

Request for Proposals

**Barron County
DHHS EHR Software
(Electronic Health Records)**

1. Important Information

- 1.1. Request for Proposal Title: DHHS EHR Software RFP
- 1.2. RFP Issuing Office: Barron County Technology Department
- 1.3. RFP Issue Date: July 8th 2024
- 1.4. Deadline for Receipt of Questions: September 10th 2024
- 1.5. RFP Proposal Receipt Deadline: September 20th 2024
- 1.6. RFP Submission Email: dhhsrfp@co.barron.wi.us
- 1.7. RFP Administrator: Lance Peterson
- 1.8. Intend to Award Notification (Estimated): October 31st, 2024 All Proposers will be notified of email decision via email.
- 1.9. Service Started Date (Estimated): January 1st, 2025
- 1.10. Barron County reserves the right to change the timeline with notification to the vendors according to our needs.

2. Introduction

- 2.1. Barron County is seeking proposals from qualified vendors for the implementation of a new Electronic Health Records (EHR) system. Currently, Barron County uses an in-house developed system (eInfosys) that integrates with our finance system. We are looking for the most complete system to handle all of our DHHS and Finance tasks.

3. General Terms and Conditions

- 3.1. Primary Responsibility:
The selected Contractor(s) will be required to assume full responsibility for all services and activities offered in the proposal. Further, the County will consider the selected Contractor(s) to be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the contract.
- 3.2. Any item not specifically mentioned but necessary for the delivery and operation of the proposed system shall be included in this proposal. These specifications and requirements should be in sufficient detail to secure proposals on comparable services.

The requirements listed herein should be met by all proposals submitted. In instances where the proposal differs from these requirements, such proposal shall note the difference and describe in detail how their proposal will meet the County's need without including this specific requirement. Failure to meet these requirements may be cause for rejection of the vendor's proposal at the County's discretion.

- 3.3. Assurance:
Any contract awarded under this RFP must be carried out in full compliance with Title VI and VII of the Civil Rights Act of 1964, as amended, and Section 504 of the Rehabilitation Act of 1973, as amended. The Provider must guarantee that services provided will be performed in compliance with all applicable Federal, State and Local laws and regulations pertinent to this project. Prior to executing an agreement the Provider will be required to provide evidence substantiating the necessary skill to perform the duties through the submission of references.
- 3.4. Independent Contractor:
In performance of the work, duties and obligations assumed by the vendor, it is mutually understood and agreed that the vendor, including any and all of the vendor's officers, agents and employees, will at all times be acting and performing in an independent capacity and not as an officer, agent, servant, employee, joint venture, partner or associate of the County.
- 3.5. Barron County prohibits discrimination in employment or in the provision of services because of race, color, religion, religious creed, sex, age, marital status, ancestry, national origin, political affiliation, physical disability, or medical condition. This clause does not require the hiring of unqualified persons.
- 3.6. The County reserves the right to reject any and all proposals, to negotiate specific terms, conditions, compensation, and provisions on any contracts that may arise from this solicitation; to waive any informalities or irregularities in the proposals, and to accept the proposal(s) that appear(s) to be in the best interest of the County. In determining and evaluating the proposals, cost and commissions will not necessarily be controlling; the experience of those who will be providing services under the contract, quality, equality, efficiency, utility, suitability of the services offered, and the reputation of applicants will be considered, along with other relevant factors.
- 3.7. Barron County reserves the right to:
- 3.7.1. Request clarification of any submitted information;
 - 3.7.2. Not enter into any agreement.
- 3.8. Portions of this RFP and the vendor's proposal may be made part of any resultant contract and incorporated in the contract.
- 4. Qualifications of the Vendor** To be considered for the award of this contract, the vendor must meet the following minimum qualifications:

- 4.1. The vendor must have the ability for contract start-up by January 1st 2025 or agreed upon date.
- 4.2. The vendor must have the central office capability to supervise and monitor the program ensuring satisfactory provision of services including HIPAA compliance.

