**\*\*IMPORTANT NOTICE\*\***

* The format of this RFP has been simplified.
* Only the following pages require signatures:

1. Exhibit A – Bid Response Packet, [Bidder Information and Acceptance](#BidderAcceptance) page
   1. [Must be signed by Bidder](#BidderAcceptance)
2. Exhibit A – Bid Response Packet, [SLEB Partnering Information Sheet](#SLEBPrime)
   1. [Must be signed by Bidder](#SLEBPrime)
   2. [Must be signed by SLEB Partner](#SLEBSubcontractor) if subcontracting to a SLEB

Please read **EXHIBIT A – Bid Response Packet** carefully, **INCOMPLETE BIDS WILL BE REJECTED.** Alameda County will not accept submissions or documentation after the bid response due date.

|  |  |
| --- | --- |
| ALAMEDA COUNTY | |
| **HEALTH CARE SERVICES** | |
| AGENCY |
| COLLEEN CHAWLA, Director |

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**OFFICE OF THE AGENCY DIRECTOR**

1000 San Leandro Boulevard, Suite 300

San Leandro, CA 94577

TEL (510) 618-3452

COUNTY OF ALAMEDA

Health Care Services Agency (HCSA)

REQUEST FOR PROPOSAL No. HCSA-900520

**for**

County Behavioral Health Care Operations and Revenue Cycle Management System

|  |  |
| --- | --- |
| **Bidders Conference #1**  **September 2, 2020**  **3:00 PM**  [Join Microsoft Teams Meeting](https://teams.microsoft.com/l/meetup-join/19%3ameeting_MmFkNzMyMDAtNGU1Ni00ZGI3LWJkYzYtNjM0NWM3YzgwNjFl%40thread.v2/0?context=%7b%22Tid%22%3a%2232fdff2c-f86e-4ba3-a47d-6a44a7f45a64%22%2c%22Oid%22%3a%224e496fde-3627-463e-859d-c5d792abfe6b%22%7d)  [+1 415-915-3950](tel:+1%20415-915-3950,,872975914# )   United States, San Francisco (Toll)  Conference ID: 872 975 914#  [Local numbers](https://dialin.teams.microsoft.com/c44e85b4-06d5-44f1-aa66-048146aad930?id=872975914) | [Reset PIN](https://mysettings.lync.com/pstnconferencing) | [Learn more about Teams](https://aka.ms/JoinTeamsMeeting) | [Meeting options](https://teams.microsoft.com/meetingOptions/?organizerId=4e496fde-3627-463e-859d-c5d792abfe6b&tenantId=32fdff2c-f86e-4ba3-a47d-6a44a7f45a64&threadId=19_meeting_MmFkNzMyMDAtNGU1Ni00ZGI3LWJkYzYtNjM0NWM3YzgwNjFl@thread.v2&messageId=0&language=en-US) | **Bidders Conference #2**  **September 3, 2020**  **10:30 AM**  [Join Microsoft Teams Meeting](https://teams.microsoft.com/l/meetup-join/19%3ameeting_YWI1MWRlYjAtMDY4NC00NjFlLWExMDMtNDY2OTc4ZThhZGVi%40thread.v2/0?context=%7b%22Tid%22%3a%2232fdff2c-f86e-4ba3-a47d-6a44a7f45a64%22%2c%22Oid%22%3a%224e496fde-3627-463e-859d-c5d792abfe6b%22%7d)  [+1 415-915-3950](tel:+1%20415-915-3950,,363724828# )   United States, San Francisco (Toll)  Conference ID: 363 724 828#  [Local numbers](https://dialin.teams.microsoft.com/c44e85b4-06d5-44f1-aa66-048146aad930?id=363724828) | [Reset PIN](https://mysettings.lync.com/pstnconferencing) | [Learn more about Teams](https://aka.ms/JoinTeamsMeeting) | [Meeting options](https://teams.microsoft.com/meetingOptions/?organizerId=4e496fde-3627-463e-859d-c5d792abfe6b&tenantId=32fdff2c-f86e-4ba3-a47d-6a44a7f45a64&threadId=19_meeting_YWI1MWRlYjAtMDY4NC00NjFlLWExMDMtNDY2OTc4ZThhZGVi@thread.v2&messageId=0&language=en-US) |
| **For complete information regarding this project, see RFP posted at** [**http://www.acgov.org/gsa\_app/gsa/purchasing/bid\_content/contractopportunities.jsp**](http://www.acgov.org/gsa_app/gsa/purchasing/bid_content/contractopportunities.jsp) **or contact the County representative listed below. Thank you for your interest!**  **Contact Person:** **Kristel Acacio, Supervising Program Specialist**  **Phone Number: (510) 618-1910**  **E-mail Address: Kristel.Acacio@acgov.org** | |

**RESPONSE DUE**

by

**2:00 p.m.**

on

**October 21, 2020**

at

**Alameda County, Health Care Services Agency**

**1000 San Leandro Blvd, Suite 300**

**San Leandro, CA 94577**

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COUNTY OF ALAMEDA

REQUEST FOR PROPOSAL No. HCSA-900520

SPECIFICATIONS, TERMS & CONDITIONS

for

**County Behavioral Health Care Operations and Revenue Cycle Management System**

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# STATEMENT OF WORK

## INTENT

It is the intent of these specifications, terms and conditions for Alameda County Health Care Services Agency (hereafter HCSA or the County) in this Request for Proposals (RFP) to seek proposals from qualified software product and service companies (Bidders) to procure an enterprise technology solution(s) to replace its legacy billing and Fee for Service (FFS) Managed Care systems. The selected solution must fully support the County’s Mental Health (MH) and Substance Use Disorder (SUD) services, as specified throughout this RFP document. This includes the ability to support and/or interface with the County’s contract providers (i.e., Community Based Organizations (CBOs) and FFS contractors). It also includes the need to interoperate with the County’s electronic health record (EHR) system.

The desired replacement system is expected to satisfy each of the County’s MH and SUD billing, claiming, and accounts payable needs as described in this RFP. This includes the need to fully support and administer the coordination of priority billing of all payor plans (the hierarchy of billing equals 1. Medicare, 2. private insurance, 3. Medi-Cal and lastly, client pay), including Medi-Cal Short Doyle and SUD Drug Organized Delivery System Waiver billing requirements, in addition to regulatory reporting, cost reporting and financial reconciliation.

The County welcomes the partnership of any qualified Bidder who may provide innovative and effective solutions to replace these critical systems. The County is open to all eligible solutions and will consider systems that require development of new functionality to meet the full breadth of needs described within this RFP. However, given that the scope of work contains specific challenges and requirements that are unique to Alameda County and California, it is expected that certain functionality be in place prior to first use of the solution (see [Detailed Functional Specifications Workbook](#Workbook)).

The County intends to award a two (2) year, three (3) month contract for the period of April 1, 2021 to June 30, 2023, with option to renew for three (3) additional one (1)-year terms, to the Bidder whose response best conforms to the RFP, meets the County’s requirements, and whose proposal presents the greatest value to the County, all evaluation criteria considered. The contract will begin with a ninety (90) day Pre-Implementation Planning Phase (PIPP) (anticipated to start on April 1, 2021), followed by an implementation start date of July 1, 2021 through June 30, 2023.

The contract amount for the two (2) year implementation period is $2.8 million, while the amount for the 90-day PIPP is subject to contract negotiation. Bidders should submit proposals that conform to the two (2) year $2.8 million implementation period amount. The County may consider budgets in excess of this total if accompanied with appropriate justification, particularly for systems that exceed the County’s specifications and requirements as outlined in this RFP. The County is not obligated to award amounts beyond the intended budget.

Renewal of the contract is intended for ongoing licensing, maintenance and support, and is contingent upon meeting performance measures and contract deliverables, as set forth by the County, and subject to periodic review. It is anticipated that up to $1.0 million per year for three (3) additional one (1) year terms may be available for any contract renewal.

In addition, if determined by the County to be in the County’s interests, enhancements to the scope of work and budget for system modifications may be separately considered during any contract or renewal term.

The issuance of this RFP in no way constitutes a commitment by the HCSA to award any contract, and the County reserves the right to reject any or all offers and discontinue this RFP process without obligation or liability to any potential Bidder.

## BACKGROUND

**HCSA** is the health authority in Alameda County whose mission is to achieve health equity by working in partnership to provide high quality services, foster safe and healthy communities, and promote fair and inclusive opportunities for all residents. Health care services are provided through a comprehensive network of public and private partnerships that ensure optimal health and well-being and respect the diversity of all residents. HCSA recognizes that to achieve this mission, it must develop high quality services and operations that are consistent with any changes in relevant economic and policy environments.

**Alameda County Behavioral Health Care Services (ACBH)** is a department of HCSA and is the Medi-Cal Mental Health Plan and the Drug Medi-Cal Organized Delivery System (DMC-ODS) Substance Use Plan for Alameda County. ACBH provides specialty mental health and substance use disorder services to eligible county residents through a combination of community-based, fee for service, and county-operated programs. These programs deliver services in clinics, homes, schools, group homes, criminal justice settings, crisis and mobile crisis, residential placement, and inpatient psychiatric hospital settings.

ACBH subcontracts service delivery to over 115 CBO mental health, 300 fee-for-service (FFS), and 30 SUD partners throughout the County.

ACBH serves as the payor for the MH and SUD CBOs and the FFS providers who are providing contracted Medi-Cal services. Contracted providers are required to bill Medicare and private insurance on their own, but inform ACBH with service and client encounter data when the client also has Medi-Cal so that ACBH can in turn bill the balance of services to Medi-Cal for proper reimbursement as well as meet Medi-Cal client reporting requirements.

ACBH bills and processes claims for County clinic services to Medicare, private insurance, and Medi-Cal for proper reimbursement as well as meet reporting requirements.

**ACBH’s Current Software Solutions**

ACBH currently maintains three separate software systems for financial management and electronic health records: InSyst, eCura/Incedo, and Clinicians Gateway (described below). Through this RFP, ACBH seeks to prioritize replacement of the InSyst system, and secondarily, to replace the eCura/Incedo system. The County is **not** currently considering a replacement for its clinical EHR system; should any such need be determined, the County will procure this solution through an additional RFP to be released at a later date. Any Bidder solution offered in response to the current RFP must, therefore, be integrated and interoperable with the different system solutions maintained and/or obtained by ACBH.

**Financial Management Systems – InSyst and eCura/Incedo**

**InSyst**

InSyst is the first of two software systems that presently comprise the County’s financial management environment for MH and SUD. InSyst contains over twenty years of historical client demographic, episodic, billing, and financial data. It is integrated with eCura/Incedo and Clinician’s Gateway (see next sections).

InSyst:

* Is the system of record for all ACBH client information from County, CBO, and FFS Managed Care programs and providers.
* Includes the service and encounter data from County, CBO, and FFS Managed Care programs and providers
  + Presently, the majority of MH/SUD CBO partners enter service information into InSyst manually. *(It is paramount that the replacement system also allows an external partner who has the capability to exchange data electronically with the County system, using standard HIPAA transactions.)*
  + Presently, all County clinic and some MH/SUD CBO partners’ service information is entered by the providers into the current EHR, Clinician’s Gateway system that is transferred electronically into InSyst daily.
  + Presently, FFS Managed Care client data is managed through a client synch interface to InSyst and services are electronically transferred into InSyst through a series of manual actions. *(It is paramount that the replacement system includes a seamless transition of client data between the accounts payable system and billing system.)*
* Produces the 837 I/P billing transactions that are submitted to Medi-Cal and Medicare
* Produces paper CMS1500 and UB04 insurance claims and patient statements
* Includes the functionality to process Medi-Cal and Medicare 835 I/P payments, denials, and adjustments
* Allows for manual entry of insurance and client payments, denials, and adjustments
* Provide for the collection and reporting of specific client, service, and episodic information for state reporting such as Client and Service Information (CSI) and California Outcomes Measurement System (CalOMS) and other requirements as established by the Final Rule
* Electronically load Medi-Cal eligibility and Medicare insurance records from a monthly State Meds Monthly Extract File (MMEF)

There are approximately 1500 licenses in place that covers both the MHS and SUD user base. Approximately 55% of the licenses are assigned to County staff, and the remainder are assigned to CBO users that need to interface with the system. *(Based on historical experience, the County estimates a potential growth of 50% in users over the life of the System replacement.)*

**eCura / Incedo**

The County’s current Fee for Service Managed Care system, eCura, contains over 22 years of client data, billing, and physician/clinician payment history. In 2020, the County expects to upgrade a portion of the legacy eCura system to Incedo. The County prefers replacing the eCura/Incedo system with the bidder’s FFS Managed Care system functionality in its proposed solution. However, the County will assess the efficacy of replacing the eCura/Incedo system with the Bidder’s FFS Managed Care system functionality compared with the efficacy of retaining the eCura/Incedo system. This assessment will determine whether the scope of solution in the final negotiated contract includes a replacement of, or integration with, the eCura/Incedo system. If the latter, integration fees to the County’s eCura/Incedo system will be considered instead.

eCura/Incedo:

* Is interfaced for unique client registration with InSyst to prevent client duplication
* Includes a client module
* Includes a provider module
* Includes a clinical authorization module
* Includes a provider payment module dependent on the authorization of services and the verification of client’s insurance coverage.
* Includes a check creation process of adjudicated claims including a data stream to an independent check printer.

Current integration requirements include the following:

* Method for “Client Synchronization” between the main billing system and the FFS Managed Care system prior to Client Registration to ensure clients have only one client record between the two systems.
* Method to share client data in both systems, such as: client demographics, CSI data and insurance eligibility.
* Seamless method to move and convert paid services from the client account in FFS Managed Care system to the main billing system for Medi-Cal billing. Most likely a conversion table will be needed to accomplish this process.
* Provide a method to process voided services performed in the billing system with or without replacement services between the main billing system and the FFS Managed Care system for services that have been moved into the main billing system.
* Provide a method to process reverted services performed in the FFS Managed Care system between the FFS Managed Care system and main billing system for services that have been moved into the main billing system.

