SOUTHWEST FLORIDA WATER MANAGEMENT DISTRICT
2379 BROAD STREET
BROOKSVILLE, FLORIDA 34604-6899
TELEPHONE: 352-505-2970

November 9, 2026

RFB 26-4984 – THIRD PARTY CLAIMS ADMINISTRATION FOR WORKERS' COMPENSATION CLAIMS

ADDENDUM #1
(Acknowledgment is Required)

The Respondent shall acknowledge its review and receipt of this Addendum by signing below and including a signed copy of this Addendum with its bid submittal. Failure to do so could result in disqualification of the bid.

Please note that double underlined information (*example*) is added wording and stricken information (~~*example*~~) is deleted wording.

I. CLARIFICATIONS:

1. Attachment 7, Open Claims Report 10/01/2020 – 10/30/2026, is hereby added in its entirety and added to the Table of Contents.

2. Attachment 8, Bill Review Report 01/01/2024 – 11/05/2026, is hereby added in its entirety and added to the Table of Contents.

3. The first paragraph of Attachment 6, Sample Agreement, section 4, Compensation, is hereby replaced in its entirety with:

   The District will pay the TPA for services rendered based on the annual fee as listed in EXHIBIT "A," Fee Schedule, for the applicable term of the Agreement. The annual fee shall be paid in 12 monthly installments over the course of the applicable term of this Agreement. The District will have no obligation beyond this amount, except for: (1) as-needed outside professional services as expressly provided in this Agreement and approved by the District; and (2) allowable, and approved by the District, third-party claim expenses and claims payments associated with the administration of workers' compensation claims.

4. The following bullet of Attachment 6, Sample Agreement, section 30, Contract Documents, is hereby deleted in its entirety:

   - ~~Exhibit "B" Business Associate Agreement~~

II. QUESTIONS AND ANSWERS:

1. **Question:** **Please provide a 5-year loss run of all claims open and closed for all lines of business. Please also include the total incurred financials as well.**

   Answer: Please refer to Attachment 3, Historical Claim Data, of the solicitation.

2. **Question:** **Please provide a list of all current open claims including their lines of business.**

   Answer: Please refer to Attachment 3, Historical Claim Data, of the solicitation.

3. **Question:** **Please provide a copy of the current TPA contract.**

   Answer: The current Agreement for Third Party Claims Administration for Workers' Compensation Claims may be obtained by submitting a public records request via the District's website, www.watermatters.org.

4. **Question:** **Please provide a copy of any special claim handling instructions currently in place.**

   Answer: The District does not maintain special claim handling instructions beyond the requirements contained in the solicitation.

5. **Question:** **Section 3.7 Audit of Files and Procedures: Would the District be open to utilizing a performance guarantee program with mutually agreed-upon service standards, performance metrics, reporting requirements, and corrective action provisions as an alternative or supplement to portions of the audit requirement?**

   Answer: The District will not replace its contractual audit rights. However, the District may consider mutually agreed performance standards and reporting metrics as a supplement to the audit process, provided such standards do not limit or otherwise diminish the District's audit rights under section 3.7 as part of a proposal submission. Please refer to section 3.7, Audit of Files and Procedures, of the solicitation.

6. **Question:** **Sample Agreement: Will the District accept exceptions to the Sample Agreement and other RFP terms if submitted through the Questions process and confirm that any exception accepted by the District through an Addendum will control over any conflicting provision of the RFP or Sample Agreement?**

   Answer: Section 1.24, Execution of Contract, states that if a respondent desires to propose a change to a term or condition of this solicitation or Sample Agreement, respondent must submit its request under the procedure set forth in the Questions section. Please refer to section 1.24, Execution of Contract, of the solicitation.

7. **Question:** **Would the District consider revising Section 10 so that the TPA's indemnification obligations apply only to third-party claims arising from the TPA's negligence, willful misconduct, or breach of the Agreement, and consider inclusion of reasonable limitations of liability and exclusion of consequential, special, incidental, exemplary, and punitive damages?**

   Answer: No. Please refer to Attachment 6, Sample Agreement, section 10, Indemnification, of the solicitation.

8. **Question:** **Would the District consider revising Section 12.1 so that responsibility for Information Security Incident costs applies only to incidents caused by the TPA's failure to comply with contractual security obligations, negligence, or willful misconduct?**

   Answer: No. Please refer to Attachment 6, Sample Agreement, section 12, Data Security and Services Provision, of the solicitation.

