Liberty Healthcare Corporation and Affiliates (Liberty) Standard Operating Policies

Liberty Healthcare Corporation
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Title:	**Solicitation Response Protocol (New Business)**	**Effective Date:**	**02/19/2015**
Author:	**Trish Piontek**	**Last Review Date:**	**09/23/2021**
Location:	**All Locations**	**Last Revision Date:**	**09/23/2021**
Functional Area:	**Business Development / Marketing**		

POLICY

The purpose of this Standard Operating Policy (SOP) is to outline those process steps and functional accountabilities associated with the response management of solicitations related to new business. The objective is to ensure that the process is well-organized; transparent to all stakeholders involved in solicitation responses; and results in solicitation responses that are compliant, responsive, and competitively differentiating, increasing the likelihood that Liberty is successful in winning new business.

PROCEDURE

The following process steps are associated with the evaluation and response of new business solicitation activity:

1. Identifying and Monitoring Opportunities: The methods and/or resources used to identify and monitor for new business opportunities that are likely to result in the issuance of a formal competitive solicitation.
2. Cultivating Opportunities: Strategies (e.g., customer meetings, relationship building, win strategy development, etc.) that may affect the shape, scope, and outcome of a future solicitation.
3. Solicitation Review/Evaluation Process: The process used to determine whether a solicitation is potentially winnable and offers sufficient value for Liberty to pursue with acceptable risk.
4. Go/No Go Decision: The formal decision on whether to develop a formal proposal response.
5. Scheduling Kick-Off and Proposal Win Strategy Meetings: Formal meetings with stakeholders to review the response logistics, timeline, and strategies for success.
6. Solicitation Summary / Project Plan and RFP Document Analysis Development: Documentation of the solicitation response process, including external deadlines, points of interest, proposal team members, and internal deadlines.
7. Execution of Proposal Activities: Development of the technical and cost proposals.
8. Proposal Production and Shipping Procedures: Electronic upload and/or printing and shipping of the final completed technical and cost proposals.
9. Post-Submission Protocols: Confirmation of proposal receipt and updating of the SharePoint team site and Proposal Database to reflect edited and new proposal materials.

Detail supporting these key steps is included as **Appendix A** to this SOP. The following supporting materials are included as **Attachments:**

- Attachment A: Sales Assessment Form
- Attachment B: Win Strategy Document
- Attachment C: Solicitation Summary and Project Work Plan
- Attachment D: Pricing Meeting Summary Form

Approved By: Trish Piontek Digitally signed by Trish Piontek Date: 2021.12.03 18:13:33 -05'00'

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Revision History

Version	Date	Author	Summary of Changes
#1	02/19/2015	Trish Piontek	Policy Created
#2	09/23/2021	Trish Piontek	Policy reviewed with changes made

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Appendix A: Solicitation Response Process - New Business

Following is process detail supporting the key steps associated with the evaluation and response management of new business solicitation activity. Designated point(s) of accountability have been identified within each step.

1. Identifying and Monitoring Opportunities [Business Development/Operations]

On an ongoing basis, all Liberty business development activity is conducted with a goal of contract acquisition and expansion. Essential to this effort are the methods and/or resources used to identify and monitor new business opportunities that are likely to result in the issuance of a formal solicitation. The following list identifies the primary activities and assigns functional accountability for conducting them:

Primary Activities	Business Development	Operations
Monitoring bid aggregators (i.e. Open Minds, GovWin)	✓	
Creating and maintaining CRM opportunity record	✓	
Monitoring/maintaining state procurement websites/push notifications	✓	
Conducting targeted market/competitor research	✓	
Networking *(i.e. conferences)*	✓	✓
Identifying existing customer expansion opportunities	✓	✓
Monitoring Watchlist activity (initiated 90 days prior to expected release date)	✓	
Monitoring news reports/sources	✓	✓
Reviewing inbound inquiries/leads	✓	

2. Cultivating Opportunities [Business Development/Operations]

To affect the shape, scope, and outcome of a solicitation of interest, the following activities may be conducted by members of those indicated functional areas:

Primary Activities	Business Development	Operations
Establishing/building relationships	✓	✓
Formulating preliminary win strategy (i.e. recruiting, licenses, MBEs, lobbyists)	✓	✓
Conducting potential customer meetings	✓	

3. Solicitation Review/Evaluation Process [Business Development/Ops Lead]

Following the identification of a solicitation of interest, Business Development will download the associated documents and either change or enter the opportunity into CRM as Sales Stage 5 – Solicitations Under Review. In addition, the COO and designated Ops Lead will be notified and provided with a copy of the solicitation. Within one (1) business day of solicitation receipt, the Sales Lead will:

1. Notify the executive team, and any other applicable stakeholders, that the RFP has been released and that it is currently under evaluation.
2. Conduct an evaluation screen of the opportunity, with input from the Ops Lead.