5. Questions

- 5.1. Proposers may submit questions and requests for clarification regarding this RFP
- 5.2. Questions may be submitted via email only outside of the two virtual meetings, citing the RFP page and section, and shall be submitted via email to dhhsrfp@co.barron.wi.us and the RFP Administrator will respond.
- 5.3. All questions will be answered in a Google Document with answers directly below the question in bold. [The link to the document, which will be updated in real time, is linked here.](#)
https://docs.google.com/document/d/16a0J9qwC2GNww4-rnIUSTHBXKJP6dVpXD1CeDiTKz_Q/edit?usp=sharing
- 5.4. The county is not responsible for email messages that are not delivered or are delayed. It is the sole responsibility of the proposer to ensure the delivery of email messages
- 5.5. Deadline to submit questions regarding this RFP: September 10th. After that time, no further questions will be accepted.
- 5.6. Questions sent to anyone other than the RFP email address listed above will not be considered.
- 5.7. There will be two virtual meetings, using Google Meet, to answer questions in person in addition to being able to ask questions via email. Virtual meetings will have various stakeholders representing Barron County, including IT Director, DHHS Director, the DHHS Financial Analyst, and other key stakeholders.
 - 5.7.1. The first virtual meeting will be July 23rd, 2024 at 10:30 AM. Using this link: meet.google.com/neb-zojj-zki To best allow us to have answers to questions, if your questions are known prior please email the RFP Email Address prior to indicating the question is for this meeting.
 - 5.7.2. The second virtual meeting will be September 10th, 2024 at 10:30 AM. Using this link: meet.google.com/yru-gdcr-guo To best allow us to have answers to questions, if your questions are known prior please email the RFP Email Address prior to indicating the question is for this meeting.

5.7.3. These two meetings will be recorded via Google Meet's recording feature.

5.7.4. If there are questions unable to be answered during the virtual meeting they will be posted on the Google Document of Questions and Answers after the meeting.

5.8. If a question is asked via email it will be responded to in an email, other than those specified prior to the virtual meetings.

6. Contract Term:

The Contract/Agreement shall be effective from January 1st, 2025 (or agreed upon date) for approximately three (3) years, terminating on December 31st of 2027. At the expiration of this contract, the County will have the option of continuing the services covered by the contracted entity. Each optional renewal will require the County's approval.

7. General Technical Requirements

7.1. Barron County is replacing a home-developed system for the following modules. More detailed explanations on modules are in Attachment 1 at the end of the RFP. It would be preferred if the location of the service is customizable. To reiterate these are what we have, there are other items listed in 7.2 that Barron County is looking for.

- 7.1.1. Intake
- 7.1.2. Client Management
- 7.1.3. Case Noting
- 7.1.4. Contract Management
- 7.1.5. Accounting
- 7.1.6. Time Reporting
- 7.1.7. Administrative Functions

7.2. Other items Barron County would like implemented that are not in our current system.

- 7.2.1. Document repository that links to information in multiple modules (Client File Management)
- 7.2.2. Recovery plans
- 7.2.3. Service Plans
- 7.2.4. Additional Time Reporting
 - 7.2.4.1. Track Face to Face Time
- 7.2.5. Template Module
 - 7.2.5.1. Ability to edit templates

- 7.2.6. Allow workers access to the contract units left and the total for the contract
- 7.2.7. Ability to electronically sign documents
- 7.3. If any of these modules cannot be implemented into the system proposed, please include an explanation of which modules your proposed system cannot do.
- 7.4. The system must be HIPAA compliant using the latest HIPAA Standards
- 7.5. The system must be able to use multi-factor authentication
- 7.6. The system must be able to utilize current PCs that are available in the County without the need for additional PCs.
- 7.7. The equipment and/or system shall be scalable to meet the County's growing needs.
- 7.8. The vendor shall respond to all major service outages within two hours. A major outage is defined as 30% or more of the functionality of the system.
 - 7.8.1. Detail the method of determining service interruptions and service call priorities. List the response time for each priority and the level of expertise devoted to each priority.
- 7.9. The system must be able to integrate with other systems. Including being able to access the database, via VPN, a replicated database, or some other technology.
 - 7.9.1. Including integration with our finance system, which is currently Alio/Linq
 - 7.9.1.1. Be able to export files for import
 - 7.9.1.1.1. Journal Entries,
 - 7.9.1.1.2. Cash Receipts,
 - 7.9.1.1.3. Payment Vouchers
 - 7.9.2. Describe or show during demo the process on how billing from EWISACSWIS integrates with the system.
 - 7.9.3. Including potential integration with our document management system, which is currently Laserfiche, if the proposed system is not capable.

