The Coordinating Center

Request for Proposals:
Care Management Information System

Request for Proposal Released: January 22, 2024
Deadline for Receipt of Proposals: February 16, 2024, 5 p.m.

I. **INTRODUCTION**
The Coordinating Center (The Center) is seeking a partner to create an innovative population health documentation system to improve care coordination efficiencies and continue to advance The Center as a premier care coordination provider in the state of Maryland and beyond.

The population health documentation system scope includes but may not be limited to the following:

   a. Ability to extract data from our current documentation system and upload to the new system
   b. Provide a HIPAA compliant platform
   c. Have direct access or by the exchange of data through an export/import process to Maryland's health information exchange, Chesapeake Regional Health Information System for our Patients (CRISP)
   d. Ability to store personal health information (PHI) and documents in a secure, cloud-based platform

A. **Authority**
This document was developed with guidance and support from the Information Systems Team and executive leadership at The Center.

This document has been prepared for use by internal organization audiences as well as industry suppliers. It should not be provided to external bodies without the express written or verbal consent of Jennifer Sears, Chief Information Officer available at jsears@coordinatingcenter.org by phone at 240-571-8131.

B. **Purpose and Scope**
This Request for Proposal (RFP) is issued solely for information and planning purposes. Further, this document does not commit The Center to contract for any service, supply, or subscription whatsoever. The Center is seeking formal proposals at this time and will rely on your estimate based on the information provided in this document or other requested information. The Center will not reimburse any information or administrative costs incurred as a result of participation in response to the RFP. All costs associated with the response will solely reside at the responding party's expense.

C. Confidentiality

All information included in this RFP is considered confidential and intended only for use by responders. No information included in this document, or in discussions related to The Center's population health documentation system selection effort, may be disclosed to another party or used for any other purpose without the express written or verbal consent. Prior to moving forward into the next phase of the selection process, vendors will be asked to sign a mutual non-disclosure statement.

II. OVERVIEW

A. About The Coordinating Center (The Center)

The Center has 40 years of expertise supporting children, youth, adults and seniors with complex medical needs and disabilities throughout Maryland. Deeply committed to a person-centered approach and philosophy, The Center helps individuals of all ages and abilities achieve optimal quality health, affordable healthcare, and meaningful community life.

The Center is a leading expert in the delivery of person-centered, community-based care coordination services and population health. With a rich history of innovation, The Center has translated national movements into ground-level, community-based programs including Medicaid rebalancing initiatives, aging in place, transitions of care, population health, and housing first. In addition, we are advocates for policy and system changes that positively affect the lives of people with the most complex needs.

B. Mission, Vision, Values

Mission

The mission of The Center is to partner with people of all ages and abilities and those who support them in the community to achieve their aspirations for independence, health, and meaningful community life.

Vision

People of all ages and abilities have equitable access to achieve optimal quality health, affordable housing, and meaningful community life.

Values

1. **Excellence**: We challenge ourselves to do great work.
2. **Collaboration**: We are better together.
3. **Integrity**: We uphold ethical standards.
4. **Equity and Inclusion**: We value diversity in many forms.
5. **Impact**: We make a difference.

6. **Learning**: We believe continual learning is essential.

C. Project Background

The Center provides care coordination services to more than 10,000 clients supporting children, youth, adults and seniors with complex medical needs and disabilities statewide.

Currently, The Center uses an off-the-shelf Care Management Information System (CMIS) SQL server system that has been heavily customized for our needs. We use our CMIS system to document/track client activity, such as, but not limited to the following: client contacts, plans of cares, goals, assessments, appointments, letters, consents, eligibility verification, providers, reminders/triggers, and housing information. Additionally, our system receives alerts from CRISP, enabling coworkers the ability to monitor client hospital encounters. Access to our documentation system is only accessible through our VPN.

The current CMIS documentation system houses client information for The Center's eight care management programs, all which have specific contract and documentation requirements.

D. Project Scope

As The Center continues its strategic growth plan to serve more clients across the State of Maryland and beyond, it is seeking a partner to develop a population health CMIS documentation system that is more user-friendly, web-based and improves efficiencies of its coworkers.

For more information about project scope, see Section D Statement of Need.

The Center plans to implement the new CMIS documentation system in Spring 2025.

