

December 3, 2010

Shelly Murray, Buyer Department of Administration Purchasing Division Building 15 2019 Washington Street, East Charleston, WV 25305-0540

RE: **Correction to Proposal Submittal** in response to Request for Quotation No. INS110001 for Continuing Education and Pre-licensing Services

Dear Ms. Murray:

Based on the issuance of Addendum No. 1, we respectfully submit the attached correction to the Financial Proposal previously delivered by Prometric. To avoid any confusion, we have resubmitted the entire financial proposal. Please replace the original financial submission with this corrected version.

We have also included two additional attachments to the technical proposal:

- 1. a signed copy of the Addendum No. 1; and
- sample notice letters—these samples are representative of the letters we currently send to
  providers (90-day Warning Notice, Telemarketer Notice, Funeral Home Notice and Preneed
  Notice) on behalf of the OIC. We will continue to communicate as required with the OIC and all
  constituent groups.

We apologize for any inconvenience this may cause and wish you the best in this procurement.

Respectfully,

Craig Johnson

C; 8.90

Senior Client Services Manager, Financial Services

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LOVE DATE

### **PROMETRIC**



(Revised) Cost Proposal to:

The West Virginia Purchasing Division, on behalf of the West Virginia Insurance Commission

In Response to RFQ No. INS11001 for Continuing Education and Pre-licensing Services

#### Submitted To:

Shelly Murray
Buyer
Department of Administration
Purchasing Division
Building 15
2019 Washington Street, East
Charleston, WV 25305-0540

Submitted By:

**ORIGINAL** 

G. Christopher Derr Chief Financial Officer chris.derr@prometric.com

443 455 8567 PHONE 443 455 8047 FAX

### **Primary Contact:**

Craig S. Johnson Senior Client Services Manager, Financial Services craig.johnson@prometric.com

443 455 8110 PHONE 443 455 8047 FAX

Due: December 7, 2010 1:30 p.m.



### COST PROPOSAL

SECTION IV. - COSTS

Cost of Services -

Compensation under the contract awarded pursuant to this RFP will be through fees charged to continuing education course providers/sponsors, continuing education course instructors, and/or insurance agents, and collected by the Administrator.

See "Attachment A" for Cost Proposal Format/Bid Sheet

If applicable, sign and submit the attached Resident Vendor Preference Certificate with the proposal.

ATTACHMENT A (REVISED)—COST PROPOSAL FORMAT/BID SHEET

### Cost Bid Schedule (Revised)

	Annual Assumptions	Fee	Annual Amount (Assumption Provided X Fee)
Continuing Education Course Review Fee	1,400	\$40.00	\$56,000
Continuing Education Expedited Course Review Fee	100	\$90.00	\$9,000
Fee for Roster Processing (per credit per student)	92,400	\$1.50	\$138,600
Fee for Late Roster Submissions (per credit per student)	924	\$3.50	\$3,234
Pre-licensing Provider Application and Course Review Fee	3	\$40.00	\$120
TOTAL.			\$206,954

Prometric will collect the existing \$25 fee per course submitted for review pursuant to 33-12-8 and remit into the Commissioner as required.

#### ADDITIONAL SERVICES

The following additional services are offered through Prometric's Administration of the West Virginia CE program at no additional cost.

#### 1. Course Auditing

Course auditing is done as a part of our quality CE administration services and requires no additional fees.



#### 2. Listing of Approved Courses Upon Request

Approved course listing will be provided at no additional cost.

#### 3. CE Credit Confirmation via CE Online

Producers may check their compliance status 24 hours a day at no additional cost.

#### **OPTIONAL SERVICES**

#### 1. Course Renewal

Prometric could implement a process whereby Providers and Courses renew with Prometric every three years.

#### Terms and Conditions

Prometric understands that these fees will remain established through July 2014, for credit banking and for evaluation of credits and providers. Prometric will notify the State in writing six months in advance of any proposed fee changes, which will be subject to the written approval of the State.

