a three-year recertification cycle.
- ACA has a three-year recertification cycle as well as quarterly Scan/POAM submissions and annual assessment requirements.
- Equifax data requires an annual survey.
- HIPAA requirements are published in the federal register. Draft language updates are indicating a specific certification may be needed in the future for HIPAA compliance.
- Note: We do not currently use IRS data.

# SECURITY – ACA DOCUMENTATION

Document	Description	Lead (months)		Document	Description	Lead (mos)
System Security & Privacy Plan (SSPP)	Documentation of detailed system security posture and control implementation descriptions. This is a very large complex document and review/response times may be long and dependent on availability. It is critical to have experienced staff regarding this type of document.	3-6		Compliance Scans	Automated baseline configuration scans against an industry standard such as CIS or DISA.	
Privacy Impact Assessment (PIA)	We utilize the CMS template. OHCA Privacy Officer maintains a central plan. Vendor will be work with the Privacy Office as needed to supply relevant info.	1		Vulnerability Scans / Metrics Dashboard	Automated vulnerability scans using tools such as Nessus. This includes servers, network, databases, and code. Monthly review of metrics with OHCA. Quarterly delivery of raw scans to CMS.	
Plans of Action and Milestones (POAM)	Created after an Assessment to track finding, weaknesses, or risk with a plan for remediation. Must be updated monthly and submitted for CMS quarterly.			Penetration Testing	Independent review of technical security of system including credentialed, SANS top 10, manual and automated testing. Report shall be made available to SAR team and OHCA. This must be done on a production-like system as is planned for go-live.	1
Contingency / Disaster Recovery Plan (BCP, DRP, BCDRP)	Standard NIST based methods for documenting Continuity and Disaster Planning as defined in SP 800-34. No specific template, however content should be covered. If spread between documents, ensure specific references are made in main document.	2		Security Assessment Plan (SAP)	A planning document for the Security Assessment Report. A CMS template is available and should be used for submitting this plan. This planning document includes detailed methodology such as what is going to be reviewed and whom is to be interviewed with their roles.	1
Incident Response Plan (IRP)	Incident Response Plan meeting federal and OHCA contractual requirements for the Data Types contained.	1		Security Assessment Workbook (SAW) / Security Assessment Report (SAR)	Independent audit as defined by CMS of control effectiveness using SSPP Control Set with CMS ARCAMPE templates.	3
Information Security Risk Assessment (ISRA)	May use CMS template for Risks, particularly as a result of an identified Weakness/POAM or Risk related to baseline controls/standards. This item is only delivered upon request.			ACA ATO Package	Compilation of above items that must be presented to Business/System Owners and CMS for the ACA ATO letter decision. CMS requires a 3 month review period. This is for initial production certification and 3 yr renewal audit.	3

# SECURITY – OTHER KEY TOPICS

- Security Metric Dashboard will be created and trend history tracked.
- MFA is necessary for all systems.
- Live Data Load and Go Live are two major milestones. SSPP and security tools should be functional and protecting systems to receive sensitive data. Certifications are needed prior to production operations.
- Assessments for Penetration Testing and Security Assessment must be conducted by an independent and qualified authority. Original raw unredacted reports are required to be submitted for review.
- A solid security architecture, boundary and data flow diagram is very important. We have a base template example to follow that I will share upon contract award for consistency among systems.

	A	B	C	D	E	F	G	H
1	Age of Vulnerabilities	Prod	Stage	Total			Additional Data	Host Count
2	<30 days						Number of System with a critical Severity Vulnerability	
3	31-60 days						Number of System with a High Severity Vulnerability	
4	61-90 days						Number of Systems scanned	
5	91+ days							
6	Total						Top 15 Vulnerabilities by Criticality (CVSS V3 7-10) and Count	Count (Hosts Impacted)
7								
8	Total Vulnerabilities by Type - April 1, 2023							
9		Critical	High	Medium	Low			
10	Total Vulnerabilities							
11	New Vulnerabilities							
12	30+ Days Vulnerabilities							
13	Resurfaced							
14	Remediations							
15	Exclusions							
16								
17	Crit & High Findings by En	Month X-3	Month X-2	Month X-1	Month X			
18	Prod							
19	Stage							
20	Remediations							
21								

# SECURITY – ARTIFICIAL INTELLIGENCE (AI)

Organization (OHCA, Gainwell, etc)	Application/System	AI Type (Local, Private, Public, Unknown)	AI Core (Gemini, Open AI, Llama, Chat GPT, etc)	Data Classification (Public, Sensitive, PHI w/BAA)	Business Use Case

- Maintain and submit an AI inventory.
- AI systems must be approved prior to use by OHCA and the state. OHCA must be notified as part of the bid of planned usage and at least 60 days prior to any desired implementation.
- Vendor must maintain an AI Risk Assessment that includes technical testing to determine risk for hallucinations and bias.
- Systems must be segmented for internal and external usage.
- Sensitive or protected data must not be used for prompts or training in a system exposed to external or public use. This includes member PHI, security information/reports, images or screen captures of sensitive info, etc.

# SECURITY – ARTIFICIAL INTELLIGENCE (AI)

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- AI contract provision is "Section C.23 Artificial Intelligence."
- AI must comply with State of Oklahoma's AI Usage Standard - [oklahoma.gov/content/dam/ok/en/omes/documents/use-of-ai-in-oklahoma-standard.pdf](https://oklahoma.gov/content/dam/ok/en/omes/documents/use-of-ai-in-oklahoma-standard.pdf)
- Use of AI must be disclosed to OHCA with the initial bid or prior to AI being used as to perform contractual obligations.
- AI terms apply only to AI used by a contractor to fulfill its obligation under its contract with OHCA.
- AI terms do not limit contractor on its use of AI unrelated to its contract with OHCA.

## C.23 ARTIFICIAL INTELLIGENCE

### 1. Definitions:

- a. "Artificial Intelligence" or "AI" shall mean the field of computer science and technology that focuses on creating machines capable of performing tasks that typically require human intelligence, which includes, but is not limited to, machine learning, large language models, reinforcement learning, natural language processing, computer vision, and deep learning.
- b. "Member data" shall mean personal information concerning Oklahoma Medicaid members located in OHCA's MMIS or given to the Contractor by an Oklahoma Medicaid member while Contractor acts within the scope of its duties under this Contract.
- c. "Protected Health Information" or "PHI" shall have its meaning under HIPAA and 45 CFR Part 160 and 164, the HIPAA Privacy and Security Rules. Protected Health Information shall include Social Security Information or other Social Security Administration (SSA) Data that meet the definition of PHI found in HIPAA. PHI for purposes of this Contract is limited to the information Contractor has access to for the purposes of fulfilling its obligations under this Contract.

### 2. Insofar as Contractor utilizes or plans to utilize Artificial Intelligence (AI) to assist in performing or to perform its obligations under this Contract, the Contractor shall provide OHCA the following information prior to beginning performance of Contractor's duties under this Contract:

- a. Scope of the use or planned use of the AI
- b. Description of the risks and limitations of the AI, including potential bias, errors, or incomplete information;
- c. Explanation of the source of the data used to train the AI and of how the data is used, including the processing location;
- d. An Inventory of AI tools being used as part of Contractor's services with a brief use case description and risk evaluation of AI related use cases including potential bias, errors, hallucination, and use of PHI.
- e. Explanation of how users can control or interact with the AI, including whether users can provide feedback or opt-out of certain features;
- f. Privacy policy that clearly outlines data collection practices and user rights if the AI collects or uses user data.

This disclosure must be submitted to the State and OHCA for approval with the initial bid on any solicitation and also prior to Contractor implementing any relevant new AI services or uses thereafter.

Contractor shall perform bias testing periodically and shall make the tests available to OHCA upon request.

# PROCUREMENT & PRIVACY

Leah Price  
Professional Service Contracts Director

Conner Mulvaney  
Privacy Officer & Contract Attorney

# BAA REQUIREMENTS

---

- Business Associate Agreements are built into Attachment C, "Section C.13 Confidentiality."
- Applicable only if the vendor handles OHCA member PHI as part of its duties and obligations under the contract. This includes any obligation where though the vendor may not have direct responsibility over PHI, the vendor has access to an OHCA system that contains PHI.
- Since OHCA is a Medicaid agency, it has additional BAA requirements on top of the standards mandated by HIPAA.
  - Acceptable Risk Controls for ACA Medicaid. And Partner Entities – ACR-AMPE
  - CMS Computer Matching Agreement (CMA)
  - SSA Information Exchange Agreement (IEA)

# BAA REQUIREMENTS

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Notable BAA Requirements:

- **One-hour Security Incident/Breach Report** – Section C.13(3)(a)(ix)
  - Contractor must notify OHCA within one hour of discovery of a security incident.
  - Security incidents *include* events that create a substantial risk to jeopardize the confidentiality, integrity or availability of sensitive OHCA data and/or systems, especially including but not limited to member PHI.
  - Security incidents *do not include* raw unanalyzed events like mere firewall pings or internal incidents that involve solely Contractor systems and data unconnected to OHCA data.
  - Discovery occurs once Contractor determines an event 1) rises to the level of a Security Incident, and 2) either impacts or likely impacts OHCA data and systems.
  - Reports should be sent to OHCA's Security Governance inbox: [securitygovernance@okhca.org](mailto:securitygovernance@okhca.org)

# BAA REQUIREMENTS

---

Notable BAA Requirements:

- One-hour Security Incident/Breach Report – Section C.13(3)(a)(ix)
  - Why is this mandatory?