7.10. The system should be able to create custom reports as users need them and contain a variety of information to suit the County's needs.

7.10.1. Reports should be able to be exported in Excel, PDF, and CSV file formats

7.10.2. The vendor shall attach some reports as examples

7.10.3. Give examples of a list of reports that are possible with the system

7.10.4. Examples of expected reports are:

7.10.4.1. Options for Ad-Hoc Reporting

7.10.4.2. Basic Demographic Reports

7.10.4.3. Service Date with funding source by vendor

7.10.4.4. Case Worker Productivity Report and be able to schedule

7.10.4.5. Report for F20942 to State

7.10.4.6. AODA report for Staff Time

7.10.4.7. Vendor Report to show spending per Vendor per SPC

7.10.4.8. Cost per SPC per placement

7.10.4.9. For WIMCR, cost per case manager per program

7.10.4.10. For WIMCR, CCS Provider report with Units and cost. Would like Degree and hours billable and non-billable to be included.

7.10.4.11. Long Term Support report Program Cost by age

7.10.4.12. Ability to see if case note is not closed, by employee

7.10.4.13. Report for Third Party Administrator showing cost for provider totals

7.10.4.14. CCOP report for State showing cost by client per SPC

7.10.4.15. Coordinated Service Team (CST) Employee Hours, if salary and fringe can be shown this is a plus.

7.11. The system must provide different levels of functionality to staff users based on user type. For example:

7.11.1. Administrators: create/manage/edit – Assign permissions to users/user groups, manage all records

7.11.2. Users: Create and manage individual records

7.11.3. Read Only: For using data and integrating with other systems

8. General Requirements for a Hosted System

8.1. Describe in detail the disaster recovery plan for the system.

8.1.1. Including Backup and recovery strategy, including days data is backed up.

8.2. Must be web-based and able to use standard browsers such as: Google Chrome and Microsoft Edge.

8.2.1. Please include a list of supported browsers or apps.

9. Installation and Migration

9.1. The vendor shall provide initial installation training to the County Staff in system administration, operation, and reporting.

9.1.1. Training should be able to be provided in a virtual classroom or meeting format

9.1.2. Describe any ongoing training programs that are offered

9.2. The vendor shall submit a complete and detailed schedule of the time frame required for installation, utility coordination, training, cut, and testing. The system must be installed in an expert manner and under a time frame designed to minimize disruption of the normal functioning of the County.

9.3. Detail how data can be moved from the current system to the new system.

10. Other Considerations

10.1. If there are other modules that your software has that may be of use for Barron County, please create an additional document with costs for those, not included in the proposal for modules listed in Section 7.1 above. These can be more than listed in sections 7.1 and 7.2.

10.2. Describe in detail information regarding warranty, and future maintenance of all elements contained in the RFP including costs. Also any other fees outside of maintenance agreement costs, including cost for reports.

11. Accounting Procedures

11.1. The accounting procedures and internal financial controls of the Vendor shall conform to generally accepted accounting practices (GAAP) in order that the costs allowed by this request can be readily ascertained and expenditures verified.

12. Reservation of Rights

12.1. Barron County reserves the right to reject any and all proposals, to award the agreement to other than the low proposal, to award separate agreements for separate parts of the services required, to negotiate the terms and conditions of all and any part of the proposals, to waive irregularities and or formalities, and in general to make award in the manner as determined to be in the best interest and at the sole discretion of the County.

13. Responsive Proposals

- 13.1. Companies are expected to examine the RFP requirements and all instructions. Failure to do so will be at the company's risk. Each company shall furnish all information requested herein. The person signing the proposal must initial all erasures or other changes. If any person contemplating submitting a proposal is in doubt of the true meaning of any part of the specifications of other conditions with the RFP, they are advised to have the portions in question clarified.

14. Changes to Proposal Documents

- 14.1. Each change or addendum issued in relation to the RFP will be on file in the Technology Office. In addition, to the extent possible, copies will be mailed or emailed to each person registered as having received an RFP. It shall be the contractor's responsibility to make inquiry as to the changes or addenda issued. All such changed or addenda issued, shall become part of the contract and all vendors shall be bound by such changes or addenda.

