



## CITY OF SAN DIEGO

PURCHASING DIVISION  
1200 Third Avenue, Suite 200  
San Diego, CA 92101-4195

Quote No. 8644-07-B

### REQUEST FOR QUOTE

Closing Date: February 21, 2007  
@ 5:00 pm P.S.T.

**Subject: Furnish the City of San Diego with Copying of Confidential Medical Records**

Timeline: As may be required for a period of one (1) year from date of award, with options to renew for four (4) additional one (1) year periods, in accordance with the attached specifications.

---

Company _____	Name _____ [PRINT OR TYPE]
Federal Tax I.D. No. _____	Signature* _____
Street Address _____	Title _____
City _____	Date _____
State _____ Zip Code _____	
Tel. No. _____ Fax No. _____	<i>*Authorized Signature: The signer declares under penalty of perjury that she/he is authorized to sign this document and bind the company or organization to the terms of this agreement.</i>
E-Mail _____	<b>SUBMITTED QUOTATIONS MUST HAVE AN ORIGINAL SIGNATURE.</b>
If not located in California, are you authorized to collect California Sales Tax? _____ Yes _____ No	Cash discount terms _____ % _____ days. [Terms of less than 20 days will be considered as Net 30 for bid evaluation purposes.]
If Yes, under what permit # _____	
City of San Diego Business Tax License #: _____	State delivery time required: _____ days after receipt of order.

---

### FOR CONSIDERATION AS A RESPONSIVE QUOTE, THE FOLLOWING IS REQUIRED:

- 1) Quote must be submitted on official City quote forms.
- 2) All information on this Request for Quote cover page must be completed.
- 3) This cover page must be signed with an original signature.
- 4) Quote must be submitted on or before the exact closing date and time. Quotes received after the exact closing date and time will NOT be considered. (If hand delivering, please allow enough time for travel and parking to submit by the closing date and time.)

FOR FURTHER INFORMATION CONCERNING THIS QUOTE, PLEASE CONTACT:

TERRELL BREAU/cjo, Procurement Specialist  
Phone: (619) 533-4507 Facsimile: (619) 533-3233  
E-mail: TBreaux@sandiego.gov

## TABLE OF CONTENTS

I. Pricing Page .....	3
II. Specific Provisions	
A. Questions and Comments .....	4
B. Pricing.....	4
C. Award.....	4
D. Submittals .....	5
E. Option Renewal .....	5
F. Insurance Requirements.....	6
G. Quality Assurance Meetings.....	7
H. References/Qualifications.....	7
I. General Provisions.....	7
J. Business Tax .....	7
III. Specifications	
A. Scope of Work .....	9
B. Copying Procedures and Process.....	9
C. Specifications for Line Item No. 2.....	9
D. Copy Quality.....	9
Forms	
Bidder's References.....	10
Certification Survey .....	11

**I. PRICING PAGE**

Item No.	Est. Qty.	U/M	Description	Unit Cost	Extension
1.	275,000	PGS	Copying of Confidential Medical Records – Per Page	\$	\$
2.	15	EA	Set Up/Preparation/Service of Subpoenas	\$	\$
3.	10	SET	Duplicate X-Ray Cost – Per Set	\$	\$
<b>TOTAL</b>					<b>\$</b>

## II. SPECIFIC PROVISIONS

### A. QUESTIONS AND COMMENTS

Questions and comments regarding this Quote must be submitted in writing to City of San Diego, Purchasing Division, ATTN: Terrell Breaux, 1200 Third Avenue, Suite 200, San Diego, CA 92101; or by fax to (619) 533-3233; or by e-mail to TBreaux@sandiego.gov, no later than 5:00 p.m. on Wednesday, January 31, 2007.

### B. PRICING

Prices quoted shall be FOB Destination to various County of San Diego locations. Prices shall include all delivery and freight charges.

Unit prices shall be based on the Unit of Measure (U/M) as specified on the Pricing Page(s). Any changes to the Unit of Measure made by the Bidder may be cause for the item to be rejected as non-responsive.

Prices shall also include any set-up/service charges for copying medical records. The City will reimburse the Vendor the actual cost for required witness fees and checks written on behalf of the City with appropriate documentation provided.

### C. AWARD

The City intends to award the primary contract to the lowest acceptable Bidder and to award the secondary "back-up" contract to the second lowest acceptable Bidder. When the contract items are needed, City personnel will first attempt to contact the primary contract Vendor. If the primary contract Vendor cannot be contacted, or cannot meet the City's needs, the secondary contract Vendor will then be contacted.

### D. SUBMITTALS

#### 1. QUOTE SUBMITTAL

Quotes may be returned in a sealed envelope to the Purchasing Division, 1200 Third Avenue, Suite 200, San Diego, CA 92101. The quote number and closing date/time must be referenced on the outside of the envelope (lower left corner). Quotes must be received by the Purchasing Division prior to 5:00 p.m. on due date. Quotes may be faxed.

