**Appendix 2**

**Specifications – Well-Being Services**

**Applies to RFP ETB0047**

**The following specifications are Mandatory for any Proposer who submits a Proposal for the Well-Being Services RFP. These specifications are in addition to the specifications listed in Appendix 1 – Specifications – General. Failure to comply with one or more of the specifications herein may disqualify a Proposer. See Appendix 6 – Performance Standards and Penalties for penalties associated with the requirements below.**

# Well-being Services Program Specifications

## Program Administration and Incentives

1. The Contractor must administer all aspects of the current, and future Well Wisconsin Well-Being Program. This includes:
   1. Providing biometric screenings and flu vaccination clinics;
   2. Providing a Health Assessment;
   3. Tracking incentive program activities and overall incentive administration;
   4. Providing a comprehensive web-portal;
   5. Providing health coaching services;
   6. Providing Program promotion and education;
   7. Coordinating activities with GHIP-participating health plans, pharmacy benefit manager, data warehouse vendor and other GHIP vendors;
   8. Supporting coordination of Employer wellness champion networks;
   9. and providing required reporting to the Department, GHIP vendors and Employer groups.
2. The Contractor must be able to administer a Well-Being Program that may have different eligibility based on Members’ health plan enrollment information, such as excluding enrollees of a Medicare Advantage Plan from receiving incentives.
3. The Contractor must provide a dynamic scorecard or points-based system to Participants that clearly summarizes the Program activity options and completion status. The Contractor will make annual updates to its system content based on expansion of the Program and as needed to keep the content engaging. The current incentive structure requires Participants to complete a health check (onsite biometric screening or self-collection materials, health care provider form, one coaching call, or self-reported dental cleaning), Health Assessment, and one well-being activity (wellness challenges, self-directed educational modules, employer-sponsored activities, health expert podcasts, etc.).

D. Cash incentives issued for the Program must be a universally accepted, physical gift card.

1. Gift cards must not be restricted to a limited list of merchants or entities.
2. Participants may not be charged a service fee for the first request to reissue an incentive payment.
3. Gift cards must comply with the Credit Card Accountability Responsibility and Disclosure Act of 2009. Policies, procedures, and fees for reissuing gift cards must be adequately disclosed to Members in Contractor’s Program materials and on Contractor’s web-portal.
4. The Contractor must have the ability to delay issuing incentive payments earned at the end of the calendar year in order to accommodate the needs of the Payroll Centers for current year tax reporting.
5. Incentives must be issued to the Participant no later than three (3) weeks after the incentive is earned, with the exception of payments earned after the November payroll report deadline, in which case incentives must be issued no later than January 15 of the following year.
6. Contractor must have system capability to provide the gift card in a lesser amount for tax purposes, to withhold FICA taxes, to the following Participant groups: Retirees, Retiree spouses and COBRA Participants. The amount withheld from the gift cards will be paid to the Department by the first Business Day of December each year during the Contract term.
7. Gift cards and gift card packaging (envelopes) must be branded with the Well Wisconsin logo and include customized disclaimer language.
8. The Contractor must be able to implement transitions in incentive design changes, such as moving from a cash incentive to other financial incentive models (e.g., premium differentials). This will include developing the necessary reporting and/or data transfers needed by the Department and other GHIP vendors to administer the changed incentive.
9. The Contractor will provide incentive payment data transfers as required in Appendix 1 – Specifications – General.

## Biometric Screenings

A. Within thirty (30) Calendar Days of the date the Contract is executed, the Contractor will submit its biometric screening protocols to the Department Program Manager for review and approval. The protocol must include quality assurance measures that address staffing levels and credentials, material delivery to sites, calibration of equipment, privacy and confidentiality, data security of Confidential Information obtained at the event, and handling of all waste.