**Current Clinical EHR System - Clinician’s Gateway**

The County’s current EHR system is Clinician’s Gateway. Clinician’s Gateway has been enhanced to include additional specialized data functions to collect and report data that is not held within the InSyst system. In addition:

* Client clinical documentation is managed through custom built templates designed to meet Medi-Cal and DMC-ODS standards. Clinicians Gateway has an active interface with InSyst which provides client data, staff, and billing rules. Service data is transferred electronically daily into InSyst.
* Clinicians Gateway has integrated document management and third-party e-prescribing and lab orders modules which electronically exchange client and encounter data.
* Clinicians Gateway electronically exchanges client, clinical and service data with the InSyst, third party applications, and reporting databases.
* County staff and some contract providers use Clinicians Gateway:
  + The Mental Health environment has 1150 active users contributing 460,000 notes annually.
  + The SUD environment currently has 400 active users writing 200,000 notes annually.

*The replacement System must interoperate with Clinician’s Gateway or its replacement, including the ability to synchronize client and program information and accept automated (synched) feeds of service data.*

## SCOPE

The Scope of work in this RFP is comprised of the following elements:

* Replace the InSyst billing system
* Either replace or integrate with the eCura/Incedo system, depending upon the County’s assessment of the efficacy of the Bidder’s proposed solution versus the capabilities of the eCura/Incedo system
* Integrate with the Clinician’s Gateway EHR system or any newly acquired County EHR system, as defined in the EHR interoperability tab of the [Detailed Functional Specifications Workbook](#Workbook).

The Bidder’s proposed system(s) shall provide all elements for the billing System. Elements include but are not limited to software, hardware, maintenance, and upgrades (the “System”) and implementation, including data migration and training (“the Implementation Project”).

The County seeks a “state-of-the-art” integrated System that includes but is not limited to the following:

* + 1. Practice management; (i.e. client data collection, pre-consumer screening and tracking, appointment scheduling, admission/discharge/transfer, billing/claiming, service/payment tracking, cost and service reporting)
    2. Managed Care, claims processing (including payment/check processing functionality to contracted providers)
    3. Eligibility verification
    4. Coordination of Benefits (COB)/Third Party Liability (TPL)
    5. Financial reporting
    6. Data warehouse integration
    7. Report writing
    8. Imaging and document management
    9. Interoperability and external system interface capabilities, specifically the ability for a CBO to easily interface with the System. This includes, but is not limited to, the following:
       1. Standard transactions for the import and export of service, claims and payment data; for example, 837I/P or 835 transactions
       2. Standard methods for the exchange of clinical information
          1. With contracted providers
          2. With California Health Information Exchanges (HIE)
          3. With other data trading partners, as needed
    10. Integrated Financial Management and Clinical systems

1. Ability to sync client, staff, provider, and procedure information between billing system and Clinicians Gateway Clinical EHR or its replacement
2. Ability to integrate with / accept automated feeds of service data from Clinicians Gateway Clinical EHR or its replacement
3. Ability to interface FFS Managed Care check write information with existing ACBH Taylor Communications check printer software as formatted in the FFS Managed Care systems weekly check write
   * 1. A distributive data process that shares data bi-directionally including but not limited to:
4. report repository;
5. web services;
6. data mining services; and
7. analytical modeling services

The proposed system must be one of the following:

1. A web-based hosted solution, where the Bidder is fully responsible for maintaining the data center (referred to as ‘hosted’ throughout the remainder of this document); or
2. An on-premise solution where the requisite software is installed in a County data center and managed by County staff (referred to as ‘On- Premise’ throughout the remainder of this document)
3. If the proposed solution is on-premise, Bidder shall install hardware adequate to meet the County’s current and projected needs.
4. Bidder will provide specifications for all requisite hardware necessary to run the proposed solutions.

The [Detailed Functional Specifications Workbook](#Workbook) of this RFP describes the specific functional needs the County requires and desires to be included in the Bidders solution.

The bid response to this RFP requires the Bidder to note which items in the [Detailed Functional Specifications Workbook](#Workbook) are already available via the proposed solutions; which items will be included later in the solution (pre- or post-implementation) at no cost; which items can be added via a change order / fee (also pre- or post-implementation); and which items are not expected to be offered or supported by the Bidder within the next two years.

The Bidder shall provide a product or solution that meets the needs for each of the following functional areas. Specifications for each of these areas (and more) for Bidder response are included in the [Detailed Functional Specifications Workbook](#Workbook). The Bidder should examine the Workbook carefully and, in their response,, Bidder will propose, plan, and execute all infrastructure and software applications to support this scope of work. *The remainder of this Scope section is informational only and intended to provide a high-level summary of the major functional areas that are expected to comprise the proposed replacement system*.

**Primary Functionality**

* + 1. **Client Look-up**

A Client Look-Up search process is required to search for a client in the Pre-Consumer and/or the Client Registration modules prior to creating a new client in Pre-Consumer or Client Registration modules, the search will be based on the user’s county security access level.

* + 1. **Contact Tracking – Pre-Consumer**

This area is the beginning stage of consumer contact, disposition, or referral. The recording of Consumer calls may involve requesting MH or SUD services or any other assistance. The State requires tracking of all calls and the disposition of the call. The call may or may not result in a referral of service. Consumer may not be officially registered in the system if a service referral is not completed. History of all calls and the disposition must be retained for reporting purposes. This module includes Pre-Consumer contact information for clients who are NOT registered in the system. Pre-consumer information would reside in this module until they are referred for service when they will be fully registered, certain information in this module should be able to default to the Client Registration screens.

* + 1. **Client Registration**

The System must support client registration process and safeguard duplication of clients. Registration information may include State and billing requirements. Also included in this section is the requirement to report Client contact information and to maintain an episode of care tied to a facility/program/FFS Managed Care provider identifier with required and non-required fields and flexibility to allow county defined tables.

* + 1. **Client Referral**

Client referrals include processing the data needed in the System for Mental Health, Substance Use Disorder or FFS Managed Care referrals to match a client’s service needs with an appropriate provider by acuity level, service location, specialty service, ethnicity, language spoken, ease of transportation, client insurance plan and other criteria. All clients will be screened through the Pre-Consumer module prior to the determination of performing a referral to either MH, SUD or FFS Managed Care providers. All referred clients must be Registered in the appropriate level of care (MH/FFS Managed Care/SUD) for the services they are to receive.

* + 1. **Appointment Scheduling**

The County desires a full scheduling system that allows for rapid entry and retrieval of client appointments based on ACBH business rules and to meet Federal and State requirements, flexibility to allow county defined tables, county defined messages, system access based on user security level, system flexibility to allow county identified fields as optional or required. Absence of an appointment scheduling in the Bidder’s proposed system, however, is not a reason to exclude the Bidder from further evaluation.

6. **Client Insurance Benefits/Policy**

The replacement System must support Master Insurance Plan requirement set up for Federal, State and private insurance plans and the appropriate interface for billing services. Also, in this section are the requirements for the specific client insurance policy benefits for: co-pay, co-insurance, deductibles etc. In addition, this section covers the Medi-Cal Eligibility Plan Management.

* + 1. **Billing, Services, Claims Production and Payment Posting**

The System must enable and process the required information needed for service entry/service maintenance, the billing of specific insurance plans for MH, SUD and FFS Managed Care services and for payment/denial/adjustment maintenance. The System must contain a billing system that is based on ACBH business rules and to meet Federal and State requirements, flexibility to allow county defined tables, county defined messages, system access based on user security level, system flexibility to allow county identified fields as optional or required.

* + 1. **Authorizations**

The System must address requirements for managing Authorizations. This includes pre-authorization, authorization and tracking of client treatment plans needed for MH and SUD treatment, FFS Inpatient treatment, SUD residential treatment, and others as identified. In all scenarios, Bidder is expected to provide and maintain functionality that is consistent with State requirements.

* + 1. **Claims Administration – Managed Care**

This functionality must support requirements of “Claims Administration” associated with the ACBH FFS Managed Care accounts payable process to pay a contracted individual or group provider for services rendered then convert the paid service into a billable service, bill and receive payment to post to the service. This process must include full tracking of service functions between both systems. The set-up of this module may differ from the billing system set up for services as this is a fee-for-service Mental Health Plan process with DHCS.

## BIDDER MINIMUM QUALIFICATIONS

To be eligible to participate in this RFP, Bidder must meet the following Bidder Minimum Qualifications.

* + 1. Bidder is regularly and continuously engaged in the business of developing and delivering electronic health care systems for behavioral health services (which includes but is not limited to mental health and/or substance use) for at least three (3) years, and demonstrates it has the ability to provide a solution that addresses operations and revenue cycle management.
    2. Bidder currently has or commits to completing and implementing a billing system that is fully compliant with California Medi-Cal Short-Doyle, Federal CMS, and private insurance billing and claiming regulations, all Federal and State reporting requirements, the requirements specified in this RFP document, and the California Short Doyle Medi-Cal requirements (published as a separate attachment to this RFP).[[1]](#footnote-1)
    3. Bidder demonstrates its ability to integrate its software with the County’s present Electronic Health Record system and /or any newly acquired County EHR system, as defined in the [Detailed Functional Specifications Workbook](#Workbook).
    4. Bidder demonstrates experience within the past 5 years of successfully building a solution similar in scope and complexity to the one described in this RFP within a managed time frame.
    5. Bidder will possess all permits, licenses and professional credentials necessary to supply product and perform services as specified under this RFP.
    6. Bidder will meet the mandatory technical requirements as outlined in the [Detailed Functional Specifications Workbook](#Workbook)  with a minimum score of 3000 or more in Qualifying Points. Bidder must include the fully completed .XLSX workbook on a flash drive with their physical bid submission.
    7. Bidder’s system must be able to accept, process, and return standard health care transactions (as outlined in Section T and included in the Detailed Functional Specifications Workbook) with external electronic health record management systems used by contracted County providers. In addition, system must provide a manual option for data entry if a contracted provider does not have the ability to interoperate electronically with the County.
    8. Bidder shall make the following commitments to the County:
       1. Bidder agrees to work with the County to develop a detailed data conversion and data validation plan as described in [Section T](#_T.__ADDITIONAL).
       2. Bidder must keep its system current with California Short Doyle, new SUD waiver billing requirements, and Federal processing rules that evolve over time at no additional cost to the County for the duration of the contract.

The County will disqualify proposals that do not demonstrate the specified Bidder Minimum Qualifications. These disqualified proposals will not be evaluated by the County Selection Committee (CSC)/Evaluation Panel and will not be eligible for contract award under this RFP.

## SPECIFIC REQUIREMENTS

Please refer to the [Detailed Functional Specifications Workbook](#Workbook) for a description of the collective functionality that the replacement billing system (and Bidder) is expected to provide. Please refer to [Section T](#_T.__ADDITIONAL) below which outlines the Contract Expectations of the County in the PIPP and Implementation Plan of the System.

In addition:

* + - 1. The selected Bidder will be expected to collaborate and partner with other existing contractors or vendors, HCSA, and external stakeholders. Solution must support all the legal data sharing constructs and framework to be compliant with all federal, state, and local laws and regulations that apply, including without limitation the HIPAA Rules, the regulations regarding the confidentiality of substance use disorder patient records set forth at 42 CFR Part 2, the California Confidentiality of Medical Information Act (California Civil Code § 56 *et. seq.*), the Lanterman-Petris-Short Act (California Welfare and Institutions Code § 5238 *et. seq*.), and laws regarding the confidentiality of HIV test results (California Health and Safety Code § 120975 *et. seq.*).

2. Bidder shall warrant that all materials and/or Products produced hereunder shall not infringe upon or violate any patent, copyright, trade secret, or other proprietary right of any third party. In the event of a claim by any third party against the County or HCSA, the County or HCSA shall promptly notify the Bidder, and the Bidder shall defend such claim and the County’s name. All expenses pertaining to such defense shall be borne by the Bidder.

## DELIVERABLES / REPORTS

During contract negotiations, the County and the selected Bidder will finalize the deliverables and milestones for the awarded scope of work. At a minimum, Bidder shall review [Section A. Intent](#_INTENT), [Section T. Contract Expectations](#_T.__ADDITIONAL), and the [Detailed Functional Specifications Workbook](#Workbook) for consideration in developing their Implementation Plan and Schedule response described within Exhibit A, [Required Documentation and Submittals](#_REQUIRED_DOCUMENTATION_AND) below. The Bidder shall consider the implementation start date as July 1, 2021 and describe its timeline the deliverable and reporting plans for the PIPP and the Implementation Plan over the contract period.

It will be the responsibility of the selected Bidder to document when each milestone has been delivered in the Implementation Plan. The County team will be allowed fifteen (15) working days for the review of each deliverable and milestone to review and approve that each deliverable and milestone has been satisfactorily completed. The selected Bidder will comply with any reporting and evaluation standards and agreements as set forth by ACBH staff.