#### 2. SUBMITTALS REQUIRED WITH QUOTE

Failure to provide the required submittals with the quote shall be cause for the quote to be rejected as non-responsive.

- a. Bidder's References (as specified in Section II, paragraph H).
- b. Certification Survey (use form on page 11).

### 3. SUBMITTALS REQUIRED UPON PROVISIONAL AWARD

Failure to provide the following documentation within the time period specified may be cause for the provisional award to be voided and the quote to be rejected as non-responsive.

- a. Insurance Requirements as specified in City of San Diego General Provisions, Section II paragraph F, if not currently on file.
- b. Taxpayer Identification Number (W-9) as specified in City of San Diego General Provisions, Section C, paragraph 15, if not currently on file.
- c. Business Tax License as specified in Section II paragraph J, if not currently on file.

#### E. OPTION TO RENEW

The City reserves the option to renew the contract for four (4) additional one (1) year periods under the terms and conditions herein stated beginning on the anniversary of the commencement of service. The renewal is contingent on a mutual agreement between the City and the Contractor with such agreement to be confirmed within sixty (60) days prior to the expiration of the contract period. Either the City or the Contractor may decline to confirm the renewal of the contract for any reason whatsoever, which shall render the renewal option null and void.

The City's initial letter offering the contractor an opportunity to renew the contract does not constitute an award of the option period. Any option acceptance must be confirmed by the City, in writing, before it becomes valid.

The City will not grant an option, if the contractor requests an increase which exceeds the average percentage variant for the previous twelve (12) months in the Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W) for the San Diego area as published by the Bureau of Labor Statistics, or 5.0%, whichever is less. If a price increase is requested, the Contractor must provide detailed supporting documentation to justify the requested increase. The requested increase will be evaluated by the City, and the City reserves the right to accept or reject such request.

This section will not be considered in the evaluation for award.

The City may desire to extend a contract on a month-to-month basis upon expiration of the current contract period under the terms and conditions of the current contract unless modified in writing. The renewal is contingent on a mutual agreement between the City and the Contractor with such agreement to be confirmed in writing prior to the expiration of the contract period.

F. INSURANCE REQUIREMENTS

All required insurance shall be submitted to Purchasing within ten (10) days of provisional award. Failure to provide the insurance certificates within the time frame specified by the City shall be cause for the quote to be rejected as non-responsive. Contractor shall maintain insurance in full force and effect during the entire period of performance under contract. Failure to do so shall be cause for termination of the contract.

All policies must have a thirty (30) day non-cancellation clause giving the City thirty (30) days prior written notice in the event a policy is canceled.

At the end of each contract year, the City reserves the right to review insurance requirements and to require more or less coverage depending upon assessment of the risk, the Vendor's past experience, and the availability and affordability of increased liability insurance coverage.

Insurance coverage must be from an insurance carrier licensed in the State of California and rated "A" or better by the A.M. Best Key Rating Guide.

The following coverage is required:

1. Commercial General Liability for a minimum of one million dollars each occurrence (\$1,000,000.00 EO). The City of San Diego must be named as an additional insured on the certificate.
2. Automobile Liability for a minimum of one million dollars combined single limit (\$1,000,000.00 CSL). The City of San Diego must be named as an additional insured on the certificate.
3. Workers' Compensation coverage in accordance with the laws of the State of California. Policy must contain a Waiver of Subrogation of Rights against the City of San Diego.
4. Professional Liability for a minimum of five million dollars each occurrence (\$100,000.00 EO). The City of San Diego must be named as an additional insured on the certificate.

G. QUALITY ASSURANCE MEETINGS

Contractor will be required to schedule at least one (1) meeting with City's Contract Administrator to discuss Contractor's performance. This meeting should be scheduled no later than eight (8) weeks from date of commencement of work. At this meeting, City's Contract Administrator will provide Contractor with feedback and will note any deficiencies in contract performance and provide Contractor with an opportunity to address and correct these areas. Additional quality assurance meetings may be required, depending upon Contractor's performance. If after quality assurance meetings performance is found to be insufficient, the city reserves the right to use another contractor until Contractor's performance is acceptable.

H. REFERENCES/QUALIFICATIONS

Bidders are required to demonstrate successful performance for work of similar size and scope as specified in this contract during the past three (3) years. Bidders must also demonstrate that they are properly equipped to perform the work as specified in this contract.

To enable the City to evaluate the responsibility, experience, skill, and business standing of the Bidder, the following documents must be included with the quote submittal:

- Bidder's References (use form on page 10).

I. GENERAL PROVISIONS

Except as otherwise specified herein, the City of San Diego General Provisions, dated January 3, 2005, (on file in the Office of the Purchasing Agent) are incorporated as part of this quote and any resulting contract by reference. The General Provisions are available online at [www.sandiego.gov/purchasing](http://www.sandiego.gov/purchasing) or via request from the Purchasing Division by calling (619) 236-6000.