9. **Question:** **Please confirm whether the Business Associate Agreement identified as Exhibit B is intended to apply to workers' compensation claims administration services. If no HIPAA-covered services are contemplated, would the District consider removing the Business Associate Agreement requirement?**

   Answer: The bullet “Exhibit “B” Business Associate Agreement” is not applicable to this solicitation. Please refer to Clarification #4 of this Addendum.

10. **Question:** **Please confirm that the flat monthly administrative fee does not include claim payments, allocated loss adjustment expenses, managed care/cost containment charges, Section 111/MMSEA reporting services, or other separately priced third-party claim expenses, and that such expenses may be charged separately as outlined in the TPA's proposal.**

    Answer: The flat monthly administrative fee is intended to cover the claims administration services required under the solicitation and does not include approved third-party claim expenses or claim payments. Please refer to Clarification #3 of this Addendum.

11. **Question:** **Would the District consider revising Sections 6.1 and 6.2 so that the TPA retains responsibility for personnel and staffing decisions while working cooperatively with the District regarding documented performance concerns, and allowing subcontractor changes upon reasonable notice rather than requiring prior approval?**

    Answer: No. Please refer to Attachment 6, Sample Agreement, section 6, Project Team Members and Subcontractors, of the solicitation.

12. **Question:** **Please confirm that Section 8 applies only to District-specific data and deliverables created specifically for the District and does not transfer ownership of the TPA's pre-existing software, RMIS functionality, methodologies, processes, templates, or other proprietary materials.**

    Answer: Yes. Attachment 6, Sample Agreement, section 8, Ownership of Documents and Other Materials, is intended to apply to District data, claim files, reports, records, and deliverables created or maintained in connection with the services provided under the Agreement. The District does not claim ownership of a respondent's pre-existing software, RMIS functionality, methodologies, processes, templates, or other proprietary intellectual property. Please refer to Attachment 6, Sample Agreement, sections 8, Ownership of Documents and Other Materials, and section 9, Ownership of Data, of the solicitation.

13. **Question:** **Section 3.9.3.8 Field Case Management / Medicare Set-Aside: Would the District be willing to utilize the TPA's preferred and established Field Case Management and Medicare Set-Aside vendor panel, subject to District approval and performance oversight?**

    Answer: No. Please refer to subsection 3.9.3.8 of the solicitation.

14. **Question:** **Please provide a detailed 5-year loss run in Excel format to include claim status (open, closed) and Claim type – i.e., Indemnity, Medical Only**

    Answer: This information is not readily available in Excel format. Please refer to Attachment 3, Historical Claim Data, of the solicitation.

15. **Question:** **Please provide a copy of the current contract in place with your TPA and any amendments.**

    Answer: The current Agreement for Third Party Claims Administration for Workers' Compensation Claims may be obtained by submitting a public records request via the District's website, www.watermatters.org.

16. **Question:** **Can you provide details on the current team structure handling claims?**

Answer: Claims administration services are currently provided by the current TPA. Team structure information is not material to preparation of a responsive proposal and will not be provided.

17. **Question:** **Can you specify the specific areas of program performance improvement sought?**

Answer: The District is satisfied with its current workers' compensation program. This solicitation is being conducted to obtain competitive proposals and ensure continued high-quality claims administration services. The District seeks proposals that meet or exceed the requirements of the solicitation.

18. **Question:** **Are there any service issues or concerns with the current TPA?**

Answer: No. The District does not have any known material service issues or concerns with the current TPA at this time. This solicitation is being conducted as part of the District's normal competitive procurement process.

19. **Question:** **Does the incumbent pursue subrogation for the county, and is there an associated cost?**

Answer: Yes, the current TPA pursues subrogation for the District at no additional cost.

20. **Question:** **How many open claims are there for all years broken down by type?**

Answer: Please refer to Attachment #7, Open Claims Report 10-30-2026, included in this Addendum.

21. **Question:** **For medical management and ancillary services, please provide current vendors for each service including: bill review, pharmacy, utilization review, case management, and subrogation as standard components.**

Answer: Bill review, pharmacy, utilization review, case management, and subrogation as standard components services are provided by the current TPA. Vendor information is not material for the preparation of a responsive proposal and will not be provided.

22. **Question:** **For medical management and ancillary services, please provide: annual volumes, spend, and fee structure for the past 3–5 years.**

Answer: Please refer to Attachment #8, Bill Review Report 01/01/2024 – 11/05/2026, included in this Addendum.