Flow-down requirements from federal contracts.

- The Information Exchange Agreement (IEA) between OHCA and CMS (2024-2029)

Section IV(A)(6)(a)(I) "Administrative Safeguards"

AND

Section IV(C)(2)-(C)(3)(a)

of the confidential nature of the data, the safeguards required to protect the data, and the civil and criminal sanctions for noncompliance contained in the applicable Federal laws. The AE shall require its contractors, agents, and all employees of such contractors or agents with authorized access to the data disclosed under this Agreement, to comply with the terms and conditions set forth in this Agreement, and not to duplicate, disseminate, or disclose such data unless authorized under this Agreement.

2. When conducting functions under this agreement, the Medicaid/CHIP agency shall report any suspected or confirmed Incidents affecting loss or suspected loss of PII within one hour of discovery to their designated CCHIO State Officer who will then notify the affected federal agency data sources, i.e., Internal Revenue Service, Department of Defense, Department of Homeland Security, Social Security Administration, Peace Corps, Office of Personnel Management or Veterans Health Administration. Additionally, the Medicaid/CHIP agency shall contact the IRS Office of Safeguards within 24 hours of discovery of any potential breach, loss, or misuse of Federal Tax Information. Reporting procedures are contained in IRS Publication 1075; section 1.8.4.
3. When conducting functions under this agreement the Medicaid/CHIP agency shall:
  - a. Email the CMS IT Service Desk at [CMS\\_IT\\_Service\\_Desk@cms.hhs.gov](mailto:CMS_IT_Service_Desk@cms.hhs.gov) within one hour of discovery: of incidents (including incidents involve Federal Tax Information (FTI)).

# BAA REQUIREMENTS

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Notable BAA Requirements:

- **One-hour Security Incident/Breach Report** – Section C.13(3)(a)(ix)
  - Why is this mandatory?
    - Flow-down requirements from federal contracts.
      - Similar provisions in the Computer Matching Agreement (CMA) with CMS and the IEA with SSA.
  - Ways to comply with the one-hour reporting requirement?
    - OHCA does not expect a full 45 CFR §164.410 report from Contractor in one hour.
    - The initial report could be as simple as an email to OHCA informing OHCA that an incident has occurred that could impact OHCA systems and data with a very high-level summary. A full report can follow later.
    - If contractor follows the CSP General Reporting Process of the FedRAMP Cloud Service Provider (CSP) Incident Communications Procedures version 5.0. (Likely met when certified FedRAMP Moderate).

# BAA REQUIREMENTS

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Notable BAA Requirements:

- **Violations of 21 O.S. §1953** - Section C.13(3)(a)(x)
  - Same reporting requirement as security incidents and breaches.
  - Statute makes it a crime to willfully access, alter, modify, disrupt or threaten a computer system without authorization.
  - Should be covered by general security incident triage and response processes Contractor already utilizes.
- **Subpoena Notification** – Section C.13(3)(a)(xiv)
  - Let OHCA know in advance and have an opportunity to respond if OHCA data or member PHI is sought by a subpoena on Contractor.

# **STANDARD LEGAL STATE TERMS**

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- **Invoicing and Payment – Section C.3**
  - Proper invoices require sufficient information for OHCA to verify services received; list will be in Section C.3(3).
  - Contractor has 90 calendar days from date of service to submit valid invoice – Section C.3(4).
  - OHCA has 45 calendar days to pay a proper invoice submitted by Contractor, and interest on any late invoice is determined by statute – Section C.3(6).
- **Insurance Coverage – Section C.14**
  - OHCA will have insurance coverage requirements in this section that are likely to be stricter than those stated in Attachment B (General State Terms) — the OHCA terms will be the governing amount since anything above what is listed in Attachment B is additional coverage required by OHCA.

# STANDARD LEGAL STATE TERMS

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- **Offshoring** – Section C.22
  - OHCA generally does not permit Contractor offshoring its obligations to foreign subcontractors.
  - If Contractor is handling sensitive OHCA data, especially member PHI, OHCA does not permit the offshoring of that data or of access to that data.
- **Intellectual Property** – C.24-25
  - Any intellectual property created by Contractor for the sole purpose of fulfilling the Contractor's obligation under the Contract with OHCA is the intellectual property of the State of Oklahoma. This is required by statute: 74 O.S. §85.60.
  - Intellectual property that is created and owned by Contractor independent of the contract or that is used in the contract or created/acquired before or outside the Contractor's obligations under the Contract does not belong to the State.

# GETTING STARTED AS A VENDOR

---

## Registration & Setup

- Register with the State of Oklahoma's supplier portal via OMES (Office of Management & Enterprise Services).
- Obtain a **Supplier ID** and complete the **W-9**/tax information.
- Verify compliance with State and Federal requirements (SAM.gov registration, if applicable).

## Monitor Opportunities

- Watch **OMES Solicitation Portal** and OHCA procurement announcements.
- Sign up for **bid notifications** in your service category.
- Review the Oklahoma OpenBid system regularly.

## Understand Procurement Rules

- Solicitations follow **Oklahoma Central Purchasing Act** and OMES rules.
- RFPs require strict compliance with submission format, deadlines and mandatory requirements.
- Business Associate Agreements (BAA) apply if handling PHI or Medicaid data.

# GETTING STARTED AS A VENDOR

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## Helpful Resources

- Oklahoma Supplier Portal: <https://oklahoma.gov/omes/divisions/central-purchasing/suppliers-and-payees/supplier-portal.html>
- OpenBid Opportunities: <https://oklahoma.gov/omes/divisions/central-purchasing.html>
- OHCA Procurement Page: [oklahoma.gov/ohca/about/procurement](https://oklahoma.gov/ohca/about/procurement)

# STATEWIDE CONTRACTS – DOING BUSINESS WITH OKLAHOMA

---

## What Are Statewide Contracts?

- **Master Agreements with the State**  
Statewide contracts are competitively awarded **master contracts** managed by the **Office of Management & Enterprise Services (OMES)**. Once awarded, these contracts serve as pre-approved agreements that any state agency can use.
- **Pre-Negotiated Terms, Pricing, and Conditions**  
OMES conducts a full competitive solicitation process to lock in **pricing, service levels and legal terms** up front. This saves agencies time and ensures consistent, fair and transparent purchasing practices.
- **Broad Agency Use**  
Instead of each agency issuing separate RFPs for common goods and services, agencies can purchase directly from these contracts. This provides **efficiency and consistency** across state government.

# STATEWIDE CONTRACTS – DOING BUSINESS WITH OKLAHOMA

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- **Vendor Inclusion in Statewide Catalog**

Awarded vendors are placed into the **Statewide Contract Catalog**, which is the “go-to” resource for agencies when making purchases. This greatly increases the visibility of vendors’ offerings.

- **Support for Multiple Categories**

Statewide contracts cover a wide range of categories — from IT services, software and telecom to office supplies, vehicles, professional services and more. Vendors may compete in one category or multiple, depending on their capabilities.

- **No Need for Repeated RFPs**

Once a vendor is on contract, agencies can buy directly under the pre-negotiated agreement, avoiding repeated procurement cycles for both the vendor and the state.

# STATEWIDE CONTRACTS – DOING BUSINESS WITH OKLAHOMA

---

## Why Statewide Contracts Matter

### Broader Market Access

- A single statewide contract opens sales opportunities across **all state agencies, higher education institutions, and some local governments.**
- Eliminates the need to respond to multiple small procurements.

### Faster Sales Cycle

- Agencies can purchase directly from the contract catalog without issuing a new RFP
- Reduces time and resources spent on repetitive bidding.

### Increased Visibility

- Being listed on a Statewide Contract positions your company as a **preferred source.**
- Agencies are encouraged to use these contracts first, which drives higher utilization.

# STATEWIDE CONTRACTS – DOING BUSINESS WITH OKLAHOMA

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## Predictable Revenue Stream

- Multi-year agreements provide consistent demand and long-term client relationships.
- Easier to forecast and scale operations.

## Competitive Advantage

- Vendors gain credibility and recognition by meeting the State's rigorous standards.
- Statewide awards can strengthen your qualifications for future RFPs and other public sector opportunities.

# PROCUREMENT RFP GUIDELINES – DOING BUSINESS WITH OHCA

---

How to Do Business with the State & OHCA:

- **Register** in the Oklahoma Supplier Portal (required for bidding).
- **Monitor solicitations** on OMES OpenBid and agency procurement pages.
- **Read the entire RFP carefully** – requirements, deadlines, submission format.
- **Follow instructions exactly** – use the forms and formats provided.
- **Submit questions** only through the official Q&A process by the posted deadline.
- Ensure compliance with **state statutes, terms and conditions**.