By signing and/or authorizing the quote submittal, the Bidder/Proposer acknowledges that they have read and understood the meaning, intent and requirements of said General Provisions; and acknowledge said General Provisions are included as a part of this quote.

J. BUSINESS TAX LICENSE

Any company doing business with the City of San Diego is required to comply with Section 31.0301 of the San Diego Municipal Code regarding Business Tax. For more information please visit the City of San Diego website at [www.sandiego.gov/treasurer/](http://www.sandiego.gov/treasurer/) or call (619) 615-1500.

The City requires that each vendor to provide a copy of their Business Tax License, or a copy of their application receipt. Failure to provide the required documents within ten (10) business days of the City's request may result in a Quote being declared non-responsive and rejected.

### III. SPECIFICATIONS

#### A. SCOPE OF WORK

The City of San Diego Retirement Department and Risk Management requires copying of confidential medical records, as may be required as part of the review process for disability claims. The Contractor is required to go to medical facilities and providers to make copies, on-site, of medical charts, letter or legal size. The Contractor is responsible for making arrangements with each facility to make the copies on-site. Currently service is being performed on a bi-weekly basis and as determined by the City and include one (1) to four (4) facilities in San Diego County.

#### B. COPYING PROCEDURES AND PROCESS

1. A list of medical facilities and providers in possession of the records needed for copying, and the required authorizations will be sent to the successful Vendor bi-weekly.
2. The successful Vendor shall be required to make arrangements with each of the medical providers to perform on-site photocopying of medical charts. Copies shall be provided to the City within six (6) weeks from receipt of order. In some expedited cases within fifteen (15) days.
3. Photocopied records, letter or legal size shall be returned to the City in packets no larger than two inches (2") thick with a cover sheet containing the applicant's name and location where records were copied. Copies shall be assembled with a stiff backing and fastened at the top with a two (2) prong fastener, no staples.
4. Each set of records shall contain a declaration from the custodian of records at each facility stating the records are true, correct copies and that all records have been copied.
5. Original records are to be returned to their original order and location.

#### C. SPECIFICATIONS FOR LINE ITEM NO. 2

Vendor shall prepare subpoenas for service on facility provided by the City. Vendor shall obtain records within fifteen (15) days of issuance of subpoena.

#### D. COPY QUALITY

Legible copies are required as determined by the City. Illegible copies will be returned and the successful Vendor will be required to recopy at no charge to the City. Recopied documents shall be provided immediately.

### BIDDER'S REFERENCES

The Bidder is **required** to provide a minimum of three (3) references where work of a similar size and nature was performed within the past three (3) years. This will enable the City of San Diego to judge the responsibility, experience, skill, and business standing of the Bidder.

#### REFERENCES

Company Name: \_\_\_\_\_ Contact Name: \_\_\_\_\_

Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

\_\_\_\_\_ Fax Number: \_\_\_\_\_

Dollar Value of Contract: \$ \_\_\_\_\_ Contract Dates: \_\_\_\_\_

Requirements of Contract: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Company Name: \_\_\_\_\_ Contact Name: \_\_\_\_\_

Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

\_\_\_\_\_ Fax Number: \_\_\_\_\_

Dollar Value of Contract: \$ \_\_\_\_\_ Contract Dates: \_\_\_\_\_

Requirements of Contract: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Company Name: \_\_\_\_\_ Contact Name: \_\_\_\_\_

Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

\_\_\_\_\_ Fax Number: \_\_\_\_\_

Dollar Value of Contract: \$ \_\_\_\_\_ Contract Dates: \_\_\_\_\_

Requirements of Contract: \_\_\_\_\_

\_\_\_\_\_

## Certification Survey

For Small, Ethnically and Culturally Diverse,  
Woman, Disadvantaged, Disabled Veteran, Or Other Businesses

All Contractors are required to complete this form and return it with their bid package.

Company Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Telephone No.: (\_\_\_\_) \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

1. Contractor's company is currently certified as small, ethnically and culturally diverse, woman, disadvantaged, disabled veteran, or other business?  Yes  No

Certification Number/Agency: \_\_\_\_\_

2. Contractor's company has applied for certification?  Yes  No

If yes, which agency? \_\_\_\_\_

3. Contractor's company is an independently owned business?  Yes  No

4. Contractor's company is 51% or more owned by a socially, economically, disadvantaged individual\*?  Yes  No

5. SIC Code: \_\_\_\_\_

6. Number of Employees: \_\_\_\_\_

7. Annual Gross Receipts (three year average): \_\_\_\_\_

8. This is not an application for certification. If you would like to receive an application for certification, please check box:

I certify that this information is correct: \_\_\_\_\_  
Authorized Signature Date

\* Black Americans, Native Americans, Hispanic Americans, Asian-Pacific Americans, Subcontinent Asian Americans, Women, any additional groups whose members are designated as socially and economically disadvantaged by the Small Business Administration (SBA) at such time as the SBA designation becomes effective.