



January 26, 2023

*Delivered via electronic mail*

Jeff Giadone  
Vice President, Public Sector California  
UnitedHealthcare  
jgiadone@uhc.com

**RE: Error in Redacted Documents**

Dear Mr. Giadone:

This letter memorializes the communications by and between the North Carolina State Health Plan for Teachers and State Employees (“Plan”), a division of the North Carolina Department of State Treasurer, and UMR, Inc. (“UMR”), beginning Tuesday, January 24, 2023, regarding UMR’s submission of redacted materials.

In accordance with Request for Proposal #270-20220830TPAS (“TPA RFP”), bidding vendors were required to submit their redacted materials “in black so that the redactions are easily identifiable by the Plan.” As part of the Plan’s fulfillment of its contractual and statutory duties, the Plan’s contracting staff communicated via email with all three TPA RFP bidders, including UMR, on December 20, 2022. That email asked bidders’ to review and redact confidential and trade secret information in documents related to the TPA RFP according to the terms of the TPA RFP. The email stated that the deadline for these redactions was 4:00 PM, Monday, January 9, 2023. UMR submitted its redacted documents to the Plan by the deadline.

Under the duties imposed on the Plan by contract and statute, the Plan is not permitted to disclose confidential and trade secret information and faces legal liability if such disclosure occurs. Accordingly, the Plan’s staff have been diligently compiling the materials submitted by participating bidders and then reviewing and confirming their redactions to avoid disclosing bidders’ trade secret and confidential information. In their review of UMR’s materials, Plan staff found that the redactions were not completed correctly by UMR. Specifically, the redactions were not “locked” by UMR, permitting any viewer to remove the applied redactions and expose UMR’s trade secret and confidential information.

Plan staff notified UMR immediately upon discovery of this issue, which impacted every redacted document throughout UMR’s proposal.

This error has delayed the Plan’s fulfillment of pending Public Records Requests. The Plan is committed to producing all responsive documents promptly in conformance with the



Public Records Act and its contractual and statutory duties concerning confidential and trade secret information. Therefore, please expeditiously correct and return the affected TPA RFP documents so the Plan may fulfill its obligations under the Public Records Act as soon as possible.

Thank you for your prompt attention to this request. We are grateful for your assistance. Please contact us if you have any questions related to this letter.

Sincerely,

*Kendall M. Bourdon*

Kendall M. Bourdon  
Director of Contracting and Compliance  
North Carolina State Health Plan