# CALENDAR OF EVENTS

|  |  |  |
| --- | --- | --- |
| **EVENT** | **DATE/LOCATION** | |
| Request Issued | August 20, 2020 | |
| Written Questions Due | by 5:00 p.m. on September 3, 2020 | |
| Networking/Bidders Conference #1 | September 2, 2020 @3:00 p.m. | [Join Microsoft Teams Meeting](https://teams.microsoft.com/l/meetup-join/19%3ameeting_MmFkNzMyMDAtNGU1Ni00ZGI3LWJkYzYtNjM0NWM3YzgwNjFl%40thread.v2/0?context=%7b%22Tid%22%3a%2232fdff2c-f86e-4ba3-a47d-6a44a7f45a64%22%2c%22Oid%22%3a%224e496fde-3627-463e-859d-c5d792abfe6b%22%7d)  [+1 415-915-3950](tel:+1%20415-915-3950,,872975914# )   United States, San Francisco (Toll)  Conference ID: 872 975 914#  [Local numbers](https://dialin.teams.microsoft.com/c44e85b4-06d5-44f1-aa66-048146aad930?id=872975914) | [Reset PIN](https://mysettings.lync.com/pstnconferencing) | [Learn more about Teams](https://aka.ms/JoinTeamsMeeting) | [Meeting options](https://teams.microsoft.com/meetingOptions/?organizerId=4e496fde-3627-463e-859d-c5d792abfe6b&tenantId=32fdff2c-f86e-4ba3-a47d-6a44a7f45a64&threadId=19_meeting_MmFkNzMyMDAtNGU1Ni00ZGI3LWJkYzYtNjM0NWM3YzgwNjFl@thread.v2&messageId=0&language=en-US) |
| Networking/Bidders Conference #2 | September 3, 2020 @ 10:30 a.m. | [Join Microsoft Teams Meeting](https://teams.microsoft.com/l/meetup-join/19%3ameeting_YWI1MWRlYjAtMDY4NC00NjFlLWExMDMtNDY2OTc4ZThhZGVi%40thread.v2/0?context=%7b%22Tid%22%3a%2232fdff2c-f86e-4ba3-a47d-6a44a7f45a64%22%2c%22Oid%22%3a%224e496fde-3627-463e-859d-c5d792abfe6b%22%7d)  [+1 415-915-3950](tel:+1%20415-915-3950,,363724828# )   United States, San Francisco (Toll)  Conference ID: 363 724 828#  [Local numbers](https://dialin.teams.microsoft.com/c44e85b4-06d5-44f1-aa66-048146aad930?id=363724828) | [Reset PIN](https://mysettings.lync.com/pstnconferencing) | [Learn more about Teams](https://aka.ms/JoinTeamsMeeting) | [Meeting options](https://teams.microsoft.com/meetingOptions/?organizerId=4e496fde-3627-463e-859d-c5d792abfe6b&tenantId=32fdff2c-f86e-4ba3-a47d-6a44a7f45a64&threadId=19_meeting_YWI1MWRlYjAtMDY4NC00NjFlLWExMDMtNDY2OTc4ZThhZGVi@thread.v2&messageId=0&language=en-US) |
| List of Attendees | September 8, 2020 | |
| Q&A Issued | September 30 2020 | |
| Addendum Issued (only if necessary to amend RFP/Q) | September 30, 2020 | |
| Response Due | October 21, 2020 by 2:00 p.m. | |
| Evaluation Period | October 22-December 10, 2020 | |
| Bidder Interview, if applicable | November 16-December 10, 2020 | |
| Board Letter Recommending Award Issued | March 16, 2021 | |
| Board Consideration Award Date | March 30, 2021 | |
| Contract Start Date | April 1, 2021 | |

**Note**: Award and start dates are approximate.

## NETWORKING / BIDDERS CONFERENCES

* + 1. **Attendance at one of the scheduled Networking/Bidders Conferences is mandatory to submit a bid response to this RFP. At least one representative from the Bidder organization must submit contact information to meet the requirement during the conference.**
    2. Networking/Bidders Conferences will be held to:
       1. Provide an opportunity for Small Local Emerging Businesses (SLEBs) and large firms to network and develop subcontracting relationships in order to participate in the contract(s) that may result from this RFP.
       2. Provide an opportunity for Bidders to ask specific questions about the project and request RFP clarification.
       3. Provide the County with an opportunity to receive feedback regarding the project and RFP.
    3. The list of Networking/Bidders Conference attendees and vendor outreach will be released in a separate document.
    4. Questions will be addressed in an RFP Question and Answer (Q&A) Report following the Networking/Bidders Conference(s). Should there be a need to amend or revise the RFP/Q, an Addendum will be issued following the Networking/Bidders Conferences.

# COUNTY PROCEDURES, TERMS, AND CONDITIONS

## EVALUATION CRITERIA / SELECTION COMMITTEE

All proposals that pass the initial Evaluation Criteria which are determined on a pass/fail basis (Minimum Qualifications, Completeness of Response, and Debarment and Suspension) will be evaluated by a County Selection Committee (CSC).  The County Selection Committee may be composed of County staff and other parties that may have expertise or experience in the areas of mental health, Fee-For-Service Managed Care, substance use disorders, technology and/or related services for the system processing functionality specified in this RFP. The CSC will score and select a Bidder in accordance with the evaluation criteria set forth in this RFP.  Other than the initial pass/fail Evaluation Criteria, the evaluation of the proposals shall be within the sole judgment and discretion of the CSC.

All contact during the evaluation phase shall only be through Kristel Acacio, the Supervising Program Specialist responsible for this RFP. Bidders shall neither contact nor lobby evaluators during the evaluation process. Attempts by Bidder to contact and/or influence members of the CSC or any County stakeholder may result in disqualification of Bidder.

The CSC will evaluate each proposal meeting the qualification requirements set forth in this RFP. Bidders should bear in mind that any proposal that is unrealistic in terms of the technical or schedule commitments, or unrealistically high or low in cost, will be deemed reflective of an inherent lack of technical competence or indicative of a failure to comprehend the complexity and risk of the County’s requirements as set forth in this RFP.

As a result of this RFP, the County intends to award a contract to the responsible Bidder(s) whose response best conforms to the RFP and whose bid presents the greatest value to the County, all evaluation criteria considered. The combined weight of the evaluation criteria is greater in importance than cost in determining the greatest value to the County. The goal is to award a contract to the Bidder(s) that proposes the County the best quality as determined by the combined weight of the evaluation criteria. The County may award a contract of higher qualitative competence over the lowest priced response. The basic information that each section should contain is specified below, these specifications should be considered as minimum requirements. Much of the material needed to present a comprehensive proposal can be placed into one of the sections listed. However, other criteria may be added to further support the evaluation process whenever such additional criteria are deemed appropriate in considering the nature of the goods and/or services being solicited.

Each of the Evaluation Criteria below will be used in ranking and determining the quality of Bidders’ proposals. Proposals will be evaluated according to each Evaluation Criteria and scored on the zero to five-point scale outlined below. The scores for all Evaluation Criteria will then be added, according to their assigned weight (below), to arrive at a weighted score for each proposal. A proposal with a high weighted total will be deemed of higher quality than a proposal with a lesser-weighted total. The final maximum score for any project is five hundred fifty (550) points, including the possible fifty (50) points for local and small, local and emerging, or local preference points (maximum 10% of final score).

The evaluation process will include a two-stage approach including an initial evaluation of the written proposal and preliminary scoring to develop a short list of Bidders that will continue to the final stage of oral presentation and interview and reference checks.  The preliminary scoring will be based on the total points, excluding points allocated to references, oral presentation and interview.

The County will select up to three (3) or four (4) Bidders receiving the highest preliminary scores and with at least 200 points to be invited to provide a one- to two-day onsite or virtual oral presentation/interview of their proposed solution. Only the Bidders meeting the short list criteria will proceed to the next stage.  All other Bidders will be deemed eliminated from the process.  All Bidders will be notified of the short list participants; however, the preliminary scores at that time will not be communicated to Bidders.

The zero to five-point scale range is defined as follows:

|  |  |  |
| --- | --- | --- |
| 0 | Not Acceptable | Non-responsive, fails to meet RFP specification. The approach has no probability of success. If a mandatory requirement this score will result in disqualification of proposal. |
| 1 | Poor | Below average, falls short of expectations, is substandard to that which is the average or expected norm, has a low probability of success in achieving objectives per RFP. |
| 2 | Fair | Has a reasonable probability of success, however, some objectives may not be met. |
| 3 | Average | Acceptable, achieves all objectives in a reasonable fashion per RFP specification. This will be the baseline score for each item with adjustments based on interpretation of proposal by Evaluation Committee members. |
| 4 | Above Average / Good | Very good probability of success, better than that which is average or expected as the norm. Achieves all objectives per RFP requirements and expectations. |
| 5 | Excellent / Exceptional | Exceeds expectations, very innovative, clearly superior to that which is average or expected as the norm. Excellent probability of success and in achieving all objectives and meeting RFP specification. |

The Evaluation Criteria and their respective weights are as follows.

|  |  |  |
| --- | --- | --- |
|  | **Evaluation Criteria** | **Weight** |
| **A.** | **Minimum Qualifications:**  Bidder has provided written confirmation that it meets each of the Minimum Qualifications specified in Section 1 of this RFP document. | Pass/Fail |
| **B.** | **Completeness of Response:**  Responses to this RFP must be complete. Responses that do not include the proposal content requirements identified within this RFP and subsequent Addenda and do not address each of the items listed below will be considered incomplete, will be rated as a “Fail” in the Evaluation Criteria and will receive no further consideration.  Responses that are rated a Fail and are not considered may be picked up at the delivery location within 14 calendar days of contract award and/or the completion of the competitive process. | Pass/Fail |
| **C.** | **Debarment and Suspension:**  Bidders, its principal and named subcontractors must not be identified on the list of Federally debarred, suspended or other excluded parties located at [www.sam.gov](http://www.sam.gov). | Pass/Fail |
| **D.** | **References (See Exhibit A – Bid Response Packet)** | Pass/Fail |
|  | **Ranking Criteria** |  |
| **E.** | **Description of the Proposed Solution:**  Proposals, including the [Detailed Functional Specifications Workbook](#Workbook), will be evaluated against the RFP specifications and the questions below:   1. Is the description of proposed solution comprehensive, clear, and detailed? 2. Does it meet the County’s requirements as outlined throughout this RFP? Is the proposed solution in line with the County Assigned Priorities and Contract Expectations? Does the replacement System: allow an external partner to exchange data electronically with the County system; provide a seamless transition of client data between the accounts payable system and billing system; demonstrate interoperability with Clinician’s Gateway or its replacement? 3. Does it exceed the County’s requirements? What, if any, are the innovative features offered by the proposed solution? Are these appropriate and/or realistic to implement given County requirements? 4. Does the description include a realistic and achievable plan for collaborating in and executing the work? 5. Does the County have an ability to customize / control changes to the system (including ability to request Bidder develop and implement reasonable enhancements that support the needs of the County)? 6. To what extent are the required and high priority components of the Bidder’s proposed solution available at the County’s required specifications prior to implementation versus at a later time? | 30 Points |
| **F.** | **Relevant Experience:**  Proposals, including the [Detailed Functional Specifications Workbook](#Workbook), will be evaluated against the RFP specifications and the questions below:   1. What is the Bidder’s experience supporting similar projects related to the County’s requirements? How well has the Bidder demonstrated experience with a public or private client/customer of a similar size, volume, and complexity as Alameda County? 2. If additional functionality will need to be developed in the Bidder’s solution, how well has the Bidder demonstrated its ability to meet the County’s requirements and/or stated desires? 3. How extensive or robust is the Bidder’s experience with electronic health record / behavioral health care operations and revenue cycle management / billing solutions and services? 4. Are the key personnel identified and staff descriptions provided appropriate to meeting the needs of the project? | 10 Points |
| **G.** | **Profile, Capacity, and Readiness:**  Proposals, including the Detailed Functional Specifications Workbook, will be evaluated against the RFP specifications and the questions below:   1. How fiscally strong is the Bidder as it relates to taking on the contract and scope of work described by the County? 2. Does the Bidder demonstrate a positive contract history? 3. To what extent has the Bidder demonstrated the requisite expertise to undertake the scope of work described in this RFP? 4. How well matched is the Bidder’s capacity to adhere to the County’s requirements and timeline? 5. Does the Bidder demonstrate ability to begin the contract in April 2021, with implementation services commencing July 2021? 6. Did the Bidder receive positive references from their clients, in particular as it relates to customer service and serving as a partner? | 10 Points |
| **H.** | **Cost:**  The points for Cost will be computed by dividing the amount of the lowest responsive bid received by each Bidder’s total proposed cost.  While not reflected in the Cost evaluation points, an evaluation may also be made of:   1. Reasonableness (i.e., does the proposed pricing accurately reflect the Bidder’s effort to meet requirements and objectives?; did the Bidder optimize the RFP’s stated budget amount to meet the County’s requirements?; are the additional costs for known proposed enhancements and/or innovative solutions explained and justified?); and 2. Realism (i.e., is the proposed cost appropriate to the nature of the products and services to be provided?) 3. Affordability (i.e. the ability of the County to finance the project); will any additional costs proposed for the full solution be cost prohibitive to the County?     Consideration of price in terms of overall affordability may be controlling in circumstances where two or more proposals are otherwise adjudged to be equal, or when a superior proposal is at a price that the County cannot afford. | 15 Points |
| **I.** | **Implementation Plan, Deliverables and Reports:**  Proposals will be evaluated against the RFP specifications and the questions below:   1. Does the Bidder have robust methods and tools for project management, and can the Bidder be expected to adhere to a defined implementation schedule? Is the proposed implementation timeline aligned with the County Assigned Priorities and Additional Contract Requirements? 2. Is the Bidder’s plan realistic to implement given County requirements? 3. In what ways does the Bidder’s timeline for proposed enhancements meet or exceed the County’s needs as described in this RFP? 4. Does the plan demonstrate the Bidder’s willingness to partner with the County to address requested needs and enhancements? 5. Does the Bidder’s plan explain how deliverables will be produced, reviewed, and approved in a timely fashion? 6. Does the Bidder’s staff have experience as it relates to Behavioral Health billing system implementations? | 15 Points |
| **J.** | **Oral Presentations / Interview:**  Up to the three (3) or four (4) of the highest scoring Bidders will be invited to provide an onsite or virtual review of its system to the evaluation committee. Bidder is expected to present at scheduled meetings that are anticipated to last at least one to three days of demonstrations.  The County will provide an agenda of topics, including time allocated to each topic and specific scripts and use cases to which the Bidder must address in the review. The County requests the Bidder’s proposed Project Manager and Technical/Product Lead actively participate in the review sessions.  The scoring for all areas of the RFP may be revised based on the oral interview. | 20 Points |
| **SMALL LOCAL EMERGING BUSINESS PREFERENCE** | | |
|  | Local Preference: Points equaling five percent (5%) of Bidder’s total score, for the above Evaluation Criteria, will be added. This will be the Bidder’s final score for purposes of award evaluation. | Five Percent (5%) |
|  | Small and Local or Emerging and Local Preference: Points equaling five percent (5%) of Bidder’s total score, for the above Evaluation Criteria, will be added. This will be the Bidder’s final score for purposes of award evaluation. | Five Percent (5%) |

## CONTRACT EVALUATION AND ASSESSMENT

During the initial 180-day period, inclusive of the 90 day PIPP, of any contract which may be awarded to Bidder, the County may review the proposal, the contract, any goods or services provided, and/or meet with the Bidder to identify any issues or potential problems.