1. The Contractor must establish and make available to Employer groups the process for scheduling biometric screening events no later than November 15 for each program year.
2. The Contractor must develop and provide a cost-effective, efficient, and engaging workplace biometric screening process administered by qualified individuals at statewide locations, accessible to all eligible Members that will meet needs of the Program.
3. The Contractor must provide a Participant registration system, accessible within the Contractor’s web-portal and via the Contractor customer service toll free number, that ensures Program eligibility prior to the Participant scheduling the screening appointment. The registration system must provide the Participant with an e-mail confirmation and at least two (2) e-mail reminders of the scheduled biometric screening, with one (1) reminder being sent seven (7) Calendar Days prior to the event and a second being sent twenty-four (24) hours prior to the event. Registration for the event must remain open until twenty-four (24) hours prior to the event.
4. The Contractor must provide convenient access to the biometric screening to all eligible Members including shift workers and events at secure facilities at convenient times and accommodate hours outside of normal work hours and days.
5. The Contractor must provide bilingual, Spanish speaking staff at onsite biometric screenings if requested by the Employer.
6. The Contractor must provide privacy screens for all biometric screening events.
7. The Contractor must establish a central point of contact for coordination with eligible Employer groups for scheduling and promoting workplace biometric screening events.
8. The Contractor must schedule a biometric screening event for any eligible Employer site that makes a formal request to the Contractor at least sixty (60) Calendar Days prior to the employer specified event date.
9. The Contractor must be able to provide onsite biometric screenings for any Employer group that will be able to obtain a minimum of twenty (20) Participants for one (1) event.
10. The Contractor must conduct semi-annual outreach to eligible Employer groups to assist with scheduling screening events.
11. Employer groups holding events in secure areas of a facility reserve the right to limit screening registration and participation to employees of that facility.
12. Coordination of events will include the following Contractor responsibilities:
    1. Hosting at least one (1) planning call between the Contractor and the Employer group site coordinator(s) prior to the event;

b Providing event-specific promotional materials which, at a minimum, includes an event flyer (provided in Microsoft Word format) and emails listing event and registration details for Employers to utilize in communication and promotion efforts;

c. Provide the site coordinator with weekly registration updates for the four (4) weeks preceding the event and assist the site coordinator with determining adjustments to the number of registrations available;

d. Allowing the site coordinator for the Employer group to increase or decrease the projected attendance for the event up to ten (10) Calendar Days prior to the event;

e. Ensuring that screening supplies meet the capacity of the event. If the Contractor wants to ship event supplies to a facility prior to the event date, the Contractor must, prior to any shipment, coordinate with the site coordinator to determine if shipments can be accepted at the facility, the correct mailing address, and the timing of such shipment; and

f. Providing a back-up plan for each site coordinator, which includes phone numbers, in case clinicians scheduled for an event are a “no show”.

1. Screening staff must arrive at least sixty (60) minutes prior to the event start time and manage event set-up and check-in of registered Participants. Room set-up, required supplies, and screening staff must be ready at the scheduled start time. Screening staff will manage event take down-and clean-up.
2. The Contractor must provide all Employer site coordinators with a satisfaction survey within five (5) Calendar Days after the date of the event. The survey must use a five (5)-point rating scale and content must be approved by the Department Program Manager prior to distribution.
3. The Contractor must provide all Participants who received a screening with a satisfaction survey within five (5) Calendar Days after the date of the event. The survey must use a five (5)-point rating scale and content must be approved by the Department Program Manager prior to distribution.

I. The Contractor must be able to provide fasting and non-fasting biometric screenings via finger stick that include tests to measure:

1. Body mass index (BMI) based on height and weight or other body fat measurement method if prior approval is received from the Department Program Manager;
2. Waist to hip ratio;
3. Blood pressure;
4. Blood glucose;
5. Cholesterol (total cholesterol, high-density lipoprotein, triglyceride, and low-density lipoprotein).

J. At all biometric screening events, the Contractor must:

1. Have a minimum of one (1) staff person trained in First Responder Training or equivalent emergency medical training;
2. Provide each Participant with a paper copy of their individual screening results at the time of the screening that includes a summary of whether the results are within normal ranges and a brief consultation explaining the results. For results that cannot be provided onsite, the Contractor will mail a hard copy of the results to the Participant’s home address;
3. Have an average screening completion time of twenty (20) minutes and a wait time of no more than ten (10) minutes for pre-registered Participants; and
4. Notify the Department Program Manager, by phone or email, of complaints or issues that occurred at the biometric screening event within one (1) Business Day of the event.