The following questions will be the focus of the initial screen:

- Do we meet the mandatory requirements?
- Can we win the contract?
- Is there sufficient value to Liberty?
- Can we tolerate the risks?
- Do we have sufficient resources and time to develop a viable proposal response?

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Should the need arise for additional input, the initial screening process may be expanded to include additional members of Business Development and/or Operations. If there is continued interest or need for further clarification following the initial screen, a more formal solicitation evaluation may be conducted by the Sales Lead and informed by the **Sales Assessment Form (Attachment A).** The objective of the form is to assist in determining Liberty's level of interest in the solicitation, identify potential challenges, and recognize where clarification might be needed. It also serves, later in the process, as a manner of informing the solicitation response strategy and forming questions for a formal Q&A.

If the Go/No Go decision depends strongly on customer clarifications, the Sr. Proposal Specialist will develop a Q & A template. The Sr. Proposal Specialist will collect, edit, and submit clarification questions within three (3) business days of the RFP and associated document download.

4. Go/No Go Decision [Sales Lead/Ops Lead/Executive Team]

Following the solicitation evaluation, the Sales Lead (with input from the Ops Lead) will make a formal Go/No Go recommendation using the **Sales Assessment Form (Attachment A**). This completed sales assessment form, including the recommendation, will be forwarded to members of the executive team for their review and feedback within one (1) day of solicitation release / receipt, if feasible.

Should the organization decide against pursuing the opportunity, the Sales Lead will:

1. Mark the Opportunity as Disqualified - LHC Chose Not to Pursue in CRM.
2. Notify relevant stakeholders of the decision not to pursue.

Should it be determined that the opportunity will be further pursued, the response process will be continued with the Sales Lead now functioning as Quarterback, the Liberty team member who is responsible for leading the development and submission of a compliant, winning proposal.

5. Scheduling Proposal Kick-Off and Win Strategy Meetings [Sr. Proposal Specialist]

Immediately following the decision to respond to the solicitation, the Sr. Proposal Specialist will work with the Quarterback to schedule a *Kick-Off Meeting* and *Proposal Win Strategy Meeting* to occur within three (3) business days of the "Go" decision. The objective and designated attendees of each meeting are as follows:

Kick-Off Meeting: Review the logistics and timelines associated with the solicitation. These include but are not limited to: service scope and schedule; evaluation criteria; pre-proposal submission activities; *Technical* and *Cost Proposal* work plans; team member roles, functional assignments, and expectations; and production details. This 30-minute meeting includes, but may not be limited to: Quarterback, Ops Lead, COO, CFO, CIO (if IT in scope), SVP, Controller, Designated Financial Analyst, Sr. Assoc. General Counsel, VP of Marketing, Designated Proposal Writer, Sr. Proposal Specialist, Director of New Business Implementation, and VP of Recruiting (if pre recruiting).

Proposal Win Strategy Meeting: Prior to the *Proposal Win Strategy Meeting*, the Quarterback will develop a draft **Win Strategy Document (Attachment B)** to directionally inform and guide the proposal development team in responding to the solicitation. This 60-minute meeting will include the Quarterback, Ops Lead, Designated Proposal Writer, Sr. Proposal Specialist, COO, VP of Marketing, SVP, and Director of New Business Implementation. Other proposal contributors may be included on an as-needed basis.

6. Solicitation Summary / Project Plan and RFP Document Analysis Development [Sr. Proposal Specialist]

The Sr. Proposal Specialist will document the solicitation response process by preparing a **Solicitation Summary / Project Work Plan (Attachment C)** and conduct an RFP document analysis. The draft of these documents will be sent to the Quarterback for review and approval and will be distributed to the proposal team in advance of the *Kick-Off Meeting*. The purpose of the document is as follows:

Solicitation Summary: Identifies key external dates and points of interest relative to the solicitation.
Project Work Plan: Identifies key proposal team members and internal deadlines based on the proposal due date.

