

Attachment 5
YH26-0031 AHCCCS AI Call Center Integration
TASK ORDER INSTRUCTIONS TO OFFERORS

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1. **Anticipated Procurement Schedule:**

All dates here are subject to change at any time.

Activity	Date
Task Order Release	November 10, 2025
Questions Due	November 21, 2025, at 3:00 p.m. (AZ Time)
Intent to Bid Form Due	November 21, 2025, at 3:00 p.m. (AZ Time)
Offeror's Proposals Due	December 9, 2025, at 3:00 (AZ Time)
Final Task Order Award (Subject to change)	January 15, 2026
Contingent Upon CMS Approval	April 1, 2026
Services Start Date	April 6, 2026

2. **Questions:** All questions concerning this solicitation shall be submitted via email using the AHCCCS Q&A form found with the solicitation documents to the Procurement Officer identified on the first page of this solicitation document. Offerors may not contact other AHCCCS employees concerning this solicitation.
3. **Evaluation Criteria and Selection Process:** Awards shall be made to the responsible Offeror(s) whose proposal is determined in writing to be the most advantageous to the State based upon the evaluation criteria.

Proposals will be evaluated based upon the ability of the Offeror to satisfy the requirements of the Task Order in a cost-effective manner. The scored portions of the evaluation are listed in this section, in their relative order of importance.

- 3.1. Evaluation Criteria 1: Experience, Expertise and Capacity of the Firm
- 3.2. Evaluation Criteria 2: Method of Approach
- 3.3. Evaluation Criteria 3: Solution Overview
- 3.4. Evaluation Criteria 4: Completed Requirements Matrix
- 3.5. Evaluation Criteria 5: Proposed Pricing

Notwithstanding any other provision of this Solicitation, AHCCCS expressly reserves the right to:

- Waive any immaterial mistake or informality,
- Reject any or all Proposals, or portions thereof, and/or
- Reissue the Task Order.

Evaluators will be focused on information expressly provided by the Offeror. No inferences or assumptions will be made by the evaluation team when scoring in order to evaluate information submitted by the Offeror, which is not clear, explicit, or thoroughly presented. Use of contingent language such as 'exploring' or 'taking under consideration' will not be given any weight during the scoring evaluation process. A policy, brochure, or reference to a policy or manual does not constitute an adequate response and will not be given any weight during the scoring evaluation process.

It is the responsibility of the Offeror to examine the entire Task Order, timely seek clarification of any requirement that may not be clear, and review all responses for accuracy before submitting its Proposal. The Proposal becomes a part of the Contract. Therefore, whatever information is stated in the Proposal may be evaluated either during the Proposal evaluation process or subsequently during other reviews. If any information

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contained inside an Offeror's proposal contradicts or does not comply with the solicitation requirements, the solicitation requirements prevail, unless otherwise accepted by AHCCCS in writing.

4. INTENT TO BID / ASFS / BIDDERS LIBRARY:

Offeror shall submit its INTENT TO BID to AHCCCS no later than the due date on the cover page of this task order. Once the intent to bid is received, the Offeror will receive an email with access and instructions to the **AHCCCS Secure File Share (ASFS)** where Offerors shall submit their proposals, as well as gain access to secured documentation related to this task order. Failure to follow the prescribed format for submission may result in AHCCCS determining that the submission is non-responsive. The Bidders Library for this task order, containing sensitive documentation, will be found in the ASFS.

5. Required Elements to respond to this task order:

- 5.1. Cover letter with signature of authorized company representative, including contract number and contact information.
- 5.2. Include with submission, FedRAMP or StateRAMP authorization, HITRUST certification, or Security and Privacy assessment and SSA-E 18 assessment or equivalent if hosted outside of AHCCCS Azure tenancy.
- 5.3. Proof of compliance with federal regulations for solutions that will process, store, or transmit data from the Federal Hub.
- 5.4. HIPAA Privacy and Security – specifically CFR title 45 public Welfare, Parts 155.260 and 164 – Security and privacy; Arizona Security standards and policies set by ADOA / ASET; and all applicable ACA requirements and standards, including MARS-E.