# REQUEST FOR PROPOSAL (RFP) PROCESS

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## Opportunity Posted

- RFP released on the OMES OpenBid Portal.
- MES procurements often posted jointly by OMES + OHCA.
- Includes: scope, technical/security requirements, evaluation criteria.

## Vendor Questions (Q&A Period)

- Vendors may submit written questions by the posted deadline.
- Official answers/addenda issued — become part of the RFP.

## Proposal Submission

- Submit via **Oklahoma eProcurement system** (or sealed bid, if specified).
- Include all required attachments (insurance, certifications, security/privacy, BAAs if PHI applies).

Late or incomplete = non-responsive

## Evaluation

- Evaluation team reviews proposals against published criteria:
  - **Technical Approach** – alignment with MES modularization strategy.
  - **Cost Proposal** – total cost of ownership.
  - **Past Performance** – Medicaid/public sector experience.
  - **Security & Compliance** – StateRAMP, HIPAA, ARCAMPE, CMS requirements.

# REQUEST FOR PROPOSAL (RFP) PROCESS

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## Clarifications / Negotiations

- Agency may request clarifications, demonstrations or oral presentations.
- Best and Final Offers (BAFOs) may be requested.

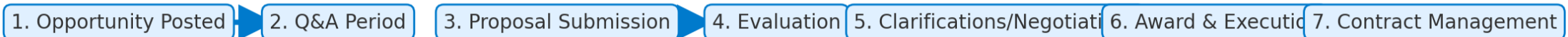
## Award & Contract Execution

- Award announced via OMES; contract executed with OHCA as the agency customer.
- Terms and conditions incorporate **state law and Medicaid-specific requirements**.

## Contract Management

- Vendor monitored for performance, reporting and compliance (privacy, security, service levels).
- Amendments/renewals managed by OMES in partnership with OHCA.

### RFP Process - State of Oklahoma & OHCA



# PROCUREMENT RFP GUIDELINES – COMMON PITFALLS (NON-RESPONSIVE)

---

## Common Mistakes That Disqualify Vendors

- ❌ Late submission – proposals must be received *before* the closing date & time.
- ❌ Missing mandatory documents – e.g., insurance, certifications, BAAs, financials.
- ❌ Failure to sign required forms – unsigned proposals are non-responsive.
- ❌ Ignoring Q&A clarifications – agencies will enforce any updates/addenda.
- ❌ Not following formatting instructions – wrong file type, incomplete sections.
- ❌ Overlooking security/privacy requirements (StateRAMP, HIPAA, ARCAMPE).

## Tips for Success

- ✓ Double-check all attachments before submission.
- ✓ Use the official delivery method (eProcurement portal or sealed bid drop-off).
- ✓ Highlight relevant **experience and compliance**.
- ✓ Contact OMES Vendor Registration for technical issues *before* the deadline.

## Helpful Link:

OMES Central Purchasing – Vendor Information

- [omes.ok.gov/services/purchasing](https://omes.ok.gov/services/purchasing)

# OMES STATE PROCESS

Jeannie Troxel, OMES Supplier Relations



# Navigating the State Bidding Process



**OKLAHOMA**  
Office of Management  
& Enterprise Services

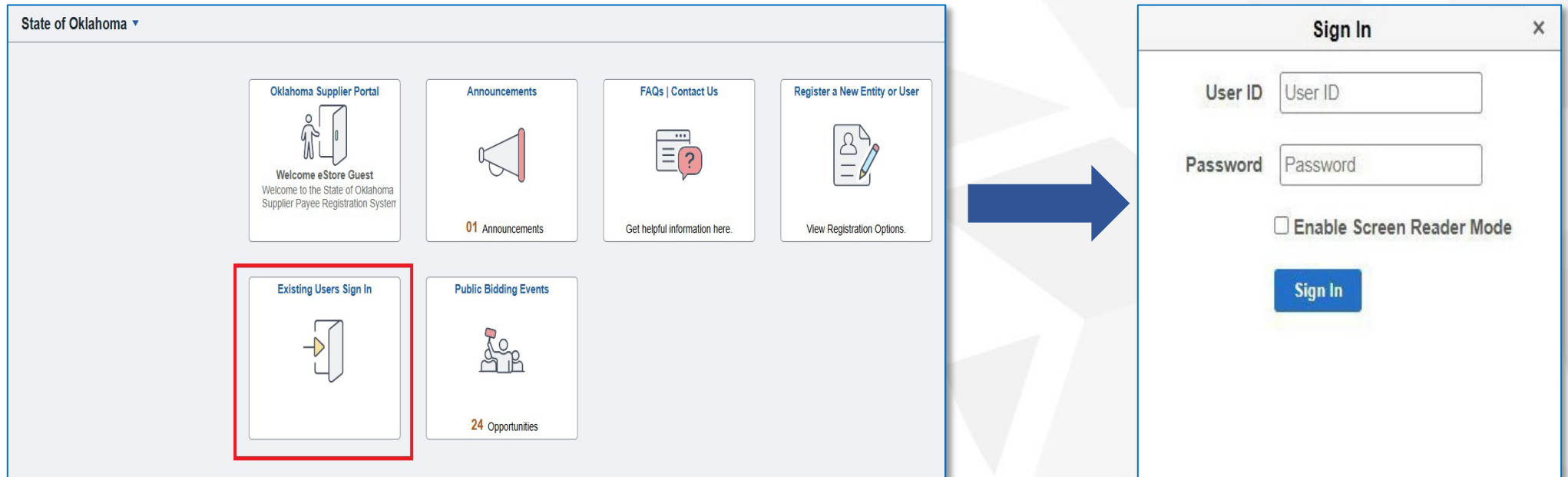
# Steps from start to finish

1. Register as a supplier.
2. Access the solicitation event.
3. Submit questions.
4. Submit a bid.

# Step 1: Register as a supplier

# Sign in to portal

Then, select the **Existing Users Sign In** tile (do not select Public Bidding Events). Enter your credentials.



The image shows a screenshot of the State of Oklahoma Supplier Portal. The main dashboard contains several tiles: 'Oklahoma Supplier Portal' (Welcome eStore Guest), 'Announcements' (01 Announcements), 'FAQs | Contact Us' (Get helpful information here), 'Register a New Entity or User' (View Registration Options), 'Existing Users Sign In' (highlighted with a red box), and 'Public Bidding Events' (24 Opportunities). A large blue arrow points from the 'Existing Users Sign In' tile to a 'Sign In' modal window on the right. The modal window has fields for 'User ID' and 'Password', a checkbox for 'Enable Screen Reader Mode', and a 'Sign In' button.

State of Oklahoma ▾

Oklahoma Supplier Portal

Welcome eStore Guest  
Welcome to the State of Oklahoma  
Supplier Payee Registration System

Announcements

01 Announcements

FAQs | Contact Us

Get helpful information here.

Register a New Entity or User

View Registration Options.