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RFP Document Analysis: An analysis will also be conducted to comparatively review and analyze the current RFP document with the previous RFP document (if applicable). Material variances will be provided to the Quarterback and discussed, as needed, during the *Kick-Off* and/or *Win Strategy Meeting(s).*

Following the *Kick-Off* and *Win Strategy Meetings*, the *Solicitation Summary / Project Work Plan* and *Win Strategy Documents* will be revised and updated on SharePoint as needed. The Sr. Proposal Specialist will send invitations for the color team proposal reviews and proposal status meetings immediately following the *Kick-Off Meeting*.

7. Execution of Proposal Activities [Proposal Team]

Following the *Kick-Off* and *Win Strategy Meetings*, the process continues with the further execution of proposal activities including:

- Pre-Proposal Submission Activities [Sr. Proposal Specialist]: Examples may include confirming attendance at bidders' conference, developing and sending a letter of intent, communicating as needed with the procurement point of contact, and submitting Quarterback-approved questions for clarification.
- Prepare a Recruiting *Pre-Recruit Open Requisition Form (if applicable)* [Quarterback and Ops Lead]
- Proposal Shell Development [Sr. Proposal Specialist]: The Sr. Proposal Specialist will develop the proposal shell and populate the draft with RFP questions and standard boilerplate materials (company profile, program summaries, standard business service descriptions, etc.) maintained in the Proposal Database on SharePoint.
- Blue Team Review [Blue Team]: The Blue Team includes, but may not be limited to: Quarterback, Ops Lead, Proposal Writer, VP of Marketing, Sr. Proposal Specialist, and Key Contributors as identified. The Blue Team meets to review the completed proposal shell. The goals of this meeting are to: 1. confirm that the proposal response structure is sound, 2. identify opportunities to weave key win themes and evidence into the proposal response, and 3. outline responses to each major RFP/RFI section.
- Technical Proposal Development [Proposal Writer]: The writer will utilize the proposal shell and work collaboratively with the Quarterback, Ops Lead, Subject Matter Experts (SMEs), and content contributors to develop the *Technical Proposal*.
- Technical Proposal Review [Proposal Team/Quarterback/Contributors]: Reviews will typically be conducted of the first (50% complete) and final (90% complete) *Technical Proposal* drafts. The objective of each is as follows:
  - First Draft/Pink Team Review – During the First Draft/Pink Team Review, those reviewing the draft conduct a strategic, cursory review of the draft submission to ensure consistency with the win themes; clearly articulated value propositions; compliance with evaluation criteria; and response clarity, accuracy, and thoroughness. The First Draft/Pink Team Review typically occurs halfway through the proposal process, i.e. at the midpoint between the decision to submit a proposal and the proposal due date.
  - Final Draft/Red Team Review – During the Final Draft/Pink Team Review, those reviewing the draft should ensure that feedback identified during the first draft review has been addressed, identify any obvious shortcomings or neglected areas that can be further improved, and fix errors and inconsistencies in spelling, grammar, style usage, etc. The purpose of this review is to evaluate the final proposal draft for persuasiveness and clarity of message. The Final Draft/Red Team Review typically occurs no less than five (5) business days prior to the proposal ship/submission date.

  Pink and Red Team proposal drafts are issued no less than two business days prior to these reviews. Participants are responsible for reading the draft and including suggested edits and comments within the proposal draft on the SharePoint team site prior to the meeting.
- Schedule and Conduct Status Meetings [Sr. Proposal Specialist]: Review ongoing status of proposal activities and deadlines. Status meetings typically take place two to three times per week; more or less as needed. Attendees include the Quarterback, Ops Lead, Proposal Writer, VP of Marketing, and Sr. Proposal Manager. Other proposal contributors may also attend, as needed, depending on the meeting agenda.
- Obtain Reference Letters (if applicable) [Quarterback/Contract Manager]: The Quarterback, with support from the relevant Contract Manager(s), will identify appropriate references for the proposal and reach out to Liberty's customer contacts to confirm their willingness to speak to our performance and/or provide a letter of reference.

