



# **KidTraks**

## **Child Welfare Financial System**

**Request for Proposal (RFP) User Guide**

**Last Updated: March 2020**

**KidTraks – RFP User Guide**  
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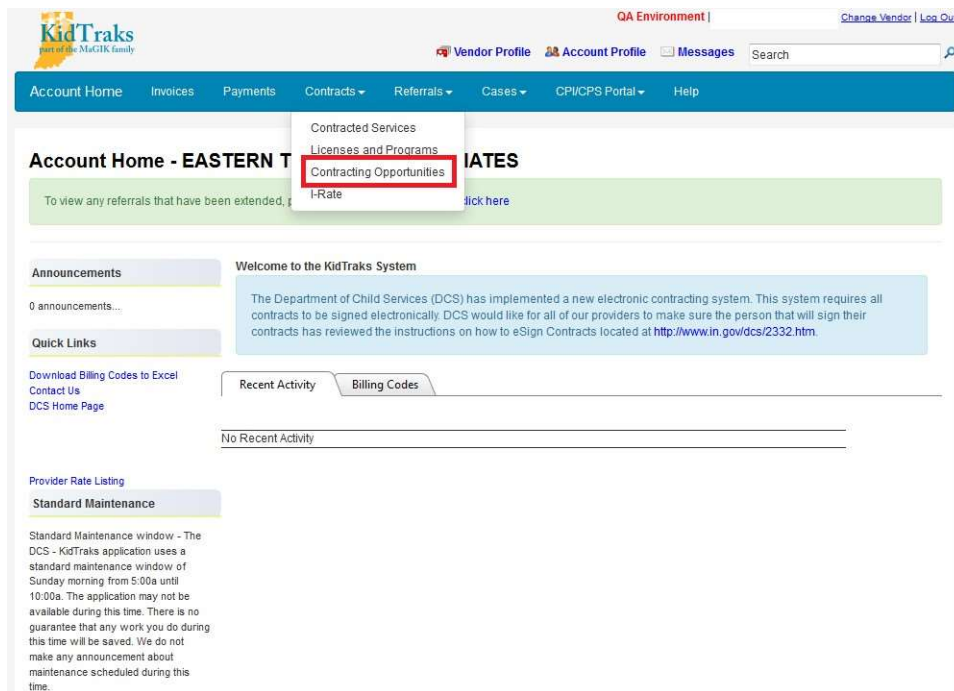
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# 1.0 INTRODUCTION


DCS KidTraks offers online access to Request for Proposals (RFPs) including the ability to submit proposals online.

Current vendors may access a listing of DCS contracts currently open for bid via their Vendor Portal page at the bottom of the screen. There is a link under Support Links titled, *Contracting Opportunities*.



Prospective vendors may access a listing of DCS contracts currently open for bid via the *Request for Proposal (RFP) Inquiry Page* which is linked as *Contracting Opportunities* on the *KidTraks Login Page* or directly via the following link: <https://financials.dcs.in.gov/Public/RFP/RequestAvailable.aspx>

[Sign In](#) | [Information and Helpful Links](#) | [Provider Service Guide](#) | **[Contracting Opportunities](#)** | [Contact Us](#)



**Contracting Opportunities:**

**Thank You for Helping Protect our Children, Families, and Future!!!**

Request Code	Title	Service Start Date	Service End Date	Proposal Due Date	Status
10000183	test	01/01/2018	12/31/2018	12/31/2018	Open For Bidding
10000000	Sample Only	07/01/2011	06/30/2019	07/07/2018	Open For Bidding
10000263	Hudson #13	01/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000257	Hudson #11	01/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000256	Hudson #10	01/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000253	Hudson #8	04/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000254	Hudson #9	04/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000223	Test March 14 2018	03/01/2018	04/07/2019	06/14/2018	Open For Bidding
10000244	April 23 rd asra proposal	04/05/2018	05/05/2018	06/09/2018	Open For Bidding
10000252	test	05/26/2018	07/07/2018	06/01/2018	Open For Bidding
10000209	Another Test...	07/01/2018	07/01/2020	05/31/2018	Open For Bidding
10000248	RFP Test Create2	04/24/2018	05/16/2018	05/30/2018	Open For Bidding
10000241	test April 20 aaa	04/05/2018	05/05/2018	05/25/2018	Open For Bidding
10000246	test 3444444	04/06/2018	05/05/2018	05/25/2018	Open For Bidding
10000242	Test RFP Swapna	04/22/2018	05/31/2018	05/19/2018	Open For Bidding
10000247	RFP Test Create	04/23/2018	05/31/2018	05/16/2018	Open For Bidding
10000264	BA Test	05/15/2018	06/15/2018	05/10/2018	Open For Bidding
10000268	Hudson #11	07/01/2018	12/31/2018	05/09/2018	Open For Bidding
10000270	Hudson #15	07/01/2018	12/31/2018	05/09/2018	Open For Bidding
10000216	Test2	06/01/2018	06/01/2019	05/01/2018	Open For Bidding
10000221	Gram Test2	05/01/2018	05/01/2019	04/30/2018	Open For Bidding
10000240	Shelley's Test	04/30/2018	05/31/2018	04/27/2018	Open For Bidding

## 2.0 VIEW LISTING OF CONTRACT OPPORTUNITIES

To view the individual details for each RFP and to begin the online proposal submission process, click on the *RFP ID* which corresponds with the *Title* of interest. Also included in the *RFP Table* are contract *Start Date*, *End Date*, and *Proposal Due Date* columns. Note that each RFP has a *Status* indicating whether the RFP is *Open for Bidding* or *Closed*. Proposals may only be submitted for those RFPs that are designated as *Open for Bidding*.

Sign In | Information and Helpful Links | Provider Service Guide | Contracting Opportunities | Contact Us

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Request Code	Title	Service Start Date	Service End Date	Proposal Due Date	Status
10000183	test	01/01/2018	12/31/2018	12/31/2018	Open For Bidding
10000000	Sample Only	07/01/2011	06/30/2019	07/07/2018	Open For Bidding
10000263	Hudson #13	01/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000257	Hudson #11	01/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000256	Hudson #10	01/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000253	Hudson #8	04/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000254	Hudson #9	04/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000223	Test March 14 2018	03/01/2018	04/07/2019	06/14/2018	Open For Bidding
10000244	April 23 rd asra proposal	04/05/2018	05/05/2018	06/09/2018	Open For Bidding
10000252	test	05/26/2018	07/07/2018	06/01/2018	Open For Bidding
10000209	Another Test...	07/01/2018	07/01/2020	05/31/2018	Open For Bidding
10000248	RFP Test Create2	04/24/2018	05/16/2018	05/30/2018	Open For Bidding
10000241	test April 20 aaa	04/05/2018	05/05/2018	05/25/2018	Open For Bidding
10000246	test 3444444	04/06/2018	05/05/2018	05/25/2018	Open For Bidding
10000242	Test RFP Swapna	04/22/2018	05/31/2018	05/19/2018	Open For Bidding
10000247	RFP Test Create	04/23/2018	05/31/2018	05/16/2018	Open For Bidding
10000264	BA Test	05/15/2018	06/15/2018	05/10/2018	Open For Bidding
10000268	Hudson #11	07/01/2018	12/31/2018	05/09/2018	Open For Bidding
10000270	Hudson #15	07/01/2018	12/31/2018	05/09/2018	Open For Bidding
10000216	Test2	06/01/2018	06/01/2019	05/01/2018	Open For Bidding
10000221	Gram Test2	05/01/2018	05/01/2019	04/30/2018	Open For Bidding
10000240	Shelley's Test	04/30/2018	05/31/2018	04/27/2018	Open For Bidding

Once the desired RFP has been accessed, the applicant will be transferred to the *RFP Information Page*. Here the applicant will be able to view more details about the chosen RFP including a description and the *Service Standards* associated with the chosen RFP.

Note: There may be one or more *Service Standards* listed for a given RFP. Our example below includes 3 *Service Standards*.

To begin the online proposal submission process, click on the *Create Proposal* link which will transfer the applicant to the *Create New Proposal Page*.

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**RFP Information:**

RFP ID: 10000216  
Title: Test2  
Start Date: 6/1/2018  
Description: testing

[Create Proposal](#)

Status: Open For Bidding  
Proposal Due Date: 5/1/2018  
End Date: 6/1/2019

**Services Requested:**

Code	Description
10521	HOME-BASED FAMILY CENTERED CASEWORK SERVICES
10522	HOME-BASED FAMILY CENTERED THERAPY SERVICES
10525	HOMEMAKER/PARENT AID

### 3.0 ATTAIN AUTHORIZATION TO CREATE A PROPOSAL

#### 3A AUTHORIZATION FOR EXISTING KIDTRAKS VENDORS

From the *Create New Proposal Page*, applicants are required to identify whether they are an existing online KidTraks vendor, or if they need to register as a new user. In the below example, we illustrate the selection of an existing online KidTraks vendor.

The screenshot shows the 'Create New Proposal' page on the KidTraks website. At the top right, there are navigation links: [Sign In](#), [Information and Helpful Links](#), [Provider Service Guide](#), [Contracting Opportunities](#), and [Contact Us](#). The KidTraks logo is in the top left, with the tagline 'part of the MaGIR family'. Below the logo, the page title is 'Create New Proposal'. The main content area displays proposal details in a table-like format:

Request ID: <b>10000216</b>	Status:	Open For Bidding
Title: Test2	Proposal Due Date:	5/1/2018
Start Date: 6/1/2018	End Date:	6/1/2019
Description: testing		

Below the details is a section titled 'Create Proposal:' with a large text area. Inside this area, there is a message: 'All users must be registered with this site before creating a proposal.' followed by a 'Note:' and the instruction: 'If you are existing user, enter your user id and password at the login page to create a proposal...'. At the bottom of this section, there are two radio button options: 'New User' (which is unselected) and 'Existing User' (which is selected and highlighted with a red circle). Below these options are two buttons: 'Select' and 'Cancel'. A red rectangular box highlights the entire selection area, including the radio buttons and the 'Select' and 'Cancel' buttons.