Existing Users Sign In

Public Bidding Events

24 Opportunities

Sign In

User ID

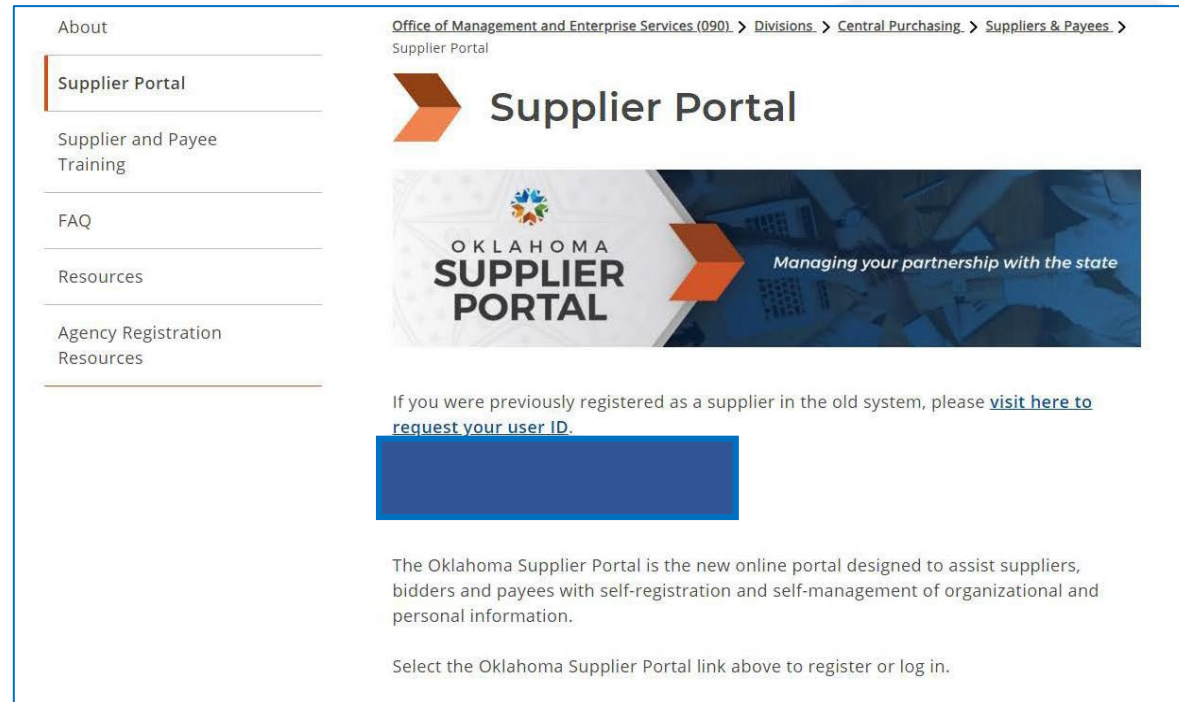
Password

☐ Enable Screen Reader Mode

Sign In

# Register in the Oklahoma Supplier Portal

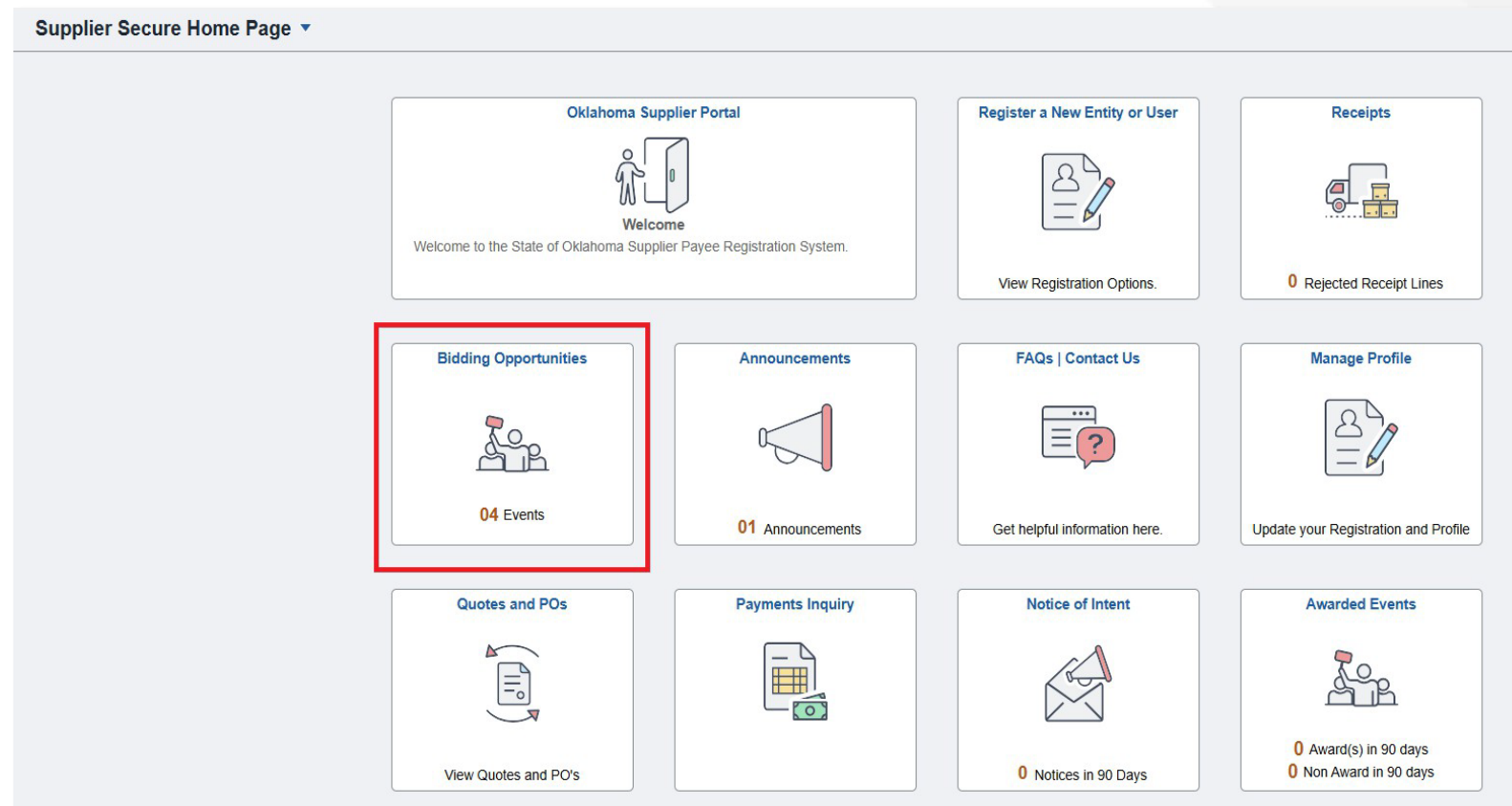
To participate in any solicitation event, you must be logged in to your bidder or supplier file. First, visit [vendors.ok.gov](https://vendors.ok.gov). Next, select the Oklahoma Supplier Portal Login button.



The screenshot displays the Oklahoma Supplier Portal website. On the left is a navigation menu with links: About, Supplier Portal (highlighted with an orange bar), Supplier and Payee Training, FAQ, Resources, Agency Registration, and Resources. The main content area features a breadcrumb trail: Office of Management and Enterprise Services (090) > Divisions > Central Purchasing > Suppliers & Payees > Supplier Portal. Below this is a large header with an orange arrow icon and the text 'Supplier Portal'. A banner image follows, showing the 'OKLAHOMA SUPPLIER PORTAL' logo and the tagline 'Managing your partnership with the state'. A text block below the banner states: 'If you were previously registered as a supplier in the old system, please [visit here to request your user ID](#).' This is followed by a solid blue rectangular box. At the bottom, a paragraph explains: 'The Oklahoma Supplier Portal is the new online portal designed to assist suppliers, bidders and payees with self-registration and self-management of organizational and personal information.' The final line of text reads: 'Select the Oklahoma Supplier Portal link above to register or log in.'

# View bidding opportunities

You are now at your Supplier Secure Home Page.  
From there, select **Bidding Opportunities**.



# View Public Events

Under Bidding Event Information, select **Public Events**.

Greetings!  
PeopleSoft version 9.2.48

< Supplier Secure Home Page

Bidding Opportunities

\*View By Bid Status

7 rows

Time Zone Central Time (US) Date Format MMDDYY Apply

Bidding Event Information

Invited Events Public Events

All 4

New 4

Accepted 0

Winning 0

Outbid 0

Declined 0

Withdrew 0

1 row

Event Name	Buying Organization / Event ID	Format / Type	Start Date / End Date	Ends In	Bid Status	Event Details
There are no events to display, please check filter options						

# Solicitation notification

Dear Invited Bidder,

You have been invited to respond to a solicitation from the State of Oklahoma. Please review this information and use the URL below to bid on this solicitation.

**Note:** This event has been edited by the contracting officer.

## Event Overview

**Event Name:** Sign Erection and Maintenance ODOT

### Description:

The Office of Management and Enterprise Services (OMES), Central Purchasing Division, is seeking responses from potential Suppliers to provide a contract for the repair and/or replacement of damaged signs, to include truss, overhead, monotube or monotube structure, small signs, extruded signs, LED signs, as well as install new installations on State highways and interstates within Oklahoma. The repairs, replacements, and new installations shall include crossroads and traffic interchanges, on an as needed basis.

## Event Details

**Event Id:** 09000-EV00000683 Round 1 Version 1

**Event Starts:** 04/04/2025 9:46AM CDT

**Event Ends:** 05/05/2025 3:00PM CDT

**Header Attachments:** FORM-CP-011-Amendment\_1\_Q\_AFinal.docx,

**Line Attachments:** None

## Event URL

[Review and bid on this event.](#)

To discuss event EV00000683 with other invited bidders, or those hosting this event, use the following URL . This forum thread is dedicated to the discussion of event EV00000683. [Discuss this event in a dedicated forum.](#)



**OKLAHOMA**  
Office of Management  
& Enterprise Services

# Public bidding events

You will see a populated list to select your event.

Greetings!  
PeopleSoft version 9.2.48

< Supplier Secure Home Page

Bidding Opportunities

\*View By Bid Status

7 rows

Time Zone Central Time (US) Date Format MMDDYY Apply

Bidding Event Information

Invited Events Public Events

4 rows

Event Name	Buying Organization / Event ID	Format / Type	Start Date / End Date	Ends In	Bid Status	Event Details
Consulting Services	Department of Transportation EV00000573	Sell RFx	03/20/2025 08:45 AM CDT 04/10/2025 08:45 AM CDT	6 days	New	>
Occupational Business Licensing SW1182	Mgmt and Enterprise Services EV00000182	Sell RFx	03/22/2023 11:30 AM CDT 04/26/2025 03:00 PM CDT	22 days	New	>
Maternal Child & Health Program	Department of Health EV00000456	Sell RFx	07/25/2024 08:17 AM CDT 12/31/2025 01:00 PM CST	271 days	New	>
CAP PROJECT	Mgmt and Enterprise Services EV00000567	Sell RFx	02/13/2030 10:03 AM CST 02/13/2030 10:03 AM CST	1776 days	New	>

View By Bid Status

All 4

New 4

Accepted 0

Winning 0

Outbid 0

Declined 0

Withdrew 0

# Step 2: Access the solicitation event

# Accessing an event

Select the appropriate event and the event page will open.