K. After each appointment, Contractor must provide information to the Participants detailing the Participant’s remaining Program requirements, highlighting health coaching and other follow-up services available, and notifying the Participant that they may receive an outreach call for health coaching.

L. In lieu of Participants obtaining biometric values at a Contractor screening event, Contractor must provide interested Participants with a self-collection test kit for return of materials to a lab for testing total cholesterol, high-density lipoprotein (HDL) cholesterol, low-density lipoprotein (LDL) cholesterol, total cholesterol (TC)/HDL ratio, triglycerides and glucose. Upon delivering the self-collection test kit, the Contractor must send follow-up emails to the Participant including:

1. A confirmation email when the self-collection sample has been processed. Results will be delivered via USPS mail and uploaded into the Participant’s web-portal account.
2. Reminder emails to those who have not returned their self-collection sample prior to the incentive deadline.
3. And email indicating if a sample is not testable with the option to request up to one replacement kit.

M. In lieu of obtaining biometric values at a Contractor screening event or a self-collection test kit, the Contractor must provide a form that is customized for the State of Wisconsin and approved by the Department Program Manager for Participants to enter lab data collected from their healthcare provider. The Contractor-developed form must include:

1. Date that labs were obtained for each result(s);
2. Indicator for blood work to identify fasting or non-fasting values; and
3. Ability for Participants to report prior results if updated blood work is not necessary based on clinical experience or United States Preventive Services Task Force (USPSTF) guidelines.

N. The Contractor must import results data from the Contractor-provided biometric screening, the self-collection lab results, or the healthcare provider lab form into the Participant’s profile or Health Assessment (in the web-portal) within ten (10) Calendar Days of the screening date, lab testing, or form submission.

O. The Contractor’s system must have an indicator to identify which biometrics are obtained at a Contractor event and which are obtained via self-collection or a health-care provider.

1. The Contractor will provide biometric screening data transfers as required in Appendix 1 – Specifications – General.

## Flu Vaccine Clinics

1. The Contractor must develop and submit a flu vaccine protocol for all Contractor conducted vaccine clinics within ninety (90) Calendar Days of the date the Contract is executed and receive approval from the Department Program Manager of the protocol no less than sixty (60) Calendar Days prior to the first screening event. The protocol must include quality assurance measures that address staffing levels and credentials, material delivery to sites, privacy and confidentiality, data security of Confidential Information obtained at the event, and handling of all waste.
2. The Contractor must provide convenient access to the flu vaccine clinics to all eligible Members including shift workers and events at secure facilities at convenient times and accommodate hours outside of normal work hours and days.
3. The Contractor must provide bilingual, Spanish speaking staff at flu vaccine clinics if requested by the Employer.
4. The Contractor must provide privacy screens for all flu vaccine clinics.
5. The Contractor must provide a Participant registration system, accessible within the web-portal and via the Contractor customer service toll free number, that collects Participant health insurance information to verify Program eligibility prior to the flu vaccine administration and for billing purposes. The registration system must provide the Participant with an e-mail confirmation and at least two (2) e-mail reminders of the scheduled flu vaccine appointment, with one (1) reminder being sent seven (7) Calendar Days prior to the event and a second being sent twenty-four (24) hours prior to the event. Registration for the event must remain open until twenty-four (24) hours prior to the event.
6. The Contractor must establish a central point of contact for coordination of events with eligible Employer groups for scheduling and promoting workplace flu vaccine clinics.
7. The Contractor must schedule a flu vaccine clinic for any eligible Employer site that makes a formal request to the Contractor at least sixty (60) Calendar Days prior to the Employer specified event date.
8. The Contractor must be able to provide a flu vaccine clinic for any Employer group that will be able to obtain a minimum of twenty (20) Participants for one (1) event.
9. The Contractor must conduct outreach to eligible Employer groups to assist with scheduling flu vaccine clinic events.
10. Employer groups holding events in secure areas of a facility reserve the right to limit clinic registration and participation to Employees of that facility.
11. Coordination of events will include the following Contractor responsibilities:
    1. Providing event-specific promotional materials, which, at a minimum, will include an event flyer (provided in Microsoft Word format) and emails listing event and registration details for Employers to utilize in communication and promotion efforts;
    2. Providing the site coordinator with weekly registration updates for the four (4) weeks preceding the event and assist the site coordinator with determining adjustments to the number of registrations available;
    3. Allowing the site coordinator for the Employer group to increase or decrease the projected attendance for the event up to ten (10) Calendar Days prior to the event;
    4. Ensuring that flu vaccine supplies meet the capacity of the event. If the Contractor wants to ship event supplies to a facility prior to the event date, the Contractor must, prior to any shipment, coordinate with the site coordinator to determine if shipments can be accepted at the facility, the correct mailing address, and the timing of such shipment; and
    5. Providing a back-up plan for each site coordinator, which includes phone numbers, in case clinicians scheduled for an event are a “no show”.
12. Flu vaccine clinic staff must arrive at least thirty (30) minutes prior to the event start time and manage event set-up and check-in of registered Participants. Room set-up, required supplies, and flu vaccine clinic staff must be ready at the scheduled start time. Flu vaccine clinic staff must manage event take-down and clean-up.
13. The Contractor must work with GHIP participating health plans to bill Participants’ vaccines respectively. Any Participant who cannot be billed through a health plan may be billed to the Department. A flu vaccine clinic coordination fee may be assessed.
14. Walk-ins must be accommodated as supplies and staff time allow, assuming the Contractor can acquire all necessary health plan member information for billing purposes.
15. By the end of each February during the Contract term, the Contractor must submit the prior year’s Participant flu shot vaccination data to the Wisconsin Immunization Registry (WIR) in a manner compliant with WIR requirements, see: <https://www.dhfswir.org/PR/portalHeader.do;jsessionid=3PvKzdRBZvwcSpjdIhEKmyiTuWZzpdEeWBbTTw3i.master:ir-server>.