When an applicant identifies themselves as an *Existing User* and clicks on the *Select* button, they are transferred to the *KidTraks Login Page* as demonstrated below. Here the applicant enters their KidTraks *User ID* and *Password*, then clicks on the *Login* button. The applicant then must return to the *RFP Inquiry Page* and select the desired *RFP ID* corresponding to the desired proposal for submission. Existing users may now advance to page 12 to continue the online proposal creation process.

 Management Gateway for Indiana's Kids

Sign In

Sign In

Remember Me

[Reset Password?](#)

[Online Reporting](#) | [Case Management](#) | [KidTraks Financials](#) | [NYTD](#)





### 3B AUTHORIZATION FOR PROSPECTIVE KIDTRAKS VENDORS

Vendors not registered as online KidTraks users must complete the registration process. This begins by identifying yourself as a *New User* from the *Create New Proposal Page* and then clicking on the *Select* button as demonstrated below.

The screenshot shows the 'Create New Proposal' page on the KidTraks website. At the top right, there are links for 'Sign In', 'Information and Helpful Links', 'Provider Service Guide', 'Contracting Opportunities', and 'Contact Us'. The KidTraks logo is in the top left. The main content area displays proposal details:

Request ID: <b>10000216</b>	Status:	Open For Bidding
Title: Test2	Proposal Due Date:	5/1/2018
Start Date: 6/1/2018	End Date:	6/1/2019
Description: testing		

Below the details is a 'Create Proposal:' section with a message: 'All users must be registered with this site before creating a proposal.' A note follows: 'Note: If you are existing user, enter your user id and password at the login page to create a proposal...'. A dialog box is open with two radio buttons: 'New User' (which is selected and highlighted with a red box) and 'Existing User'. Below the radio buttons are 'Select' and 'Cancel' buttons.

### 3C PROSPECTIVE KIDTRAKS VENDOR REGISTRATION

The applicant is then transferred to the *Registration Page*. Here the user completes the online form and clicks on the *OK* button as illustrated below.

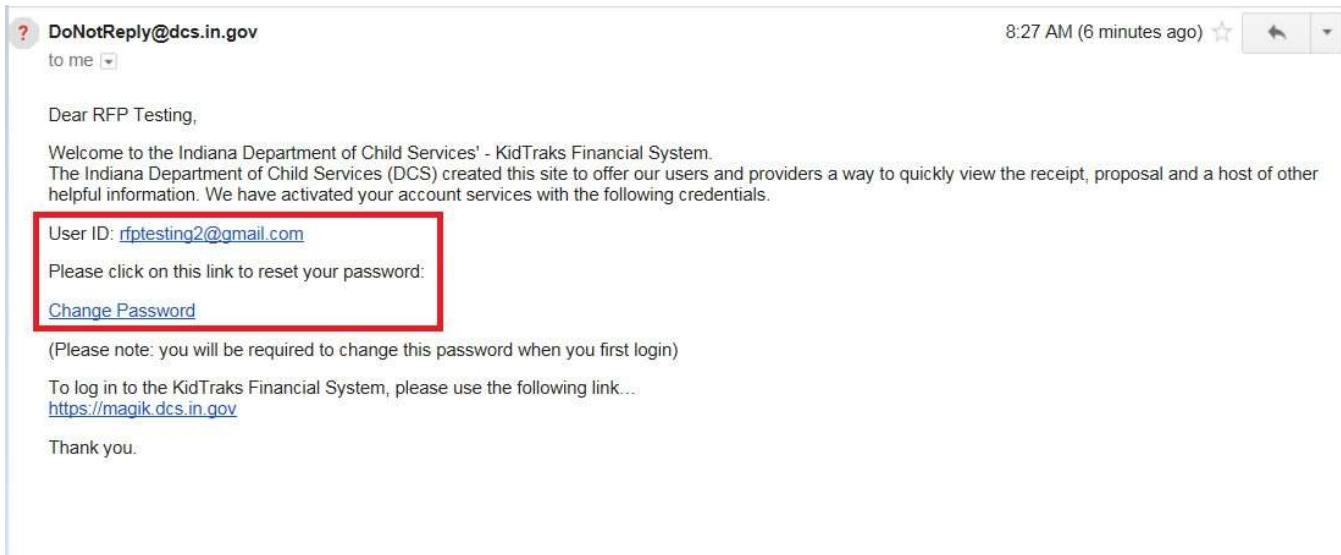
The screenshot shows the 'New User Registration' page on the KidTraks website. At the top left is the KidTraks logo with the tagline 'part of the MaGIK family'. At the top right are navigation links: 'Sign In | Information and Helpful Links | Provider Service Guide | Contracting Opportunities | Contact Us'. The main heading is 'New User Registration' followed by 'Create a new account'. The form fields are: 'First Name:\*' (RFP), 'Last Name:\*' (Testing), 'Email Address:\*' (rfptesting2@gmail.com), 'Confirm Email Address:\*' (rfptesting2@gmail.com), 'Phone:' (555-555-5555), and 'Ext:' (12345). Below these is a section 'Sign up to receive E-mail from the following distribution lists.' with two options: 'Foster Parents' (All foster parents regardless of licensing agency) and 'Foster Parent Vendors' (Foster Parents who have been paid in last 6 months). A CAPTCHA image shows the number '851902'. Below the CAPTCHA is a text input field containing '851902'. At the bottom are 'OK' and 'Cancel' buttons.

A successful registration is indicated at the bottom of the *Registration Page* when the form is completed and the *OK* button is selected.

This screenshot shows the same registration form as above, but with a red-bordered box at the bottom containing the message: 'Your registration has been successfully submitted. You will receive an email shortly which contains your temporary password and login instructions. Thank you.' The form fields are filled with the same data as in the previous screenshot.

As indicated in the successfully submitted message on the *Registration Form* above, a confirmation notice is sent to the email address provided. Contained in the email is a link to *Change your Password*. By clicking on the link you will be taken to a page to create a new password.

**Note: Please check your spam folder for confirmation emails. Confirmation emails are sent out immediately upon registration submission.**



Once you enter in your new password, click on *Change My Password*.

## Change Password

Please submit the following information:

Email Address:

RFP Testing

\* New Password:

\* Re-enter New Password:

Change My Password

Back to Login

Once your password has been successfully changed click on *Back to Login*. You will then be directed to the KidTraks login page to log in.



## Change Password

---

Please submit the following information:

Email Address:

RFP Testing

\* New Password:

\* Re-enter New Password:

Change My Password

Back to Login

Password changed successfully;

From the *KidTraks Login Page*, enter your *User ID* (your email address) and paste your *Password*. Click on the *Login* button.



## Sign In

---

Enter password

Sign In

Remember Me

[Reset Password?](#)

[Online Reporting](#) | [Case Management](#) | [KidTraks Financials](#) | [NYTD](#)



Once you are successfully logged into KidTraks, you will be directed to the screen below. Click on *KidTraks*.

The screenshot shows the KidTraks application interface. On the left, there is a vertical menu with the following items: Applications, KidTraks (highlighted with a red box), Support, and Manage Security. To the right of the menu is a large red banner with a photograph of a young girl. The banner contains the text: "Our children can't wait! Call the Indiana Child Abuse Hotline Today... If you suspect abuse or neglect 1-800-800-5556". Below the banner is a yellow "Partners" section containing logos for COMODO SECURE, Microsoft, zendesk, SurveyMonkey, cisco commons, Adobe, govDELIVERY, JTAC, and Quest.

Next, click on *Contracting Opportunities*.

The screenshot shows the KidTraks system home page. At the top left is the KidTraks logo with the tagline "part of the MaGIK family". At the top right are links for "Log Out" and "Welcome RFP Testing". Below the logo is a blue navigation bar with "IN.gov" on the left and "Indiana Department of Child Services" with a logo on the right. The main content area has a "Welcome to the KidTraks System" heading and a message: "There are no records to display...". On the left side, there are sections for "News", "Quick Links" (with "Contracting Opportunities!!" highlighted in a red box), and "Standard Maintenance". The "Standard Maintenance" section contains a paragraph: "Standard Maintenance window - The DCS - KidTraks application uses a standard maintenance window of Sunday morning from 5:00a until 10:00a. The application may not be available during this time. There is no guarantee that any work you do during this time will be saved. We do not make any announcement about maintenance scheduled during this time."

## 4.0 ONLINE PROPOSAL FORMS AND ATTACHMENTS

From the *RFP Inquiry Page*, select the *RFP ID* corresponding with the RFP desired for proposal submission.