23. **Question:** **For medical management and ancillary services, please provide: any contractual carve-outs, guarantees, or required vendor relationships.**

Answer: The solicitation does not contain any contractual carve-outs or guarantees related to medical management and ancillary services. However, as provided in section 3.9, Scope of Services, of the solicitation, the successful TPA shall coordinate Field Case Management and Medicare Set-Aside services with firms selected by the District. Please refer to subsection 3.9.3.8 of the solicitation.

24. **Question:** **For medical management and ancillary services please provide: Historical subrogation recoveries and fee arrangements.**

Answer: Historical subrogation recovery information is not tracked in a format readily available to the District and will not be provided. Please refer to subsection 3.9.3.6 of the solicitation.

25. **Question:** **How many nurse case managers are currently assigned, and are they exclusively dedicated?**

Answer: Nurse case management services are assigned by the current TPA on an as-needed basis. Nurse case managers are not exclusively dedicated to the District's account.

26. **Question:** **How many claims per year were assigned to Nurse Case Managers from 1/1/20–1/1/2025?**

Answer: On average, one to two claims per year were assigned to a Nurse Case Manager during the referenced period.

27. **Question:** **Are all new claims triaged by a nurse?**

Answer: No.

28. **Question:** **Is the assignment of Nurse Case Managers standard for all cases, or are there specific criteria for their assignment?**

Answer: Nurse Case Managers are assigned on an as-needed basis.

29. **Question:** **Do you use Field Case Managers for medical management purposes, and if so, what criteria are used for their assignments?**

Answer: Field case managers are assigned on an as-needed basis with a discussion between the TPA and the employer.

30. **Question:** **What is the number of billed charges, bill review allowance, negotiated bill fees, hospital review fees, PPO savings for the past 3 years, and current fee structure?**

Answer: Please refer to Attachment #8, Bill Review Report 01/01/2024 – 11/05/2026, included in this Addendum.

31. **Question:** **What network do you use for Medical Bill Review services?**

Answer: Medical bill review services are currently provided by the current TPA. Vendor information is not material for the preparation of a responsive proposal and will not be provided.

32. **Question:** **Who is your current provider for Medical Bill Review Services?**

Answer: Medical bill review services are currently provided by the current TPA. Vendor information is not material for the preparation of a responsive proposal and will not be provided.

33. **Question:** **Who do you currently work with for Pharmacy Benefit Management Services, and what is the number of prescriptions filled from 1/1/20–1/1/2025?**

Answer: The current Pharmacy Benefit Management Services provider (PBM) is MyMatrixx. The total prescriptions processed from 01/01/2020 through 11/04/2026 is 182.

34. **Question:** **Do you have an EDI with its PBM vendor for pharmacy bills, or is this handled manually?**

Answer: These services are currently provided by the current TPA. Vendor information is not material for the preparation of a responsive proposal and will not be provided.

35. **Question:** **Who is your current Utilization Review vendor?**

Answer: The current TPA does utilization review in-house.

36. **Question:** **In your workflow, do adjusters process their own prior authorizations?**

Answer: Yes.

37. **Question:** **Can you provide detailed utilization review statistics for the past five years, including the number of assignments, gross annual expense, gross savings, net savings, and percentage of savings?**

Answer: The current TPA does not send out for utilization review. No statistics are available.

38. **Question:** **Please clarify that the monthly flat administrative service fee is separate from the bill review fees (Network Access, PPO Discounts and Bill review) as they are usually outside of the administrative service fee.**

Answer: The flat monthly administrative fee is intended to cover the claims administration services required under the solicitation and does not include approved third-party bill review fees. Please refer to Clarification #4 of this Addendum.

III. ATTACHMENTS:

1. Attachment 7 – Open Claims Report 10/01/2020 – 10/30/2026
2. Attachment 8 – Bill Review Report 01/01/2024 – 11/05/2026

Ari Horowitz
Procurement Specialist
cc: Project Manager

ACKNOWLEDGEMENT OF ADDENDUM #1

BY: _____
DATE

_____
(TYPE/PRINT NAME AND TITLE)

_____
COMPANY NAME

ATTACHMENT 7
OPEN CLAIMS REPORT 10/01/2020 - 10/30/2026
FOR
REQUEST FOR PROPOSALS #26-4984
THIRD-PARTY CLAIMS ADMINISTRATION FOR
WORKER'S COMPENSATION CLAIMS

B90 - SOUTHWEST FLORIDA WATER MANAGEMENT DISTRICT
Claims From: 10/01/2020 To: 10/30/2026
As of: 10/30/2026