Program costs will be paid to Prometric by fees collected from the course providers. Fees may be paid by approved credit cards or checks payable to Prometric Assessments. The program of continuing education administration as outlined in the RFP issued by the State of West Virginia Offices of the Insurance Commissioner will be without cost to the State.

### **PROMETRIC**



Supplement to Technical Proposal Submittal to:

The West Virginia Purchasing Division, on behalf of the West Virginia Insurance Commission

In Response to RFQ No. INS11001 for Continuing Education and Pre-licensing Services

#### Submitted To:

Shelly Murray
Buyer
Department of Administration
Purchasing Division
Building 15
2019 Washington Street, East
Charleston, WV 25305-0540

Submitted By:

ORIGINAL

G. Christopher Derr Chief Financial Officer chris.derr@prometric.com

443 455 8567 PHONE 443 455 8047 FAX

### **Primary Contact:**

Craig S. Johnson Senior Client Services Manager, Financial Services craig.johnson@prometric.com

443 455 8110 PHONE 443 455 8047 FAX

Due: December 7, 2010 1:30 p.m.



PROMETRIC INC

State of West Virginia Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

\*A24153430 02 443-455-6889

.501 SOUTH CLINTON ST

BBALTIMORE MD 21224

# Request for Quotation

BFO NUMBER INS11001 1

ADDRESS CORRESPONDENCE TO ATTENTION OF SHELLY MURRAY

304-558-8801

NSURANCE COMMISSION

1124 SMITH STREET CHARLESTON, WV

25305-0540 304-558-3707

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PROMETRIC INC

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V 501 SOUTH CLINTON ST

State of West Virginia Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

21224

443-455-6889

Request for Quotation INS11001

INS11001

ADDRESS CORRESPONDENCE (O ATTENTION OF

SHELLY MURRAY 304-558-8801

INSURANCE COMMISSION

1124 SMITH STREET CHARLESTON, WV

25305-0540 304-558-3707

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### INS11001

### Addendum No. 1

1. Page 5, Section 1.2 – The RFP states that the Administrator will be responsible for "(v) communicating with agents, including preparing and mailing continuing education handbooks..." Will the Administrator be required to create and produce a handbook for both providers and agents? Will the Administrator be required to print these handbooks?

Answer: The Administrator will be responsible for making available continuing education information for agents and providers on their website. Should the administrator change they will be required to notify all parties (agents and providers) of the change via a mailing. A postcard notice of the change would be acceptable (see question 8 below).

2. Page 14, Section 2.2 – The RFP states that the OIC averages 8,000 new CE course submissions annually. Could the State please confirm this number as it seems somewhat high?

Answer: The average is NOTcorrect; the annual average of new course submissions is 1,400. The 8,000 represents the average number of courses available. An adjustment will be made to the Annual Assumption in the Cost Bid Schedule lowering from 8,000 to 1,400. (See Attached)

3. Page 17, Sections 3.2.5 – Please clarify if the \$25 Continuing Education (CE) course fee is included in the current \$40 charge or if this is an additional fee beyond the \$40 charge??

Answer: Twenty five dollars is the statutory fee amount due the state of WV for each course review submission. The Administrator may quote an additional cost to cover their services. The \$25 is included in the current \$40 charge.

4. Page 17, Section 3.2.6 – Please clarify if the State plans to eliminate paper rosters. If not, will the State allow Offerors to submit two fees for Roster Processing on Attachment A – one for electronic rosters and one for paper rosters?

Answer: The State intends to eliminate paper rosters.

5 Page 17, Section 3.2.9 – Will the State allow the Administrator to provide written status notifications via email or is a mailing required? Please clarify whether additional notifications are required, and, if so, the type and frequency.

Answer: The State requires status notification be mailed to the agents mailing address 90 days prior to the end of a reporting period. Also refer to question #1 above regarding a change in Administrators. The Administrator will be responsible for a notice sent to funeral homes and telemarketing firms refer to question #6.

6. Page 17, Section 3.2.10 – Please clarify by what means and in what format the State is expecting the Administrator to distribute instructions to telemarketing firms and funeral homes.