[Sign In](#) | [Information and Helpful Links](#) | [Provider Service Guide](#) | [Contracting Opportunities](#) | [Contact Us](#)



**Contracting Opportunities:**

**Thank You for Helping Protect our Children, Families, and Future!!!**

Request Code	Title	Service Start Date	Service End Date	Proposal Due Date	Status
10000183	test	01/01/2018	12/31/2018	12/31/2018	Open For Bidding
10000000	Sample Only	07/01/2011	06/30/2019	07/07/2018	Open For Bidding
10000263	Hudson #13	01/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000257	Hudson #11	01/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000256	Hudson #10	01/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000253	Hudson #8	04/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000254	Hudson #9	04/01/2018	06/30/2018	06/30/2018	Open For Bidding
10000223	Test March 14 2018	03/01/2018	04/07/2019	06/14/2018	Open For Bidding
10000244	April 23 rd asra proposal	04/05/2018	05/05/2018	06/09/2018	Open For Bidding
10000252	test	05/26/2018	07/07/2018	06/01/2018	Open For Bidding
10000209	Another Test...	07/01/2018	07/01/2020	05/31/2018	Open For Bidding
10000248	RFP Test Create2	04/24/2018	05/16/2018	05/30/2018	Open For Bidding
10000241	test April 20 aaa	04/05/2018	05/05/2018	05/25/2018	Open For Bidding
10000246	test 3444444	04/06/2018	05/05/2018	05/25/2018	Open For Bidding
10000242	Test RFP Swapna	04/22/2018	05/31/2018	05/19/2018	Open For Bidding
10000247	RFP Test Create	04/23/2018	05/31/2018	05/16/2018	Open For Bidding
10000264	BA Test	05/15/2018	06/15/2018	05/10/2018	Open For Bidding
10000268	Hudson #11	07/01/2018	12/31/2018	05/09/2018	Open For Bidding
10000270	Hudson #15	07/01/2018	12/31/2018	05/09/2018	Open For Bidding
10000216	Test2	06/01/2018	06/01/2019	05/01/2018	Open For Bidding
10000221	Gram Test2	05/01/2018	05/01/2019	04/30/2018	Open For Bidding
10000240	Shelley's Test	04/30/2018	05/31/2018	04/27/2018	Open For Bidding

## 4A RFP INFORMATION PAGE

Once you have selected the RFP desired for proposal submission, you will be directed to the RFP Information Page below, which provides some additional information. There are two links provided: the *RFP Inquiry* and *Create Proposal* links. Also, the *Service Standard(s)* for the selected RFP are itemized. Please verify that the selected RFP is the one intended for proposal submission. If not, the RFP Inquiry link will return you to the previous *RFP Inquiry Page*. In the provided example of *Test2*, we will begin to create the online proposal by clicking on the *Create Proposal* link.

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[Vendor Profile](#) [Account Profile](#) [Messages](#)

[Account Home](#) [Invoices](#) [Payments](#) [Contracts](#) [Referrals](#) [Cases](#) [CPI/CPS Portal](#) [Help](#)

RFP Information

[RFP Inquiry](#) [Create Proposal](#)

RFP ID: **10000216** Status: Open For Bidding

Title: Test2

Description: **testing**

Start Date: 6/1/2018 End Date: 6/1/2019

Proposal Due Date: 5/1/2018

**Existing Proposals:**

Proposal ID	Request ID	Legal Name	DBA	Status
10003329	10000216			Open

**Service Requested:**

Code	Description
10521	HOME-BASED FAMILY CENTERED CASEWORK SERVICES
10522	HOME-BASED FAMILY CENTERED THERAPY SERVICES
10525	HOMEMAKER/PARENT AID

## 4B PROPOSAL INFORMATION PAGE

The first page presented to the applicant after clicking upon the *Create Proposal* link is the *Proposal Information Page*. Note how the *Proposal Information Page* is divided into four sections which are accessed via the tabs *Basic Information*, *Proposed Services*, *Errors*, and *Attachment*. Clicking on the individual tabs will allow you to navigate between the proposal sections.

In addition, from the *Proposal Information Page*, the user is provided with options to *Delete*, *Submit*, or *Print Proposal Application* by clicking on the down arrow of the dropdown menu entitled *Action*. This dropdown menu with its respective options are available on the *Proposal Information Page* no matter which tab is selected.

Note: If the applicant selects *Delete*, the entire proposal will be deleted. Only correctly completed proposals will qualify for submission. The option to *Print Proposal* is available at any time in the process – whether the proposal has been submitted or if it is still open.

Also note there is an *Eligible to Submit* icon in the *Proposal Header* which provides the applicant with a gauge as to whether or not the proposal is ready for submittal. When you click on the red icon, you will be transferred to the *Errors* tab where a listing of errors is provided. If the icon registers as green, the proposal is ready for submission.

The screenshot displays the Proposal Information Page. At the top is a blue navigation bar with links: Account Home, Invoices, Payments, Contracts, Referrals, Cases, CPI/CPS Portal, and Help. Below this is the 'Proposal Information' section, which includes an 'Action' dropdown menu with options: Delete, Submit, and Print Proposal Application, and a 'Go' button. The 'Proposal Header' section shows 'Proposal ID: 10003333' and 'Request Title: Test2'. To the right of the header is an 'Eligible to Submit' indicator with a red icon and the text 'Status: Open'. Below the header is a tabbed interface with four tabs: 'Basic Information' (selected), 'Proposed Services', 'Errors', and 'Attachment'. The 'RFP Information' section is visible below the tabs, containing the following details:

RFP ID:	10000216	Status:	Open For Bidding
Title:	Test2		
Description:	Community Based Services, formerly referred to as IV-B Services, are programs which promote the well-being of children and families and are designed to strengthen and stabilize families (including adoptive, foster and extended families). They are also designed to help families at risk or in crisis including services to assist families in preventing disruption and the unnecessary removal of children from their home. They help to maintain the safety of children in their own homes, support families preparing to reunify or adopt, and assist families in obtaining other services to meet multiple needs. Community Based Services are identified by the following categories: Adoption, Resource Parent Services, Family Centered Services, Other Services, Addictions Services, and Probation Services. For more information about this and other current contracting opportunities, please visit <a href="http://www.in.gov/dcs/3151.htm">http://www.in.gov/dcs/3151.htm</a>		
Start Date:	6/1/2018	End Date:	6/1/2019
Proposal Due Date:	5/1/2018		



## 4C BASIC INFORMATION PAGE

The first form presented for completion is the *Basic Information* form. There are four links provided on the *Basic Information* form: *Certified Minority Owned Business*, *Certified Women Owned Business*, *Buy Indiana Entity*, and *Veteran-Owned Business*. These links all open to *Indiana Department of Administration (IDOA) Pages* which provide more information on how to qualify for these programs. For more information please see the IDOA Requirements document (Attachment IDOA 1) and the corresponding IDOA required attachments (Attachment IDOA 2-4). If already certified in any of these programs, please select the applicable program category(s).

Complete the *Basic Information* form by filling out all sections. The Chief Executive Officer, Financial Officer, Contact Person for Proposal, and Disaster Contact are critical sections to complete as the contact information entered are transferred into KidTraks. Once the form is completed, click on the *Save* button at the bottom of the page. Clicking on the *Cancel* button will remove your entries from the completed fields. Clicking on the *Close* button will log you out of KidTraks and return you to the *KidTraks Login Page*.

**Note: If you navigate away from the *Proposal Information Page* prior to clicking on the *Save* button, all entries will be lost. Never use the browser *Back* button to return to previously viewed pages!**

Legal Applicant/Agency Name:

Doing Business As:

Registered with Secretary of State:  Not Registered  Registered

Federal EIN # or SS#:  Medicaid ID:

Physical Address same as Mailing Address

Mailing Address:	Physical Address:
Address Line 1: <input type="text"/>	Address Line 1: <input type="text"/>
Address Line 2: <input type="text"/>	Address Line 2: <input type="text"/>
City: <input type="text"/>	City: <input type="text"/>
State: <input type="text"/>	State: <input type="text"/>
Zip5: <input type="text"/>	Zip5: <input type="text"/>
Zip4: <input type="text"/>	Zip4: <input type="text"/>

Applicant's Legal Status:  For Profit  Certified Minority Owned Business  
 Not For Profit  Certified Women Owned Business  
 Sole Proprietorship  Buy Indiana Entity  
 Partnership  Veteran-Owned Business  
 Other

**Chief Executive Officer:**

Name:  Telephone:

Email:  Fax:

Address:

**Financial Officer:**

Name:  Telephone:

Email:  Fax:

Address:

**Contact Person for Proposal:**

Name:  Telephone:

Email:  Fax:

Address:

**Disaster Contact:**

Name:  Telephone:

Email:  Fax:

Address:

After clicking on the *Save* button, and if the *Basic Information* form is not completed correctly, error notifications will be visible via a red asterisk by the section in question, as well as bulleted explanations at the bottom of the page. See below for an illustration of an incomplete *Basic Information* form.

The screenshot displays the 'Basic Information' section of a vendor profile in the KidTraks system. The form contains several fields, many of which are marked with a red asterisk to indicate they are required but not filled out. The 'Legal Applicant/Agency Name' field is highlighted with a red circle. Below the form, a list of error messages is displayed, detailing the missing required information.

**UAT Environment | Welcome David Hudson | [Change Vendor](#) | [Log Out](#)**

**Account Home | Invoices | Payments | Contracts | Referrals | Cases | CPI/CPS Portal | Help**

Proposal Information      Action:

**Proposal Header**

Proposal ID: 10003330      Eligible to Submit:

Request Title: RFP Phase 2 #2      Status: Open

**Basic Information | Proposed Services | Errors | Attachment**

**RFP Information:**

RFP ID: 10000251      Status: Open For Bidding

Title: RFP Phase 2 #2

Description: RFP Phase 2 #2

Start Date: 7/1/2019      End Date: 6/30/2020

Proposal Due Date: 6/30/2019

Legal Applicant/Agency Name:\*

Doing Business As:

Registered with Secretary of State:\*  Not Registered  Registered

Federal EIN # or SS#:       Medicaid ID:

Physical Address same as Mailing Address

**Mailing Address:**

Address Line 1:\*

Address Line 2:

City:\*

State:\*

Zip5:\*

Zip4:

**Physical Address:**

Address Line 1:\*

Address Line 2:

City:\*

State:\*

Zip5:\*

Zip4:

Applicant's Legal Status:  For Profit       Certified Minority Owned Business

Not For Profit       Certified Women Owned Business

Sole Proprietorship       Buy Indiana Entity

Partnership       Veteran-Owned Business

Other

**Chief Executive Officer:**

Name:\*       Telephone:\*

Email Address:\*       Fax:

**Financial Officer:**

Name:       Telephone:

Email Address:       Fax:

**Contact Person for Proposal:**

Name:\*       Telephone:\*

Email Address:\*       Fax:

**Disaster Contact:**

Name:       Telephone:

Email Address:       Fax:

- Required Legal Applicant/Agency Name
- Required Registered with Secretary of State
- Required Mailing Address Line 1
- Required Mailing City
- Required Mailing State
- Required Mailing Zipcode
- Required Physical Address Line 1
- Required Physical Address City
- Required Physical Address State
- Required Physical Address Zipcode
- Legal Status Required
- Required CEO Name
- Required CEO Telephone
- Required CEO Email
- Required Contact Person Name
- Required Contact Person Telephone
- Required Contact Person Email

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## 4D SELECTING APPLICABLE SERVICES FOR PROPOSAL

The next section of the online proposal submission to be completed is found under the *Proposed Services* tab. Click on the corresponding tab located on the *Proposal Information Page* as indicated below. The *Proposed Services Section* lists those *Services Standards* available for the selected RFP. Note the column indicating the completion status of each referenced service. To begin filling out the *Proposed Services* form(s), click on the corresponding *Service Code*.

