

## Request for Information

DATE: December 31, 2025

TO: **Dependent Eligibility Verification Audit (DEVA) Vendors**

FROM: Patrick Chang, San Francisco Health Service System

RE: **Dependent Eligibility Verification Audit (DEVA) Request for Information  
(RFQ#HSS2025.O1)**

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### **I. Request for Information (RFI) Intent.**

The San Francisco Health Service System (SFHSS) is soliciting information to determine the availability and qualifications of a vendor partner capable of providing dependent eligibility verification and auditing (DEVA) services to ensure the eligibility of dependents enrolled in medical, dental, and vision benefits through SFHSS.

### **II. The San Francisco Health Service System.**

SFHSS is dedicated to providing outstanding health and other employee benefits to SFHSS Members, preserving and improving sustainable, quality health benefits, enhancing the well-being of employees, retirees and their families, and adhering to the highest standards of customer service. SFHSS executes all process phases related to benefit operations and administration of non-pension benefits (including health, dental and vision) for over 130,000 individuals, including both active and retired employees of the City and County of San Francisco, the San Francisco Unified School District, the Community College of San Francisco, and the San Francisco Superior Court (collectively known as (or “Members”), and their covered dependents pursuant to The City and County of San Francisco Charter §§ 12.200-12.203 and A8.420-A8.432, and San Francisco Administrative Code §§ 16.700-16.703.

Target Population: SFHSS member employees and retirees may enroll eligible dependents on their health coverage in accordance with Section B (Eligible Dependents of Health Service System Members) of the San Francisco Health Service System Rules.<sup>1</sup>

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<sup>1</sup> San Francisco Health Service System Rules are available at <https://sfhss.org/san-francisco-health-service-system-member-rules>.

As of January 1, 2025, there were approximately 41,000 active employees and 35,000 retirees with at least one (1) dependent enrolled in benefits through SFHSS, including a legal spouse, registered domestic partner, children, and surviving dependents.<sup>2</sup>

More information on the demographics of the population which is served can be found under the SFHSS Demographics Report available at <https://data.sfgov.org/stories/s/ppty-2mqw>.

### **III. SFHSS Goals and Needs.**

SFHSS seeks to conduct one or more DEVA audits to help maintain costs of healthcare benefits. Covering ineligible dependents puts health plan administrators at financial risk and increases overall healthcare costs for eligible members. SFHSS is seeking information on the availability and qualifications for vendors to provide the following DEVA services, which may include, but not limited to:

- 1) **Population Scope:** An audit conducted for:
  - all covered dependents
  - a sample population of covered dependents
- 2) **Target Population:** Audit population can include dependents of the following plan participants:
  - Active employees
  - Retired employees
  - Leave of absence employees
  - COBRA enrollees
- 3) **Benefits:** An audit conducted of a participant's enrolled dependent(s) in accordance with eligibility requirements under the SFHSS Rules (for one plan or several plans with the same plan rules) which may include:
  - Medical
  - Dental
  - Vision
- 4) **Communications:**
  - Print and mail up to ten (10) SFHSS-created letters to be sent over a specific time period and directed to DEVA participants as identified by SFHSS, and where each letter will have a unique distribution list provided by SFHSS.

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Dependents who are covered under a qualified medical child support order Qualified Medical Child Support Orders (QMCSO) will not be audited.

<sup>2</sup> SFHSS Demographics Report available at <https://data.sfgov.org/stories/s/ppty-2mqw>

- Collaborate with SFHSS to develop a cover sheet with a unique barcode or other solution approved by SFHSS for receiving, tracking, digitizing, and indexing DEVA participant mail responses that facilitate rapid sorting, collating, and linking each SFHSS member's record.
- Collect eligibility documentation via USPS mail, secure fax, secure online document upload.<sup>3</sup>
- Notify participants of dependent(s) eligibility status.
- If needed, provide templates, sample notices, eligibility requirements, and/or other audit materials for City's review and approval.

5) Documentation Review and Determination:

- Provide a secure online self-service portal that complies with the United States Department of Justice (DOJ) Web Content Accessibility Guidelines Version 2.1 Level AA that will allow audit participants to submit documentation; view, save, and print audit notices; review deadlines for action and eligibility criteria; and available twenty-four (24) hours a day, seven (7) days a week.<sup>4</sup>
- Collect, review, and qualify all received documentation required by SFHSS from DEVA participants which establishes relationships between the member and their dependents.<sup>5</sup>
- Provide a system for digitizing, combining, and indexing verification documents mailed by DEVA participants to the vendor in a manner that is compatible and readable to SFHSS' systems.
- Determine eligibility for benefits based upon received documentation in accordance with SFHSS Rules.
- Provide claims and appeals management resources.