Greetings!  
PeopleSoft version 9.2.48

< Bidding Opportunities

Event Details

Bid on Event Accept Invitation

▼ Bidding Event Information

Event Name	Occupational Business Licensing SW1182	Event Start Date	03/22/2023 11:30 AM CDT
Business Unit	Mgmt and Enterprise Services	Q&A End Date	04/05/2023 03:00 PM CST
Event ID	EV00000182	Event End Date	04/26/2025 03:00 PM CDT
Event Status	Posted	Event Round	1
Buyer Name	Cristy Diane Newton	Event Version	1
Sealed Event	Yes	Event Format	Sell
Payment Terms	Due in 45 Days	Event Type	RFX
Contact Information	Cristy Diane Newton	Billing Location	OMES-ADMINISTRATION
Description	The Office of Management and Enterprise Services (OMES) Information Services Division (ISD) seeks proposals from qualified suppliers for licensing solutions.		
		Event Currency	US Dollar
		Multiple Bids	Allowed
		Edits to Submitted Bids	Yes

View Bid Package View Event Q&A Forum

▼ Lines 3 rows

Line Number	Bid Mandatory	Item Description	Line Group	Requested Quantity/UOM	Comments and Attachments
1	No	Licensing Software Application		1.0000 EACH	
2	No	Program Maintenance and Support		1.0000 EACH	
3	No	Implementation, Configuration, Onboarding/Training Services		1.0000 EACH	


Important items to note:



- Event start date.
- Q&A end date.
- Event end date.
- Multiple bids – allowed or not.
- Edits to submitted bids – yes or no.

# Event details

## Bidding event information

**Bidding Event Information**

Event Name	Occupational Business Licensing SW1182
Business Unit	Mgmt and Enterprise Services
Event ID	EV00000182
Event Status	Posted
Buyer Name	Cristy Diane Newton
Sealed Event	Yes
Payment Terms	Due in 45 Days
Contact Information	Cristy Diane Newton 
Description	<div>The Office of Management and Enterprise Services (OMES) Information Services Division (ISD) seeks proposals from qualified suppliers for licensing solutions.</div>

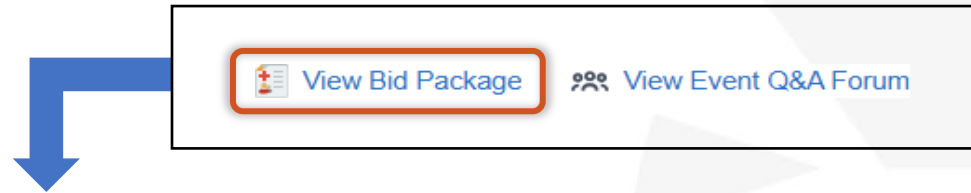
 [View Bid Package](#)  [View Event Q&A Forum](#)

## Note these items

Event Start Date	03/22/2023 11:30 AM CDT
Q& A End Date	04/05/2023 03:00 PM CST
Event End Date	04/26/2025 03:00 PM CDT
Event Round	1
Event Version	1
Event Format	Sell
Event Type	RFx
Billing Location	OMES-ADMINISTRATION
Event Currency	US Dollar
Multiple Bids	Allowed
Edits to Submitted Bids	Yes

# View bid package

Select **View Bid Package** if you are ready to review the solicitation to consider a submission:



### View Bid Package

▼ Attachments

Filename	Description
EV00000182_SW1182_Licensing_Bidder_Instructions.pdf	
EV00000182_SW1182_Licensing_Attachment_A.docx	
EV00000182_SW1182_Licensing_Exhibit_1_Scope.xlsx	
EV00000182_SW1182_Licensing_Exhibit_2_Pricing.xlsx	
EV00000182_SW1182_Licensing_Attachment_C.pdf	
EV00000182_SW1182_Licensing_OMESFormVendorPayee.docx	
EV00000182_SW1182_Licensing_OMESFormCP004_Non-Collusion.docx	
EV00000182_Amendment_1.pdf	Amendment 1 to correct error on cover page.
EV00000182_Amendment_2_Q_A.pdf	Amendment 2 Q&A
EV00000182_SW1182_Licensing_Attachment_B.pdf	

▼ Comments

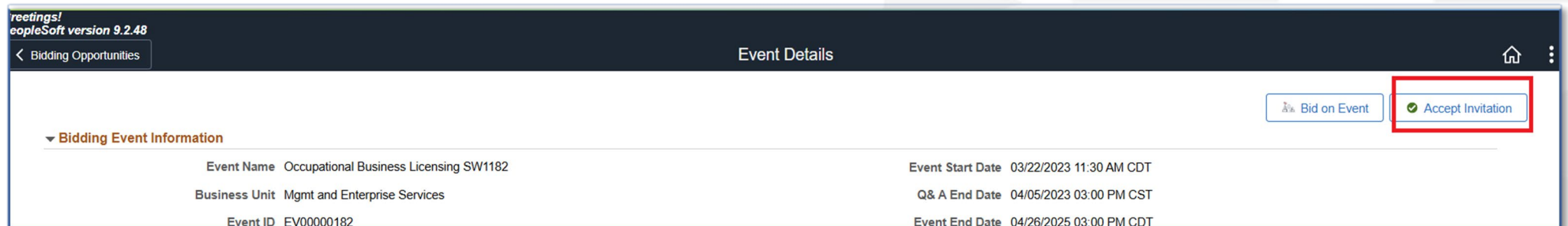
SW1182 Licensing Software Solution RFP for Statewide contract.

This is a new solicitation for SW1182 Licensing Software solution for use by state agencies for example professional licenses for doctors, nurses, lawyers, plumbers, funeral directors, and other professions, issued by state boards or agenc...

[More](#)

# Accept invitation to bid

If you wish to participate, select **Accept Invitation** in the top right corner:



The screenshot displays the 'Event Details' page in PeopleSoft. The top navigation bar includes a home icon and a menu icon. Below the navigation bar, there are two buttons: 'Bid on Event' and 'Accept Invitation'. The 'Accept Invitation' button is highlighted with a red rectangular box. Below the buttons, there is a section titled 'Bidding Event Information' which contains the following details:

Bidding Event Information	
Event Name	Occupational Business Licensing SW1182
Business Unit	Mgmt and Enterprise Services
Event ID	EV00000182
Event Start Date	03/22/2023 11:30 AM CDT
Q & A End Date	04/05/2023 03:00 PM CST
Event End Date	04/26/2025 03:00 PM CDT

# Accept invitation to bid cont.

When you are ready to bid on it, you can easily locate the solicitation in the left column. Select **Accepted**, and it will take you back to the event:

The screenshot displays the 'Bidding Opportunities' page in PeopleSoft version 9.2.48. On the left sidebar, the 'Accepted' filter is selected, showing 1 row. The main table displays the details for the selected event:

Event Name	Buying Organization / Event ID	Format / Type	Start Date / End Date	Ends In	Bid Status	Event Details
Consulting Services	Department of Transportation EV00000573	Sell RFx	03/20/2025 08:45 AM CDT 04/10/2025 08:45 AM CDT	6 days	Accepted	>

# What if you don't want to submit a bid?

Accepting a bid does not obligate you to make a submission. If you decide not to submit, you can either decline the event later or just not submit anything.

There is no penalty for accepting a bid and not submitting anything.



# Event page

Select the event to return to the Event Page.

Greetings!  
PeopleSoft version 9.2.48

< Bidding Opportunities

Event Details

[Bid on Event](#) [Accept Invitation](#)

▼ Bidding Event Information

Event Name	Occupational Business Licensing SW1182	Event Start Date	03/22/2023 11:30 AM CDT
Business Unit	Mgmt and Enterprise Services	Q&A End Date	04/05/2023 03:00 PM CST
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Description	The Office of Management and Enterprise Services (OMES) Information Services Division (ISD) seeks proposals from qualified suppliers for licensing solutions.		