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- Cost Proposal Development [Quarterback, Ops Lead & Financial Analyst]: Development of *Cost Proposal* includes development of budget shell and participation in *Preliminary* and *Final Pricing Meetings*.
- Develop/Distribute Pricing Summary Sheet [Quarterback]: Prior to the Preliminary and Final Pricing Meetings, the Quarterback will populate and distribute a **Pricing Summary Sheet (Attachment D)** that summarizes relevant cost information (e.g., customer budget, financial assumptions, pricing strategy) to meeting participants (24-48 hours prior to scheduled meeting).
- Schedule Pricing Meetings [Vice President of Marketing]: The Vice President of Marketing will contact the President following the *Kick-Off Meeting* to confirm availability and will schedule the *Preliminary* and *Final Pricing Meetings*. Unless decided otherwise, the President will participate in only the *Final Pricing Meeting*.
- Complete Required Forms [Sr. Proposal Specialist]
- Monitor for Solicitation Amendments [Sr. Proposal Specialist]
- Review Legal Content [Senior Associate General Counsel]: This includes a review of penalty clauses, insurance requirements, contract performance requirements, sample contract, etc.
- SDB Plan Development [Sr. Proposal Specialist/Quarterback]: If MBE/WBE/VBE participation is required, a plan of action will be developed by Business Development and the Quarterback. The Financial Analyst will also be informed to the extent that the plan impacts the development of the *Cost Proposal*.

8. Proposal Production and Shipping Procedures [Vice President of Marketing and Sr. Proposal Specialist]

Following the completion of the *Technical* and *Cost Proposals*, the Vice President of Marketing and Sr. Proposal Specialist will initiate activities related to proposal production and submission as included in the solicitation summary/project plan.

It is preferred to ship two days (48 hours) ahead of deadline to have a day to recover if necessary. If FedEx misses the deadline, alert Quarterback immediately. A backup plan needs to be identified and agreed upon by the Quarterback and Vice President of Marketing in the event there is an issue with shipping.

9. Post-Submission Protocols [Quarterback/Vice President of Marketing/Sr. Proposal Specialist]

The following post-submission protocols are to be followed:

- Contact should be made to confirm receipt with designated procurement point of contact and an attempt made to determine the number of competitive submissions. [Sr. Proposal Specialist]
- All final proposal docs are saved on the SharePoint proposal team site [Sr. Proposal Specialist].
- The status of the Opportunity should be updated in CRM to Sales Stage 8 - Solicitation Response or Document Submitted. All related solicitation activity (e.g. responses to clarification questions, Best and Final Offer requests, etc.) should be captured and documented in CRM. The Sales & Marketing Coordination meeting will also be utilized to update and brief the team regarding the status of the proposal. [Quarterback]
- Within three (3) business days of production, a link to the Solicitation Response Satisfaction Survey should be distributed to all team members. [Sr. Proposal Specialist]
- Edits to existing proposal content or new proposal content that may be useful in future solicitations will be added to the Proposal Database on SharePoint. [Sr. Proposal Specialist]
- Respond to any clarification or BAFO requests following submission. [Proposal Team]
- Following determination of award, the proposal outcome should be updated/recorded in the opportunity entry in CRM. [Quarterback]
- Obtain, review, analyze, and report evaluation and competitive response documentation, award documentation, evaluation results, etc. [Sr. Proposal Specialist/VP of Marketing]
- An internal and external (if allowable by solicitation) debrief meeting should be scheduled in collaboration with the Quarterback to review and discuss outcomes and identify process improvement opportunities. [Vice President of Marketing]
- All final and related solicitation files should be uploaded to the designated SharePoint subsite [Sr. Proposal Specialist]
- Following notification of award/non-award, the Quarterback will notify the Executive Team of the outcome.
- Should an award be made to Liberty, the SVP will communicate the award, via email, to the organization.

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Solicitation Review

Solicitation Title:

Customer: ______________________ **Today's Date:** ______________________

Released: ______________________ **Due:** ______________________

Estimated Close Date: ______________________ **Estimated Budget:** ______________________

Sales Lead: ______________________ **Questions Due Date:** ______________________

Pre-Bid Meeting: ______________________

Description of Service:

Method of Invoicing and Payment:

Live Resumes Required (check box):

☐ Yes ☐ No ☐ N/A

3rd Party Billing Required:

% Of Scoring Based on Cost:

Incumbent:

Length of Contract:

Expected Competition:

Renewal Terms:

Contact with Customer Prior to Solicitation:

Start-Up Costs Payment:

Meet Minimum Qualifications (check box):