Answer: Producers who sell only pre-need funeral insurance or only through a telemarketing firm engaged solely in telemarketing insurance products by a scripted presentation filed with, and approved by the Commissioner, may submit an affidavit and have their requirement reduced to six hours. Of those, at least 3 credits must be from courses categorized as Ethics. Approximately 6 months prior to the expiration of the bienium, the Administrator will be required to provide a notice to telemarketing

firms and funeral homes using a mailing list provided by the state (approx 350 funeral homes/telemarketing firms) asking them to remind their agents of the requirement.

7. Page 17, Section 3.2.13 – Is there a renewal currently required of courses and providers in West Virginia?

Answer: Courses that receive zero WV activity during a bienium expire. If a course expires, a new application with fee must be submitted for the course to be reviewed and approved for the next bienium.

8. Page 17, Section 3.2.18 – Will the new Administrator be expected to mail a postcard with this information to all 7,700 resident licensees? If not, could the State please clarify the requirement?

Answer: The new Administrator will be required to notify all parties (agents and providers) of the change and a postcard notification would be acceptable.

9. Page 18, Sections 3.2.18 – Please clarify if the State is expecting Administrators to print and mail informational packets to all candidates or just make them available on the Administrator's website?

Answer. The Administrator would need to make informational packets available on their website.

10. Page 18, Section 3.2.22 – How many annual audits does the State anticipate? How many of those audits are online courses? Classroom courses? Are the audits only to take place within the State?

Answer: The Administrator will create and maintain a means for monitoring the quality and compliance of the continuing education courses and investigate complaints regarding approved courses and programs. Respondents will be evaluated based on their proposals.

11. Page 18, Section 3.2.24 – Are the transcripts to be made available for PE course completions or only CE?

Answer: Continuing Education course only.

12. Page 19, Section 3.2.31 – What is the projected go-live or implementation date of the State Based System?

Answer: Tentatively scheduled for February 2011.

13. Is there a renewal currently required of courses and providers in West Virginia?

Answer: See response to question #7.

14. Are the transcripts to be made available for PE course completions or only CE?

Answer: See response to question #11.

15. What is the projected go-live or implementation date of the State Based System?

Answer: See response to question #12.

### Cost Proposal Format/Bid Sheets

### Cost Bid Schedule (Revised)

	Annual	Fee	Annual Amount
	Assumptions		(Assumption
			Provided X Fee)
Continuing Education Course	1,400	\$	\$
Review Fee			
Continuing Education Expedited	100	\$	\$
Course Review Fee			
Fee for Roster Processing (per	92,400	\$	\$
credit per student)			
Fee for Late Roster Submissions	924	\$	\$
(per credit per student)			
Pre-licensing Provider Application	3	\$	\$
and Course Review Fee			
TOTAL			\$



### SAMPLE NOTICE LETTER

90-DAY WARNING NOTICE LETTER



PROMETRIC

# West Virginia Offices of the Insurance Commissioner Continuing Education Program

### **Continuing Education Status Notice**

DOE, JOHN R 123 MAIN STREEET ANYTOWN WV 99999

999999

April 1, 2010

Our records indicate that, as of March xx, 2010, your continuing education status for the compliance period that began July 1, 2008 and ends June 30, 2010 is: **NOT YET COMPLIANT**.

Your continuing education requirement is 24 hours, which must include 3 hours of ETHICS. Our records indicate you have completed 4 hours of GENERAL courses and 2 hours of approved ETHICS.

Failure to comply with your CE requirement will result in automatic SUSPENSION of your license by the Offices of the Insurance Commissioner. Any producer, whose license is Suspended on June 30, 2010 for non-compliance, may seek reinstatement of the license by June 30, 2012. The 2010 CE Reinstatement form and instructions will be on the Insurance Commissioner's website (<a href="www.wvinsurance.gov">www.wvinsurance.gov</a>) after July 1, 2010. A late submission fee of \$5.00 for each credit hour completed after June 30, 2010 will be required to be paid by the producer as part of the reinstatement process.