[View Bid Package](#) [View Event Q&A Forum](#)

▼ Lines

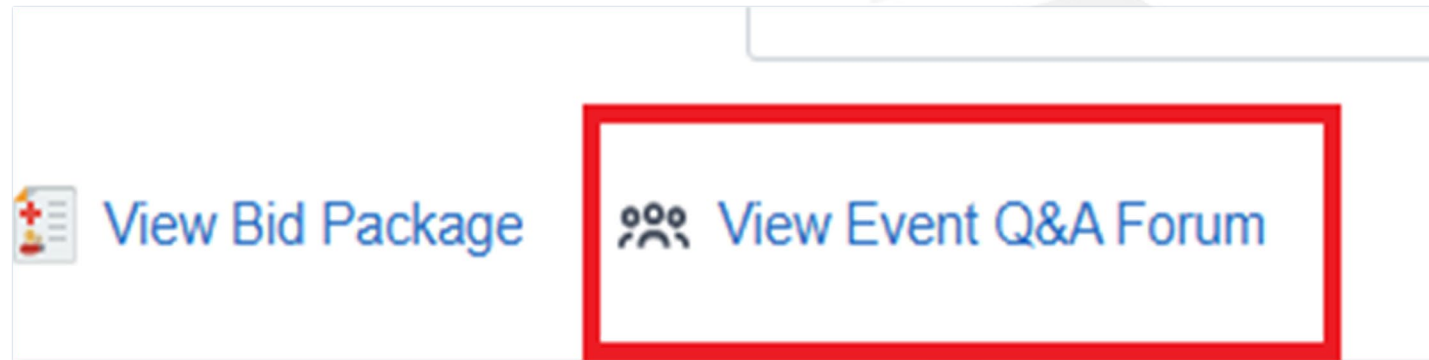
3 rows

Line Number	Bid Mandatory	Item Description	Line Group	Requested Quantity/UOM	Comments and Attachments
1	No	Licensing Software Application		1.0000 EACH	
2	No	Program Maintenance and Support		1.0000 EACH	
3	No	Implementation, Configuration, Onboarding/Training Services		1.0000 EACH	

# Step 3: Submit questions

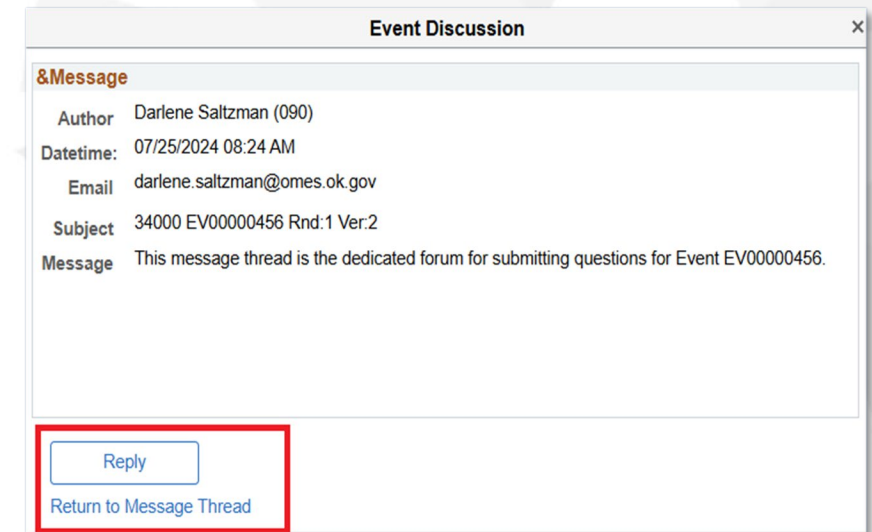
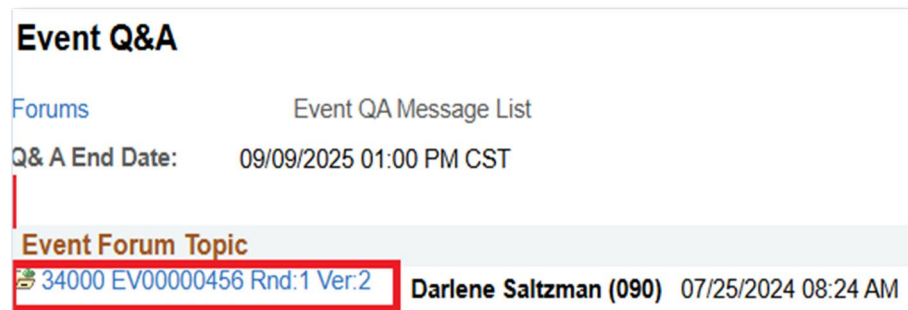
# View event Q&A

Questions about the statement of work, any requirement to submit or the particulars of the event must be asked in the [Event Q&A Forum](#).



# Navigate to event discussion

Select the event title (blue link) under **Event Forum Topic**, then select the **Reply** button.

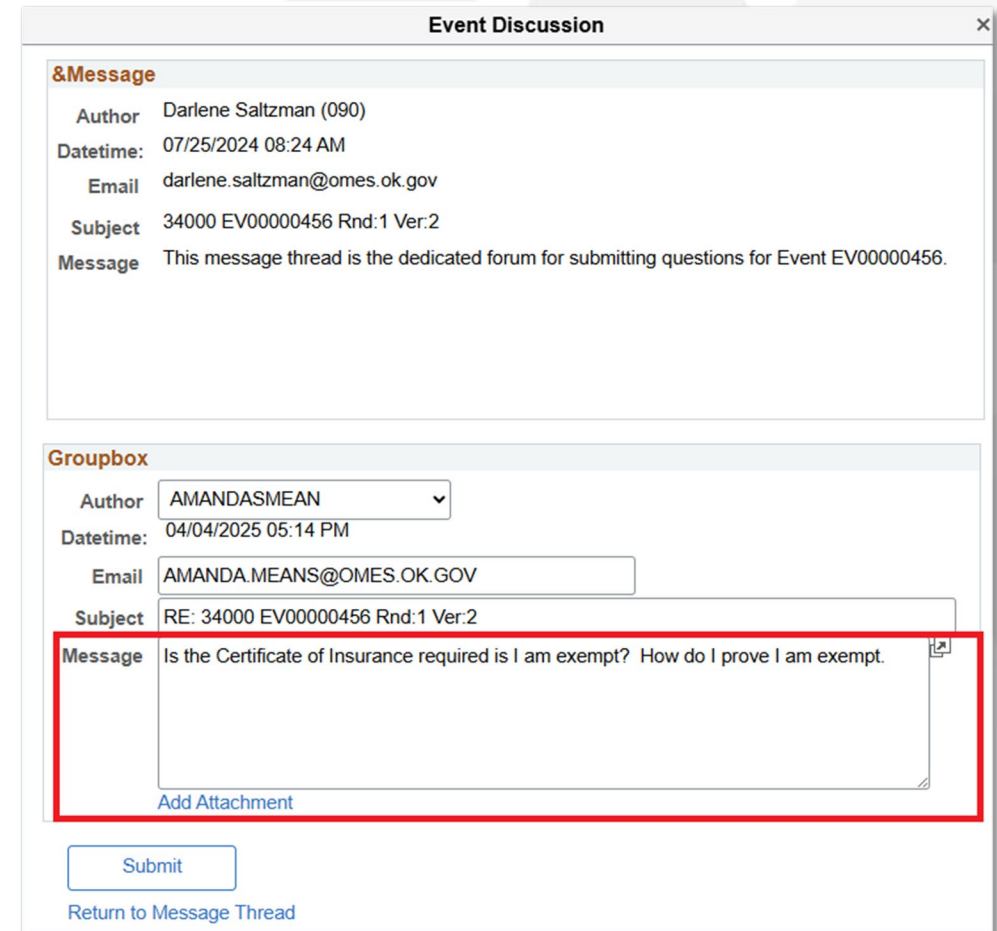


# Submit question(s)

The Event Discussion box appears.

Either type your question in the message box or upload a document, which can be useful if you have a series of questions.

Select **Submit** when you are done.



The screenshot shows a web form titled "Event Discussion". It contains two main sections: "&Message" and "Groupbox".

The "&Message" section displays a message from Darlene Saltzman (090) dated 07/25/2024 08:24 AM. The subject is "34000 EV00000456 Rnd:1 Ver:2". The message text states: "This message thread is the dedicated forum for submitting questions for Event EV00000456."

The "Groupbox" section contains a form for submitting a new question. The "Author" field is set to "AMANDASMEAN". The "Datetime" field shows "04/04/2025 05:14 PM". The "Email" field is "AMANDA.MEANS@OMES.OK.GOV". The "Subject" field is "RE: 34000 EV00000456 Rnd:1 Ver:2". The "Message" field contains the text: "Is the Certificate of Insurance required is I am exempt? How do I prove I am exempt." This field is highlighted with a red border. Below the message field is a blue link "Add Attachment". At the bottom of the form is a blue button labeled "Submit" and a blue link labeled "Return to Message Thread".

# Successful question submission


If you successfully submitted your question, you will see it linked below Event Forum Topic.



**Event Q&A**

[Forums](#)      Event QA Message List

Q& A End Date:      09/09/2025 01:00 PM CST

**Event Forum Topic**

 34000 EV00000456 Rnd:1 Ver:2      **Darlene Saltzman (090)** 07/25/2024 08:24 AM

 RE: 34000 EV00000456 Rnd:1 Ver:2      **AMANDASMEAN** 04/04/2025 05:18 PM 

All questions and answers will be published as an amendment.

# Step 4: Submit a bid



# Answer general event questions

Scroll down to Step 1: Answer General Event Questions. The questions vary between solicitations and can appear slightly different than shown here.

**Step 1: Answer General Event Questions**

The event administrator requests your response to questions not specific to any specific item.

General Event Questions	18
Required Questions	10
Questions Responded To	0

[Hide Event Questions](#)

**Event Questions**

★ Bid Required    🌟 Ideal Response Required

**General Questions** 1 of 18

Does your bid meet specifications? Bidder - Attach response here!

Response

[Add Comments or Attachments](#)

★

CONTACT NAME/PHONE NUMBER/EMAIL (7.1)

Provide name and email for rfp communication in either a cover page or transmittal letter.