6) Data and Reporting:

- Ensure that all information sharing, retention, and destruction practices are in full compliance with HIPAA and other applicable regulations.
- Commit to maintaining and hosting City data solely on hardware residing on data centers located in the United States, whereas no City data is downloaded to or stored on any hardware residing on data centers not residing in the United States.
- Provide final report and audit results.

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<sup>3</sup>See Section C (Eligibility Documentation Required and Optional) of the San Francisco Health Service System Rules, available at <https://sfhss.org/san-francisco-health-service-system-member-rules>.

<sup>4</sup> Web Content Accessibility Guidelines (WCAG) 2.1 available at <https://www.w3.org/TR/WCAG21/>

<sup>5</sup> Participants to provide copies (not original documents), and the vendor will not be required to return submitted documentation to participants.

- Provide City twenty-four (24) hours a day, seven (7) days a week access to DEVA participant data (“City data”), including but not limited to call-recordings, chat logs, and submitted documents.
- Securely transmit all collected City data to City, including but not limited to call-recordings, chat logs, and submitted documents, in the City’s preferred format and in accordance with City’s encryption requirements, at a mutually agreed upon schedule.
- Provide standard regular reporting on a weekly basis during the project.
- Provide ad-hoc reporting as-needed upon request.

7) **Account Management:**

- Provide an Account Manager to align with SFHSS during the DEVA project, which may include regularly scheduled meetings.
- Provide operational updates and troubleshooting support to City as-needed.

**IV. Submitting your Response.**

**Response Deadline.** Vendors must complete the Vendor Response Form [Appendix A], ensuring to also the RFI Product Overview (Appendix A Section 4) and submit the form in PDF format via email to [patrick.chang@sfgov.org](mailto:patrick.chang@sfgov.org), cc: [william.kudenov@sfgov.org](mailto:william.kudenov@sfgov.org) and [michael.visconti@sfgov.org](mailto:michael.visconti@sfgov.org) no later than **5:00 PM (PT) on Friday, January 9, 2026**. Any attachments to the Vendor Response Form must not exceed ten (10) total pages and must be submitted with the Vendor Response Form (Appendix A).

As a result of this RFI, SFHSS may release a request for proposals or request for bid. Failure to respond to this RFI will not preclude an entity from responding to any subsequent procurement requests.

**V. Minimum Qualifications.**

Qualified Respondents shall:

- 1) Respondent is a Corporation, Limited Liability Company, or Non-Profit entity in Good Standing with the State of California (or vendor’s state of formation).
- 2) Respondent is licensed to do business in California.
- 3) Respondent has at least three (3) years of experience of providing dependent eligibility verification services.
- 4) Respondent has reviewed and can meet the requirements for becoming an Approved City Supplier (<https://www.sf.gov/step-by-step--become-city-supplier>).

## **VI. Desirable Qualifications.**

- 1) Experience performing dependent eligibility verification and auditing (DEVA) services for at least one (1) government or one (1) non-profit organization within the past five (5) years.
- 2) Respondent has experience performing dependent eligibility verification for at least one (1) organization in excess of 10,000 lives.

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## Appendix A – Vendor Response Form

### **Section 1: Vendor Information**

*Does your organization meet the qualifications referenced in Section VII [Minimum Qualifications] and Section VIII (Desirable Qualifications) of this RFI?*

Qualifications	Vendor Response
1. Respondent is a Corporation, Limited Liability Company, or Non-Profit entity in Good Standing with the State of California (or vendor's state of formation).	
2. Respondent is licensed to do business in California.	
3. Respondent has at least three (3) years of experience of providing dependent eligibility verification services.	
4. Respondent has reviewed and can meet the requirements for becoming an Approved City Supplier	
5. Respondent has experience performing dependent eligibility verification and auditing (DEVA) services for at least one (1) government or one (1) non-profit organization within the past five (5) years.	
6. Respondent has experience performing dependent eligibility verification for at least one (1) organization in excess of 10,000 lives.	
Vendor Information	
1. Name	
2. Address	
3. Physical	
4. Website	
5. Federal Tax ID	
6. City Supplier ID (if applicable)	
7. Primary Contact Name	
8. Email and Telephone Number	