5.5. Transmittal Letter:

The Transmittal Letter should briefly summarize the Offeror's ability to supply the requested services that meet the requirements defined in the Task Order and must contain a statement/attestation indicating the Offeror's willingness to provide the services and deliverables, subject to the terms and conditions set forth in the Task Order.

A person authorized to commit the Offeror to its representations and who can certify that the information offered in the proposal meets all general conditions must sign the Transmittal Letter. In the Transmittal Letter, please indicate the principal contact for the proposal along with an address, telephone number, and an email address if that contact is different than the individual authorized for signature.

In addition to the required detailed legal analysis, the Offeror shall summarize in their Submittal Letter the list of distinct portions, including exact page numbers, of their document is requested to be kept confidential. See "Request for Proprietary / Confidential Determination" paragraph (below).

5.6. Experience, Expertise and Capacity of the Firm (limit 10 pages)

- 5.6.1. Specific experience, expertise and capacity of the firm with this type of initiative.
- 5.6.2. List of names and classification of personnel expected to perform specific activities, including use of subcontractors.
- 5.6.3. Experience and expertise of the proposed staff with this type of initiative.
- 5.6.4. A description of Experience, Expertise and Capacity of the proposed staff.

5.7. Method of Approach

- 5.7.1. Proposed initiative management methodology and approach to fulfill the requirements of this initiative. (Limit 5 pages)
- 5.7.2. High level narrative description of how the vendor will satisfy each of the requirements in the requirements matrix. (Limit 5 pages)

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5.7.3. High level proposed schedule to meet the objectives for AHCCCS anticipated timeline for implementation.

5.8. **Solution Overview** (Limit 10 pages) describing your technical approach to fulfilling the requirements outlined in the Global Requirements (Requirements Matrix).

5.9. **Completed Requirements Matrix** (please fill in the last two columns on each tab)

5.10. **Proposed Pricing:**

5.10.1. Be advised that all pricing must be inclusive of all costs associated with your solution. No other expenses (i.e. TRAVEL or PER DIEM) will be paid.

5.10.2. Complete pricing document Solution pricing structure document.

5.10.3. Please note that the vendor rate card and/or block of hours are for new development (if needed) only, and SHALL NOT BE USED for required design, implementation, required elements and M&O of the proposed solution.

5.10.4. Please note that the Software and License costs should include licensing costs for each component of the Solution, which will be hosted in the AHCCCS Azure environment. AHCCCS will host the Solution and retain ownership of the licensing for each component.

5.11. **Subcontracts:** Offeror shall clearly list any proposed subcontractors and the subcontractor's proposed responsibilities in the Offer.

6. **AWARD**

6.1. AHCCCS anticipates awarding the response to the contractor(s) with the most advantageous response(s). The award of this task order is contingent on CMS and FNS approval.

6.2. This project will be procured through the Data Management Services contract set, and all terms and conditions of those two documents shall apply to this project.

6.3. AHCCCS may provide Protected Health Information (PHI) to the Contractor in connection with this task order. Therefore, the attached HIPAA Business Associate Addendum is incorporated into this task order.

7. **Offshore Performance of Work Prohibited:** Any service that are described in the specifications or scope of work that directly serve the State of Arizona or its clients involve access to secure or sensitive data or personal client data shall be performed within the defined territories of the United States. Unless specifically stated otherwise in the specifications, this paragraph does not apply to indirect or "overhead" services, redundant back-up services, or services that are incidental to the performance of the contract. This provision applies to work performed by subcontractors at all tiers. **Offerors shall declare all anticipated offshore services in the Offer.**

8. **Presentations and Demonstrations:**

AHCCCS may request Offerors who are determined to be reasonably susceptible for award to give a presentation or show a demonstration of the product or service to the evaluation committee. Though oral presentations are not scored separately for this procurement, information presented could impact the Offeror's final evaluation of any part of the submitted proposal.

9. **Proposal Organization:**

The Offeror's Proposal shall be prepared and organized as follows:

9.1. Font and Margins: All proposals shall be submitted in Calibri 11-point font or larger with margins no less than ½". Exception to Font Size: Graphics, tables, and charts may be in a smaller font. Portrait and landscape orientation are allowable.

