

Catalina Foothills Unified School District

RFP #21-02-26 MEDICAL / EMPLOYEE ASSISTANCE PROGRAM / HSA
ADMINISTRATION

ADDENDUM 4 – 11-30-2020

1. Due to COVID-19, the proposing vendor strongly prefers to refrain from sending any physical copies or USB proposals during this time in accordance with best practices regarding COVID-19 and to keep ourselves, consultants, and clients safe and healthy. Can you confirm if Catalina Foothills Unified School District will accept electronic-only submission via email in light of the current situation? **No, we have specified the format for responses;**
2. What is the reason for marketing away from the incumbent? **We are interested in seeking the best possible benefits for our employees;**
3. Who else is included in this marketing? **See Below**
4. Is there a specific budget the group has in mind when selecting a new vendor? **No**
5. Is there an opportunity to include any additional products within the quote (FSA, COBRA, HRA, Commuter, etc.)? **No.**
6. Is the group marketing anything else this year (carriers, HRIS, etc.)? **We do not anticipate seeking bids for other products.**
7. Does the group utilize any technology systems for HRIS, Benefits Administration, Payroll, and/or Enrollment? If so, who? **For HRIS, we use PeopleWerks and Munis for Payroll.**
8. Total HSA assets under management?

Current District contributions toward the cost of the respective plans are:

- The District Annual Contribution is currently \$5,257 per year or a monthly contribution of \$438.08 for the employee only tier.
- For the Value Gold Plan, the District applies \$433.24 toward the employee only tier; the remaining balance of \$61 per month may be used towards dental or vision coverages.
- For the Copay Gold Plan and the Classic Gold Plan, the District pays \$438.08 towards the cost of the employee only tier.
- For the HDHP Plan, the District applies \$349.03 towards the Employee Only tier leaving a balance of \$86.33 per month that is contributed to the employees' Health Savings Account.

9. HSA Account Closure fee? **No HAS account closure fee**

RESPONSIVE AND NON-RESPONSIVE VENDOR LIST
 Project Name: MEDICAL / EMPLOYEE ASSISTANCE PROGRAM / HSA ADMINISTRATION - Solicitation Number: RFP 21-02-26
 Excel File Created: 11/18/2020 - 9:20:56 AM Arizona Time

SENT BID ALERT EMAIL:
 --- SORT ID - 1 --->>> GREEN DOWNLOADED BID DOC
 --- SORT ID - 2 --->>> GRAY NO BID PLACED
 --- SORT ID - 3 --->>> WHITE NON-RESPONSIVE VENDOR

SORT #	USER ID	NAME OF FIRM	REGISTRANT NAME	ADDRESS	CITY	ST-PROV	ZIP	CNTY	PHONE	FAX	EMAIL	WEBSITE	BID DOC	NO BID
1	26337	Blue Cross Blue Shield of AZ	Judge Rida	4220 N 23rd Avenue Bldg 2	Phoenix	AZ	85021	USA	602-364-6134		irida@bluecross.com		11/17/20	
3	38925	CBIZ	Oscar Diaz	1765 E. Skyline Dr.	Tucson	AZ	85718	USA	520-235-4726	520-327-6782	odiaz@cbiz.com	www.cbiz.com		
3	41073	Elite Community Services, LLC	Susan Appenzeller	3651 E. Baseline Rd, # E 222	Gilbert	AZ	85234	USA	480-558-1275	480-558-1276	susan@elitesvc.com	www.elitesvc.com		
1	90108	Employees Benefits Corporation	Matt Stader	1350 Dennis Way, Ste 300	Milwaukee	WI	53253	USA	4087294860	4088113790	matt.stader@ebc.com	www.ebc.com	11/18/20	
3	41234	Gallagher	Michael Forsyth	771 E Daily Dr	Camarillo	CA	93010	USA	8055855105		michael_forsyth@gall.com			
3	41096	Group Health Benefits of America	Rod Snyder	10521 Chambers Drive	Tampa	FL	33626	USA	8139663384		rod@snyder.com	www.grouphealthbenefitsofamerica.com		
3	18278	HMAS	Dina Tank	2520 Venture Oaks Way	Sacramento	CA	95833	USA	602.283.1090		dina.tank@hmas.com	www.hmas.com		
3	41808	Lincoln Financial Group	Brandon Krohm	11811 N. Tatum Blvd, Suite 4055	Phoenix	AZ	85028	USA	602-796-0086		Brandon.Krohm@lfg.com	https://www.lfg.com/public/governance/governance		
3	19544	Managstaff, Inc.	Neil Chiril	950 W. Elliot Rd, Suite 212	Tempe	Arizona	85284	USA	6024057421	6024319222	neilc@managstaff.com	www.managstaff.com		
3	32463	Moreton & Company	Greg Killian	101 South 700 East, Suite 300	Salt Lake City	UT	84111	USA	8017157105		greg@moreton.com			
3	36291	OneAmerica	Scott Kinmartin	60 E. Rio Salado Parkway	Tempe	AZ	85281	USA	4804665349	4802195571	scot.kinmartin@oneamerica.com			
3	39944	RespondersHealth	Jeremy Spreitzer	21517 N 120th Ave.	Sun City	AZ	85373	USA	623373556		jeremy@respondershealth.com	www.respondershealth.com		
3	41127	SUNSHINE ENTERPRISE USA LLC	Sam Faragalla	2759 Meadow Sage Ct	Oviedo	FL	32765	USA	4073087989	4076362985	sam@sunshineusa.com	www.sunshineusa.com		
3	29564	Take Charge America	David Richardson	20620 N. 19th Avenue	Phoenix	AZ	85027	USA	623-266-6760	623-266-8214	dfrichardson@takechargeamerica.com	www.takechargeamerica.org		
3	42351	The Halpin Companies, Inc.	Katharine Halpin	2323 N. Central Avenue, Suite 2105	Phoenix	AZ	85004	USA	6022661961		khalpin@halpincompanies.com	www.HalpinCompanies.com		
3	39656	The Hartford	Andrew Schneeweis	8888 E Raintree Drive	Scottsdale	AZ	85260	USA	480-824-5015		andrew.schneeweis@hartford.com	www.hartford.com/		
3	14871	UnitedHealthcare	Elaine Cannon	1 E Washington St., Ste 1700	Phoenix	AZ	85004	USA	602-255-8689	602-255-8719	elaine_cannon@uhc.com	www.uhc.com		