## **Section 2: Vendor Questionnaire**

*Please indicate and describe your approach to services described in Section III (SFHSS Goals and Needs) above.*

Service	Standard	Optional	Not Available
<b>Population Scope:</b> An audit conducted for:			
• the entire population			
• all covered dependents			
• a sample population of covered dependents			

*Additional Vendor Notes:*

<b>Target Population:</b> Audit population can include dependents of the following plan participants:			
• Active employees			
• Retired employees			
• Leave of absence employees			
• COBRA enrollees			

*Additional Vendor Notes:*

<b>Benefits:</b> An audit conducted of a participant's enrolled dependent(s) in accordance with eligibility requirements under the SFHSS Member Rules (for one plan or several plans with the same plan rules) which may include:			
• Medical & Vision			
• Dental			

*Additional Vendor Notes:*

Service	Standard	Optional	Not Available
<b>Communications:</b>			
• Print and mail up to ten (10) SFHSS-created letters to be sent over a specific one-hundred and twenty (120) day period or less.			
• Collaborate with SFHSS to develop a cover sheet with a unique barcode or other solution approved by SFHSS for receiving, tracking, digitizing, and indexing DEVA participant mail responses.			
• Collect eligibility documentation via USPS mail, secure fax, secure online document upload.			
• Notify participants of dependent(s) eligibility status.			
• If needed, provide templates, sample notices, eligibility requirements, and/or other audit materials for City's review and approval.			

*Additional Vendor Notes:*

Service	Standard	Optional	Not Available
<b>Documentation Review and Determination:</b>			
<ul style="list-style-type: none"> <li>Provide a secure online self-service portal that complies with the United States Department of Justice (DOJ) Web Content Accessibility Guidelines Version 2.1 Level AA that will allow audit participants to submit documentation; view, save, and print audit notices; review deadlines for action and eligibility criteria; and available twenty-four (24) hours a day, seven (7) days a week</li> </ul>			
<ul style="list-style-type: none"> <li>Collect, review, and qualify all received documentation required by SFHSS from DEVA participants which establishes relationships between the member and their dependents.</li> </ul>			
<ul style="list-style-type: none"> <li>Provide a system for digitizing, combining, and indexing verification documents mailed by DEVA participants to the vendor.</li> </ul>			
<ul style="list-style-type: none"> <li>Determine eligibility for benefits based upon received documentation.</li> </ul>			
<ul style="list-style-type: none"> <li>Provide claims and appeals management resources.</li> </ul>			

*Additional Vendor Notes:*

Service	Standard	Optional	Not Available
<b>Data and Reporting:</b>			
• Ensure that all information sharing, retention, and destruction practices are in full compliance with HIPAA and other applicable regulations.			
• Commit to maintaining and hosting City data solely on hardware residing on data centers located in the United States, whereas no City data is downloaded to or stored on any hardware residing on data centers not residing in the United States.			
• Provide final report and audit results.			
• Provide City twenty-four (24) hours a day, seven (7) days a week access to DEVA participant data (“City data”), including but not limited to call-recordings, chat logs, and submitted documents.			
• Securely transmit all collected City data to City, including but not limited to call-recordings, chat logs, and submitted documents, in the City’s preferred format and in accordance with City’s encryption requirements, at a mutually agreed upon schedule			
• Provide standard regular reporting on a weekly basis during the project.			
• Provide ad-hoc reporting as-needed upon request.			

*Additional Vendor Notes:*

Service	Standard	Optional	Not Available
<b>Account Management:</b>			
<ul style="list-style-type: none"> <li>Provide an Account Manager to align with SFHSS during the DEVA project, which may include regularly scheduled meetings.</li> </ul>			
<ul style="list-style-type: none"> <li>Provide operational updates and troubleshooting support to City as-needed.</li> </ul>			

*Additional Vendor Notes:*

Service	Standard	Optional	Not Available
<b>Other Services:</b> (Vendor to include as needed)			

*Additional Vendor Notes:*

### **Section 3: Vendor Pricing Approach**

*Please describe your fees, fee structure, and any variables, for the services in this RFI.*