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9.2. Page Limits: The Offeror has the discretion to include or exclude the task order requirement of text as a part of the Offeror's response; however, the required page limit applies regardless of whether or not the text is included. AHCCCS will only consider the information provided within the allotted page limit and permitted attachments, if any, in response to a specific submission requirement when evaluating the Offeror's Proposal. AHCCCS will not consider information outside the allotted page limit or any other information provided elsewhere in the Proposal when reviewing a specific response to an individual submission requirement.

9.3. Please use the following labels for each submission requirement:

PART A

- A1 Transmittal Letter
- A2 Signed Solicitation Amendment(s)

PART B

- B1 Experience, Expertise and Capacity
- B2 Method of Approach
- B3 Solution Overview
- B4 Completed Requirements Matrix
- B5 Pricing Proposal

PART C

- C1 Separate, signed, Legal Analysis for Confidential /Proprietary Determination (if any)
- C2 Exceptions to any part of task order

10. **Presentations and Demonstrations:** AHCCCS may request Offerors to give a presentation or show a demonstration of the product or service to the evaluation committee. Though presentations/demonstrations are not scored separately for this task order, information presented could impact the Offeror's final evaluation of any part of the submitted proposal.
11. **Clarification of Offers:** AHCCCS may request clarification of an offer at any time after receipt. Clarifications may be requested orally or in writing.
12. **Negotiations:** **Negotiations** may be conducted orally or in writing at the discretion of AHCCCS. Negotiations may be conducted in order to improve offers in such areas of cost, price, specifications, performance, or terms, to achieve the best value for the State.
13. **Best and Final Offers:** Best and Final Offers may be requested from any Offeror, however award(s) may be made without requesting a BAFO ; therefore, offers should be submitted on most favorable terms.
14. **Request for Confidential/Proprietary Determination:**
- 14.1. If an Offeror believes that a specific portion of its proposal contains information that should be withheld from public inspection due to confidentiality, the Offeror shall submit to the Procurement officer a detailed legal analysis, prepared by legal counsel, which sets forth the bases for the requested non-disclosure and the specific harm or prejudice which may arise if disclosed. The analysis shall be presented to the Procurement Officer at the same time as the proposal.

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- 14.2. An entire proposal shall not be identified as confidential; only those very limited and distinct portions which are considered by the Offeror as confidential may be identified as such. **Pricing shall not be considered as confidential.**
- 14.3. In the event that AHCCCS receives a request for disclosure of the information, AHCCCS will disclose the information in accordance with the law. Prior to disclosure, AHCCCS will inform the Offeror of such request and provide the Offeror with a period of time to take action it deems appropriate to support non-disclosure. The Offeror shall be responsible for any and all costs associated with the nondisclosure of the information.
- 14.4. In addition to the required detailed legal analysis, the Offeror shall summarize in their Submittal Letter the distinct portions, including exact page numbers, of their document is requested to be kept confidential.
- 14.5. If any pieces of your proposal are being requested to be kept confidential, and withheld from public viewing, please submit an additional redacted copy of the proposal, clearly listed as REDACTED in the file name. This will ensure that our office is crystal clear on which version of your proposal is acceptable for public viewing.
- 14.6. Regardless of a determination issued by the procurement officer, all portions of the Offeror's proposal, even pages that are proprietary, may be provided to CMS or other state or federal oversight agencies.
15. **Exceptions:** All exceptions included with the Offer shall be submitted in a clearly identified separate section of the Offer in which the Offeror clearly identifies the specific paragraphs of the Solicitation where the exceptions occur. Any exceptions not included in such a section shall be without force and effect in any resulting Contract unless such exception is specifically accepted by the Procurement Officer in a written statement. The Offeror's preprinted or standard terms will not be considered by the State as a part of any resulting Contract. All terms and conditions of the State Contract shall apply to this solicitation and exceptions to the terms contained in the State contract will not be allowable for this task order. All exceptions that are contained in the Offer may negatively impact an Offeror's susceptibility for award. An Offer that takes exception to any material requirement of the solicitation may be rejected.