PORT ID	USER ID	NAME OF FIRM	REGISTRANT NAME	ADDRESS	CITY	ST-PROV	ZIP	CNTY	PHONE	FAX	EMAIL	WEBSITE	BID DOC	NO BID
3	38824	Valley Schools	Tish Brasher	Po Box 41760	Phoenix	AZ	85080	USA	6235944370		tbrasher@vsd.org	www.valleyschools.org	11/18/20	
4	27880	OHIO INSURANCE	David Hester	1229 SolonField,SL	Columbus	OH	43228	USA	5053886583		dmullis@insurance@gmail.com		11/18/20	
5	35047	Floral Park Consulting LLC	Jack Brownes	32, Irving Ave	Floral Park	NY	11001	USA	5167776806	5167776806	jackbrownes32@gmail.com		11/18/20	
5	38679	North America Procurement Council	Eric Johnson	Po Box 40445	Grand Junction	CO	81504	USA	302-450-1923		sourcemanagement@nasc.org		11/18/20	
5	30506	Parsons LDS Corporation	Jerry Brooks	48 Seabreeze Way	Vancouver	WA	98662	USA	206-800-9909	206-800-9999	keric@parsons.com		11/17/20	
5	30146	Tutor Assessments	Camilla Hester	4107 Wellington Ave	Nashville	TN	37212	USA	615-457-7932	866-398-2002	cmh@tutor.com	www.tutor.com	11/18/20	

Medical Bid List 11/17/2020

Carrier Name	Contact Name	Phone Fully Insured	email address	Group Size
Aetna	Quotes	N/A	az-mmRFP@aetna.com	51+
Aetna	Quotes	N/A	acabupresalequoterequest@aetna.com	2-50
Aetna	Ms. Laurie Kaminski	602-659-1764	Kaminski.L1@aetna.com	51-300
Aetna	Ms. Tracey Lyons	602-659-1719	lyonst@aetna.com	300+ public/labor
Blue Cross Blue Shield of Arizona	N/A	N/A	lrqbids@azblue.com	Large Group
Blue Cross Blue Shield of Arizona	Mr. Jed Brandes	602-864-5719	jed.brandes@azblue.com	Large Group
Blue Cross Blue Shield of Arizona	N/A	N/A	phxbids@azblue.com	Small Group
Cigna Healthcare	Mr. Drew Pierce	480-426-6714	drew.pierce@cigna.com	Under 500
Cigna Healthcare	Mr. Jerry Smith	480-426-6759	Jerry.Smith@cigna.com	500+
Humana (Broker #Phx HAN 1752646)	Phoenix	Bids	easyrate@humana.com	2-99 lives only
Humana (Broker #Phx HAN 1752646)	Phoenix	Bids	phoenixrfp@humana.com	For groups with 100+
UnitedHealthcare	Mr. Jared Moen	602-255-8537	jared_moen@uhc.com	100
UnitedHealthcare	Jesus Arenas	602-255-1701	jesus_a_arenas@uhc.com	2-100
UnitedHealthcare 2-50	West Quotes	N/A	westquotes@uhc.com	Feb-50
UnitedHealthcare 51-100	West Subs	N/A	westsubs@uhc.com	51-100
Self-Funded				
Aliera Healthcare	Mr. Jim Going	602-714-0730	jgoing@alierahealthcare.com	level Funding
Ameriben	Mr. Jon Aubrey	801-984-0414	jaubrey@ameriben.com	N/A
Ameriben	N/A	N/A	rfp@ameriben.com	N/A
Kairos Health	RFP	888-331-0222	kairos@kairoshealthaz.org	All Sizes
Kairos Health	Ms. Klaudia Gyder	602-200-2413	klaudia.gyder@kairoshealthaz.org	All Sizes
Arizona Benefit Plans, Inc.	Unknown	Unknown	quoter2@azben.com	N/A
ASBAIT/Meritain	Mr. Ralph Epifanio	480-299-2643	ralph.epifanio@meritain.com	N/A
EMI	Ms. Nancy Purdy	800-662-5850	npurdy@emihealth.com	50+ Fully Insured 100+ Partially Self-Funded
HealthComp	Mr. Kyle Gerdts	559-312-2422	kgerdts@healthcomp.com	TPA
HealthNow Administrative Services (HNAS)	Tracy Ly	Unknown	tracy.ly@hnas.com	TPA
Health Taps	Mr. Garrett Watkins	972-765-7370	garrett.watkins@healthtap.com	60
Meritain	Mr. Sean Shepard		sean.shepard@meritain.com	N/A