The screenshot shows the KidTraks web application interface. At the top left is the KidTraks logo with the tagline 'part of the MaGIK family'. The top right shows a user greeting 'Welcome RFP Tester2' with links for 'Change Vendor' and 'Log Out'. Below this is a navigation bar with 'Account Home', 'Cases', 'CPI/CPS Portal', and 'Help'. A search bar is also present. The main content area is titled 'Proposal Information' and includes an 'Action:' dropdown menu and a 'Go' button. Below this is a 'Proposal Header' section with 'Proposal ID: 10003334' and 'Request Title: Test2'. On the right side of the header, it indicates 'Eligible to Submit' with a red circle icon and 'Status: Open'. A tabbed interface below the header shows 'Basic Information', 'Proposed Services' (which is selected and highlighted), 'Errors', and 'Attachment'. Under the 'Proposed Services' tab, there is a table with three columns: 'Service Code', 'Service Description', and 'Completed'. The table contains three rows of data, each with a 'No' in the 'Completed' column. Red boxes highlight the 'Service Code' and 'Completed' columns in the table.

Service Code	Service Description	Completed
10521	HOME-BASED FAMILY CENTERED CASEWORK SERVICES	No
10522	HOME-BASED FAMILY CENTERED THERAPY SERVICES	No
10525	HOMEMAKER/PARENT AID	No

## 4E PROPOSED SERVICES FORM

Begin the form completion by filling in the *Contact Person for Service* section of the form. Note that on the *Proposed Services* form, there are two links provided: *Back to Service List* and *DCS State Region Map (Click Here)*. The *DCS State Region Map (Click Here)* link is addressed in Section 4G County/Contact Table. Clicking on the *Back to Service List* link will return you to the table itemizing all of the proposed *Service Standards* relevant to the selected RFP.

If you want to include this Service Standard in your proposal submission, you must check *Include Service in Proposal*, shown below.

**Note: If you navigate away from the *Proposal Information Page* prior to clicking on the *Save* button, all entries will be lost. *Never* use the browser *Back* button to return to previously viewed pages!**

Basic Information
Proposed Services
Errors
Attachment

Back To Service List

This box must be checked for each service being proposed

\*Include Service in Proposal?

Proposed Service: 10521-HOME-BASED FAMILY CENTERED CASEWORK SERVICES

Contact Person for Service:

Name:*	<input type="text"/>	Telephone:*	<input type="text"/>
Email Address:*	<input type="text"/>	Fax:	<input type="text"/>

Service - Components

Component Code	Component Desc	Unit Of Measure	Standard Rate	My Proposed Rate	Rate*
(Required) 331	FACE TO FACE	HOUR	30.00		30.00
(Required) 908	COURT	APPEARANCE	10.00		10.00
(Required) 1178	CRISIS RESPONSE	HOUR	20.00		20.00
(Required) 1201	SUPERVISED VISITATION	HOUR	50.00		50.00
(Required) 1670	INTERPRETER SERVICES	ACTUAL COST	1.00		1.00
(Required) 10507	REPORTS	HOUR	40.00		40.00

Select County(s) and enter a contact for each county where the service will be performed:\*

Counties:

DCS State Region Map(Click Here)

There are no records to display...

## 4F COMPONENT CODE TABLE

Found next on the *Proposed Services* form is the *Component Code Table* (Billable Units). Here you will find the listing of all components relevant to the selected *Service Standard* within the RFP. This table also provides the applicant with the relevant *Component Codes* (Billable Units), Component Description, their Units of Measure, and their respective standardized rates.

Some Service Standards require that all the components be selected. These components will have a standard rate that cannot be negotiated. These are shown under the *Rate* column. These components with a fixed standard rate will have a field that cannot be edited, as shown below under My Proposed Rate column. In the example below for Home Based Family Centered Casework none of the rates can be edited within this column. By applying for this service your agency agrees to provide the service at the fixed standard rate.

Service - Components

Component Code	Component Desc	Unit Of Measure	Standard Rate	My Proposed Rate	Rate*
(Required) 331	FACE TO FACE	HOUR	30.00		30.00
(Required) 908	COURT	APPEARANCE	10.00		10.00
(Required) 1178	CRISIS RESPONSE	HOUR	20.00		20.00
(Required) 1201	SUPERVISED VISITATION	HOUR	50.00		50.00
(Required) 1670	INTERPRETER SERVICES	ACTUAL COST	1.00		1.00
(Required) 10507	REPORTS	HOUR	40.00		40.00

## 4G COUNTY/CONTACT TABLE

Next on the *Proposed Services* form is the county selection area. To select the regions and/or counties corresponding to the associated services, click on the dropdown menu and select *Add*. Note: Clicking on the *DCS State Region Map (Click Here)* link will open up a browser window with an illustration of the state of Indiana identifying which counties are in which regions as depicted below.

Once *Add* has been selected from the county dropdown list, click on the *Go* button.

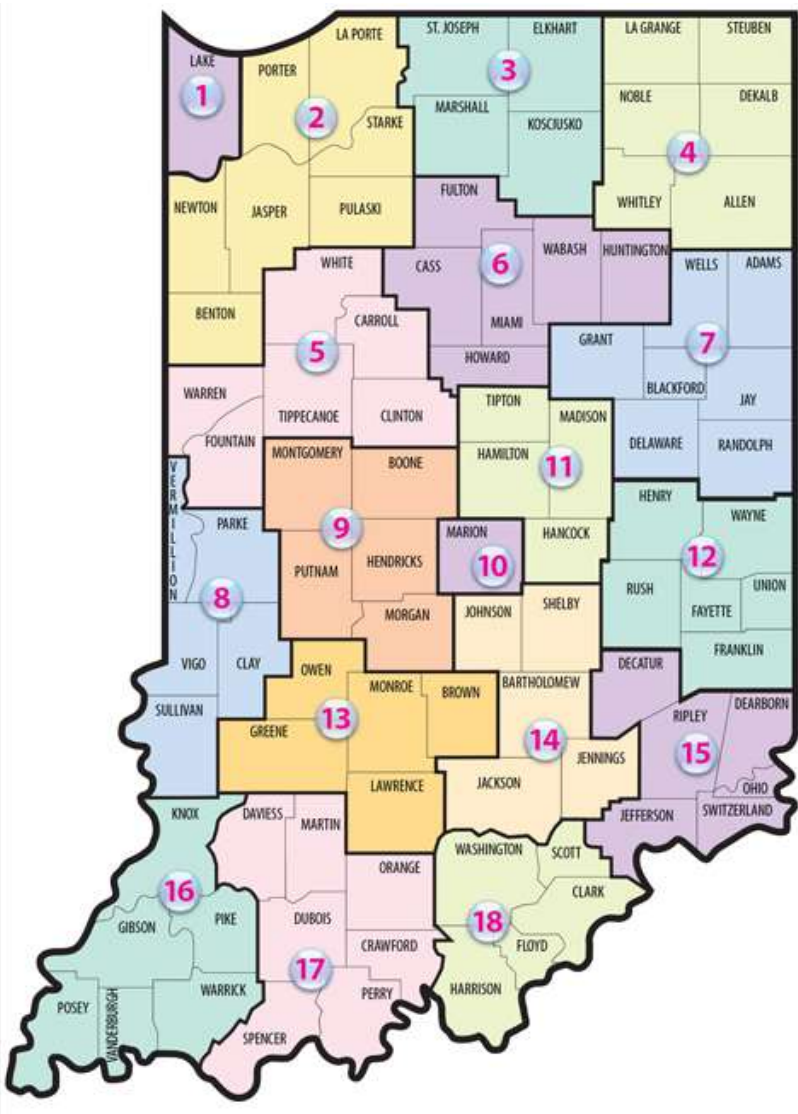
Select County(s) and enter a contact for each county where the service will be performed:

Counties: [DCS State Region Map\(Click Here\)](#) Add Go

There are no records to display...

Save Apply Cancel

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Clicking on the *Go* button opens up the *County Selection* dialog box. Begin by filling in the *Name, Phone* and *Email* fields. Note: Each county and/or region requires the entry of corresponding contact information.

There are two ways to populate the *Counties Selected* field. The first option is to click on the *Filter By Region* dropdown list which will provide a window listing all of Indiana's regions as demonstrated below. See previous page for instructions on accessing a map of Indiana providing a region legend.

For our purposes we've elected to bypass the region option and select by county. Illustrated below is the selection of Carroll County from the *Counties Available* list. Once the desired county is selected, click on the *Select* link to move it into the *Counties Selected* field. Repeat this process to select all counties desired for service representation. Counties may be removed from the *Counties Selected* field by highlighting the applicable counties and clicking on the *Remove* link.