The County reserves the right to determine, at its sole discretion, whether:

1.                Bidder has complied with all terms of this RFP; and

2.                Any problems or potential problems with the proposed goods and services were evidenced which make it unlikely (even with possible modifications) that such goods and services have met or will meet the County’s needs.

If, as a result of such determination, the County concludes that it is not satisfied with Bidder, Bidder’s performance under any awarded contract and/or Bidder’s goods and services as contracted for therein, the Bidder will be notified that the contract is being terminated.  Bidder shall be responsible for returning County facilities to their original state at no charge to the County.  The County will have the right to invite the next highest ranked Bidder to enter into a contract.  The County also reserves the right to re-bid this project if it is determined to be in its best interest to do so.

## J. NOTICE OF RECOMMENDATION TO AWARD

* + 1. At the conclusion of the RFP response evaluation process (“Evaluation Process”), all Bidders will be notified in writing by e-mail or fax, and US Postal Service, of the contract award recommendation, if any, by HCSA. The document providing this notification is the Notice of Recommendation to Award.

The Notice of Recommendation to Award will provide the following information:

* + - 1. The name of the Bidder being recommended for contract award; and
      2. The names of all other parties that submitted proposals.
    1. At the conclusion of the RFP response evaluation process and negotiations, debriefings for unsuccessful Bidders will be scheduled and provided upon written request and will be restricted to discussion of the unsuccessful offeror’s bid. Under no circumstances will any discussion be conducted with regard to contract negotiations with the successful Bidder.
    2. The submitted proposals shall be made available upon request no later than five (5) calendar days before approval of the award and contract is scheduled to be heard by the Board of Supervisors.

## K. BID PROTEST/APPEALS PROCESS

* + 1. HCSA prides itself on the establishment of fair and competitive contracting procedures and the commitment made to following those procedures. The following is provided in the event that Bidders wish to protest the bid process or appeal the recommendation to award a contract for this project once the Notices of Recommendation to Award/Non-Award have been issued. Bid protests submitted prior to issuance of the Notices of Recommendation to Award/Non-Award will not be accepted by the County.

Any bid protest by any Bidder regarding any other bid must be submitted in writing to James Nguyen, Administrative and Financial Services Manager, 1000 San Leandro Blvd., Suite 300, San Leandro, CA 94577, Fax (510) 351-1367 **before 5:00 pm of the FIFTH (5th) business day following the date of issuance of the Notice of Recommendation to Award, not the date received by the Bidder**. A bid protest received after 5:00 pm is considered received as of the next business day.

* 1. The bid protest must contain a complete statement of the reasons and facts for the protest.
  2. The protest must refer to the specific portions of all documents that form the basis for the protest.
  3. The protest must include the name, address, email address, fax number and telephone number of the person representing the protesting party.
  4. The County Agency/Department will transmit a copy of the bid protest to all Bidders as soon as possible after receipt of the protest.
     1. Upon receipt of written protest, HCSA Administrative and Financial Services Manager, or designee will review and evaluate the protest and issue a written decision. The HCSA Administrative and Financial Services Manager, may, at his or her discretion, investigate the protest, obtain additional information, provide an opportunity to settle the protest by mutual agreement, and/or schedule a meeting(s) with the protesting Bidder and others (as appropriate) to discuss the protest. The decision on the bid protest will be issued at least ten (10) business days prior to the Board hearing or HCSA award date.   
          
        The decision will be communicated by e-mail or fax, or US Postal Service mail, and will inform the Bidder whether or not the recommendation to the Board of Supervisors or HCSA in the Notice of Recommendation to Award is going to change. A copy of the decision will be furnished to all Bidders affected by the decision. As used in this paragraph, a Bidder is affected by the decision on a Bid protest if a decision on the protest could have resulted in the Bidder not being the apparent successful Bidder on the Bid.
     2. The decision of the HCSA Administrative and Financial Services Manager on the bid protest may be appealed to the Auditor-Controller's Office of Contract Compliance & Reporting (OCCR) located at 1221 Oak St., Room 249, Oakland, CA 94612, Fax: (510) 272-6502 unless the OCCR determines that it has a conflict of interest in which case an alternate will be identified to hear the appeal and all steps to be taken by OCCR will be performed by the alternate. The Bidder whose Bid is the subject of the protest, all Bidders affected by the HCSA Administrative and Financial Services Manager’s decision on the protest, and the protestor have the right to appeal if not satisfied with the HCSA Administrative and Financial Services Manager’s decision. All appeals to the Auditor-Controller’s OCCR shall be in writing and submitted within five (5) business days following the issuance of the decision by the HCSA Administrative and Financial Services Manager, not the date received by the Bidder. An appeal received after 5:00 p.m. is considered received as of the next business day. An appeal received after the FIFTH (5th) business day following the date of issuance of the decision by the HCSA Administrative and Financial Services Manager shall not be considered under any circumstances by the HCSA or the Auditor-Controller OCCR.
  5. The appeal shall specify the decision being appealed and all the facts and circumstances relied upon in support of the appeal.
  6. In reviewing protest appeals, the OCCR will not re-judge the proposal(s). The appeal to the OCCR shall be limited to review of the procurement process to determine if the contracting department materially erred in following the Bid or, where appropriate, County contracting policies or other laws and regulations.
  7. The appeal to the OCCR also shall be limited to the grounds raised in the original protest and the decision by the HCSA Administrative and Financial Services Manager. As such, a Bidder is prohibited from stating new grounds for a Bid protest in its appeal. The Auditor-Controller (OCCR) shall only review the materials and conclusions reached by the HCSA Administrative and Financial Services Manager or department designee, and will determine whether to uphold or overturn the protest decision.
  8. The Auditor’s Office may overturn the results of a bid process for ethical violations by HCSA staff, County Selection Committee members, subject matter experts, or any other County staff managing or participating in the competitive bid process, regardless of timing or the contents of a bid protest.

* 1. The decision of the Auditor-Controller’s OCCR is the final step of the appeal process. A copy of the decision of the Auditor-Controller’s OCCR will be furnished to the protestor, the Bidder whose Bid is the subject of the Bid protest, and all Bidders affected by the decision.
     1. The County will complete the Bid protest/appeal procedures set forth in this paragraph before a recommendation to award the Contract is considered by the Board of Supervisor or HCSA.
     2. The procedures and time limits set forth in this paragraph are mandatory and are each Bidder's sole and exclusive remedy in the event of Bid Protest. A Bidder’s failure to timely complete both the Bid protest and appeal procedures shall be deemed a failure to exhaust administrative remedies. Failure to exhaust administrative remedies, or failure to comply otherwise with these procedures, shall constitute a waiver of any right to further pursue the Bid protest, including filing a Government Code Claim or legal proceedings.

## L. TERM / TERMINATION / RENEWAL

* + 1. The term of the contract, which may be awarded pursuant to this RFP, will be two (2) years and three (3) months.
    2. By mutual agreement, any contract which may be awarded pursuant to this RFP, may be extended for three (3) additional one (1)-year terms at agreed prices with all other terms and conditions remaining the same.

## M. PRICING

* + 1. Prevailing Wages: Pursuant to Labor Code Sections 1770 et seq., Bidder shall pay to persons performing labor in and about Work provided for in Contract not less than the general prevailing rate of per diem wages for work of a similar character in the locality in which the Work is performed, and not less than the general prevailing rate of per diem wages for legal holiday and overtime work in said locality, which per diem wages shall not be less than the stipulated rates contained in a schedule thereof which has been ascertained and determined by the Director of the State Department of Industrial Relations to be the general prevailing rate of per diem wages for each craft or type of workman or mechanic needed to execute this contract.

## N. AWARD

* + 1. Proposals will be evaluated by a committee and will be ranked in accordance with the RFPsection entitled “Evaluation Criteria/Selection Committee.” The committee will recommend award to the Bidder who, in its opinion, has submitted the proposal that best serves the overall interests of the County and attains the highest overall point score. Award may not necessarily be made to the Bidder with the lowest price.
    2. Small and Emerging Locally Owned Business: The County is vitally interested in promoting the growth of small and emerging local businesses by means of increasing the participation of these businesses in the County’s purchase of goods and services.

As a result of the County’s commitment to advance the economic opportunities of these businesses, **Bidders must meet the County’s Small and Emerging Locally Owned Business requirements in order to be considered for the contract award.** These requirements can be found online at:

<http://acgov.org/auditor/sleb/overview.htm>

For purposes of this bid, applicable industries include, but are not limited to, the following NAICS Code(s): 518210, 541511, 541512, 541519, 541690, and 541990.

A small business is defined by the [United States Small Business Administration](http://www.sba.gov/) (SBA) as having no more than the number of employees or average annual gross receipts over the last three (3) years required per SBA standards based on the small business's appropriate NAICS code.

An emerging business is defined by the County as having either annual gross receipts of less than one-half (1/2) that of a small business OR having less than one-half (1/2) the number of employees AND that has been in business less than five (5) years.

* + 1. The County reserves the right to reject any or all responses that materially differ from any terms contained in this RFP or from any Exhibits attached hereto, to waive informalities and minor irregularities in responses received, and to provide an opportunity for Bidders to correct minor and immaterial errors contained in their submissions. The decision as to what constitutes a minor irregularity shall be made solely at the discretion of the County.
    2. Any proposal/bids that contain false or misleading information may be disqualified by the County.
    3. The County has the right to decline to award this contract or any part thereof for any reason.
    4. Board approval to award a contract is required.
    5. A contract must be negotiated, finalized, and signed by the recommended awardee prior to Board approval.
    6. Final Standard Agreement terms and conditions will be negotiated with the selected Bidder. Bidder may access a copy of the Standard Services Agreement template can be found online at:

<http://www.acgov.org/gsa/purchasing/standardServicesAgreement.pdf>

The template contains minimal Agreement boilerplate language only.

* + 1. The RFP specifications, terms, conditions and Exhibits, RFP Addenda and Bidder’s proposal, may be incorporated into and made a part of any contract that may be awarded as a result of this RFP.

## O. INVOICING

* + 1. Bidder shall invoice the requesting department, unless otherwise advised, upon satisfactory receipt of product and/or performance of services as defined in a milestone-based payment schedule, to be negotiated with the selected Bidder, that will become part the contract.
    2. County will use best efforts to make payment within forty-five (45) days following receipt and review of invoice and upon complete satisfactory receipt of product and performance of services.
    3. County shall notify Bidder of any adjustments required to invoice.
    4. Invoices shall contain County purchase order number, invoice number, remit to address and itemized products and/or services description and price as quoted and shall be accompanied by acceptable proof of delivery.
    5. Bidder shall utilize standardized invoice upon request.
    6. Invoices shall only be issued by the Bidder who is awarded a contract.
    7. Payments will be issued to and invoices must be received from the same Bidder whose name is specified on the purchase orders.
    8. The County will pay Bidder monthly or as agreed upon, not to exceed the total RFPquoted in the bid response.

## P. ACCOUNT MANAGER / SUPPORT STAFF

* + 1. Bidder shall provide a dedicated competent Account Manager who shall be responsible for the County account/contract. The Account Manager shall receive all orders from the County and shall be the primary contact for all issues regarding Bidder’s response to this RFP and any contract which may arise pursuant to this RFP.
    2. Bidder shall provide a dedicated competent Project Manager who shall be responsible for the implementation of the proposed solution. The Project manager shall be fully trained and experienced implementing the Bidder’s Solution. The County reserves the right to interview and approve the assigned Project Manager.
    3. Bidder shall provide a dedicated competent Technical/Product Lead who shall be responsible for the technical specifications of the software, including collaboration with County staff regarding the design and details for any agreed upon enhancements . The Technical/Product Lead shall be fully trained and experienced implementing the Bidder’s solution. The County reserves the right to interview and approve the assigned Technical/Product Lead.
    4. Bidder shall also provide adequate, competent support staff that shall be able to service the County during normal working hours, Monday through Friday. Such representative(s) shall be knowledgeable about the contract, products offered and able to identify and resolve quickly any issues including but not limited to order and invoicing problems.
    5. Bidder Account Manager and Project Manager shall be familiar with County requirements and standards and work with the HCSA to ensure that established standards are adhered to.

# INSTRUCTIONS TO BIDDERS

## Q. COUNTY CONTACTS

All contact during the competitive process is to be through Kristel Acacio, Supervising Program Specialist, only. Contact information is provided in Section R below. All questions regarding these specifications, terms and conditions are to be submitted in writing, preferably via e-mail to Kristel Acacio by the specified date on the Calendar of Events.

The evaluation phase of the competitive process shall begin upon receipt of sealed bids until a contract has been awarded. Bidders shall not contact or lobby evaluators during the evaluation process. Attempts by Bidder to contact evaluators may result in disqualification of Bidder.

The GSA Contracting Opportunities website will be the official notification posting place of all Requests for Interest, Proposals, Quotes and Addenda. Go to <http://www.acgov.org/gsa_app/gsa/purchasing/bid_content/contractopportunities.jsp> to view current contracting opportunities.

## R. SUBMITTAL OF BIDS

* + 1. All bids must be SEALED and must be received at the Health Care Services Agency of Alameda County BY 2:00 p.m. on the due date specified in the [Calendar of Events](#_CALENDAR_OF_EVENTS).

NOTE: LATE AND/OR UNSEALED BIDS CANNOT BE ACCEPTED. IF HAND DELIVERING BIDS PLEASE ALLOW TIME FOR METERED STREET PARKING OR PARKING IN AREA PUBLIC PARKING LOTS AND ENTRY INTO SECURE BUILDING.