E. Physical Locations and Employee Counts:

The Center's office is located in Millersville, Maryland. The Center employs about 315 employees all who work remotely in their homes and in the community across the state of Maryland.

III.   REQUESTED INFORMATION

A. Purpose for the RFP

With this RFP, The Center is requesting information regarding your company and products/services related to the population health CMIS documentation system project. This information will be gathered from different organizations and used to evaluate sourcing options for The Center. All proposals submitted to The Center shall provide a baseline of the cost metrics

associated with the submitted solution(s) with the understanding that it will likely need to be refined based on subsequent clarification with The Center, as well as the potential scope change throughout the subsequent process.

B. RFP Procedure

To respond to this RFP, respondent shall submit a proposal narrative including answers to questions in section E Proposal Narrative, Attachment A and a version of any master services agreement or other contract which would be utilized, if chosen. The answers provided in your response will be evaluated by staff from various functional areas of The Center. The following guidelines should provide clarification around responding to the RFP. However, should additional assistance be required, a contact person has been listed below for guidance.

C. Response Delivery

Submit all responses in PDF format via electronic delivery by **February 16, 2024 at 5 p.m.,** or sooner to **Jennifer Sears at jsears@coordinatingcenter.org**. If questions arise throughout the creation of the RFP response, feel free to contact **Jennifer Sears** by the email listed above or by phone at 240-571-8131**.** All communication between your company and The Center upon receipt of this RFP shall only be with **Jennifer Sears.** Communication directed to parties other than the individual listed may result in disqualification of respondent's submission.

Any response received after the date specified for receipt will not be considered without prior written or electronic approval.

All RFPs will be evaluated as received and included in the following process:

1. Review and scoring of the responses, as well as clarification of information as determined necessary by the project team at The Center.
2. Identification of two or three final candidates to conduct in-depth review of capabilities, including virtual interviews/demos specific to The Center processes and requirements.
3. Providing recommendations to The Center executive leadership team on the cost of the ongoing service as well as an estimated implementation timeframe.

D. Statement of Need

The fundamental goal of the Population Health CMIS documentation system project is to source a vendor/partner who can assist in replacing our current system while achieving the following requirements:

1. Must be able to work with our current vendor to extract, transform and load all data into the system from a SQL Server.
2. Have a Health Level 7 (HL7) compliant web-based technology system that is accessible on different platforms that would include but not limited to, laptops, tablets, and phones for The Center's coworkers to access anywhere, anytime.
3. Must have the ability to date and time stamp documentation and provide documentation history of all entries.
4. Must be able to support customizable legal record requests and export information in a PDF format.
5. Must allow for electronic signatures of documentation.
6. Have the ability to submit invoices electronically to contractors/partners.
7. Have user customizable dashboards and reports that provide quality data, upcoming tasks, due dates, and client caseload.
8. Allow for HIPAA compliant electronic communication between clients and coworkers.
9. Have interoperability with CRISP, the State of Maryland's LTSS system, and other documentation systems used by other partners.
10. Hosted in a HIPAA compliant cloud platform, and unlimited cloud storage.
11. Have built-in redundancy and a National Institute of Standards and Technology (NIST) back-up processes.

E. **Proposal Narrative**
   Your response should be in PDF format, using Times New Romans 12-point font and one-inch margins.

1. **Include the following information in an executive summary, which should not exceed two pages:**

   i.   A brief description about your organization
   ii.   Your overall strengths and weaknesses as an organization
   iii.   Your experience with case management and/or population health programs
   iv.   Why you believe you are good fit for this project
   v.   Your commitment to diversity and inclusion
   vi.   Your plans for growth in the next five years

2. **Address the requirements and answer the following questions below (a-i) in narrative form, which should not exceed 25 pages:**

a. **Data Migration**
   i. Describe the proposed process of importing data from our current system to a new cloud-based CMIS documentation system.

b. **Project Plan**
   ii. Include a sample project plan to include Planning, Implementing, Executing, Monitoring and Controlling and Closing phases.
   iii. Provide a list of all individuals who would be part of the project team.
   iv. Include a resume for each individual (excluded in total page count).