Contact Person for Service:

Name:\* Venda Wannabee Telephone:\* 5555555555  
Email Address:\* vwannabee@serviceprovider.com Fax: 5554444444

Service - Components

Component Code	Component Name
(Required) 331	FACE TO
(Required) 908	COURT
(Required) 1178	CRISIS P
(Required) 1201	SUPERV
(Required) 1670	INTERP
(Required) 10507	REPORT

Select County(s) and enter

Counties: DCS State Region

There are no records to display

Save Apply Cancel

Having selected Carroll County for our service representation, it appears in the *Counties Selected* field and disappears from the *Counties Available* listing as illustrated below. Next, click on the *Submit* button.

Contact Person for Service:

Name:\*  Telephone:\*   
Email Address:\*  Fax:

Service - Components

Component Code	Component Name
(Required) 331	FACE TO
(Required) 908	COURT
(Required) 1178	CRISIS P
(Required) 1201	SUPERV
(Required) 1670	INTERP
(Required) 10507	REPORT

Select County(s) and enter

Counties:

There are no records to display...

**County Selection**

Name:\*   
Phone:\*   
Email:\*   
Filter By Region:

Counties Available:

- Adams
- Allen
- Bartholomew
- Benton
- Blackford
- Boone
- Brown
- Cass
- Clark
- Clay
- Clinton
- Crawford
- Daviess
- Dearborn
- Decatur
- DeKalb

Select>>

Remove<<

Counties Selected:

- Carroll



## 4H FINALIZING PROPOSED SERVICES FORM

Once the county(s) and/or region(s) have been selected and the appropriate contact information has been entered and submitted for service representation, the record(s) appear in the *Counties Table* of the *Proposed Services* form.

Complete the form by clicking on the *Save* or *Apply* button. Clicking on the *Save* button will save all entries and return you to the *Services Section* listing all services pertinent to the selected RFP. Clicking on the *Apply* button will save all entries and maintain your placement on the current page. Clicking on the *Cancel* button will remove all field entries and return you to the *Services Section* listing.

County/Region records may be deleted by clicking on the box corresponding to the county/region you wish to delete. Then select *Delete* from the dropdown menu and click on the *Go* button.

Proposal Information Action:

---

Proposal Header

Proposal ID: 10003341 Eligible to Submit:

Request Title: Test2 Status: Open

---

Basic Information **Proposed Services** Errors Attachment

---

[Back To Service List](#)

\*Include Service in Proposal?

Don't forget to check this box!

Proposed Service: 10521-HOME-BASED FAMILY CENTERED CASEWORK SERVICES

---

Contact Person for Service:

Name:*	<input type="text" value="Venda Wannabee"/>	Telephone:*	<input type="text" value="555555555"/>
Email Address:*	<input type="text" value="vwannabee@servicepvoider.com"/>	Fax:	<input type="text" value="555444444"/>

---

Service - Components

Component Code	Component Desc	Unit Of Measure	Standard Rate	My Proposed Rate	Rate*
(Required) 331	FACE TO FACE	HOUR	30.00		30.00
(Required) 908	COURT	APPEARANCE	10.00		10.00
(Required) 1178	CRISIS RESPONSE	HOUR	20.00		20.00
(Required) 1201	SUPERVISED VISITATION	HOUR	50.00		50.00
(Required) 1670	INTERPRETER SERVICES	ACTUAL COST	1.00		1.00
(Required) 10507	REPORTS	HOUR	40.00		40.00

---

Select County(s) and enter a contact for each county where the service will be performed:\*

Counties: [DCS State Region Map\(Click Here\)](#) Add

<input type="checkbox"/>	Region	County	County Desc	First Name	Phone	Email
<input type="checkbox"/>	Region 5	08	Carroll	Venda Wannabee	(555) 555-5555	vwannabee@servicepvoider.com

---

By clicking on *Save*, you will be directed to the screen shown below. By clicking on *Apply*, the data will be saved but the user will not be directed to the next screen. In this example, the user completed all requirements under the Proposed Services tab for *Home Based Family Centered Casework Services*. Note the *Yes* comment under the Completed Section.

If the user wants to apply for the other available Service Standards, they should select the Service Code link from this screen. If the user only wants to apply for *Home Based Family Centered Casework Services*, the user should move on to 4I Uploading Attachments.

The screenshot displays a web application interface with a blue navigation bar at the top containing links for Account Home, Invoices, Payments, Contracts, Referrals, Cases, CPI/CPS Portal, and Help. Below the navigation bar, there is a 'Proposal Information' section with an 'Action:' dropdown menu and a 'Go' button. The 'Proposal Header' section shows 'Proposal ID: 10003341' and 'Request Title: Test2'. On the right side, it indicates 'Eligible to Submit' with a red dot and 'Status: Open'. Below this, there are tabs for 'Basic Information', 'Proposed Services', 'Errors', and 'Attachment'. The 'Proposed Services' tab is active, showing a table with three columns: 'Service Code', 'Service Description', and 'Completed'. The first row, representing 'HOME-BASED FAMILY CENTERED CASEWORK SERVICES', is highlighted with a red border and shows 'Yes' in the 'Completed' column. The other two rows show 'No'.

Service Code	Service Description	Completed
10521	HOME-BASED FAMILY CENTERED CASEWORK SERVICES	Yes
10522	HOME-BASED FAMILY CENTERED THERAPY SERVICES	No
10525	HOMEMAKER/PARENT AID	No

## 4I UPLOADING ATTACHMENTS

Under the Attachment tab within the Proposal Information screen, users will find the *Required* or *Optional* attachments needed for proposal submission.

In the screen below, you will see the list of *Required* and *Optional* attachments. Listed first are the *Required* attachments per contract Type. In this example, the RFP is for Community Based Services. Below these attachments are *Required* or *Optional* attachments specific to the Service Standard the user is proposing for. These are identified under the Service column. In the example below the user only applied for *Home Based Family Centered Casework Services*.

To add an attachment click on the *Required* or *Optional* link under the Attachment column. Descriptions of each attachment type can be found in Appendix B. The attachments are specific to the RFP type and proposed Service Standard.

Account Home Invoices Payments Contracts Referrals Cases CPI/CPS Portal Help

Proposal Information Action:  Go

Proposal Header  
Proposal ID: 10003341  
Request Title: Test2  
Eligible to Submit:   
Status: Open

Basic Information Proposed Services **Attachment**

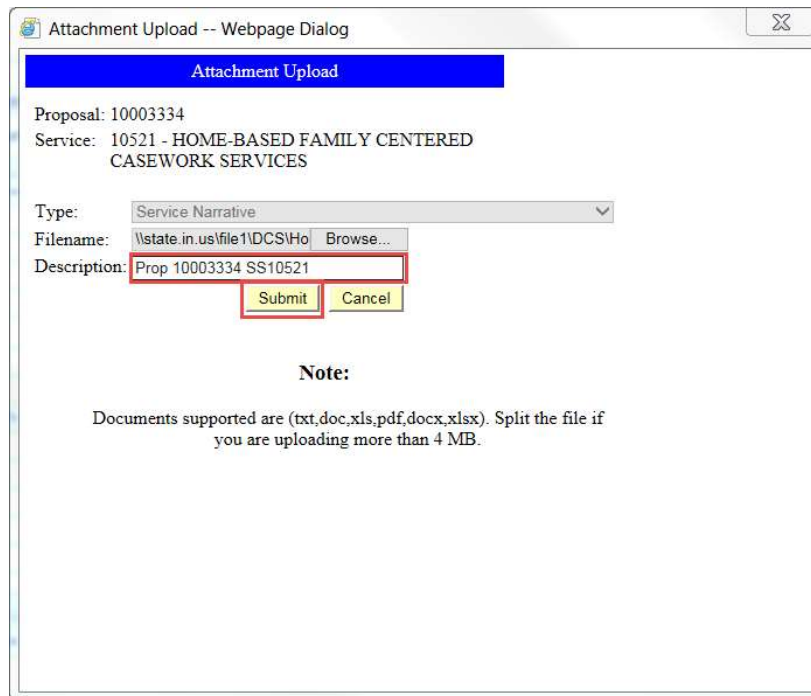
Please select the applicable individual Attachment hyperlinks to upload documents.

Type	Service	Attachments
Agency Quality Improvement		<a href="#">Required</a>
Funding Sources		<a href="#">Required</a>
Legal Status		<a href="#">Required</a>
Organizational Chart		<a href="#">Required</a>
Proposal Application		<a href="#">Required</a>
Provider Financials		<a href="#">Required</a>
Provider Insurance		<a href="#">Required</a>
Provider Narrative		<a href="#">Required</a>
Secretary of State Entity Report		<a href="#">Required</a>
Other	HOME-BASED FAMILY CENTERED CASEWORK SERVICES	<a href="#">Optional</a>
Service Narrative	HOME-BASED FAMILY CENTERED CASEWORK SERVICES	<a href="#">Required</a>

Add Users will select this if they want to upload additional provider documents labeled Other.

No attachment available....

Click on *Browse* to select the document you wish to upload from your computer. Once the document has been uploaded, type in the Description of the document. Then select *Submit*.