Bids will be received only at the address shown below, and by the time indicated in the [Calendar of Events](#_CALENDAR_OF_EVENTS). Any bid received after said time and/or date or at a place other than the stated address cannot be considered and will be returned to the Bidder unopened.

All bids, whether delivered by an employee of Bidder, U.S. Postal Service, courier or package delivery service, must be received and time stamped at the stated address prior to the time designated. The Health Care Services Agency’s timestamp shall be considered the official timepiece for the purpose of establishing the actual receipt of bids.

* + 1. Bids are to be addressed and delivered as follows:

**Alameda County, Health Care Services Agency**

**RFP No. HCSA-900520**

**Attn: Kristel Acacio, Supervising Program Specialist**

**1000 San Leandro Blvd, Suite 300**

**San Leandro, CA 94577**

For questions:  
E-MAIL: Kristel.Acacio@acgov.org

PHONE: (510) 618-1910

**Bidder's name, return address, and the RFP number and title must also appear on the mailing package.**

**\*PLEASE NOTE** that on the bid due date, a bid reception desk will be open between 9:00 a.m. – 2:00 p.m. and will be located on the third floor at 1000 San Leandro Blvd, Suite 300.

* + 1. Bidders are to submit one (1) original hardcopy bid (Exhibit A – Bid Response Packet, including additional required documentation), with original ink signatures, plus five (5) copies of their proposal. Original proposal is to be clearly marked “ORIGINAL” with copies to be marked “COPY”. All submittals should be printed on plain white paper, and must be either loose leaf or in a 3-ring binder (**NOT** bound). It is preferred that all proposals submitted shall be printed double-sided and on minimum 30% post-consumer recycled content paper. Inability to comply with the 30% post-consumer recycled content recommendation will have no impact on the evaluation and scoring of the proposal.

Bidders **must** also submit an electronic copy of their proposal. The electronic copy must be in a single file (PDF with OCR preferred), and shall be an **exact** scanned image of the original hard copy Exhibit A – Bid Response Packet, including additional required documentation. The file must be on disk or USB flash drive and enclosed with the sealed original hardcopy of the bid.

* + 1. BIDDERS SHALL NOT MODIFY BID FORM(S) OR QUALIFY THEIR BIDS. BIDDERS SHALL NOT SUBMIT TO THE COUNTY A SCANNED, RE-TYPED, WORD-PROCESSED, OR OTHERWISE RECREATED VERSION OF THE BID FORM(S) OR ANY OTHER COUNTY-PROVIDED DOCUMENT.
    2. No email (electronic) or facsimile bids will be considered.
    3. All costs required for the preparation and submission of a bid shall be borne by Bidder.
    4. Only one bid response will be accepted from any one person, partnership, corporation, or other entity; however, several alternatives may be included in one response. For purposes of this requirement, “partnership” shall mean, and is limited to, a legal partnership formed under one or more of the provisions of the California or other state’s Corporations Code or an equivalent statute.
    5. All other information regarding the bid responses will be held as confidential until such time as County Selection Committee has completed its evaluation, an recommended award has been made by County Selection Committee, and the contract has been fully negotiated with the recommended awardee named in the recommendation to award/non-award notification(s). The submitted proposals shall be made available upon request no later than five (5) calendar days before the recommendation to award and enter into contract is scheduled to be heard by the Board of Supervisors. All parties submitting proposals, either qualified or unqualified, will receive mailed recommendation to award/non-award notification(s), which will include the name of the Bidder to be recommended for award of this project.  In addition, award information will be posted on the County’s “Contracting Opportunities” website, mentioned above.
    6. Each bid received, with the name of the Bidder, shall be entered on a record, and each record with the successful bid indicated thereon shall, after the award of the order or contract, be open to public inspection.
    7. California Government Code Section 4552: In submitting a bid to a public purchasing body, the Bidder offers and agrees that if the bid is accepted, it will assign to the purchasing body all rights, title, and interest in and to all causes of action it may have under Section 4 of the Clayton Act (15 U.S.C. Sec. 15) or under the Cartwright Act (Chapter 2, commencing with Section 16700, of Part 2 of Division 7 of the Business and Professions Code), arising from purchases of goods, materials, or services by the Bidder for sale to the purchasing body pursuant to the bid. Such assignment shall be made and become effective at the time the purchasing body tenders final payment to the Bidder.
    8. Bidder expressly acknowledges that it is aware that if a false claim is knowingly submitted (as the terms “claim” and “knowingly” are defined in the California False Claims Act, Cal. Gov. Code, §12650 et seq.), County will be entitled to civil remedies set forth in the California False Claim Act. It may also be considered fraud and the Bidder may be subject to criminal prosecution.
    9. The undersigned Bidder certifies that it is, at the time of bidding, and shall be throughout the period of the contract, licensed by the State of California to do the type of work required under the terms of the Contract Documents. Bidder further certifies that it is regularly engaged in the general class and type of work called for in the Bid Documents.
    10. The undersigned Bidder certifies that it is not, at the time of bidding, on the California Department of General Services (DGS) list of persons determined to be engaged in investment activities in Iran or otherwise in violation of the Iran Contracting Act of 2010 (Public Contract Code Section 2200-2208).
    11. It is understood that County reserves the right to reject this bid and that the bid shall remain open to acceptance and is irrevocable for a period of one hundred eighty (180) days, unless otherwise specified in the Bid Documents.

## S. RESPONSE FORMAT

* + 1. Bid responses are to be straightforward, clear, concise and specific to the information requested.
    2. In order for bids to be considered complete, Bidder **must** provide responses to all information requested. See [Exhibit A – Bid Response Packet](#_EXHIBIT_A_1).
    3. Bid responses, in whole or in part, are NOT to be marked confidential or proprietary. County may refuse to consider any bid response or part thereof so marked. Bid responses submitted in response to this RFPmay be subject to public disclosure.  County shall not be liable in any way for disclosure of any such records. Please refer to the County’s website at: <http://www.acgov.org/gsa/departments/purchasing/policy/proprietary.htm> for more information regarding Proprietary and Confidential Information policies.

## T. CONTRACT EXPECTATIONS

The items in this section are presented here to inform Bidder of the County’s expectations that will be included in the contract. Bidder is not required to provide response to these items specifically, and shall provide the [Required Documentation and Submittals](#_REQUIRED_DOCUMENTATION_AND) as outlined in Exhibit A of the RFP document; however, Bidder should consider the following expectations when preparing its estimated implementation and support costs and schedules in the bid response.

**Pre-Implementation Planning Phase (PIPP)**

1. During the first 90 days of contract, referred to as the PIPP, the Bidder shall participate in a series of introductory training and planning workshops designed to educate select County staff in the use of the proposed solution. This includes providing the County with access to a sandbox or training environment to use for testing and experimentation during the PIPP period.
2. In addition, Bidder will work with the County to document current business processes and educate County on the configuration or implementation options, the implications of each of these options, and provide a series of recommendations to address during the implementation. This includes the identification for any new functionality that is agreed upon between Bidder and County. This plan shall be reviewed and approved by the County prior to the start of the implementation activities.
3. The resulting Implementation Plan will become part of the contract, and include performance provisions that the selected Bidder must meet, and payments of implementation fees or other pre-implementation costs will be tied to these milestones (as described in the Bid Response Packet section of this RFP document).

Upon commencement of the two (2) year implementation period of the contract between the successful Bidder and County, the Bidder shall have 18-24 months to complete the implementation of their proposed products or solutions (meaning the system must be fully operational and ready for Production use by the entire County community).

**Implementation Project**

1. The project is expected to address / include the items described in this section.
2. Verify system hardware requirements and deliver and load software for the proposed solution delivery model.
3. If on-premise:
4. Bidder will develop relationships with the County’s Information Systems Department (ISD), obtain an understanding of County’s infrastructure and work with the County to load the required operating system and application software to County hosted servers so that they are fully functional and integrated.
5. After the software is loaded Bidder will work collaboratively throughout the term of the Agreement so that the System is fully functional and compatible with the network, and on other related items.
6. Bidder will design and develop a data replication process that meets the needs of the County including the requirement for business continuity.
7. Bidder shall approach process using a collaborative effort involving Bidder and County team members, and if requested by County other project stakeholders, to identify the frequency of replication and critical components.
8. If Hosted:
9. Confirm the Bidder data center infrastructure meets County requirements for Security, Performance, Recovery, and Continuity of operations.
10. Provide a copy of the Bidder Service Level Agreement and Business Continuity / Disaster Recovery Plan.
11. System Training. Bidder will work with the County to develop a detailed, comprehensive training plan that describes how training will be delivered throughout the course of the implementation, including who provides specific trainings to the respective user groups (includes system administrator audiences and end user audiences) and what form of training materials will be developed or otherwise made available by the respective parties. Bidder is expected to deliver training and materials in accordance with this plan.
12. Configure System. As part of the configuration of the proposed system Bidder will provide County detailed demonstrations / walkthroughs of the proposed system, including all applications, and generate the required Gap Analysis of the proposed system, the current system and Bidder assessment of needs.
13. Integration & Interoperability. Bidder will work with the County to identify the needed requirements for integration and interoperability and incorporate such needs into the master implementation plan.
14. At the request of County, Bidder will design and develop additional tools to assist the County in meeting its needs. If the design and development of any additional tool will incur additional costs, Bidder shall provide a written summary of the cost to County for review and approval prior to starting any work.
15. Bidder must also specify if other customers similar to County can also benefit from the enhancements and share in the cost of the development and deployment of the solution.
16. The System shall be able to provide for connectivity of County developed databases, including interoperability with the existing clinical EHR, Clinicians Gateway (or its replacement) and electronic imaging database. The Bidder will collaborate with the County and third-party vendors to build the necessary interfaces.
17. Bidder will provide and support separate Testing and Training environments.
18. Bidder shall make changes to data structure as requested by County so as to meet the requirements contained in the Detailed Functional Specifications Workbook.
19. Develop Custom Programming Modifications.
20. The Bidder should have a clear, written specification and change management process for the County and Bidder to follow. Bidder will work with County staff to ensure a common understanding of each development request.
21. Once an understanding is confirmed Bidder will provide a design specification that includes screen design, technical information, and workflow, and will be shared with the County. Specifications also to include cost and delivery date. Bidder must also specify if other customers similar to County can also benefit from the enhancements and share in the cost of the development and deployment of the solution.
22. Bidder will provide, at any time requested, a walkthrough to show the County the work in progress. Bidder will promptly respond to any questions that may arise, and promptly address and correct any discrepancies between design and deployment.
23. System Testing. Bidder will perform tests required to verify the system performs all functions described above and document results, including but not limited to the following:
24. The system testing phase will start with a documented plan so that there is mutual understanding of expectations of the outcomes of this phase.
25. Bidder will monitor issues that arise from the system testing and regularly discuss issues during the project meetings with the County.
26. The final step of testing will be comprehensive using actual data. During this step, Bidder will support County staff as they test all aspects of the application. As defined by the system acceptance plan / criteria and approved by the county.
27. Data Conversion.
28. County and Bidder will jointly develop a plan for completion of data mappings and development of unique rules to be applied in the conversion of InSyst and eCura/Incedo (if applicable) data to the new system database(s). The Data Conversion Plan will include client and episode data, detailing specific data elements and be incorporated into the Implementation Project Plan.
29. Bidder and County will jointly develop a list of specific files and data elements to be converted or drawn from to support the New System’s performance and functionality. Data Conversion Plan will include provision of an archive database containing data from the current County data system, as agreed upon by County and Bidder. At a minimum, data conversion needs to include the following types of information:
30. Client Demographics
31. Insurance Policy (Insurance Company Master records and the Client Insurance policy/plan)
32. Facility / Program Information (Reporting Unit)
33. Prior to Go-Live, the County shall require at least three (3) conversion tests.
34. The test conversions will be done to both identify potential data issues and to give a better estimate of the time the full conversion will take.
35. After each test Bidder will review with the County the results and provide the County an opportunity to review the converted data.
36. System Cutover
37. Bidder will work with the County to create a plan for system cut-over, including how the system will be validated prior to first production use.
38. Only after the success criteria are met, as determined by County, a final cutover shall be conducted.
39. Final System Acceptance.
40. System acceptance is based on the system cutover and the success criteria that are to be defined in the master implementation plan set. At a minimum, success criteria are expected to include successful:

* 270/271 Medi-Cal Eligibility process and monthly eligibility MMEF Tape file
* Coordination of priority billing of all payor plans
* Production of insurance claims
* Production of a Medicare 837/835, Medi-Cal 837I&P (incl. Coordination of Benefits segment)/835
* Medi-Cal Void and Replace claim process
* CSI and CalOMS reportingFFS Managed Care check writing process (for integrated FFS Managed Care system)
* FFS Managed Care transfer of billed data (for non-integrated FFS Managed Care system (eCura/Incedo))

1. Following the ‘go live’ cutover, Bidder will complete a review of the project to provide information to both Bidder and County as to what worked and what could be improved. Information will be provided for use with the Project and so it can be used for future projects.