Contact your CE provider(s) to obtain the status of any courses that you have completed but are not shown on your transcript. CE Providers are responsible for submitting rosters to Prometric that contain course completion information.

View your TRANSCRIPT at Prometric's website: www.prometric.com

Also refer to Prometric's Website to view or request a **list of approved CE courses** tailored by General, Ethics, number of credits, self-study vs. classroom, etc. and to view the Frequently Asked Questions.

Do not send certificates of course completion to Prometric or to the Insurance Commissioner's office. Credits are required to be reported to Prometric by CE providers. Prometric will record your credits and mail you a notice when you become compliant.

Additionally, an ETHICS requirement is now in place and, at least 3-hours of approved Ethics courses must be included as part of your continuing education component for the reporting period ending June 30, 2010

IMPORTANT NOTE: Effective July 1, 2009, WV Code 33-12-8a, "Producer Training for Long-Term Care Products", requires all active, veteran producers that sell, solicit or negotiate Long-Term Care insurance complete a one-time Long-Term Care training course of no less than eight hours prior to July 1, 2010. In addition, if a producer is newly licensed (after July 1, 2009) they must complete the one-time training immediately, prior to selling any Long-Term Care products. The new Act requires that all Long-Term Care producers continue to receive ongoing training of no less than four hours in each mandatory continuing education biennium subsequent to the biennium in which the one-time training was completed.

Prometric

ATTN: West Virginia CE 1260 Energy Lane

St. Paul, MN 55108

Phone: Fax:

800.805.9127 800.735.7977

E-mail:

Pro.ce-services@prometric.com

Web site: www.prometric.com

Use the form on the reverse side to notify the Office of the Commissioner of a change in your name or address.



### SAMPLE NOTICE LETTER

TELEMARKETER NOTICE LETTER

January 26, 2010

Telespectrum Worldwide Agent Licensing Manager 251 Grey Flats Road Beckley, WV 25801-5874

RE: Continuing Education Affidavits

As you may know, the West Virginia Offices of the Insurance Commissioner has contracted with Prometric Inc. to provide administrative services for the continuing education (CE) program. As we approach the June 30, 2010 CE compliance period, Prometric is responsible for documenting a reduction in the normal CE requirement for individual agents as authorized in Chapter 33, Article 8(c)(1)(B).

Enclosed is an AFFIDAVIT that should be photocopied and supplied to all qualified West Virginia resident agents working for your company. The Affidavits must be completed, properly notarized in the presence of the agent and returned to Prometric no later than March 21, 2010. The agents' records will then be flagged as only having to complete six (6) hours of continuing education, three of which must be APPROVED in ETHICS.

Prometric is also required to issue a written transcript to each resident agent no later than April 1, 2010. Our goal is to have these affidavits processed in our systems so that these written transcripts accurately document both the agent's required number of credit hours and their compliance. Affidavits received after March 21, 2010 may not be processed prior to the issuance of the transcripts resulting in confusion by your employees as to their status under the terms of Chapter 33, Article 8(c)(1)(B).

We urge you to promptly copy, distribute, and return these affidavits to Prometric to avoid any confusion following the issuance of the transcripts on April 1, 2010. Completed affidavits should be returned, NO LATER THAN MARCH 21, 2010, to:

West Virginia CE Affidavit Processing Prometric 1260 Energy Lane St. Paul, MN 55108

Please call 1-800-805-9127 if you have any questions and we appreciate your support.