CLAIM NUMBER	DATE OF INJURY	DATE CLOSED	BODY PART	NATURE	CAUSE OF INJURY	DESCRIPTION OF ACCIDENT (BRIEF)	TOTAL PAID (TO DATE)	TOTAL INCURRED (TO DATE)	TOTAL RESERVES (TO DATE)	CLAIM TYPE	LOCATION	DEPARTMENT	DIVISION	REGION
B9330009	5/6/2024	N/A	MULTIPLE BODY PARTS	STRAIN	PUSHING OR PULLING	PUSHING HEAVY BASKET, STRAIN MULTIPLE BODY PARTS	$ 38,887.88	$ 117,445.55	$ 78,557.67	LT	Brooksville	Geohydrologic Data	Operations, Lands and Resource	690 Data Collection
B9350003	4/17/2026	N/A	MULTIPLE BODY PARTS	STRAIN	MOTOR VEHICLE	INVOLVED IN MVA, STRAIN MULTIPLE BODY PARTS	$ 14,275.35	$ 18,399.00	$ 4,123.65	MO	Brooksville	Regulatory Support Services	Regulation	460 Regulatory Support
B9350006	7/8/2026	N/A	MULTIPLE BODY PARTS	MULTIPLE PHYSICAL INJURIES	FALL, SLIP, OR TRIP	TRIP AND FALL, MULTIPLE PHYSICAL INJURIES MULTIPLE BODY PARTS	$ 1,055.09	$ 8,536.00	$ 7,480.91	MO	Brooksville	Field Operations	Operations, Lands and Resource	600 Operations
							$ 455,630.60	**$ 688,171.05**	**$ 232,540.45**					

ATTACHMENT 8
BILL REVIEW REPORT 01/01/2024 - 11/05/2026
FOR
REQUEST FOR PROPOSALS #26-4984
THIRD-PARTY CLAIMS ADMINISTRATION FOR
WORKER'S COMPENSATION CLAIMS

CORVEL

Bill History Detail

Site: All
Date Range: Custom: 01/01/2024 - 11/05/2026
Customer BU: Southwest FL Water Management District (284197)
Bill Type: All
Line of Business: All
Bill Status: Invoiced
Duplicate Filter: Non-Duplicates Only
Date for Bill Inclusion: Status Date
Send Back Filter: No Filtering
Include Report Key: Yes
Prepared: 11/05/2026 08:23:25 AM

Number of Claims	30
Number of Bills	291
Total Bill Charges	$220,799.54
Total Standard Savings	$121,371.98
Total Enhanced Bill Review Savings	$1,052.92
Total PPO Savings	$3,981.38
Total Negotiation Savings	$0.00
Total Adjustment Savings	$270.00
Total Savings	$126,676.28
Total Standard Fees	$1,665.75
Total Enhanced Bill Review Fees	$248.77
Total PPO Fees	$958.37
Total Negotiation Fees	$0.00
Total Adjustment Fees	$398.50
Total Fees	$3,271.39
Total Recommended Payments	$94,123.26

Bill History Detail

Site: All
Date Range: Custom: 01/01/2024 - 11/05/2026
*See summary for additional options

Summary	
Average Percent Savings	57.37%

CORVEL

Bill History Detail

Site: All
Date Range: Custom: 01/01/2024 - 11/05/2026
Customer BU: Southwest FL Water Management District (284197)
Bill Type: Ambulatory Surgery Center; Hospital Inpatient; Hospital Outpatient
Line of Business: All
Bill Status: Invoiced
Duplicate Filter: Non-Duplicates Only
Date for Bill Inclusion: Status Date
Send Back Filter: No Filtering
Include Report Key: Yes
Prepared: 11/05/2026 08:40:06 AM

Number of Claims	3
Number of Bills	3
Total Bill Charges	$10,208.74
Total Standard Savings	$6,128.39
Total Enhanced Bill Review Savings	$0.00
Total PPO Savings	$0.00
Total Negotiation Savings	$0.00
Total Adjustment Savings	$0.00
Total Savings	$6,128.39
Total Standard Fees	$18.50
Total Enhanced Bill Review Fees	$0.00
Total PPO Fees	$0.00
Total Negotiation Fees	$0.00
Total Adjustment Fees	$4.50
Total Fees	$23.00
Total Recommended Payments	$4,080.35

Bill History Detail

Site: All
Date Range: Custom: 01/01/2024 - 11/05/2026
*See summary for additional options

Summary	
Average Percent Savings	60.03%