**Software Considerations.**

* + 1. Bidder is to provide a detailed breakout of all requisite software modules or related components, including and one-time and/or ongoing licensing costs or associated fees.
    2. The following submissions shall be included in the System prior to System Acceptance at no additional cost to County. The County will be responsible for the cost of incorporating specification changes made after System Acceptance.

|  |  |
| --- | --- |
| Submission Name | Submission Cost |
| Federal Standard 837 P/I Electronic Submission (claim and encounter) (Medi-Cal/Medi-Care) | No charge |
| Federal Standard 835 Electronic Remittance | No charge |
| ANSI 274 | No charge |
| ANSI 277 | No charge |
| Standard CMS 1500 Paper Billing | No charge |
| Standard UB-04 (CMS 1450) Paper | No charge |
| Standard Self Pay Statement | No charge |
| ANSI X 12N Standard 270/271 | No charge |
| ANSI X 12N 5010 format 837P/835 CBO | No charge |
| CSI State Reporting Requirement | No charge |
| CALOMS Reporting Requirement | No charge |

* + 1. For any enhancements made by Bidder as per the County’s request, Bidder must specify if other customers similar to County can benefit from software enhancements and share in the cost of the development and deployment of the solution.
    2. Software provided by Bidder will support all functions and technical requirements as contained in in this Agreement, including as identified in the Detailed Functional Specifications Workbook.
    3. Provide a paperback or electronic version of the data dictionary, fully mapped and contain a list of all the tables, master files, and full specifications for all data elements within each table (format, index, labels, etc.). The data dictionary shall be kept current.
    4. The System shall allow County to add clients and update the information for any individual via an established secure API or web-service.
    5. The System shall allow the County to add custom data fields during implementation on an as needed basis.
    6. Medi-Cal and DCR (Denied Correction Report) Database. Currently the County utilizes a SQL database, developed by in house staff, to manage and monitor the current status of the Medi-Cal 837/835 claiming/payment processes. The new system will include this functionality for the purpose of reconciling 837 claim lines to receipt of 835 and the warrant; as well as allow providers to correct denials via user screens. This functionality can be provided through the use of a module that is fully integrated with the main database. Acceptability of any solution will be determined solely by the County.
    7. Bidder will provide the County with updated, enhanced versions of all Bidder Software products that are purchased or otherwise no cost to County under this Agreement and as needed to efficiently operate the System. Any updates that are needed to efficiently run the System and/or to correct any problems or ‘bugs’ shall be provided at no cost to County through the Warranty and Extended Warranty periods. Updates, corrections, or other software provided by Bidder will be delivered in a downloadable format whenever possible.
    8. Nonconformity and Correction of Software. County agrees to notify Bidder in writing within 180 days of System Acceptance of any Nonconformity affecting such Software, describing in reasonable detail such Nonconformity. If County does not become aware of any Nonconformity until after that time period, it shall have 120 days from the discovery of the Nonconformity to notify Bidder. As used in this Agreement, “Nonconformity” means a reproducible condition in the Software that prevents the Software from performing the functions described in the Product Documentation and the Specifications such that the Software does not operate or cannot be used in a production environment. If County delivers to Bidder a timely notice of Nonconformity and Bidder determines that the items specified in the notice are in fact Nonconformities, Bidder will modify the Software to remove the Nonconformity and will provide the modifications to County for testing. Bidder’s modifications will be made at no additional cost. Upon receipt of corrected Software from Bidder, County will have a reasonable additional period of time, not to exceed ninety (90) days, to review the corrected Software to confirm that the identified and agreed-upon Nonconformities have been corrected. In the event that any Nonconformity persists through three (3) correction cycles as described herein, then Bidder shall refund to County all amounts paid by County with respect to purchased Bidder Software and any affected Services, which shall constitute County’s sole remedy in connection with such Nonconformity and County may terminate this Agreement.

**Equipment/System**

Bidder System will include the following:

* + 1. Database. The System will utilize an industry-standard database. Bidder will provide a seamless integration to a reporting tool, and ideally any report the user creates using that tool can be added into the reports menu within the application (in addition to the standard reports already included with the application). The Bidder shall provide the syntax code underlying all standard reports.
    2. Performance/Operating Environment. If on-premise - as part of implementation, Bidder will provide specific services designed to maximize the performance of the system and establish monitoring systems to ensure smooth operation. Those specific services may include:
       1. Verify System Hardware Specifications;
       2. Review network/telecommunications specifications to include, but not limited to, routers, switches and firewalls;
       3. Install, configure and document Bidder Applications installation;
       4. If required, configure load balanced environment;
       5. Pretest for ‘crash resistance’; and
       6. Set up database maintenance routines.
    3. Reliability/Availability. If on-premise, The System will allow County to utilize Microsoft SQL Server backup utilities to perform incremental log backups while the system is running. The System will not need to be taken offline for maintenance, other than standard updates to SQL Server or Application updates.
    4. Flexibility & Maintainability. The System will include a screen designer tool that allows the user to create custom screens (including the addition of new data fields) to capture information outside of the standard screens within the system. These screens will have the same look and feel as the standard screens so the user experience is the same. In addition, any of the fields and field labels on the screen can be customized by user with Form Designer Tool.
       1. Screen Designer will have the ability to incorporate business rules / validation logic to confirm the appropriateness of the data being entered.
    5. Usability. Users will be able to efficiently access information within a few clicks and information will be presented in an easy to understand format.
    6. Ease of Deployment and Administration. If on-premise, The System will be accessible through a simple web page utilizing Terminal Services or Citrix. If Hosted, the system will be accessible through a standard internet browser.
    7. Scalability. The System shall be scalable, with data servers having the capacity to expand as needed. And if on-premise, utilizing additional Terminal Servers and other Load-Balancing technology as needed by County.
    8. Version Control
       1. If on-premise, the System will include a complete installation program that is wizard driven to make the upgrade process as easy as possible. Use of the wizard for future upgrades will be at County discretion.
       2. Bidder will supply a fully integrated System that provides support for billing and FFS managed care.
    9. The System will provide a seamless movement of data from the EHR or FFS Managed Care to the billing system where all payers can be billed in the order of priority.
    10. The System will be delivered with CSI, CalOMS, OSHPD and Medi-Cal fields identified. Bidder will keep system current with State and Federal requirements (as defined by the current companion / billing guides) throughout the contract at no additional cost to the County.
    11. The System will be designed to support the County’s current business process and will grow and change with the County as the State, Federal, and local funding methods as funding sources change in amount and expectation.
    12. The system will include a mechanism for CBO’s to report payments received from other revenue sources (i.e. Medicare, private insurance, clients, etc.) for ACBH related service activities. CBO’s should have the flexibility to electronically upload remittance files and/or manually enter payments, adjustments or denial information received from other payor sources, with the ability to attach supporting documentation and the ability for the County to review, accept and commit the entries.

**General Terms Related to Bidder System Services**

* + 1. Service Appointments.
       1. If / When on-site or remote services are required, Bidder shall have a method to send a Confirmation of Services to the County.
       2. The County’s will grant service authorization.
       3. Approval of onsite or remote service is not an authorization and approval for additional charges.
       4. Confirmation of Services will be sent upon verbal agreement of dates with County.
       5. The County authorization should be returned within 2 business days or resources and dates may be released.
    2. Support Services
       1. Bidder shall provide telephone support for the System and Bidder Software. Telephone support requests pertaining to California-specific requirements shall be responded to by Bidder staff who have California-specific knowledge. Telephone support services will include assistance related to routine questions regarding use of the products, assistance in identifying and verifying the causes or suspected errors or malfunctions in the products, advice on detours for identified errors or malfunctions, where reasonably available, and advice on the best means for correcting operator error. Telephone support does not include post go-live Implementation or Training services or the development of new programs by County. Bidder will make a good faith effort to respond to County requests for telephone support between the hours of Monday through Friday, and 8:00 a.m. to 6:00 p.m. Pacific Time within two hours, except for Bidder holidays (New Year’s Day, Martin Luther King Day, President’s Day, Memorial Day, Fourth of July, Labor Day, Columbus Day, Veteran’s Day, Thanksgiving Day, Friday following Thanksgiving, Christmas).
       2. Telephone support may not include the ability to respond to any questions arising from:
          1. Modifications to software by persons other than Bidder personnel.
          2. Products not provided under this Agreement.
          3. Correction of operator error.
          4. County operating system, telecommunications and/or hardware products.
          5. Third-party software products Affiliated with the Bidder solution
    3. If on-premise, the County agrees to assume responsibility for installation and maintenance of an Internet connection with a reliable connection speed as identified by Bidder to enable Bidder to access to County’s hardware configuration for purposes of remote support. An email address is also required for the purpose of upgrades and updates.

### 

### EXHIBIT A

**BID RESPONSE PACKET**

**RFP No. HCSA-900520**

To: The County of Alameda

From:

(Official Name of Bidder)

* **AS DESCRIBED IN THE SUBMITTAL OF BIDS SECTION OF THIS RFP, BIDDERS ARE TO SUBMIT ONE (1) ORIGINAL HARDCOPY BID (EXHIBIT A – BID RESPONSE PACKET), INCLUDING ADDITIONAL REQUIRED DOCUMENTATION), WITH ORIGINAL INK SIGNATURES, PLUS FIVE (5) Copies AND ONE (1) ELECTRONIC COPY OF THE BID IN PDF (with OCR preferred)**
* **ALL PAGES OF THE BID RESPONSE PACKET (EXHIBIT A) MUST BE SUBMITTED IN TOTAL WITH ALL REQUIRED DOCUMENTS ATTACHED THERETO; ALL INFORMATION REQUESTED MUST BE SUPPLIED; ANY PAGES OF EXHIBIT A (OR ITEMS THEREIN) NOT APPLICABLE TO THE BIDDER MUST STILL BE SUBMITTED AS PART OF A COMPLETE BID RESPONSE, WITH SUCH PAGES OR ITEMS CLEARLY MARKED “N/A”**
* **BIDDERS SHALL NOT SUBMIT TO THE COUNTY A RE-TYPED, WORD-PROCESSED, OR OTHERWISE RECREATED VERSION OF EXHIBIT A – BID RESPONSE PACKET OR ANY OTHER COUNTY-PROVIDED DOCUMENT**
* **ALL PRICES AND NOTATIONS MUST BE PRINTED IN INK OR TYPEWRITTEN; NO ERASURES ARE PERMITTED; ERRORS MAY BE CROSSED OUT AND CORRECTIONS PRINTED IN INK OR TYPEWRITTEN ADJACENT, AND MUST BE INITIALED IN INK BY PERSON SIGNING BID**
* **BIDDER MUST QUOTE PRICE(S) AS SPECIFIED IN RFP**
* **BIDDERS THAT DO NOT COMPLY WITH THE REQUIREMENTS, AND/OR SUBMIT INCOMPLETE BID PACKAGES, SHALL BE SUBJECT TO DISQUALIFICATION AND THEIR BIDS REJECTED IN TOTAL**
* **IF BIDDERS ARE MAKING ANY CLARIFICATIONS AND/OR AMENDMENTS, OR TAKING EXCEPTION TO POLICIES OR SPECIFICATIONS OF THIS RFP, INCLUDING THOSE TO THE COUNTY SLEB POLICY, THESE MUST BE SUBMITTED IN THE EXCEPTIONS, CLARIFICATIONS, AMENDMENTS SECTION OF THIS EXHIBIT A – BID RESPONSE PACKET IN ORDER FOR THE BID RESPONSE TO BE CONSIDERED COMPLETE**

#### BIDDER INFORMATION AND ACCEPTANCE

1. The undersigned declares that the Bid Documents, including, without limitation, the RFP, Addenda, and Exhibits have been read.
2. The undersigned is authorized, offers, and agrees to furnish the articles and/or services specified in accordance with the Specifications, Terms & Conditions of the Bid Documents of RFP No. HCSA-900520—County Behavioral Healthcare Operations and Revenue Cycle Management System.
3. The undersigned has reviewed the Bid Documents and fully understands the requirements in this Bid including, but not limited to, the requirements under the County Provisions, and that each Bidder who is awarded a contract shall be, in fact, a prime Contractor, not a subcontractor, to County, and agrees that its Bid, if accepted by County, will be the basis for the Bidder to enter into a contract with County in accordance with the intent of the Bid Documents.
4. The undersigned acknowledges receipt and acceptance of all addenda.
5. The undersigned agrees to the following terms, conditions, certifications, and requirements found on the County’s website:

* [**Debarment / Suspension Policy**](http://www.acgov.org/gsa/departments/purchasing/policy/debar.htm)

[<http://www.acgov.org/gsa/departments/purchasing/policy/debar.htm>]

* [**Iran Contracting Act (ICA) of 2010**](http://www.acgov.org/gsa/departments/purchasing/policy/ica.htm)

[<http://www.acgov.org/gsa/departments/purchasing/policy/ica.htm>]

* [**General Environmental Requirements**](http://www.acgov.org/gsa/departments/purchasing/policy/environ.htm)

[<http://www.acgov.org/gsa/departments/purchasing/policy/environ.htm>]

* **Small Local Emerging Business Program**

[<http://acgov.org/auditor/sleb/overview.htm>]

* [**First Source**](http://www.acgov.org/gsa/departments/purchasing/policy/first.htm)

[<http://acgov.org/auditor/sleb/sourceprogram.htm>]

* [**Online Contract Compliance System**](http://www.acgov.org/gsa/departments/purchasing/policy/compliance.htm)

[<http://acgov.org/auditor/sleb/elation.htm>]

* [**General Requirements**](http://www.acgov.org/gsa/departments/purchasing/policy/genreqs.htm)

[<http://www.acgov.org/gsa/departments/purchasing/policy/genreqs.htm>]

* [**Proprietary and Confidential Information**](http://www.acgov.org/gsa/departments/purchasing/policy/proprietary.htm)

[<http://www.acgov.org/gsa/departments/purchasing/policy/proprietary.htm>]

1. The undersigned acknowledges that Bidder will be in good standing in the State of California, with all the necessary licenses, permits, certifications, approvals, and authorizations necessary to perform all obligations in connection with this RFP and associated Bid Documents.
2. It is the responsibility of each Bidder to be familiar with all of the specifications, terms and conditions and, if applicable, the site condition. By the submission of a Bid, the Bidder certifies that if awarded a contract they will make no claim against the County based upon ignorance of conditions or misunderstanding of the specifications.
3. Patent indemnity: Bidders who do business with the County shall hold the County of Alameda, its officers, agents and employees, harmless from liability of an nature or kind, including cost and expenses, for infringement or use of any patent, copyright or other proprietary right, secret process, patented or unpatented invention, article or appliance furnished or used in connection with the contract or purchase order.
4. Insurance certificates are not required at the time of submission. However, by signing Exhibit A – Bid Response Packet, the Bidder agrees to meet the minimum insurance requirements stated in the RFP. This documentation must be provided to the County, prior to award, and shall include an insurance certificate and additional insured certificate, naming the County of Alameda, which meets the minimum insurance requirements, as stated in the RFP.
5. The undersigned acknowledges ***ONE*** of the following (please check only one box):

Bidder is not local to Alameda County and is ineligible for any bid preference; **or**

Bidder is a certified SLEB and is requesting 10% bid preference; (Bidder must check the first box and provide its SLEB Certification Number in the [SLEB PARTNERING INFORMATION SHEET](#SLEBCerta)); **or**

Bidder is LOCAL to Alameda County and is requesting 5% bid preference, and has attached the following documentation to this Exhibit:

* Copy of a verifiable business license, issued by the County of Alameda or a City within the County; and
* Proof of six (6) months business residency, identifying the name of the Bidder and the local address. Utility bills, deed of trusts or lease agreements, etc., are acceptable verification documents to prove residency.