15. Taxes, Terms and Conditions

- 15.1. Section 258 of the law amends Sec. 77.54 (9a) of the Statutes which exempts the state and local units of government from payment of the state sales tax on goods and services purchased. We are informed by the Department of Revenue that no exemption certificates are required from governmental units and no exempt status numbers are issued to governmental units. All local units of government should notify vendors that they are exempt from payment of the tax by statute, and that notes to that effect on vendor invoices will satisfy Department of Revenue auditors should the vendor be audited.
- Barron County is exempt from Federal Excise and State Sales Tax. The County's tax numbers are: Fed ID #39-6005668. Payment terms are Net 30 upon receipt and acceptance.

16. Method of Award

- 16.1. The award will be made to the vendor whose proposal is determined to be professionally and technically complete. The selection process may, however, include a request for additional information or an oral presentation to support the written proposal. The price proposal will be considered firm and cannot be altered after receipt per the terms of this proposal.

The County reserves the right to award this contract not necessarily to the vendor with the lowest price, but to the vendor that demonstrates the best ability to fulfill the requirements of the RFP. The successful vendor will be chosen based on the qualifications and selection criteria discussed later in this proposal in Section 21.

The successful vendor shall commence work only after the transmittal of a fully executed contract and after receiving written notification to proceed from Barron County. The successful vendor will perform all services indicated in the proposal in compliance with the negotiated contract. All proposals will be reviewed and recommendations for a selection will be made to Barron County's DHHS Software RFP Team.

Barron County reserves the right to reject any and all proposals for any reason in whole or in part received in response to this RFP. Barron County will not pay for any information herein requested, nor is it liable for any cost incurred by the proposer.

Vendors whose proposals do not meet the mandatory requirements will be considered non-compliant. After the evaluation of the proposals and selection of the successful vendor, all vendors will be notified of the selected firm.

17. Withdrawal of Proposal

- 17.1. Proposals may be withdrawn in person by a vendor, or authorized representative, provided their identity is made known and a receipt is signed for the proposal, but **only** if the withdrawal is made prior to the stated proposal deadline. No proposal may be withdrawn for at least 90 days after opening. The successful company proposal and prices shall remain firm for the entire contract period

18. Indemnification and Hold Harmless:

- 18.1. The Contractor whose proposal is accepted must agree to the following indemnification and hold harmless responsibilities:

The Contractor shall indemnify and hold harmless the County and its employees, agents, officers, and elected officials from any and all claims, damages, losses or expenses, including attorneys fees, which the County and its employees, agents, officers, and elected officials suffer or for which they may be held liable, arising out of or resulting from the assertion against them of any claims, debts, or obligations, in consequence of the performances of this proposal (and subsequent contract) by the Contractor and its employees, agents, officers, which are the result of the negligence, error or omission of the Contractor and its employees, agents or officers.

19. Equal Employment Opportunity:

- 19.1. The Contractor and its subcontractors, as required by law, shall not discriminate against the employee or applicant for employment with the respect to hire, tenure, terms, conditions or privileges of employment, or a matter that directly relates to employment, because of race, color, religion, national origin, age, sex, disability, that is unrelated to the individual's ability to perform the duties of a

particular job or position, height, weight, or marital status. Breach of this covenant may be regarded as a material breach of the Contract.

The Contractor agrees to post notices containing this policy against discrimination in conspicuous places available to applicants for employment and employees. All solicitation or advertisements for employees, place by or on the behalf of the Contract, will state that all qualified applicants will receive consideration for employment without regard to race, color, sex, national origin, disability, age, height, weight, marital status and religion.

20. Insurance Requirements

- 20.1. The successful vendor shall procure and maintain during the term of the contract Commercial General Liability Insurance on an "Occurrence basis" with limits of liability of not less than \$1,000,000 per occurrence, \$1,000,000 aggregate. Vendor shall carry Worker's Compensation and Employer's Liability Insurance Coverage as required by law.
- 20.2. The successful vendor agrees to list Barron County as an additional insured on all required policies and shall submit certificates of insurance to Barron County certifying that the vendor has obtained the minimum coverage limits as required herein. If the above coverage expires during the term of the Agreement, vendor's insurer shall deliver renewal certification and/or policies to Barron County at least thirty (30) days prior to expiration.