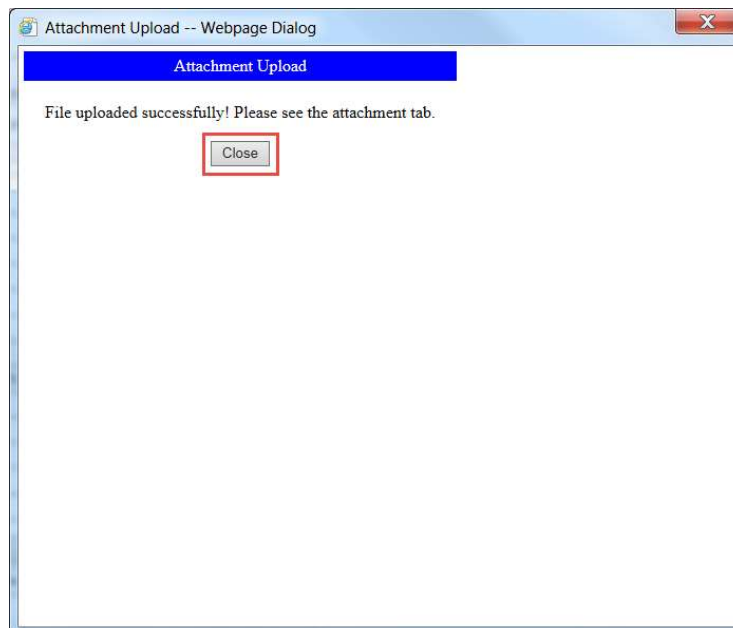


The screenshot shows a dialog box titled "Attachment Upload -- Webpage Dialog". The dialog has a blue header bar with the text "Attachment Upload". Below the header, the following information is displayed:

- Proposal: 10003334
- Service: 10521 - HOME-BASED FAMILY CENTERED CASEWORK SERVICES
- Type: Service Narrative (dropdown menu)
- Filename: \\state.in.us\file1\DCS\Ho Browse...
- Description: Prop 10003334 SS10521

At the bottom of the form area, there are two buttons: "Submit" and "Cancel". Below the form area, there is a "Note:" section with the text: "Documents supported are (txt,doc,xls,pdf,docx,xlsx). Split the file if you are uploading more than 4 MB."

Once the *Submit* button has been selected, an *Attachment Upload* dialog box will appear indicating that the upload was completed successfully. Click on the *Close* button.



The screenshot shows the same dialog box as above, but now it displays a success message: "File uploaded successfully! Please see the attachment tab." Below the message is a single button labeled "Close".

## 4J DELETING ATTACHMENTS

As the user uploads attachments, the attachments move to a completed section at the bottom of the screen. To delete an uploaded attachment, click on the X under the *Delete* column. To delete attachments from your proposal, simply click on the “X” next to the attachment you wish to delete.

When an attachment has been selected for deletion and the “X” has been clicked upon, a message window will appear asking you to verify that you want to delete the chosen attachment from the proposal. Click *OK* to continue with the deletion or *Cancel* to cancel the deletion.

Account Home
Invoices
Payments
Contracts ▾
Referrals ▾
Cases ▾
CPICPS Portal ▾
Help

Proposal Information Action:

Proposal Header

Proposal ID: 10003341 Eligible to Submit: ●

Request Title: Test2 Status: Open

Basic Information
Proposed Services
Errors
Attachment

Please select the applicable individual Attachment hyperlinks to upload documents.

Type	Service	Attachments
Proposal Application		<a href="#">Required</a>

Type	Service	Description	Attachments	Delete
Provider Narrative		Provider Narrative	test.docx	✕
Organizational Chart		Organizational Chart	test.docx	✕
Legal Status		Legal Status	test.docx	✕
Provider Financials		Provider Financials	test.docx	✕
Funding Sources		Funding Sources	test.docx	✕
Agency Quality Improvement		Agency Quality Improvement	test.docx	✕
Secretary of State Entity Report		Secretary of State	test.docx	✕
Provider Insurance		Provider Insurance	test.docx	✕
Service Narrative	HOME-BASED FAMILY CENTERED CASEWORK SERVICES	Service Narrative	test.docx	✕
Other	HOME-BASED FAMILY CENTERED CASEWORK SERVICES	Other	test.docx	✕

## 4K PROPOSAL APPLICATION

The Proposal Application is not required for this RFP. The application has been replaced with the Transmittal Letter, explained in the RFP Boilerplate.

## 5.0 PROPOSAL SUBMISSION

### 5A ELIGIBILITY TO SUBMIT

When users are ready to submit their proposal, it is important to look at the color of the Eligible to Submit button. If this button is **Red**, the proposal is not ready to be submitted and the user should check the Errors tab. Users can either click on the Eligible to Submit button or the Errors tab to view the errors.

Account Home | Invoices | Payments | Contracts ▾ | Referrals ▾ | Cases ▾ | CPI/CPS Portal ▾ | Help

Proposal Information Action:  Go

Proposal Header  
Proposal ID: 10003330  
Request Title: RFP Phase 2 #2

Eligible to Submit: ●  
Status: Open

Basic Information | Proposed Services | Errors | Attachment

Error_ID	Proposal_ID	Message	Severity_Desc
10775197	10003330	Basic Information is Missing Required Fields. Please resolve error(s) on the Basic Information tab.	Error
10775198	10003330	No Service is submitted on this proposal. Please go to the Proposed Services tab and select at least one Service.	Error
10775199	10003330	Please attach Provider Narrative on the Attachment tab.	Error
10775200	10003330	Please attach Proposal Application on the Attachment tab.	Error
10775201	10003330	Please attach Organizational Chart on the Attachment tab.	Error
10775202	10003330	Please attach Legal Status on the Attachment tab.	Error
10775203	10003330	Please attach Provider Financials on the Attachment tab.	Error
10775204	10003330	Please attach Funding Sources on the Attachment tab.	Error
10775205	10003330	Please attach Agency Quality Improvement on the Attachment tab.	Error
10775206	10003330	Please attach Secretary of State Entity Report on the Attachment tab.	Error
10775207	10003330	Please attach Provider Insurance on the Attachment tab.	Error
10775208	10003330	Please attach Actual Costs Report on the Attachment tab.	Error

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In the screen below, the error has been corrected and the Proposal is ready for submission. Note the Green Eligible to Submit button.

Account Home | Invoices | Payments | Contracts ▾ | Referrals ▾ | Cases ▾ | CPI/CPS Portal ▾ | Help

Proposal Information Action: Print Proposal Application ▾ Go

Proposal Header  
Proposal ID: 10003341  
Request Title: Test2

Eligible to Submit: ●  
Status: Open

Basic Information | Proposed Services | Errors | Attachment

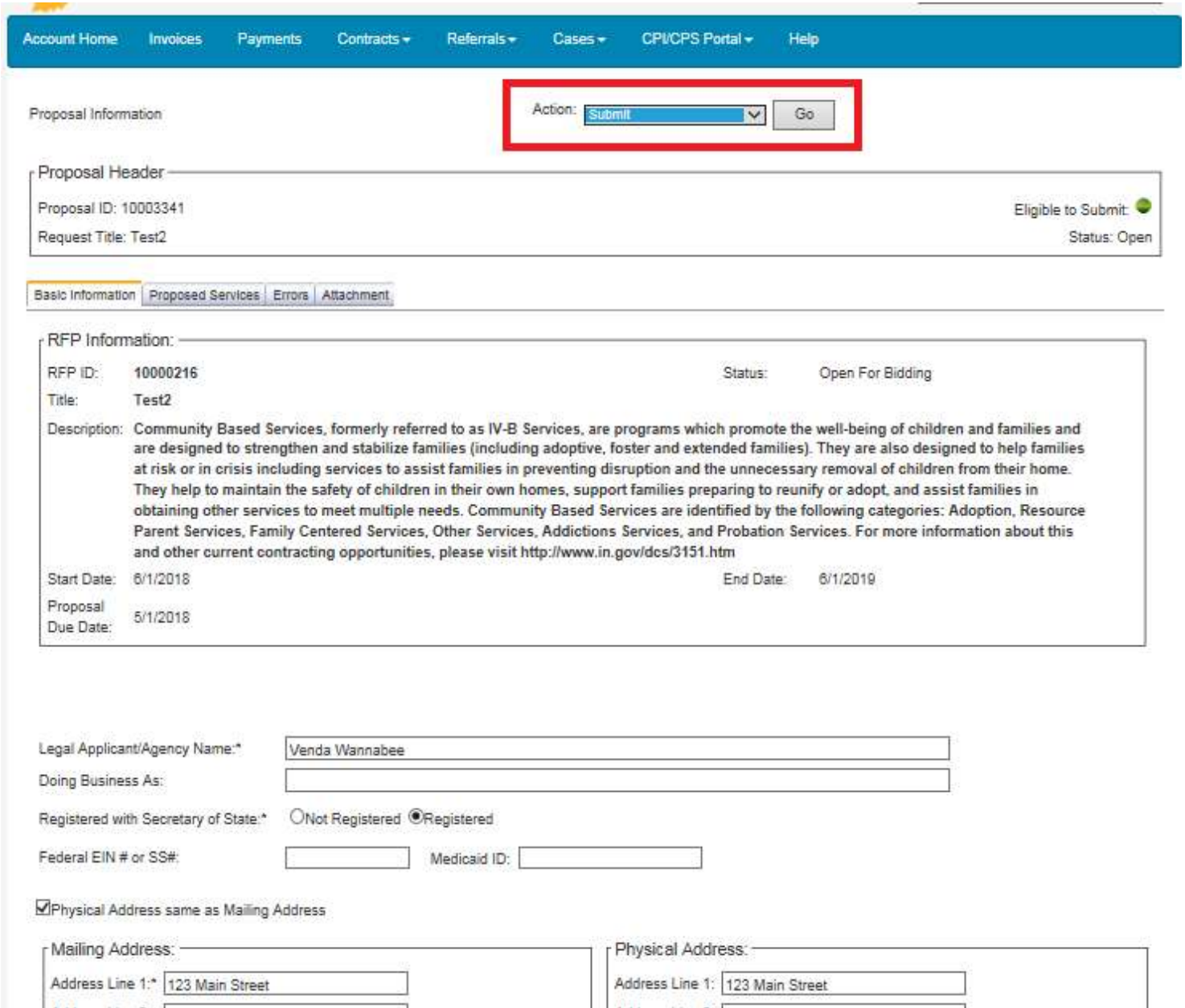
There are no Errors..