# Attachment 1 Bidding Instructions

The questions mostly follow the Attachment 1 Bidding Instructions, which identify where in the packet the corresponding information is located.

★  
CONTACT NAME/PHONE NUMBER/EMAIL (7.1)  
Provide name and email for rfp communication in either a cover page or transmittal letter.  
Please note an attachment is required.  
[Enter File Attachment Response](#)

★  
EXHIBIT 1 - COMPANY INFORMATION (7.2)  
If requested, attach company information exhibit here. You may also attach any portions of your proposal that contain pertinent information such as organization resumes/bios/charts, letters of support, etc.  
Please note an attachment is required.  
[Enter File Attachment Response](#)

★  
CP076\* (7.3a)  
Complete and sign form. All questions must be addressed.  
Please note an attachment is required.  
[Enter File Attachment Response](#)

★  
CP004\* (7.3b)  
Complete form and have signed by authorized signatory person for contracting obligations.  
Please note an attachment is required.  
[Enter File Attachment Response](#)



7 Required Bid Format

1. Responding suppliers are required to submit responses in the "Bid Factors" section of the online event page. Any other forms of submission will not be accepted and may deem supplier's offer "non-responsive".
2. Please use, as appropriate, fillable forms as provided. Handwritten and scanned pdf's may not be accepted.
- 3.

7.1 Section One: Cover Page  
Provide a dated cover page or transmittal letter that identifies the Solicitation and the Bidder and provides Bidder contact information.

7.2 Section Two: Executive Summary and Company Information  
Exhibit 1: Required Product Information  
The Bidder's required product information from Exhibit 1: Required Product Information shall be submitted in this section. This includes the number of product options, size options, durability printing location, art design method, cobranding abilities, minimum mandatory shipping amounts, minimum mandatory shipping quantity, physical samples (BAND THREE: FOOD AND BEVERAGE ONLY), variety, material options, etc. All requested information listed for each band in Exhibit 1: Required Product Information shall be provided for evaluation. If the requested information is unavailable, the Bidder shall respond with "N/A".

08/30/2024 For Agency and Central Purchasing Use Page 4 of 10

Bidders are only responsible for providing complete and accurate information for the bands their company is capable of fulfilling. If the Bidder is capable of responding to multiple bands, information for each band shall be addressed in the response.

7.3 Section Three: REQUIRED Forms, Certifications and Disclosures  
Exhibit 2: Responding Bidder Information - CP076  
Exhibit 3: Non-Collusion Certification - CP004

- a. Completed "Responding Bidder Information" Form CP076 form set forth and accompanying required documentation.
- b. Completed "Certification for Competitive Bid and Contract, or Non-Collusion" Form CP004 attached to bid.
- c. Signed Amendments to the solicitation (if any).

# First type of general questions

There are two ways a general question may appear. This first version does not include a response box and only needs an upload before it is complete. Select **Enter File Attachment Response**.

General Questions

1 of 16

CONTACT NAME/PHONE NUMBER/EMAIL (7.1)

Provide name and email for rfp communication in either a cover page or transmittal letter.

Please note an attachment is required.

Enter File Attachment Response

# Bid response page

The Upload Bid Response box opens.

Question Comments and Attachments

Business Unit 56600Event ID EV00000675

CONTACT NAME/PHONE NUMBER/EMAIL (7.1)

Provide name and email for rfp communication in either a cover page or transmittal letter.

Please note an attachment is required.

Attachments

Upload Bid Response

Attached File	Attachment Description	Upload	View		
		<div>Upload</div>	<div>View</div>	<a href="#">Upload Bid Response</a>	<a href="#">Delete</a>

1-1 of 1

Comments

Add New Comments

OK

Cancel

# Upload files

To upload your file, select the **Upload** button under Upload, then select **Choose File**.

**Question Comments and Attachments** [X]

Business Unit 56600      Event ID EV00000675  
CONTACT NAME/PHONE NUMBER/EMAIL (7.1)  
Provide name and email for rfp communication in either a cover page or transmittal letter.  
Please note an attachment is required.

**Attachments**

**Upload Bid Response**

[Icon] |< < 1-1 of 1 > >

Attached File	Attachment Description	Upload	View		
		<b>Upload</b>	View	<a href="#">Upload Bid Response</a>	<a href="#">Delete</a>

**Comments**

Add New Comments

[Text Area]

OK Cancel



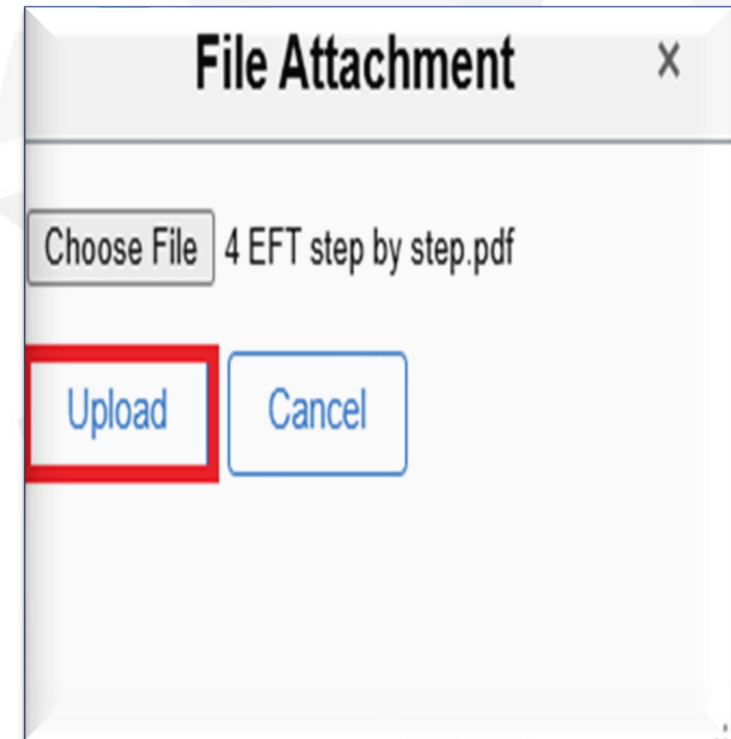
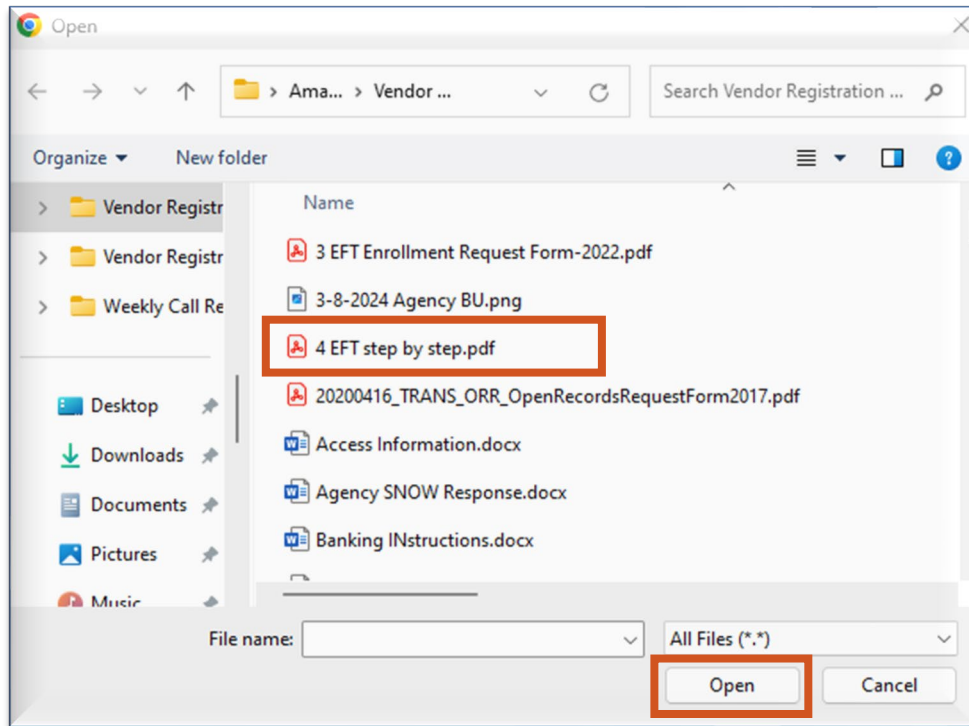
**File Attachment** [X]

**Choose File** No file chosen

**Upload** **Cancel**

# Select files to upload

A file browser pops up for you to choose your file. The file then populates to the File Attachment box. Select **Upload**.



# Submit files

This returns you to Upload Bid Response, where you can see your file is attached. Select **OK** and continue to answer all questions.

Question Comments and Attachments

Business Unit 56600Event ID EV00000577

CP076\* (7.3a)

Complete and sign form. All questions must be addressed.

Please note an attachment is required.