National General	Molly Kelly	602-648-4133	molly.kelly@ngic.com	Level Funding quotes 2-500
PrarieStates	Mr. Mike Balsan	920-452-4201	mbalsan@praireontheweb.com	Captive
RAGHT	Amanda Weaver	928-753-4700	amandaw@ecollinsandassociates.com	rural public entities
Roundstone	Mr. David Konrad	440-617-0333 X228	dkonrad@roundstoneinsurance.com	TPA
Starmark	Mr. Brady Wolfe	208-321-5250	brady.wolfe@trustmarkins.com	self-funding only
Tall Tree Administrators	Jessica Griffiths	801-938-1146	jgriffiths@talltreehealth.com	TPA
Valley Schools Employee Benefits Trust	Mr. Patrick Dittman	623-594-4370	pdittman@vsit.org	school districts

COBRA-FSA-HAS-HRA

11/17/2020

Carrier Name	Contact Name	Phone	email address	Group Size
Accrue Solutions	Mr. Kyle Eastland	469-414-2012	info@accrueresolutions.com	N/A
AmeriFlex	Wydler Raney	303-824-9002	wraney@myameriflex.com	N/A
Basic	Ms. Dulce Leyva	520-327-0455	dulce@basiconline.com	N/A
Basic	Gloria Pulgarin	520-390-8832	gpulgarin@basiconline.com	N/A
Benefits in a Card	Ms. Christine McNeese	864-770-6119	christine.mcneese@benefitsinacard.com	500+
ConnectYourCare	Andrea Dennis		andrea.dennis@connectyourcare.com	N/A
Discovery Benefits	Bridgit Moszer	701-492-7222	bmoszer@discoverybenefits.com	N/A
EBC	Les Martin	800-346-2126 X290	les.martin@ebcflex.com	N/A
Health Equity	Jason Nurse	630-673-2413	jnurse@healthequity.com	N/A
HRPro	Ms. Kelly Olligschlager	248-581-0278	kollig@hrpro.biz	N/A
Infinisource	Damon Carlso	517-306-2176	dcarlson@infinisource.com	N/A
NueSynergy	Mr. Brett Flanagan	480-459-8733	bflanagan@nuesynergy.com	N/A
P&A Group	Mr. Rick Neward	949-202-8266	newardr@padmin.com	N/A
Sterling Administration	lynn DeMaria		lynn.demaria@sterlingadministration.com	N/A
Sterling Administration	Mr. Eric Chandler	510-381-3549	eric.chandler@sterlingadministration.com	N/A
WageWorks, Inc.	Jason Nurse	630-673-2413	jnurse@healthequity.com	N/A

EAP
11/17/2020

Carrier Name	Contact Name	Phone	email address	Group Size
Aetna	Quotes	N/A	az-mmRFP@aetna.com	51+
Aetna	Quotes	N/A	acabupresalequote@request@aetna.com	2-50
Aetna	Ms. Laurie Kaminski	602-659-1764	KaminskiL1@aetna.com	51-300
Aetna	Ms. Laurie Kaminski	602-659-1764	KaminskiL1@aetna.com	51-300
Aetna	Ms. Tracey Lyons	602-659-1719	lyonst@aetna.com	300+ public/labor
CompPsych	Ms. Ann-Marie Hejna	312-660-1074	ahejna@comppsych.com	N/A
Concern:EAP	Humberto Chacon	650-988-7415	Humberto_chavon@concern-eap.com	N/A
Curalinc Healthcare	Yury Sirochinsky	224-534-0806	ysirochinsky@curalinc.com	N/A
EAPPreferred	Ms. Carmen De Los Reyes	602-264-4600 X190	carmen@eappreferred.com	N/A
E4 Health	Mr. Stephen Van Der Watt	Unknown	svanderwatt@ndbh.com	N/A
Holman Group and Holman-Frazier LLC	Jill Schlesinger	800-321-2843 X212	jills@holmangroup.com	N/A
Jorgensen Brooks	Mr. Paul Fleming	480-583-0897	paul@jorgensenbrooks.com	N/A
LifeWorks EAP	rmeyer, Director of Business	602-358-3479	mharmeyer@morneaushepell.com	N/A