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Users should select *Submit* from the *Action* dropdown list located on the *Proposal Information Page* and click on the *Go* button.

Note: The *Action* dropdown list is available from any of the sections (tabs) located on the *Proposal Information Page*.

**Note: It is not possible to edit or delete a proposal once it has been successfully submitted.**



The screenshot displays the 'Proposal Information' page. At the top, a navigation bar includes links for 'Account Home', 'Invoices', 'Payments', 'Contracts', 'Referrals', 'Cases', 'CPI/CPS Portal', and 'Help'. Below this, the 'Action' dropdown menu is set to 'Submit', and the 'Go' button is highlighted with a red rectangular box. The 'Proposal Header' section shows 'Proposal ID: 10003341' and 'Request Title: Test2'. On the right, it indicates 'Eligible to Submit' with a green dot and 'Status: Open'. Below the header, there are tabs for 'Basic Information', 'Proposed Services', 'Errors', and 'Attachment'. The 'RFP Information' section provides details for RFP ID 10000216, Title 'Test2', and Status 'Open For Bidding'. It includes a detailed description of 'Community Based Services' and their purpose. Dates for Start (6/1/2018), End (6/1/2019), Proposal Due (5/1/2018), and RFP Due are also listed. The 'Legal Applicant/Agency Name' is 'Venda Wannabee'. There are fields for 'Doing Business As', 'Registered with Secretary of State' (with 'Registered' selected), 'Federal EIN # or SS#', and 'Medicaid ID'. A checkbox for 'Physical Address same as Mailing Address' is checked. At the bottom, there are separate fields for 'Mailing Address' and 'Physical Address', both with 'Address Line 1' set to '123 Main Street'.

## 5B SUCCESSFUL PROPOSAL SUBMISSION

Once the proposal has been submitted, the Status of the proposal will show as Submitted. Select *Close* at the bottom of the screen to exit this page.

Account Home Invoices Payments Contracts Referrals Cases CPI/CPS Portal Help

Proposal Information Action:  Go

Proposal Header  
Proposal ID: 10003341  
Request Title: Test2  
**Status: Submitted**

Basic Information Proposed Services Errors Attachment

RFP Information:  
RFP ID: 10000216 Status: Open For Bidding  
Title: Test2  
Description: Community Based Services, formerly referred to as IV-B Services, are programs which promote the well-being of children and families and are designed to strengthen and stabilize families (including adoptive, foster and extended families). They are also designed to help families at risk or in crisis including services to assist families in preventing disruption and the unnecessary removal of children from their home. They help to maintain the safety of children in their own homes, support families preparing to reunify or adopt, and assist families in obtaining other services to meet multiple needs. Community Based Services are identified by the following categories: Adoption, Resource Parent Services, Family Centered Services, Other Services, Addictions Services, and Probation Services. For more information about this and other current contracting opportunities, please visit <http://www.in.gov/dcs/3151.htm>  
Start Date: 6/1/2018 End Date: 6/1/2019  
Proposal Due Date: 5/1/2018

Legal Applicant/Agency Name:\*   
Doing Business As:   
Registered with Secretary of State:\*  Not Registered  Registered  
Federal EIN # or SS#:  Medicaid ID:

Physical Address same as Mailing Address

Mailing Address:   
Address Line 1: 123 Main Street  
Address Line 2:

Physical Address:   
Address Line 1: 123 Main Street  
Address Line 2:



## 5C REVIEW PROPOSAL SUBMISSION

To review your submitted proposal(s), simply click on *Close* from the screen above to return to the *RFP Inquiry Page*. In the example below the provider opened several proposals, but only submitted one.

Note: It is possible to review your proposal both before and after submission.

Account Home
Invoices
Payments
Contracts ▾
Referrals ▾
Cases ▾
CP/CPS Portal ▾
Help

RFP Information
RFP Inquiry
 [Create Proposal](#)

RFP ID:	10000216	Status:	Open For Bidding
Title:	Test2		
Description:	<p>Community Based Services, formerly referred to as IV-B Services, are programs which promote the well-being of children and families and are designed to strengthen and stabilize families (including adoptive, foster and extended families). They are also designed to help families at risk or in crisis including services to assist families in preventing disruption and the unnecessary removal of children from their home. They help to maintain the safety of children in their own homes, support families preparing to reunify or adopt, and assist families in obtaining other services to meet multiple needs. Community Based Services are identified by the following categories: Adoption, Resource Parent Services, Family Centered Services, Other Services, Addictions Services, and Probation Services. For more information about this and other current contracting opportunities, please visit <a href="http://www.in.gov/dcs/3151.htm">http://www.in.gov/dcs/3151.htm</a></p>		
Start Date:	6/1/2018	End Date:	8/1/2019
Proposal Due Date:	5/1/2018		

**Existing Proposals:**

Proposal ID	Request ID	Legal Name	DBA	Status
10003329	10000216			Open
10003333	10000216			Open
10003335	10000216			Open
10003336	10000216			Open
10003337	10000216			Open
10003340	10000216			Open
10003341	10000216	Venda Wannabee		Submitted

**Service Requested:**

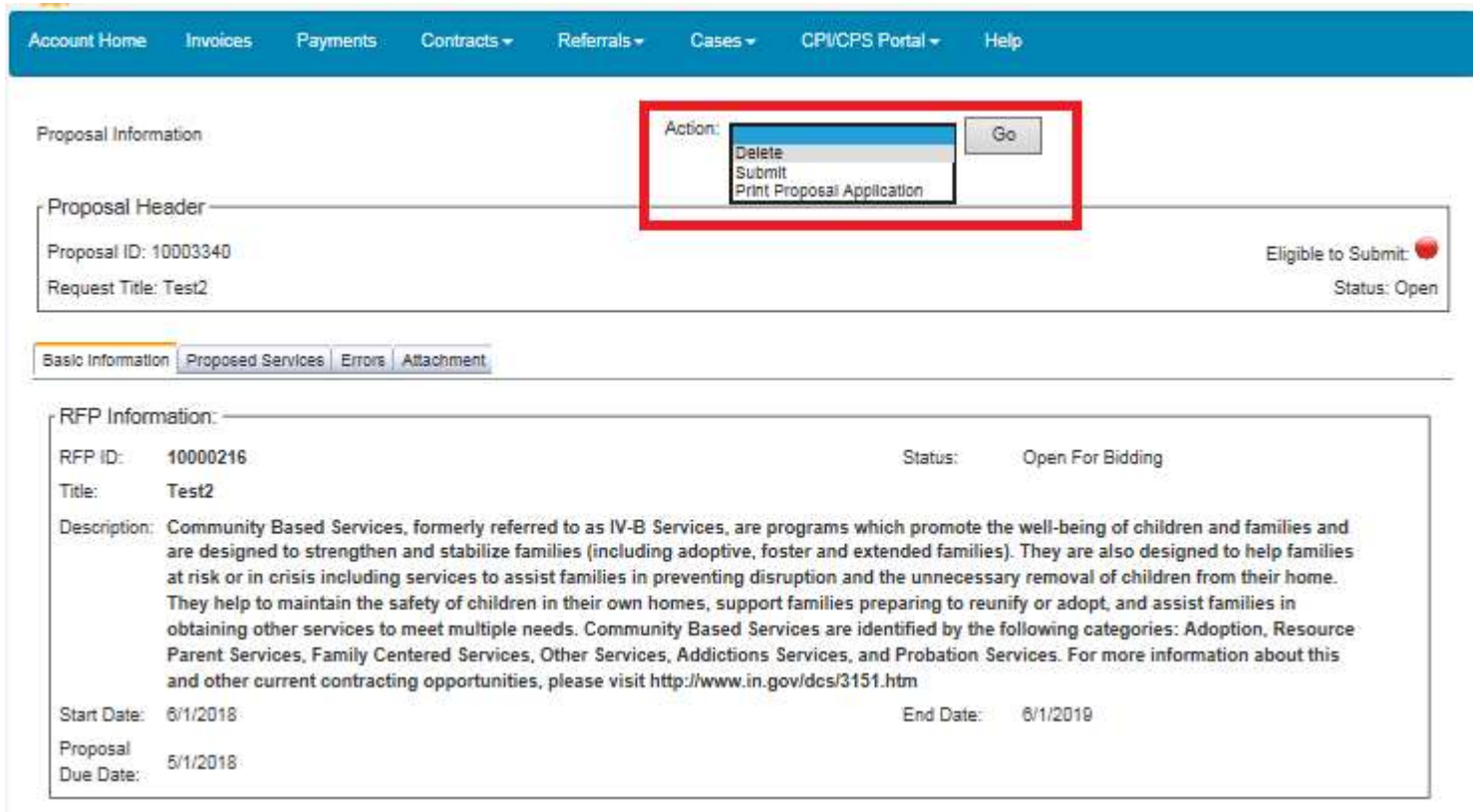
Code	Description
10521	HOME-BASED FAMILY CENTERED CASEWORK SERVICES
10522	HOME-BASED FAMILY CENTERED THERAPY SERVICES
10525	HOMEMAKER/PARENT AID

## 6.0 DELETING PROPOSALS

**Note: It is not possible to edit or delete a proposal once it has been successfully submitted.**

Should you decide you don't want to submit a proposal for the selected RFP select the *Delete* option from the *Action* dropdown list as demonstrated below. Next, click on the *Go* button and follow instructions on the following screen.

Note: The *Action* dropdown list is available from any of the sections (tabs) located on the *Proposal Information Page*.