☐ Yes ☐ No ☐ N/A

Growth Potential:

Caps on Profit:

Necessity of Partnerships/Subcontractors (including MBE/WBE):

Performance Bonds Required:

IT Requirements:

Medical/Pharmaceutical Cost Risk:

Advantages to Liberty for Submitting:

Disadvantages to Liberty for Submitting/Red Flags and Mitigation Plan(s):

Recommendation:

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Customer Name
Program Name / Solicitation No.
Win Strategy Analysis

OVERVIEW

Win/Strategy Meeting		**Contract Value**	
Quarterback		**Questions Due Date/Time**	
VPO		**Response Due Date/Time**	

CLIENT/CUSTOMER INTELLIGENCE

1. What are the overarching issues that are driving this procurement? What does the customer want to achieve by making this investment?
a. Who are the key decision makers and influencers (if known)?
c. Who are our champions (if applicable)?
d. Who are our detractors (if applicable)?
2. What are the customer's three (3) to five (5) major Motivators (i.e. hot button issues or concerns regarding this procurement) and the associated Decision Criteria (i.e. what the customer is looking for in a vendor and/or solution to address those issues?

Motivator #1:	
Decision Criteria:	
Motivator #2:	
Decision Criteria:	
Motivator #3:	
Decision Criteria:	
Motivator #4:	
Decision Criteria:	
Motivator #5:	
Decision Criteria:	

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Customer Name
Program Name / Solicitation No.
Win Strategy Analysis

COMPETITIVE ENVIRONMENT

3. Who are the likely competitors for this procurement?

4. What advantages do we have compared to the anticipated competition?

5. What are our vulnerabilities or weaknesses as compared to the competition?

7. How can we demonstrate these advantages in our proposal?

9. How will we minimize or counter our weaknesses?

10. Is there additional competitive information that we need to further inform our strategy (i.e. current contracts, previous RFP responses)?

COMPARATIVE ANALYSIS MATRIX

Customer Buying Criteria	Liberty	Competitor	Competitor	Competitor	Competitor	Competitor
Example: Experience successfully implementing similar programs.	✓	✓	X	✓+	X	✓
1.						
2.						
3.						
4.						
5.						

Key: ✓ (meets criteria), ✓+ (exceeds criterial), x (does not meet criteria)

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CUSTOMER NAME
PROGRAM NAME / SOLICITATION NO.
WIN STRATEGY ANALYSIS

WIN THEME DEVELOPMENT

Buying Criteria:	
Liberty Offering:	
Customer Benefit:	
Proofs / Evidence:	
WIN THEME #1:	
Buying Criteria:	
Liberty Offering:	
Customer Benefit:	
Proofs / Evidence:	
WIN THEME #2:	
Buying Criteria:	
Liberty Offering:	
Customer Benefit:	
Proofs / Evidence:	
WIN THEME #3:	
Buying Criteria:	
Liberty Offering:	
Customer Benefit:	
Proofs / Evidence:	
WIN THEME #4:	
Buying Criteria:	
Liberty Offering:	
Customer Benefit:	
Proofs / Evidence:	
WIN THEME #5:	

Buying Criteria: The primary customer Motivators (hot button issues) listed on Page 1 of the Win Strategy Document.
Liberty Offering: The things that Liberty offers to help the customer address the hot button issues.
Customer Benefit: The "so what?" What does the customer stand to gain from the Liberty offering?
Proofs / Evidence: How will we demonstrate Liberty's offerings and the customer benefit in our proposal response?

PROPOSAL/RESPONSE DEVELOPMENT

11. Does Liberty have any discriminators that set us apart from our competition, based on the Competitive Analysis matrix? How can we demonstrate them in the proposal?
12. Do we offer any additional benefits that are unrelated to the customer motivators, i.e. ways to add value to the program that the customer may not have considered? If so, how can we demonstrate these benefits in the proposal?
13. What do we anticipate we will need to submit a winning proposal (i.e. technology, human resource support, supporting proposal documentation)?
14. Do we have all the evidence necessary to support our argument? If not, what do we need (i.e. testimonials, documented facts, etc.)?
15. What is the recommended tone of our proposal (i.e. aggressive, conservative or educational)?