21. Selection Criteria

- 21.1. Pricing
- 21.2. Amount of Replacement Modules contained
- 21.3. Completeness of the Proposal
- 21.4. Ability to match the timeline of Barron County with the vendor
- 21.5. Amount of other relevant modules that could be added
- 21.6. Support Responsiveness

22. Proposal Package

- 22.1. Vendors must submit a response in the form of a proposal which includes the following sections:

- 22.1.1. Cover Letter
- 22.1.2. Executive Summary to the RFP
- 22.1.3. Technical Proposal
- 22.1.4. Pricing Page
- 22.1.5. All current customers in the state of Wisconsin
- 22.1.6. List of users outside of WI
- 22.1.7. Ability to schedule a demo of the solution showing us the features submitted in the RFP and the ability to show us additional features of the solution.

23. Proposal Acceptance, Rejection, cancellation, and withdrawal

- 23.1. Each proposal is submitted with the understanding that it is subject to negotiation at the option of Barron County. However, Barron County reserves the right to make an award on the basis of the original proposal, without negotiation with any proposer.
- 23.2. The proposal shall be firm for acceptance for ninety (90) days from the date of the proposal.
- 23.3. Barron County reserves the right to negotiate with the proposer(s) within the scope of the RFP in the best interests of Barron County. Barron County reserves the right to accept or reject any and all proposals submitted or cancel this RFP in whole or in part if such cancellation is in the best interest of Barron County. Prior to the date and time set forth as the Proposal Receipt Deadline, proposals may not be modified or withdrawn without the consent of Barron County.
- 23.4. Gratuities and Kickbacks. It shall be unethical for any person to offer, give, or agree to give any elected official, employee or former employee to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer for employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or a purchase request, influencing the contents of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceedings or application, request for ruling, determination, claim or controversy, or other particular matter, pertaining to any program requirement or a contract or subcontract, or to any solicitation or proposal therefore.

ATTACHMENT 1

eInfosys Modules

1. Client Management

- a. Entry and management of clients.
 - i. Client Demographics
 - ii. Client Aliases
 - iii. Client Associates
 - iv. Client Drug Usage History
 - v. View Client Intake History
 - vi. View Client Case History
 - vii. View Accounting Transactions
- b. Client Case Information
 - i. Diagnosis Codes
 - ii. Provider Management
 1. Case Manager - Single case manager per case.
 2. Service Providers - One or more service providers per case.
 - iii. Services - Open and close service strips (Costs are reported using the Wisconsin Department of Health Services GEARS or Grant Enrollment, Application and Reporting System (formerly CARS), Department of Children and Families System SPARK)
 1. Program Funding (CARS)
 2. Object - Provided or Purchased Service
 3. SPC - Service Program Category - 60301-Assessment, 60302-Case Planning, 60400-Case Mgmt/Service Coordination, 51000-CCS, 50900-CSP, etc.
 4. Target Population - 01-Developmentally Disabled, 03-Birth to Three, 18-AODA, 31-Mental Health, etc.
 5. Service Start/End
 - iv. View Contracts for Client/Case
 1. Vendor
 2. Program Funding (CARS)/SPC - Service Program Funding
 3. HIPAA Service Code
 4. Contract Start/End
 5. Unit Type/Rate/Quantity
 - v. Scheduled Events
 1. Overview
 - a. Type - Task or Reminder
 - b. Event - Crisis Plan Due, Review Due, Billing Release of Information Expires, etc.