The screenshot displays the 'Proposal Information' page. At the top, there is a navigation bar with links: Account Home, Invoices, Payments, Contracts, Referrals, Cases, CP/CPS Portal, and Help. Below this, the 'Proposal Information' section is visible. A red box highlights the 'Action:' dropdown menu, which is currently open and shows three options: 'Delete', 'Submit', and 'Print Proposal Application'. A 'Go' button is located to the right of the dropdown. Below the dropdown, the 'Proposal Header' section shows 'Proposal ID: 10003340' and 'Request Title: Test2'. To the right, there is a status indicator 'Eligible to Submit' with a red dot and 'Status: Open'. Below the header, there are tabs for 'Basic Information', 'Proposed Services', 'Errors', and 'Attachment'. The 'Basic Information' tab is selected, showing 'RFP Information' with the following details: RFP ID: 10000216, Title: Test2, Status: Open For Bidding, Description: Community Based Services, formerly referred to as IV-B Services, are programs which promote the well-being of children and families and are designed to strengthen and stabilize families (including adoptive, foster and extended families). They are also designed to help families at risk or in crisis including services to assist families in preventing disruption and the unnecessary removal of children from their home. They help to maintain the safety of children in their own homes, support families preparing to reunify or adopt, and assist families in obtaining other services to meet multiple needs. Community Based Services are identified by the following categories: Adoption, Resource Parent Services, Family Centered Services, Other Services, Addictions Services, and Probation Services. For more information about this and other current contracting opportunities, please visit <http://www.in.gov/dcs/3151.htm>, Start Date: 6/1/2018, End Date: 6/1/2019, Proposal Due Date: 5/1/2018.

## 7.0 APPENDICES

### Appendix A: Helpful Tips

- This guide is best viewed in the screen resolutions of 1024 x 768 or 800 x 600.
- Those vendors using IE browsers which include the “Compatibility View” feature should have it deselected when viewing KidTraks sites.
- Some of the pages in this guide are legal size (8.5”x14”) rather than letter size (8.5”x11) in order to accommodate the graphics.
- For new users requesting authorization, please check your spam folder for password emails. Confirmation emails are sent out immediately upon registration submission.
- **Do Not** use the browser *Back* button to return to previously viewed pages!
- If you navigate away from the *Proposal Information Page* forms prior to clicking on the *Save* button, all entries will be lost.
- When users select *Save* and the screen refreshes, sometimes it scrolls down to the bottom of the screen. This may appear that you are on a blank page; however, you just need to scroll up.
- *Service Code* refers to the number assigned to a *Service Standard*.
- *Component Code* refers to the number assigned to a *Component (Business Unit)*.
- Both *Service Codes* and *Component Codes* are used in the billing for services and will appear in *Attachment A* if a contract is entered into.
- A *Service Narrative* is required for each *Service Standard* proposed.
- Please refer to your RFP and Appendix B to clarify which document attachments are required for submission completion.
- When uploading attachments, file formats are restricted to Word documents (.doc), Excel documents (.xls), and Adobe Acrobat documents (.pdf).
- If an applicant elects to delete an open proposal, the entire proposal will be deleted. Only open proposals may be deleted or edited.
- Only completed proposals will qualify for submission.
- Proposals can be edited after they have been saved. They cannot be edited after they have been submitted.

*The Department of Child Services (DCS) has legal limitations in answering questions regarding the RFP process. All questions/inquiries regarding an RFP should have been submitted in writing by the deadline listed in the RFP. To access a list of responses to submitted questions please refer to the DCS Web site. Only answers posted on the DCS Web site, (<http://www.in.gov/dcs/3153.htm>), will be considered official and valid by the State. Inquiries are not to be directed to any staff member of DCS. Such action may disqualify the respondent from further consideration for a contract resulting from an RFP. However, for questions regarding technical issues with the online application, please email [childwelfareplan@dcs.in.gov](mailto:childwelfareplan@dcs.in.gov).*

### APPENDIX B: ATTACHMENT DESCRIPTIONS

## **Provider Documentation**

Providers should upload one copy of each of the following documents per RFP.

**Attachment Name:** Provider Narrative

**Contract Type:** Community Based and Youth Service Bureau

**Document Description:** This document will be listed as an attachment on the DCS Website located within the specific RFP you are applying. Respondents should provide one Provider Narrative for each proposal submitted.

**Attachment Name:** Organizational Chart

**Contract Type:** Community Based

**Document Description:** Please provide an organizational chart documenting your agency's leadership structure. The chart should include the position and the name of the individual holding that position.

**Attachment Name:** Legal Status

**Contract Type:** Community Based

**Document Description:** Please provide supporting documentation of your agency's legal status, including a Certificate of Existence from the Secretary of State.

**Attachment Name:** Provider Financials

**Contract Type:** Community Based

**Document Description:** Please provide the last 2 years Profit & Loss Statements.

**Attachment Name:** Funding Sources

**Contract Type:** Community Based

**Document Description:** Please provide supporting documentation of other funding sources.

**Attachment Name:** Agency Quality Improvement

**Contract Type:** Community Based

**Document Description:** Please provide your agency's practice for assessing quality of services and monitoring improvement.

**Attachment Name:** Secretary of State Entity Report

**Contract Type:** Community Based

**Document Description:** Within the Secretary of State website (<https://bsd.sos.in.gov/publicbusinesssearch>) the provider must find their entity report. This report is the requested attachment. The status of the report should be Active and the Business Entity Report due date should be in the future.

**Attachment Name:** Provider Insurance

**Contract Type:** Community Based

**Document Description:** Please provide supporting documentation of agency's current insurance.

**Attachment Name:** Budget

**Contract Type:** Child Advocacy Center, Community Partners, Youth Service Bureau, Community Based (Specialized Services only)

**Document Description:** This document will be listed as an attachment on the DCS Website located within the specific RFP you are applying. Respondents should submit a completed budget in compliance with the outlined format per RFP.

**Attachment Name:** Actual Costs Report

**Contract Type:** Healthy Families

**Document Description:** This document will be listed as an attachment on the DCS Website located within the specific RFP you are applying. Respondents should submit a completed report in compliance with the outlined format.

**Attachment Name:** Other

**Contract Type:** Community Based

**Document Description:** This section is for any additional documents you want to upload as supporting documentation for your proposal.

## **Service Standard Documentation**

Providers should upload one copy of each of the following documents specific to the service standard they are applying for within the RFP.

**Attachment Name:** Service Narrative

**Contract Type:** All

**Service Standard:** All

**Document Description:** This document will be listed as an attachment on the DCS Website located within the specific RFP you are applying. Respondents should provide one Service Narrative for each Service Standard they are applying for. (NOTE: If respondents are proposing for Community Partners for Child Safety, respondents must include a service narrative for each region being proposed. The region number should be included in the service narrative).

**Attachment Name:** Licensed Child Placing Agency Documentation

**Contract Type:** Community Based

**Service Standard:** Family Prep

**Document Description:** Respondents must provide supporting documentation of licensure.

**Attachment Name:** Comprehensive Service Certification

**Contract Type:** Community Based

**Service Standard:** Comprehensive Home Based Services

**Document Description:** Respondents must provide certification for the Comprehensive Home Based Service they are proposing.

**Attachment Name:** Child Parent Psychotherapy (CPP) Certification

**Contract Type:** Community Based

**Service Standard:** Counseling

**Document Description:** Respondents must provide CPP certification documentation.

**Attachment Name:** Functional Family Therapy (FFT) Certification

**Contract Type:** Community Based

**Service Standard:** Functional Family Therapy (FFT)

**Document Description:** Respondents must provide FFT certification documentation.

**Attachment Name:** DMHA Certification

**Contract Type:** Community Based

**Service Standard:** Detoxification, Residential Substance Use, Substance Use Disorder Assessment, Substance Use Outpatient Treatment

**Document Description:** Respondents must provide DMHA certification documentation.

**Attachment Name:** DMHA ASAM Scoring Designation Level

**Contract Type:** Community Based

**Service Standard:** Residential Substance Use Treatment

**Document Description:** Respondents must provide their ASAM level, as shown in the letter and certificate designated by DMHA. If respondents are in the designation process, please upload any communication you have had with DMHA regarding this process. More information about ASAM designation levels is provided through this link: <https://www.in.gov/fssa/dmha/3073.htm>

**Attachment Name:** Indiana Coalition Against Domestic Violence Certification

**Contract Type:** Community Based

**Service Standard:** Domestic Violence Batterers Intervention Services

**Document Description:** Respondents must provide Indiana Coalition Against Domestic Violence certification documentation.

**Attachment Name:** Family Centered Treatment (FCT) Certification

**Contract Type:** Community Based

**Service Standard:** Family Centered Treatment (FCT)

**Document Description:** Respondents must provide FCT certification documentation.

**Attachment Name:** CSAYC Certification (Optional)

**Contract Type:** Community Based

**Service Standard:** Sexually Harmful/Reactive Youth

**Document Description:** If applicable, respondents should provide CSAYC certification documentation.

**Attachment Name:** Specialized Services Supporting Documentation

**Contract Type:** Community Based

**Service Standard:** Specialized Services

**Document Description:** Respondents must provide documentation (including licensure, certification, etc.) to support the specialized service they are proposing.

**Attachment Name:** Specialized Populations Training, Certification, or Credentials (Optional)

**Contract Type:** Community Based

**Service Standard:** Any Community Based Services

**Document Description:** If applicable, respondents should provide any training completion or in-progress documentation, certification, or credentials for working with specialized populations.

**Attachment Name:** Evidence Based/Promising Practice Documentation or Curriculum (Optional)

**Contract Type:** Community Based

**Service Standard:** Father Engagement, Parent Education, Detoxification/Withdrawal Management, Substance Use Disorder Assessment, Substance Use Outpatient Treatment

**Document Description:** If applicable, respondents should provide any evidence based/promising practice documentation (in-progress or completion) or curriculum.