### AFFIDAVIT

l,	, of	, WV,
I,(Name-PLEASE PRINT)	(City)	,
an employee of	the State of West Virginia,	hereby certify that I am a licensed operating under West Virginia Insurance
I certify that, during the period of July insurance products by a scripted pre Virginia Insurance Commissioner.	v 1, 2008 to June 30, 2010, sentation which has been fi	I have engaged solely in telemarketing led with and approved by the West
I understand that if I engage solely in just six hours credit of an approved o in ETHICS, by June 30, 2010.	n telemarketing insurance pr continuing education program	roducts by a scripted presentation, I need m, three hours of which must be approve
I further understand that false statem insurance agent's license or other dis	nents on this affidavit may re sciplinary action by the Wes	esult in revocation or suspension of my t Virginia Insurance Commissioner.
(Signature)	(Date)	
NOTARY SECTION: STATE OF WEST VIRGINIA: COUNTY OF,	to wit:	
or her knowledge or belief, the answe	, after first having been c ers herein given are true and	duly sworn, states that, to the best of his decreet.
Taken subscribed and sworn before respires:	me this day of	, 2010. My commission
(Seal)	Nota	ary Public

### Return the completed Affidavit, NO LATER THAN MARCH 21, 2010, to:

West Virginia CE Affidavit Processing Prometric 1260 Energy Lane St. Paul, MN 55108

Continuing education Transcripts to be mailed in April to all producers may not reflect the reduced hours requirement for pre-need producers. As soon as this Affidavit is received by Prometric, your record will be updated to reflect the reduced hour requirement. You should review your compliance status online at www.prometric.com before June 30, 2010, to ensure your record reflects the reduced hour requirement.



### SAMPLE NOTICE LETTER

FUNERAL HOME NOTICE LETTER

## WEST VIRGINIA OFFICES OF THE INSURANCE COMMISSIONER CONTINUING EDUCATION PROGRAM

January 26, 2010

RE: Continuing Education Affidavits for Insurance Agents selling only Preneed Insurance

Dear Funeral Home:

As you may know, the West Virginia Offices of the Insurance Commissioner has contracted with Prometric Inc. to provide administrative services for the continuing education (CE) program. As we approach the June 30, 2010 CE compliance period, Prometric is responsible for documenting a reduction in the normal CE requirement for individual agents as authorized in Chapter 33, Article 8(c)(1)(A).

The West Virginia Offices of the Insurance Commissioner requests that a copy of the enclosed attachments be distributed to all individuals employed by the above referenced funeral home who engage in the sale of preneed burial insurance. Individuals who may have submitted an AFFIDAVIT to the Insurance Commissioner in the past MUST complete and submit a new AFFIDAVIT to continue to be eligible for the reduced continuing education hours.

Enclosed is an AFFIDAVIT that should be photocopied and supplied to all qualified West Virginia resident Insurance agents who sell only preneed burial insurance contracts. The Affidavits must be completed, properly notarized in the presence of the agent and returned to Prometric no later thanMarch 21, 2010. The agents' records in this office will then be flagged as only having to complete six (6) hours of continuing education, three hours of which must be approved in ETHICS.

Prometric is also required to issue a written transcript to each resident agent no later than April 1, 2010. Our goal is to have these affidavits processed in our systems so that these written transcripts accurately document both the agent's required number of credit hours and their compliance. Affidavits received after March 21, 2010 may not be processed prior to the issuance of the transcripts resulting in confusion by your employees as to their status under the terms of Chapter 33, Article 8(c)(1)(A).

We urge you to promptly copy, distribute, and return these affidavits to Prometric to avoid any confusion following the issuance of the transcripts on April 1, 2010. Completed affidavits should be returned **NO LATER THAN MARCH 21, 2010,** to:

West Virginia CE Affidavit Processing Prometric 1260 Energy Lane St. Paul, MN 55108

Please call 1-800-805-9127 if you have any questions and we appreciate your support.

### <u>AFFIDAVIT</u>

<i>I</i> ,	, of		,(State),
(Name)	, of Funeral Home,	(City) ai hereby certify ti	n employee of
		-	
I am a licensed insurance i	agent of the State of Wes	st Virginia, opera	ating under
West Virginia Insurance Ag	gent's license number		·
insurance products. Althou	ugh I am currently license ed burial insurance.  The	ed to sell life, ac insurance com	rance contracts and no other cident and sickness insurance, I will panies for which I am currently
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(List additional insurance c	ompanies on a separate	sheet of paper)	
approved continuing educa 2010, and every two years I further understand that fai	ition program, three hours thereafter. Ise statements on this aff.	s of which must idavit may resul	need just six hours credit of an be approved in ETHICS, by June 30, It in revocation or suspension of my irginia Insurance Commissioner.
(Signature)		(Date)	
NOTARY SECTION: STATE OF WEST VIRGINI COUNTY OF			
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or her knowledge or belief,	the answers herein given	are true and co	orrect.
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	West Virginia CE	Affidavit Proc	essing
	Pror	netric	