1. The Contractor and the Department will work with participating GHIP health plans on a method to reimburse the Contractor for uploading or entering Participant flu shot vaccination data into the Wisconsin Information Registry (WIR).

## Health Assessment

A. The Contractor must provide a Health Assessment that:

1. Is an instrument validated by a nationally recognized third party but can be customized with at least ten (10) Department -provided questions;
2. May be completed, on average, in fifteen (15) minutes or less;
3. Measures modifiable health risk behaviors and readiness to change, and stratifies risk;
4. Is available on the web-portal. For Participant’s unable to complete the Health Assessment in the web-portal, the Contractor must provide the ability for the Participant to complete it by mobile phone, landline phone, or by paper, whichever is the preferred submission type for the individual Participant; and
5. Allows web-portal users to partially complete the Health Assessment and return to it with all previously entered information saved.

B. The Contractor must provide an online and printable version of the Health Assessment content translated in Spanish. If a Participant wishes to complete the Health Assessment in a different language, the Contractor must provide Language Line interpretation service for support and completion.

C. The Contractor must provide the proposed content of the Health Assessment to the Department Program Manager at least nine (9) months prior to the Program year start date and have all Department -required updates completed at least thirty (30) Calendar Days prior to the Program year start date.

D. The Contractor will not modify the Health Assessment content without prior notice to and approval from the Department Program Manager.

E. Upon completion of the Health Assessment, the Participant must be presented with a score of their health status and risk factors along with recommendations on:

1. Health goals related to each risk factor;
2. Strategies to reduce each risk factor; and
3. Resources available to help the Participant address risk factors, including Contractor’s health coaching as well as resources available through health plans and community resources generally available to Wisconsin residents.

The score must be presented to the Participant in an easy-to-understand summary and utilize the score from the prior year, if one exists, to display changes in health status or risk.

F. The Contractor must provide all Participants who completed the Health Assessment with a satisfaction survey upon the completion of the Health Assessment. The survey must use a five (5)-point rating scale and content must be approved by the Department Program Manager prior to distribution.

G. The Contractor will provide Health Assessment data transfers as required in Appendix 1 – Specifications – General.

## Program Website and Web-Portal

The Contractor will provide a dedicated website and a web-portal as part of the Contract. The website will provide basic Program information. The web-portal will be used to present and track Participant level information on participation in the well-being programs and provide health resources and education to all Members.