- c. Due Date
 - d. Worker
 - e. Date Completed (Task Only)
2. Current Events
 3. Event History

2. Case Noting Modules

- a. Targeted Case Management (CM)
 - i. Date of Service
 - ii. Contact Type
 - iii. Place of Service
 - iv. Time - Hours/Minutes
 - v. Service (SPC/Funding Source)
 - vi. Medicaid Billable
 - vii. Visit Note
 - viii. Electronic Signature
- b. Community Support Program (CSP) Services
 - i. Date of Service
 - ii. Contact Type
 - iii. MA Procedure Code**
 - iv. Time - Hours/Minutes
 - v. Service (SPC/Funding Source)
 - vi. Place of Service
 - vii. Medicaid Billable
 - viii. Visit Note
 - ix. Electronic Signature
- c. Comprehensive Community Services (CCS)
 - i. Date of Service
 - ii. Contact Type
 - iii. MA Procedure Code**
 - iv. Time - Hours/Minutes
 - v. Service (SPC/Funding Source)
 - vi. Place of Service
 - vii. Medicaid Billable
 - viii. Mileage**
 - ix. Visit Note
 - x. Electronic Signature

3. Contract Management - Purchased Service Contracts

- a. Service Authorization
 - i. Services provided by contracted vendors that are paid by Barron County.
 - ii. County Waiver Agency (CWA) Children's Long Term Support (CLTS) authorized services provided by contracted vendors that are paid by third party

administrator Wisconsin Physician Service (WPS) (Transitioning to Gainwell/ForwardHealth in 2025).

- b. Contract
 - i. Vendor
 - ii. Contract Amount
 - iii. Contract Group
 - 1. Adult Family Home
 - 2. AODA Detox Services
 - 3. Birth to 3
 - 4. Case Management
 - 5. Child Care Institution
 - 6. Community Based Residential Facility
 - 7. Consulting Services
 - 8. Counseling & Therapy Services
 - 9. CSP Case Management
 - 10. Daily Living Skills
 - 11. Group Home
 - 12. Interpreter Services
 - 13. Mental Health Inpatient Services
 - 14. Mentoring Services
 - 15. Psychiatrist Services
 - 16. Respite Care
 - 17. Supportive Home Care
 - 18. Terminating Parental Rights/Legal Serv
 - 19. Treatment Foster Care
 - 20. Vocational Services
 - 21. Etc.
 - c. Contract Parts
 - i. Client
 - ii. HIPAA Service Code
 - iii. Contract Start/End
 - iv. Unit Type/Rate/Quantity/Amount
4. **Accounting**
- a. Cash Receipting - eInfosys entry and export/import into Alio
 - b. Payments - eInfosys entry and export/import into Alio
 - i. Purchased Service Contracts
 - ii. Wisconsin's Statewide Automated Child Welfare Information System (eWiSACWIS)
 - 1. Download/Import Payment Vouchers
 - 2. Export/Upload Check Numbers
 - c. AJE (Adjusting Journal Entries) - eInfosys entry and export/import into Alio
 - d. Billing

- i. Medicaid Billing
 - 1. EDI Trading Partner with ForwardHealth
 - a. CM - Targeted Case Management
 - b. CSP - Community Support Program
 - c. CCS - Comprehensive Community Services
 - 2. Paper and/or ForwardHealth Portal Claim Submission
 - a. AODA Services
 - b. Crisis Intervention Services
- ii. Wisconsin Physician Service (WPS) - Transitioning to Gainwell/ForwardHealth in 2025
 - 1. Targeted Case Management Services for Children's Long Term Support Services (CLTS)
- e. Manage Indirect or Non-Clients (Program Administrative Costs)

5. Intake

- a. Referrals for Service
 - i. Referral Source
 - ii. Service Type
 - iii. Priors
 - iv. Reporter Information
 - v. Victim(s) Information
 - vi. Case Type (Category)
- b. Intake Transfer
 - i. Open Case
 - ii. Update Case
 - iii. No Case

6. ES Data Entry - 100% Time Reporting for Economic Support Services staff.

- a. Date
- b. Time Hours/Minutes
- c. Time Study Category
 - i. Child Care Administrative Services
 - ii. Child Care Eligibility and Authorizations
 - iii. Child Care Hearings and Other
 - iv. ESS/Non W-2 Services (Adult Cases)
 - v. Family Related MA-FS
 - vi. Non-Productive Time (Breaks, Sick, Vacation, Holiday, Comp)

7. Administrative Functions

- a. Active Employees - Entry and management of employees currently using eInfosys.
- b. Inactive Employees - Entry and management of employees no longer using eInfosys.
- c. Security Groups - Controls employee access to eInfosys modules and screens.
- d. Page Views - Audit trail of modules and screens accessed by eInfosys users.