Official Name of Bidder:

Street Address Line 1:

Street Address Line 2:

City: State: Zip Code:

Webpage:

Type of Entity / Organizational Structure (check one):

Corporation  Joint Venture

Limited Liability Partnership  Partnership

Limited Liability Corporation  Non-Profit / Church

Other:

Jurisdiction of Organization Structure:

Date of Organization Structure:

Federal Tax Identification Number:

Primary Contact Information:

Name / Title:

Telephone Number: Fax Number:

E-mail Address:

**Commitment of Bidder to the Following:**

If applicable, Bidder is committed to completing and implementing a billing system that is fully compliant with California Medi-Cal Short-Doyle, Federal CMS, and private insurance billing and claiming regulations, all Federal and State reporting requirements, the requirements specified in this RFP document, in the Detailed Functional Specifications Workbook, and in the California Short Doyle Medi-Cal requirements published with this RFP.

Bidder is committed to working with the County to develop a detailed data conversion and data validation plan as described in [Section T](#_T.__CONTRACT).

Bidder is committed to keeping its system current with California Short Doyle, new SUD waiver billing requirements, and Federal processing rules that evolve over time at no additional cost to the County for the duration of the contract.

**SIGNATURE:**

Name and Title of Signer:

Dated this day of 20

#### BID FORM(S)

Bidder hereby certifies to County that all representations, certifications, and statements made by Bidder, as set forth in this Bid Form and attachments are true and correct and are made under penalty of perjury pursuant to the laws of California.

Bidders shall provide a budget for a total of five years and three-months that incorporates all phases of the project (the initial three (3) month period for the PIPP, the two (2) year Implementation Plan beginning July 1, 2021, and the subsequent three years beginning on July 1, 2023, intended for contract renewal).

The contract amount for the two (2)-year implementation period is $2.8 million, while the amount for the three (3) month PIPP is subject to contract negotiation. It is anticipated that up to $1.0 million per year for three (3) additional one (1) year terms may be available for any contract renewal. The County may consider budgets in excess of this amount if accompanied with appropriate justification - particularly for systems that exceed the County’s specifications and requirements as outlined in this RFP and the Detailed Specification Functional Workbook.

The proposed budget should state all costs, including all licensing and professional service costs, etc. for the proposed solution. A five-year budget is requested by the County, detailing start-up costs, one-time fees and expenses, as well as ongoing costs and recurring fees, on the premise the contract is renewed during each of these periods.

Bidder shall state one-time costs, which are anticipated to include but are not limited to:

* Implementation fees
* Training (if separate from implementation)
* Software / module set up fees
* Any other one-time costs

Bidder shall state ongoing costs, which are anticipated to include but are not limited to:

* Software licenses
* Hosting fees
* Maintenance

Sample template included below IS an EXAMPLE BUDGET. bidders must provide their own comprehensive budget based on a three (3) month PIPP PERIOD, A two (2) year implementation pLAN, and three additional one-year periods.

| **Sample Budget –** | **Y0: Apr 2021 – June 2021** | **Y1: July 2021 – June 2022** | **Y2: July 2022 – JUne 2023** | **Y3: July 2023 – JUne 2024** | **Y4: July 2024 – JUne 2025** | **Y5: July 2026 – JUne 2027** |
| --- | --- | --- | --- | --- | --- | --- |
| **One-Time Fees/Expenses** | | | | | | |
| *Implementation Fees* |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| *Training (if separate from implementation)* |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |
| *Software / module set up fees* |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| *Other One-Time costs* |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **Total One-Time Fees/Expenses** |  |  |  |  |  |  |
| **Ongoing/recurring Fees** | | | | | | |
| *Software licenses* |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |
| *Hosting fees* |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| *Maintenance* |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| *Other ongoing/recurring fees* |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **Total Ongoing Recurring Fees** |  |  |  |  |  |  |
|  | | | | | | |
| **Total Cost Of Bidder’s Proposed Solution** |  |  |  |  |  |  |

#### REQUIRED DOCUMENTATION AND SUBMITTALS

**All of the specific documentation listed below is required to be submitted with the Exhibit A – Bid Response Packet in order for a bid to be deemed complete. For each section below that requires Bidder to include and answer each of the listed questions/prompts in the bid response, Bidders shall duplicate, in order, each question/prompt in their bids in that section of the proposal to ensure completeness of response. Bidders shall submit all documentation, in the order listed below and clearly label each section with the appropriate title (i.e. Table of Contents, Letter of Transmittal, Key Personnel, etc.).**

1. **Table of Contents**: Bid responses shall include a table of contents listing the individual sections of the proposal and their corresponding page numbers. Tabs should separate each of the individual sections.

2. **Letter of Transmittal**: Bid responses shall include a description of Bidder’s history including capabilities and approach in providing its services to the County, and provide a brief synopsis of the highlights of the Proposal and overall benefits of the Proposal to the County. Description should also include a statement of how the Bidder explicitly meets each of the Minimum Bidder Qualifications listed in [Section I.D.](#_DELIVERABLES_/_REPORTS) This synopsis should not exceed three (3) pages in length and should be easily understood.

3. **Exhibit A – Bid Response Packet:** Every Bidder must fill out and submit the complete Exhibit A – Bid Response Packet.

**(a)** **Bidder Information and Acceptance:**

(1) Every Bidder must select one choice under Item 10 of page 41 of the RFP (Exhibit A) and must fill out, submit a signed page 44 of the RFP (Exhibit A).

**(b)** **SLEB Partnering Information Sheet:**

(1) Every Bidder must fill out and submit a signed SLEB Partnering Information Sheet, (found on page 56 of the RFP (Exhibit A) indicating their SLEB certification status. If Bidder is not certified, the name, identification information, and goods/services to be provided by the named CERTIFIED SLEB partner(s) with whom the Bidder will subcontract to meet the County SLEB participation requirement must be stated.  Any CERTIFIED SLEB sub-contactor(s) named, the Exhibit must be signed by the CERTIFIED SLEB(s) according to the instructions. All named SLEB subcontractor(s) must be certified by the time of bid submittal.

**(c)** **References:**

(1) Bidders must use the templates on page 57 of the RFP (Exhibit A – Bid Response Packet) to provide references.

(2) Bidders are to provide a list of at least three (3) references. References must be satisfactory as deemed solely by County. References should have similar scope, volume and requirements to those outlined in these specifications, terms and conditions.

* + Bidders must verify the contact information for all references provided is current and valid.
  + Bidders are strongly encouraged to notify all references that the County may be contacting them to obtain a reference.

(3) The County may contact some or all of the references provided in order to determine Bidder’s performance record on work similar to that described in this request. The County reserves the right to contact references other than those provided in the Response and to use the information gained from them in the evaluation process.

**(d)** **Exceptions, Clarifications, Amendments:**

1. This shall include clarifications, exceptions and amendments, if any, to the RFP and associated Bid Documents, and shall be submitted with your bid response using the template on page 58 of the RFP (Exhibit A – Bid Response Packet).
2. **THE COUNTY IS UNDER NO OBLIGATION TO ACCEPT ANY EXCEPTIONS, AND SUCH EXCEPTIONS MAY BE A BASIS FOR BID DISQUALIFICATION.**

4. **Completion of** **Detailed Functional Specifications Workbook**:

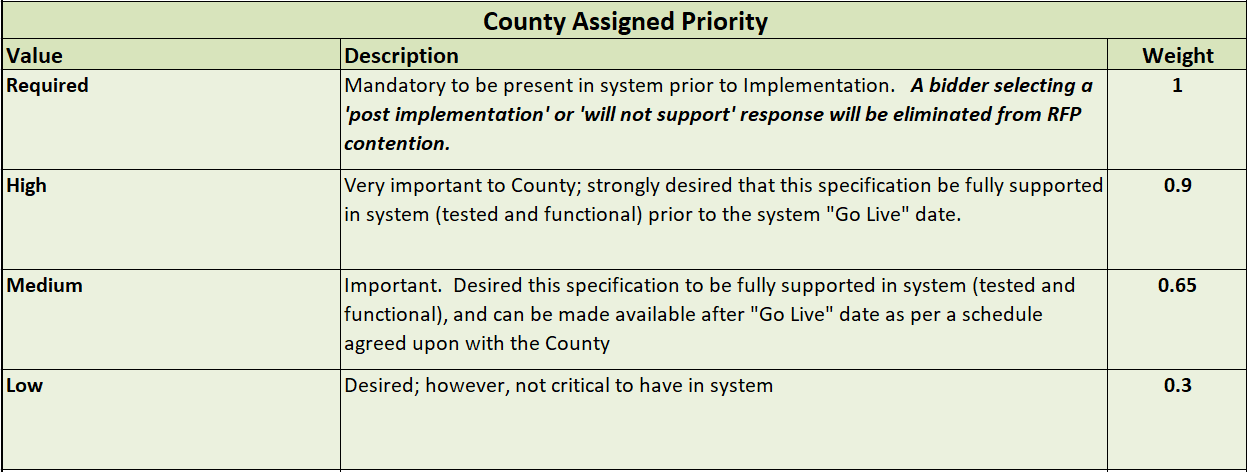
Bidder shall print and include the complete Summary Page of the separate .XLSX workbook that must be completed and returned as part of the Bidder’s RFP response. This Detailed Functional Specifications Workbook (in .XLSX format) can be found on the GSA Contracting Opportunities website alongside this RFP posting.

**Bidder must include the fully completed .XLSX workbook on a flash drive with their physical bid submission.**

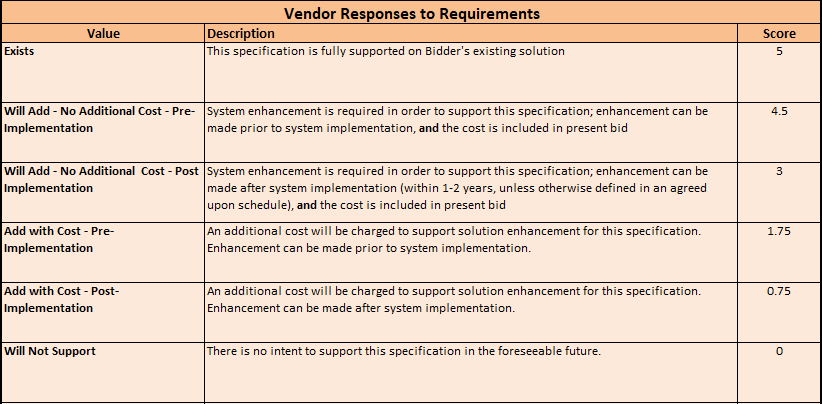
Bidder shall complete and include all of the following workbook tabs:

* General Product and Usability
* Pre-Consumer
* Client Registration
* Benefits and Insurance
* Client Referral
* Appointment Scheduling
* Authorization Management
* Billing/Payment/Adj or Denial Posting
* Claims Administration / FFS Managed Care
* EHR Interoperability
* System Architecture
* Database Specifications
* Reporting Specifications
* Security Specifications
* EDI Specifications
* System Reliability Specifications
* Production Scheduling and Control
* Other Environment Specifications
* System Standards Specifications
* Interface Specifications

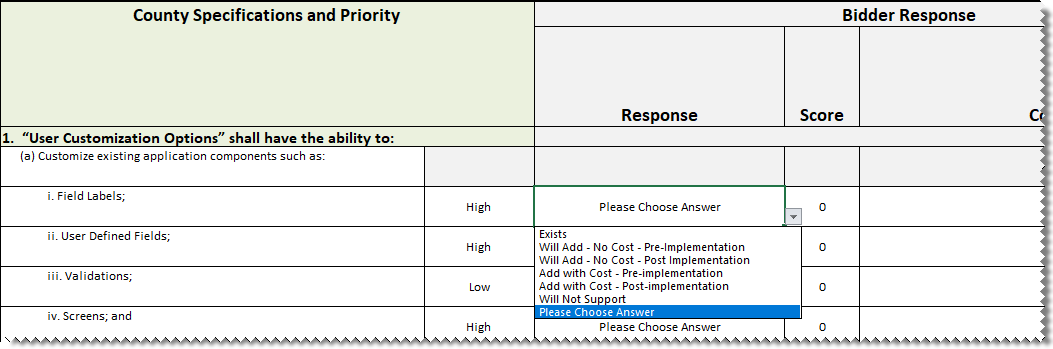
Each tab includes a set of specifications that the County expects to have in the replacement system. Each Specification has been assigned a County priority, as follows:



For each of the Specifications throughout this workbook, the Bidder must provide a response from a drop-down list using one of the following values:



To make a response, simply select an answer from the drop-down list in each Specifications Response column. A score will be calculated.



There is also a column for Bidders to provide a brief comment if needed. Please keep your comments brief. When completed, save the Excel workbook using the following file naming convention for the electronic copy of the file submitted:

*RFP-HCSA-900520 Workbook Response – [Bidder Name].xlsx*

where Bidder Name is the name of your company.

5. **Key Personnel & Staff Profile (2-3 pages)**: Bid responses shall include a complete list of all key personnel associated with this RFP. This list must include the key personnel who will be leads on the project, including the Project Manager, Technical/Product Lead, Account Manager, and any other key roles as identified by the Bidder, as well as a proposed governance structure. Bidder should also include a description of the governance structure between Prime Bidder and Subcontractor, if applicable. For each person on the list, include the following information and attach most recent resume (resumes do not count toward any page limitation):

(a) The person’s relationship with Bidder, including job title and years of employment with Bidder;

(b) The role that the person will play in connection with the RFP;

(c) The person’s experience as it relates to the RFP;

(d) The person’s availability to be local and/or on-site.