c. **Key Features**
   i. Ability to store letters, consents forms and other documents.
   ii. Ability to customize letters per client.
   iii. Ability to date and time stamp entries and how entries can be deleted, edited, and tracked.
   iv. Ability to capture electronic signatures.
   v. Provide triggers/reminders for upcoming tasks.
   vi. Ability to customize legal record request and import into a PDF.
   vii. Permit HL7 compliant client and coworker communication within the system.
   viii. Manage 837 files.
   ix. Provide interoperability with other documentation systems or health information exchanges.

d. **Reports/Dashboards**
   i. Provide reports and the ability to export data.
   ii. Customizable dashboards per user or role that present upcoming tasks.
   iii. Ability for end users to view client caseload.
   iv. Provide mapping features that can display clients' residences.
   v. Integrate with Power Business Intelligence (BI).

e. **Ongoing Support**
   i. After initial onboarding is completed, what support and resources are available, i.e., for issues/troubleshooting?
   ii. Where is your support center located and what are the hours?
   iii. Describe your change management process.
   iv. What is your turn around on system changes whether they be minor, medium or major?
   v. How do we contact you when issues arise?

f. **Technology**
  i. Are there regular planned maintenance windows or system outages?
  ii. How do you notify users of the maintenance windows or system outages?
  iii. What specific technical requirements are needed for the system?

g. **Budget**
  i. Based on the information provided, submit a preliminary implementation plan budget.
  ii. Provide an annual budget post implementation, including any ongoing licensing and maintenance fees.

h. **Security**
  i. Do you have a designated HIPAA Privacy and Security Officer?
  ii. Have you completed and formally documented a risk analysis for your application and systems?
  iii. Is your organization system and organizations control (SOC) certified?
  iv. Do you require unique usernames or user IDs to access your system?
  v. Does your system have automatic inactivity timeout of logoff settings activated?
  vi. Do you have a documented incident reporting policy and response procedures?
  vii. Do your internal procedures include the immediate notification to The Center in writing of any incident where ePHI or confidential data has been compromised?
  viii. Have you had any security or data privacy incidents in the past two years? If so, describe and include remediation.
  ix. Do you have a business continuity and disaster recovery plan in place?
  x. Do you perform background checks on new employees?
  xi. Are employees required to sign some type of confidentiality agreement which outlines their individual responsibilities for protecting patient information?

i. **Future Growth**
  i. Can the system grow with our company, i.e., adding more clients/programs, users?
  ii. Describe the import and export processes of new clients/programs.

APPENDIX A: RFP RESPONSE FORM

Organization/Company's Name:	Click or tap here to enter text.
Responder's Name:	Click or tap here to enter text.
Responder's Title:	Click or tap here to enter text.
Responder's Email Address:	Click or tap here to enter text.
Responder's Phone Number:	Click or tap here to enter text.
Organization/Company's Website:	Click or tap here to enter text.
Main Product/Services:	Click or tap here to enter text.
Main Market/Customers:	Click or tap here to enter text.
Number of Years in the Market:	Click or tap here to enter text.
Company Location (s):	Click or tap here to enter text.
Number of Employees:	Click or tap here to enter text.
Notable Acquisitions:	Click or tap here to enter text.
Key Business Partners:	Click or tap here to enter text.
2019 Gross Revenue:	Click or tap here to enter text.
2019 Net Income:	Click or tap here to enter text.
Return on Investment:	Click or tap here to enter text.
Reference #1 Name:	Click or tap here to enter text.
Reference #1 Phone Number:	Click or tap here to enter text.
Reference #1 Email Address:	Click or tap here to enter text.
Reference #1 Company Name:	Click or tap here to enter text.
Number of Years Reference #1 Has Been a Customer	Click or tap here to enter text.
Reference #2 Name:	Click or tap here to enter text.
Reference #2 Phone Number:	Click or tap here to enter text.
Reference #2 Email Address:	Click or tap here to enter text.
Reference #2 Company Name:	Click or tap here to enter text.
Number of Years Reference #2 Has Been a Customer	Click or tap here to enter text.
Reference #3 Name:	Click or tap here to enter text.

Reference #3 Phone Number:	Click or tap here to enter text.
Reference #3 Email Address:	Click or tap here to enter text.
Reference #3 Company Name:	Click or tap here to enter text.
Number of Years Reference #3 Has Been a Customer	Click or tap here to enter text.