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Customer Name
Program Name / Solicitation Number
Solicitation Project Work Plan

GENERAL INFORMATION

State | Solicitation/RFP Title | Solicitation Number

Enter State

Agency/Department/Client Name | Type | Source

SELECT | SELECT

Date Issued | Date Received | Date Distributed | Due Date/Time

Product Line | Service(s) to be Provided

Contract Duration | Contract Value

Enter Data

Is there an incumbent? If yes, provide vendor name.

SELECT Enter Data

CLIENT CONTACT INFORMATION

Designated Contact | Title | Phone Number | Email Address

Mailing Address | Submission Address

PRE-SUBMISSION ACTIVITIES

Letter of Intent (date/time) | Pre-Bid Conference (date/time) | Location

SELECT

Internal Questions Due Date | Question Due Date | Expected Q&A Response Date

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Customer Name
Program Name / Solicitation Number
Solicitation Project Work Plan

SCOPE OF SERVICES, RFP & CONTRACT DETAILS

Solicitation/Contract Details (bidder requirements, contract terms, etc…)

Background:

Scope of Services:

Contract Term:

TECHNICAL PROPOSAL

1.	
2.	
3.	
4.	
5.	
6.	

COST PROPOSAL

Small Diverse Business and Small Business Participation

Is there a subcontracting requirement? If, yes indicate target goal			Subcontractors/Partners
Yes/No	**Goal**		Enter Data

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Customer Name
Program Name / Solicitation Number
Solicitation Project Work Plan

Required Documentation and Forms (☒ indicates signature required)

☐		☐	
☐		☐	
☐		☐	
☐		☐	
☐		☐	

Project Team

Kick-Off Meeting (date/time)

Quarterback/Sales Lead | **Program Operations** | **Contributors** | **Finance**

Legal | **Lead Writer** | **Production** | **Program Implementation**

Recruiting | **Information Technology**

Project Work Plan: Technical Proposal

Kick-Off Meeting: **Win Strategy Meeting:**

Pink Team Draft Complete	**Draft Review**	**Pink Team Review**
Pink Team Reviewers:		
Red Team Draft Complete	**Draft Review**	**Red Team Review**
Red Team Reviewers:		

Technical Proposal Complete:

Project Work Plan: Cost Proposal

Testing of Cost Proposal Worksheet Completed

Preliminary Budget Completed **Preliminary Budget Review**

Final Budget Completed **Final Budget Review with Dr. Caskey**

Cost Proposal Complete:

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Customer Name
Program Name / Solicitation Number
Solicitation Project Work Plan

Resumes	**Resumes to Corporate (date)**	**Formatting Resumes (date)**
Legal Review	**Mid Pt. Review of RFP Documents (date)**	

Evaluation & Scoring		
Key Decision Makers	**Bidders Presentations**	**Implementation Timeline**
Intent to Award	**RFP Debriefing**	
Appeals/Protest Process		
Confidentiality / Redaction Process		

Production, Submission, and Shipping Details		
Production/Shipping Date		
Due Date		
Number of Originals	**Number of Copies**	**Number of Electronic Copies**
Submission Address		
Special Instructions		

Pricing Meeting Summary Form

Today's Date: ____________ **Finance Lead:** ____________

Quarterback: ____________ **Operations Lead:** ____________

Brief Overview of Opportunity:

Duration of Contract: ____________ **Initial Term of Contract:** ____________

Option Years: ____________

Proposed Margin: ____________

Price Inflators? ☐ Yes ☐ No

Type of Contract (check all that apply):

☐ Cost Reimbursement ☐ Fixed Fee ☐ Unit Rates ☐ Other **(describe)**

Comments:

Type of Contract (check all that apply):

☐ Paid by Customer ☐ Fee-for-Service / Third Party Billing **(describe)**

Comments:

Start-Up Period & Financing:

Structure of Budget:

Pricing Summary Attachments:

Pricing Assumptions:

Client Budget Allocation:

Scoring of Cost Proposal:

Costs to Recover:

SBD/DBE Requirement: ☐ Yes ☐ No

IT Cost Confirmed? ☐ Yes ☐ No

Recruiting/HR Costs Confirmed? ☐ Yes ☐ No

Legal Costs Confirmed? ☐ Yes ☐ No

Credentialing Costs Confirmed? ☐ Yes ☐ No

Insurance Costs Confirmed? ☐ Yes ☐ No

Customer Pricing Sheet Attached? ☐ Yes ☐ No

Notes to Support Costs:

Additional Notes:

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