Continuing education Transcripts to be mailed in April to all producers may not reflect the reduced hours requirement for pre-need producers. As soon as this Affidavit is received by Prometric, your record will be updated to reflect the reduced hour requirement. You should review your compliance status online at www.prometric.com before June 30, 2010, to ensure your record reflects the reduced hour requirement.

1260 Energy Lane St. Paul, MN 55108



### SAMPLE NOTICE LETTER

PRENEED NOTICE LETTER

# WEST VIRGINIA OFFICES OF THE INSURANCE COMMISSIONER CONTINUING EDUCATION PROGRAM

January 26, 2010

### NOTICE TO INDIVIDUALS SELLING PRENEED BURIAL INSURANCE CONTRACTS

Chapter 33, Article 12, Section 8(c)(1)(A) of the West Virginia Code reduces the continuing education requirements for individuals selling **ONLY** preneed burial insurance contracts from 24 hours to 6 hours, three hours of which must be approved in ETHICS.

Individuals who have sold **ONLY** preneed burial insurance contracts since July 1, 2008, and will continue to self **ONLY** preneed burial insurance contracts are required to complete six hours of an approved program of continuing education, three hours of which must be approved in ETHICS, in the current two year period ending June 30, 2010, and every two years thereafter.

If you sell **ONLY** preneed burial insurance contracts and no other insurance products, complete the attached AFFIDAVIT and return it, ON OR BEFORE MARCH 21, 2010, to the following address:

West Virginia CE Affidavit Processing Prometric 1260 Energy Lane St. Paul, MN 55108

If, in addition to preneed burial insurance contracts, you sell or have sold, in the last two years, any life, accident or sickness insurance product or other insurance (other than credit life or credit accident and sickness insurance), then do not complete or return the attached AFFIDAVIT. You are required to complete 24 hours of approved continuing education by June 30, 2010, and every two years thereafter.

Individuals who may have submitted an AFFIDAVIT to this office in the past MUST complete and submit a new AFFIDAVIT to continue to be eligible for the reduced continuing education hours.

### <u>AFFIDAVIT</u>

<i>I</i> ,	, of		,, (State),
(Name)	Funeral Ho	(City) me, hereby certify	,(State), an employee of / that
I am a licensed insurance age	ent of the State of	West Virginia, op	erating under
West Virginia Insurance Agen	t's license numbe	r	·
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approved continuing education 2010, and every two years the I further understand that false s	n program, three h reafter. statements on this	nours of which mu s affidavit mav rei	I need just six hours credit of an ust be approved in ETHICS, by June 30 sult in revocation or suspension of my Virginia Insurance Commissioner.
(Signature)		(Date)	
NOTARY SECTION: STATE OF WEST VIRGINIA: COUNTY OF	, to wit:		
or her knowledge or belief, the	, after fir answers herein g	rst having been d iven are true and	uly sworn, states that, to the best of his correct.
Taken subscribed and sworn b expires:			, 2010. My commission
(Seal)		<del></del>	Notary Public
Return the compl	Nest Virginia C	NO LATER T CE Affidavit Prometric	HAN MARCH 21, 2010 to:

West Virginia CE Affidavit Processin Prometric 1260 Energy Lane St. Paul, MN 55108

Continuing education Transcripts to be mailed in April to all producers may not reflect the reduced hours requirement for pre-need producers. As soon as this Affidavit is received by Prometric, your record will be updated to reflect the reduced hour requirement. You should review your compliance status online at www.prometric.com before June 30, 2010, to ensure your record reflects the reduced hour requirement.