Bidder shall include and answer each of the following questions/prompts in the bid response for this section:

1. How many people in total are employed by your company? Delineate between employees and consultants.
2. How many total FTEs does your company have, and how many did it have last year?
3. Where are your companies’ support teams / development teams located?
4. Do any of these teams have access to PHI? Please specify.
5. How many employees staff the Customer Support team for the proposed solution?
6. What percent of the Customer Support staff for the proposed solution have been employed for greater than 12 months?
7. How many employees staff the User Training team for the proposed solution?
8. How many employees staff the Implementation team for the proposed solution?
9. What percent of the Implementation staff for the proposed solution(s) have been employed for greater than 12 months?
10. How many employees staff the Development team for the proposed solution?
11. What percent of the Development staff for the proposed solution employed for greater than 12 months?
12. How many employees staff the Quality Control/Audit (QA) team for the proposed solution?
13. What percent of the QA staff for the proposed solution has employed for greater than 12 months?
14. If your company has offshore staff, how does your company ensure compliance with HIPAA and 42 CFR Part 2?

6. **Relevant Experience (5-6 pages):**

Bidder shall describe what experience, if any, the Bidder has with Short Doyle-compliant systems or billing systems of equivalent or similar scope and complexity. Bidder shall also describe what experience the Bidder has with public or private clients/customers of a similar size and volume as Alameda County. Bidder shall describe what experience, if any, the Bidder has with integrating their systems into complex scenarios in the past of a similar scope and level of complexity to Alameda County.

Bidder shall include and answer each of the following questions/prompts in the bid response for this section:

1. Please describe and name up to three (3) implementations (including scope of implementation) of your solution to public or private customers of a similar size and volume as Alameda County.

7. **Description of the Proposed Solution (4-5 pages)**:

Bidder response shall describe the system it proposes to deliver and implement as requested in this RFP, including:

* + - 1. A high-level description of the proposed services to replace the InSyst and eCura/Incedo systems for ACBH as described in this RFP;
      2. A high-level description of how the proposed system will integrate with and an evaluation of the overall interoperability with the County’s other systems and specifications as described in this RFP;
      3. A clear description of how the Bidder’s proposed solution addresses and/or exceeds the specific, defined needs of the County with respect to the scope of work contained in this RFP. Bidder should describe any innovative, creative, and effective solutions, methods, and/or approaches they wish for the County to consider in addressing system replacement;
      4. An articulated strategy and willingness to engage with the County in a long-term discussion regarding system replacement, maintenance, and improvement; and
      5. An overview plan for collaborating in the work;

Bidder shall also include and answer each of the following questions/prompts in the bid response for this section:

* + - 1. What is your Product name and version #?
      2. When is the next version release?
      3. Does the system support integrated clinical, administrative, billing, medical records, and reporting functions?
      4. Is there a single database for scheduling, billing and clinical functions?
      5. Does the system offer an accounts payable managed care module?
      6. Does the system offer an integrated clinical EHR module? Please describe the included module and basic functionality.
      7. Does the system offer a primary care module?
      8. Does the system include a certified and secure Client Portal?
      9. Does the system include separate training and testing environments?
      10. Does the system provide medication assisted treatment (MAT) functionality?
      11. Is it a client server, ASP or hosted model?
      12. Is the product comprehensive or modular?
      13. If modular, please list all modules available, their current version, and provide additional documents with all technical specifications, requirements, and dependencies for each module to operate fully with the "core" product.
      14. Describe the Technology Stack (i.e data base components). Please provide a technical product architecture diagram.
      15. Is the proposed system certified by ONC? At what level?
      16. If the solution is hosted, where are the data centers located?
      17. Does your company own and manage the data centers? If no, who provides that service?
      18. Who owns the data?
      19. Describe your company’s disaster recovery plans. Describe system availability.
      20. How does the system handle document scanning and simple routing?
      21. The County **strongly** desires a solution that allows its contracted providers to share information electronically; in other words, a contracted provider should not be required to have to manually enter client data if they are using their own alternate EHR / Financial Management product. Please describe the methods in which data can be imported into the system.
      22. Confirm ability to accept an 837-encounter reporting transaction from an external system and provide an error report of exceptions.
          1. Includes replacement and voided claims
      23. Confirm ability to return an 835 transaction to a third-party system.
      24. Ability to define and import additional data elements from third party systems (Contracted providers, in particular). Includes, but is not limited to:
          1. Service and encounter data
          2. Clinical Data
          3. Documents / Images
          4. Other data, as deemed necessary by county.
      25. Describe the ability to create data extracts in standard file formats that can be securely sent to a contracted provider / external system for processing.
      26. Describe your company’s approach for managing the segmentation of MH, FFS managed care and SUD data
      27. What is your company’s approach to assisting agencies achieve certification (Joint Commission, CARF, etc.) through use of the software?
      28. How does the system manage staff credentials? Are there alerts for licensing due dates?
      29. What is your company’s approach to converting data from legacy system(s) to the system?
      30. Please confirm the ability to create reports from any data entered into system.
      31. Describe any incorporated report writing module
      32. Please provide screen shots of the following screens in the system:
          1. Login Home Page
          2. Operations / Billing Staff View
          3. System Administrator Staff View
      33. Please provide a copy of your company’s service level agreement documentation.
      34. Does your company have any active plans to merge or be acquired in the next 3-5 years?
      35. How does your company support state or other regulatory changes?
      36. Like many States, the regulatory requirement for processing and reporting health care data continue to evolve. How will your company support ACBH manage such change over time? At what cost?

8. **List of Contracts (2-3 pages)**:

Bidder shall include and answer each of the following questions/prompts in the bid response for this section:

1. How many Live Clients (Sites) does your company have?
2. How many installations in last 3 years?
3. How many Solutions installed in California?
4. How many organizations have de-installed system(s) in last two years, and why?
5. How many organizations have not renewed a contract with your company in the past two years?

Bidder must also list all entities for which the Bidder has held contracts for at least the last three (3) years specific to experience required and described in this RFP. For each contract listed, Bidders must include the following information for items (a) through (h) in order for the List of Contracts to be considered complete:

Client Name

Client Address

Client Contact Person (Name, Telephone, e-mail)

Name of Contract

Contract Period

Dollar Amount

Type of Service Provided (brief description)

9. **Implementation Plan & Schedule (2-4 pages)**: Bidder shall clearly describe their plan and schedule for completion of the scope of work and reporting on the deliverables requested in this RFP. Bidder shall review Section T – Contract Expectations, Implementation Project sections, as well as responses to the Detailed Functional Specifications Workbook for consideration in developing their Implementation Plan and Schedule response.

The Bidder shall consider the implementation start date to be July 1, 2021, and describe its timeline, deliverable, and reporting plans for pre- and post-implementation activities over an 18-24 month period. It will be the responsibility of the selected Bidder to document when each milestone has been delivered in the Project Plan.

Bidder shall also include and answer each of the following questions/prompts in the bid response for this section:

1. How does your company approach system implementations?
2. Describe any training and assistance that accompanies the product:
   * 1. For System Administrators during design phase
     2. For Users during implementation phase
3. Does your company offer a demonstration Sandbox environment for the software so that potential customers can get hands on experience during the demonstration?
4. Does your company have documented/published best practice workflows for using the software?
5. What other types of documentation are provided to assist in learning the software?
6. How often will a support person(s) be available once the system goes “LIVE” in case of any system difficulty?

10. **Budget Table and Narrative (2-3 pages)**:

The proposed budget table, or [Bid Form](#Text46), should state costs, including both one-time costs and ongoing fees, staffing, indirect costs, etc. for the proposed services requested in this RFP. Budgets should include a narrative description to aid the reader in evaluating the budget. The Budget narrative should include and answer each of the following questions/prompts in the bid response for this section:

1. How does your company license its software? At what cost?
2. About how much will on-going maintenance and upgrades cost on a monthly or annual basis?
3. How are the licenses issued? Concurrent user versus named User?
4. How many staff are required to maintain the system (FTEs)?
5. What is the estimated annual cost beyond June 2023, assuming three additional years of product support?
6. What is the estimated cost of providing all enhancements that your organization marked as “Add with Cost”?
7. Is there a charge to copy, move or retrieve patient data from the product?
8. What is the estimated cost of integration with the Clinicians Gateway EHR system?
9. What is the estimated cost of integration with eCura/Incedo (if the proposed solution does not include its own Managed Care offering)
10. What, if any, changes to fees/costs/rates are planned?

Bidder shall denote any one-time costs, which are anticipated to include but not be limited to:

* Implementation fees
* Training (if separate from implementation)
* Software / module set up fees
* Any other one-time costs
* Close out/transition fees

Bidder shall denote any ongoing costs, which are anticipated to include but not be limited to:

* Software licenses
* Hosting fees

Maintenance

**Any items proposed that exceed the $2.8 million implementation budget amount must be accompanied by appropriate justification and explanation.**

**SMALL LOCAL EMERGING BUSINESS (SLEB)**

PARTNERING INFORMATION SHEET

**RFP No. HCSA-900520**

**In order to meet the Small Local Emerging Business (SLEB) requirements of this RFP**, **all bidders must complete this form as required below.**

**Bidders not meeting the** [**definition of a SLEB**](http://acgov.org/auditor/sleb/overview.htm) **(**[**http://acgov.org/auditor/sleb/overview.htm**](http://acgov.org/auditor/sleb/overview.htm)**) are required to subcontract with a SLEB for at least twenty percent (20%) of the total estimated bid amount in order to be considered for contract award. SLEB subcontractors must be independently owned and operated from the prime Contractor with no employees of either entity working for the other. This form must be submitted for each business that bidders will work with, as evidence of a firm contractual commitment to meeting the SLEB participation goal. (Copy this form as needed.)**

**Bidders are encouraged to form a partnership with a SLEB that can participate directly with this contract. One of the benefits of the partnership will be economic, but this partnership will also assist the SLEB to grow and build the capacity to eventually bid as a prime on their own.**

**Once a contract has been awarded, bidders will not be able to substitute named subcontractors without prior written approval from the Auditor-Controller, Office of Contract Compliance & Reporting (OCCR).**

**County departments and the OCCR will use the web-based Elation Systems to monitor contract compliance with the SLEB program** **(Elation Systems:** [**http://www.elationsys.com/elationsys/**](http://www.elationsys.com/elationsys/)**).**

|  |
| --- |
| **BIDDER IS A CERTIFIED SLEB (sign at bottom of page)**  **SLEB BIDDER Business Name:**  **SLEB Certification #: SLEB Certification Expiration Date:**  **NAICS Codes Included in Certification:** |

|  |
| --- |
| **BIDDER IS NOT A CERTIFIED SLEB and will subcontract      % with the SLEB named below for the following goods/services:**  **SLEB Subcontractor Business Name:**  **SLEB Certification #:       SLEB Certification Expiration Date:**  **SLEB Certification Status:  Small /  Emerging**  **NAICS Codes Included in Certification:**  **SLEB Subcontractor Principal Name:**  **SLEB Subcontractor Principal** **Signature: Date:** |

**Upon award, prime Contractor and** **all SLEB subcontractors** that receive contracts as a result of this bid process agree to register and use the secure web-based ELATION SYSTEMS. ELATION SYSTEMS will be used to submit SLEB subcontractor participation including, but not limited to, subcontractor contract amounts, payments made, and confirmation of payments received.

Bidder Printed Name/Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Street Address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State:\_\_\_\_\_\_\_\_\_\_ Zip Code:\_\_\_\_\_\_\_\_\_

Bidder Signature: Date:

#### REFERENCES

**RFP No. HCSA-900520**

Bidder Name:

|  |  |
| --- | --- |
| Company Name: | Contact Person: |
| Address: | Telephone Number: |
| City, State, Zip: | E-mail Address: |
| Services Provided / Date(s) of Service: | |

|  |  |
| --- | --- |
| Company Name: | Contact Person: |
| Address: | Telephone Number: |
| City, State, Zip: | E-mail Address: |
| Services Provided / Date(s) of Service: | |

|  |  |
| --- | --- |
| Company Name: | Contact Person: |
| Address: | Telephone Number: |
| City, State, Zip: | E-mail Address: |
| Services Provided / Date(s) of Service: | |

|  |  |
| --- | --- |
| Company Name: | Contact Person: |
| Address: | Telephone Number: |
| City, State, Zip: | E-mail Address: |
| Services Provided / Date(s) of Service: | |

|  |  |
| --- | --- |
| Company Name: | Contact Person: |
| Address: | Telephone Number: |
| City, State, Zip: | E-mail Address: |
| Services Provided / Date(s) of Service: | |

#### EXCEPTIONS, CLARIFICATIONS, AMENDMENTS

**RFP No. HCSA-900520**

Bidder Name:

List below requests for clarifications, exceptions and amendments, if any, to the RFP and associated Bid Documents, and submit with your bid response.

The County is under no obligation to accept any exceptions and such exceptions may be a basis for bid disqualification.

|  |  |  |  |
| --- | --- | --- | --- |
| **Reference to:** | | | **Description** |
| Page No. | Section | Item No. |  |
| EXAMPLE |  |  |  |
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\*Print additional pages as necessary

### EXHIBIT B

**INSURANCE REQUIREMENTS**

Insurance certificates are not required at the time of submission; however, by signing Exhibit A – Bid Packet, the Bidder agrees to meet the minimum insurance requirements stated in the RFP, prior to award. This documentation must be provided to the County, prior to award, and shall include an insurance certificate and additional insured certificate, naming the County of Alameda, which meets the minimum insurance requirements, as stated in this Exhibit B – Insurance Requirements.

The following page contains the minimum insurance limits, required by the County of Alameda, to be held by the Contractor performing on this RFP:

\*\*\* see next page for county of alameda minimum insurance requirements \*\*\*



1. This file is located at the GSA Contracting Opportunities website alongside this RFP posting. [↑](#footnote-ref-1)