Attachments

Upload Bid Response

1-1 of 1

Attached File	Attachment Description	Upload	View		
3_EFT_Enrollment_Request_Form-2022.pdf		Upload	View	<a href="#">Upload Bid Response</a>	<a href="#">Delete</a>

Comments

Add New Comments

OK

Cancel

# Additional attachments

Most general questions only require one attachment per line, but there may be times where multiple attachments are needed. To upload an additional attachment for one question, select **Upload Bid Response**.

Question Comments and Attachments

Business Unit 56600Event ID EV00000577

CONTACT NAME/PHONE NUMBER/EMAIL (7.1)

Provide name and email for rfp communication in either a cover page or transmittal letter.

Please note an attachment is required.

Attachments

Upload Bid Response

1-1 of 1

Attached File	Attachment Description	Upload	View		
3_EFT_Enrollment_Request_Form-2022.pdf		Upload	View	Upload Bid Response	Delete

Comments

Add New Comments

OK

Cancel

# Additional attachments cont.

A new line is added. You can do this as many times as needed. An attachment description is not required, but you are welcome to optionally add any comments in the comment box.

**Upload Bid Response**

1-2 of 2

Attached File	Attachment Description	Upload	View		
3_EFT_Enrollment_Request_Form-2022.pdf	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="View"/>	<a href="#">Upload Bid Response</a>	<a href="#">Delete</a>
		<input type="button" value="Upload"/>	<input type="button" value="View"/>	<a href="#">Upload Bid Response</a>	<a href="#">Delete</a>

**Comments**

The file size limit is 25 MB for each attachment and 64 characters for file names.

# Second type of general questions

The second type of general questions may include questions with response boxes. Select **Yes** or **No** from the drop-down menu, then upload your documents.

★

Do you carry Workers Compensation Insurance Coverage?

Bidder is required to provide with the bid a certificate of insurance showing proof of compliance with the Oklahoma Workers Compensation Act.

YES - Include a certificate of insurance with bid

NO - attach a signed statement that provides specific details supporting the exemption you are claiming from the Workers Compensation Act.

Response Yes

[Add Comments or Attachments](#)

# Add unit bid price

After uploading, proceed to Step 2: Enter Line Bid Responses. Enter **1.00** under Your Unit Bid Price.

**Step 2: Enter Line Bid Responses**

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event 1  
Lines That Require a Response 1  
Lines Responded To 0  
Your Total Line Pricing 0.0000 USD

[Hide Line Detail](#)

★ Bid Required [Line Comments/Files](#)

**Lines**

[Grid](#) [Search](#) 1-1 of 1 [View All](#)

Line		Item ID	Description	Unit	Requested Quantity	Your Bid Quantity	Your Unit Bid Price	Your Total Bid Price		
1	★		RFP FOR A BOOK PROGRAM FOR MCH @ CLINICS	EA	1.0000	1.0000	<input type="text"/>	0.0000 USD	Bid	<a href="#">Comment</a>

**Lines**

[Grid](#) [Search](#) 1-1 of 1 [View All](#)

Line		Item ID	Description	Unit	Requested Quantity	Your Bid Quantity	Your Unit Bid Price	Your Total Bid Price		
1	★		RFP FOR A BOOK PROGRAM FOR MCH @ CLINICS	EA	1.0000	1.0000	<input type="text" value="1.00"/>	0.0000 USD	Bid	<a href="#">Comment</a>

# Submitting additional documents

Do not select Bid and do not select the comment bubble to add comments and attachments.

If you have additional documents for submission that were not covered in the general questions, select **Click to attach Event Documents and Bid Response** in the bottom left corner the page.

This box pops up, and you can follow the same process as before.

The screenshot displays a modal window titled "Event Documents and Bid Response". It contains a table of attached files with columns for "Attached File", "Attachment Description", and "View". The files listed are:

Attached File	Attachment Description	View
1_Bidding_Instructions.pdf		<a href="#">View</a>
2_Attachment_A_-_Purpose_and_Scope.pdf		<a href="#">View</a>
3_Attachment_B_-_NegotiableTerms.pdf		<a href="#">View</a>
4_Exhibit_1_-_Required_Product_Information.pdf		<a href="#">View</a>
5_Exhibit_2_-_Responding_Bidder_Informaton.pdf		<a href="#">View</a>
6_Exhibit_3_-_Non_Collusion_Certification.pdf		<a href="#">View</a>
7_Exhibit_4_-_Bid_Specifications.pdf		<a href="#">View</a>
8_Exhibit_5_-_Price.pdf		<a href="#">View</a>
9_Bid_Packet_Instructions.pdf		<a href="#">View</a>

Below the table is a section titled "Upload Bid Response" with a table for new uploads:

Attached File	Attachment Description	Upload	View		
		<a href="#">Upload</a>	<a href="#">View</a>	<a href="#">Upload Bid Response</a>	<a href="#">Delete</a>

At the bottom of the modal is a "Comments" section with a "View Event Comments" button.

# Validate entries

After you have answered all questions and uploaded all items, select **Validate Entries**.

[Click to attach Event Documents and Bid Response](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

If there are errors, the below box will pop up. Select **OK**.

Please see message(s) at the top of the page. (18058,314)

# Correct entry errors

Scroll to the top of the page to locate errors. Correct any errors, then validate entries again. Select **OK**.

**Event Details**

! Response required. You must enter a response for General Question 5 - CP004\* (7.3b) Complete form and ...

! Response required. You must enter a response for General Question 14 - PRICING\* (7.8) Submit pricing d ...

! Response required. You must enter a response for Line 1- Line Question: What price are bidding?

! All lines Required. You must enter a bid for line 1 - Requisition for a solicitation f ...



Correct any errors and validate the entries again. Select **OK**.

No errors found. (18058,313)

OK

# Bid confirmation

If you choose **Submit Bid**, a bid confirmation will appear. A bid confirmation will also be sent to the email address associated with your account.

**Bid Confirmation**

Your bid has been successfully submitted.

Bid ID	1	Bid Date	05/02/2025 4:17:46PM CDT	
Event ID	EV00000577	Merchandise for Resale RFP - Req 5660018774		
Event Format	Sell Event	Round	1	Version 1
Start Date	04/28/2025 11:40AM PDT	End Date	05/08/2025 03:00 PM CDT	
Your Total Price 1.00 USD				

Copy Bid

Your\_Bid.pdf  
32 KB

**Bid Notification**

This is confirmation your bid has been received. See below for details.

**Bid Details**  
Event ID: 56600 - EV00000577 Round 1 Version 1  
Event Name: Merchandise for Resale RFP - Req 5660018774  
Bid ID: 1  
Date Posted: 05/02/25 4:17:46PM CDT

**Event URL**  
[Review and bid on this event.](#)

Reply



Reply all

Forward

# Editing a submitted bid

Follow the same steps to edit a submitted bid or return to a bid that has been saved for later. Log in with your user ID, return to Bidding Events and open the events.

Select the **Actions** arrow to bring up a contextual menu, then select **View/Edit Bid**. This will take you back to the Bidding Event Information page. From there, follow the steps to submit a bid.

 View Bid Package  View Event Q&A Forum								
▼ Bid Information								
1 row								
Bid ID	Round	Version	On Behalf Of	Submitted By	Event Status	Bid Date	Bid Status	Actions
1	1	1		conversiontest	Posted	05/02/2025 4:17:46PM	Posted	Actions ⌵

# FAQs

# FAQs 1-2

## 1. Why can't I see the event/solicitation/bid anymore?

- Once a bid closes, it is no longer visible to the public while it is being evaluated and awarded.

## 2. How long does the evaluation take?

- The length of the evaluation process varies based on several factors. Most solicitations are awarded in about 30 days, but the process can take as long as three to six months.

# FAQs 1-2

## 1. Why can't I see the event/solicitation/bid anymore?

- Once a bid closes, it is no longer visible to the public while it is being evaluated and awarded.

## 2. How long does the evaluation take?

- The length of the evaluation process varies based on several factors. Most solicitations are awarded in about 30 days, but the process can take as long as three to six months.

# FAQs 5-6

5. If I am missing any documents, such as my COI or SOS Certificate, due to availability upon submission, will I automatically be disqualified?

- No. You will be provided an opportunity to submit those documents prior to the awarding of the bid, if you note in your submission that you will provide them later.

6. What if I am certain that a required upload does not apply to me, but I cannot select Submit without the upload?

- Create a document briefly explaining that the upload is not applicable to you and why. Example: “Sole proprietorship with no employees, so exempt from carrying worker’s comp insurance.”

# Communications and questions tip

During the open solicitation, do not contact the agency. The contracting officer listed on the Bidder Instructions cover page is the only individual you should contact regarding any questions or issues with the solicitation.

# Questions?



**OKLAHOMA**  
Office of Management  
& Enterprise Services

# Supplier Bid Submission Guide

The information shared in this presentation is also available in the [Supplier Bid Submission Guide](#). Scan below to access the guide.



# Thank you for attending!

For supplier registration and bidder submission assistance, contact:



Supplier Registration team  
405-521-2930

Monday-Thursday, 9 a.m.-4 p.m. CST

# **Q&A CLOSING REMARKS**

**[oklahoma.gov/ohca/nexus](https://oklahoma.gov/ohca/nexus)**