1. The website and web-portal must have mobile capabilities. At a minimum the mobile capabilities must:
   1. Have the ability to synchronize with commonly used activity trackers and/or mobile applications, such as FitBit, Garmin, Jawbone or other activity trackers or mobile application(s) specified by the Department; and
   2. Allow the Member to access program information and complete key program activities (e.g., complete an assessment, schedule screening or flu vaccine appointments) from their mobile device.
2. The Contractor must have web-portal content and functionality updated, tested, and approved by the Department Program Manager at least fourteen (14) Calendar Days prior to the Program year start date each year during the Contract term. All web-portal features must be available with a single sign-on and must include:
   1. A scorecard that tracks and summarizes Participants’ incentive activities;
   2. Access to the Health Assessment;
   3. Information on the Contractor-provided biometric screenings, flu vaccine events, and registration system;
   4. Secure upload functionality for submitting Program-required documentation;
   5. Communication functions that allow users to submit secure questions to the Contractor and allow the Contractor to push general and targeted communications to users via USPS, e-mail, text and other standard communication vehicles, as requested by the Department;
   6. Incentive payment status (e.g., pending, issued, etc.);
   7. Educational modules available on demand and recommended to the Participant based on Participant’s completed Health Assessment and biometric screening results;
   8. A variety of health topics must be made available to Members including, but not limited to nutrition, physical activity, sleep, stress, tobacco use, excessive alcohol use, and medication adherence.
   9. Functions that allow users to schedule health coaching and contact a health coach;
   10. An area for Members to view their health coaching information (e.g., upcoming appointment information, appointment history, individualized plans and goals, etc.);
   11. Links to Members’ respective GHIP vendors (e.g. health plan, pharmacy benefit manager, potentially the mental health and/or chronic condition management program vendor(s)).
3. The web-portal must be available to all Participants; access to the incentive section of the web-portal must be limited to incentive-eligible Participants only.
4. For Participants employed by the University of Wisconsin System, the Contractor must be able to capture, either via the user profile in the web-portal or as part of the Health Assessment, the name of the primary campus that employs the Participant. This functionality must also be made available, upon the Department’s request, to other large Employer groups.

## Health Education and Coaching Programs

1. The Contractor must provide (12) webinars/podcasts at minimum with health experts each year of the Contract term. Topics and promotion methods must be included in the Contractor’s annual promotion and communication plan submitted to the Department. Content must be provided to the Department Program Manager at least ten (10) Calendar Days prior to the release date and include all updates required by the Department five (5) Calendar Days prior to the air date. At least one (1) webinar or podcast per year will be specific to the requirements of the Program and the Contractor’s services offered as part of the Program. A post-webinar/podcast satisfaction survey must be available to attendees.
2. Wellness coaching must be offered for a wide range of risk factors related, but not limited to: weight management, nutrition, physical activity, sleep, stress, tobacco use, excessive alcohol use, and medication adherence. The Contractor must provide all Participants with a satisfaction survey upon completion of their first and third coaching sessions. The survey must use a five (5)-point rating scale and content must be approved by the Department Program Manager prior to distribution.
3. In addition to the staffing requirements outlined in Appendix 1 – Specifications – General, the Contractor must provide at least two full-time well-being Program managers dedicated to the account to support the account team with planning, implementation, and evaluation of the program, including, but not limited to recruiting, training and maintaining wellness champion networks, designing and delivering educational presentations, onsite behavior change or coaching programs at Employer locations, designing wellness challenges or activities for Employers to implement, supporting in-person health fairs or large biometric health screening events and other duties as outlined in the Contract. The Contractor will hire additional Program managers, if necessary to support the Program, specific to the Department’s needs and the Contractor must include the Department in the hiring process. Contractor will perform the initial hire screening and will bring qualified candidates to the Department for the Department’s final approval. The cost of these Program Managers will be fully borne by Contractor.
4. The Contractor will provide Program participation data transfers as required in Appendix 1 – Specifications – General.