

**TOWN OF ARLINGTON
MASSACHUSETTS
PURCHASING DEPARTMENT**

INVITATION TO BID

BID NO. 15-11

Sealed bids, pursuant to the Uniform Procurement Act, Ch. 30B, are invited and will be received by the Town Manager, Town of Arlington, Massachusetts, until **10:00 A.M., Thursday, March 26, 2015**, at the Office of the Purchasing Director, 730 Massachusetts Avenue, Arlington, Massachusetts, at which time and place they will be publicly opened and read for:

HEALTH RECORD SOFTWARE PACKAGE

Bids received after this time will not be accepted. Specifications and Proposal Forms will be available and may be obtained at the Office of the Purchasing Director, 730 Massachusetts Avenue, Arlington, MA, 02476 on or after **March 11, 2015** and on the Town Website: www.arlingtonma.gov/purchasing.

Proposals must be submitted on forms provided and in a sealed envelope plainly marked:

BID # 15-11, Health Record Software Package

Certificate of Non-Collusion form must be submitted with bids in order to be considered.

For further information please contact Domenic R. Lanzillotti, Purchasing Officer @ (781) 316-3003.

The Town Manager reserves the right to cancel any Invitation for Bid and/or to reject in whole or in part any and all bids, when it is deemed in the best interest of the Town to do so.

TOWN OF ARLINGTON

Adam W. Chapdelaine
Town Manager

March 12, 2015

Town of Arlington

**BID #15-11
PROPOSAL PAGE**

Health Record Software Package

Furnish Health Record Software Package to include to include start up, implementation and training as per specifications and requirements attached.

Vendor must state product bid and submit descriptive literature.

		<u>TOTAL PRICE</u>
1 each	Health Record Software Package	\$ _____

Signature _____

Company _____

Business Address: _____

Telephone _____ Fax _____

Date _____

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity, or group of individuals.

(Signature of individual submitting bid or proposal)

(Name of individual submitting bid or proposal)

Name of Business

Date

Pursuant to M.G.L. Chapter 62C, Section 49A, I certify under the penalties of perjury that I have complied with all laws of the commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Social Security Number or
Federal Identification Number

Signature of Individual or Responsible
Corporate Officer and Title

**NON-COLLUSION FORMS
MUST BE SIGNED AND
SUBMITTED WITH BID**

**Arlington Youth Counseling Center
Software Requirements Specification for
Electronic Medical Record and Billing System**

1. Introduction

The Arlington Youth Counseling Center (AYCC) seeks proposals for a fully integrated electronic health record (EHR) software package that specializes in outpatient behavioral health. Proposed budget for initial costs, including start up, implementation, and training costs cannot exceed \$60,000. The EHR software package will replace AYCC's existing EHR software package, requiring seamless data migration. The selected software product must, at a minimum, provide the following functionality:

1. Client intake and demographic documentation
2. Waitlist management and clinician assignment of new clients
3. Multi-resource appointment scheduling (i.e., scheduling of room and clinician simultaneously) with the ability to set recurring appointments
4. Insurance eligibility, authorization management, billing, and remittance processing
5. Clinical health records (e.g., progress notes, utilization review, etc.)
6. E-Prescribing for one part time MD
7. Reporting – both standard and ad hoc reporting
8. Ability to migrate existing data into new software package
9. Scanning capability of insurance cards and other documents directly into the software
10. Client portal (optional) for access to client records or to make payments

Contact Information

Project Manager: Patti J Brennan
Town of Arlington
Health and Human Services
27 Maple St, Arlington, MA 02476
pbrennan@town.arlington.ma.us
781-316-3411

2. Overview of AYCC

The Arlington Youth Counseling Center, located in Arlington, Massachusetts, is a non-profit, licensed mental health agency committed to promoting and supporting the social and emotional wellbeing of Arlington's youth and families. AYCC offers a variety of services including: individual and family counseling, group counseling, and psychopharmacological services. All services are provided on an outpatient basis.

Staff

The staff at AYCC consists of:

- Director (1 FTE)
- Assistant Director (1 FTE)
- Psychologist/Supervisor (.50 FTE)
- 2 Administrative Staff (1.30 FTE)

- 20 Fee-for-Service (“FFS”) clinicians (part time ~ 8 FTEs)
- Psychiatrist (.20 FTE)

The Assistant Director and Psychologist each see a limited number of clients in addition to their managerial responsibilities. The administrative staff consists of a billing/office manager and a medical records clerk whose combined hours total 1.3 FTEs.

AYCC uses a fee-for-service model in which contracted clinicians are paid for kept appointments, required meetings and agency trainings. The FFS clinicians all work on a part time basis.

AYCC also employs a part-time psychiatrist, who provides psychiatric evaluation, consultation and medication management to AYCC clients.

Facilities

AYCC’s office is located within a historic building owned by the Town of Arlington, and AYCC makes use of up to 10 rooms for client sessions. Clinicians also meet with clients, individually or in groups, at each of the public schools as well as occasionally at a predetermined offsite location (e.g., client’s home).

Operations

AYCC currently schedules approximately 150 to 200 client sessions per week. The administrative and managerial staff work on site at AYCC. The fee-for-service clinicians are able to work remotely for some tasks (e.g., completing progress notes, scheduling appointments, emailing clients/staff, etc.); however, all client sessions are conducted on site at AYCC or at one of the public schools.

AYCC is credentialed with several insurance payors, most of which subcontract behavioral health benefits to another insurance payor. Further, AYCC can submit billing for additional insurance providers if the client’s plan provides out-of-network benefits.

Below is a partial list of insurance payors:

- Blue Cross Blue Shield
- Fallon
- Aetna
- Cigna
- Harvard Pilgrim Health Care (United Behavioral Health)
- United Healthcare
- Tufts
- MassHealth*
- Beacon

*MassHealth has a complex multi-tier system where mental health benefits can be provided by any one of a number of behavioral health providers, who in turn, have multiple products. For example, Neighborhood Health Plan (NHP) is a MassHealth product. With NHP, clients could have a commercial plan (e.g. Verizon), Commonwealth Care or Medicaid.

3. Software System Requirements

The proposed system must be designed specifically for mental/behavioral health organizations, and have the following capabilities:

- Current Meaningful Use certification for Stage 1 and Stage 2

- Customizable in terms of creation of data fields, table modifications, and screen layout
- Reportable data fields, including custom fields
- Compatible with windows 8
- Meet HIPAA guidelines
- PCI compliant if credit card payment portal is being specified
- MSDP certification preferred

Prior to executing a written contract, AYCC requires use of a test database for a period of one week to ensure software meets its needs. If required, AYCC will sign confidentiality agreement with vendor.

Intake, Authorizations & Scheduling

At a minimum the proposed system should include the following features:

- ability to check eligibility and to decrement and manage authorizations
- ability to add multiple insurances for a single client and the ability to process multiple payments (e.g., co-pays, grant funding, sliding scale, etc.) for a single session
- multi-resource scheduling for the client, clinician, and the session room
- schedule recurring appointments
- waitlist management
- referral management (i.e., referrals from court, schools, physicians, etc.)
- method for converting scheduled appointments to kept or canceled
- dashboard of clinician appointments and session rooms
- ability to send appointment reminders by email, post card, or SMS
- ability to schedule multiple clients for the same group session appointment

Clinical Information Management

At a minimum, the proposed system should include the following features:

- ability to view historical client data
- offer a menu of treatment templates specific to behavioral health with the ability to have staff easily modify or create customized treatment templates (e.g., screen building tools)
- easy to access client historical data via a dashboard type interface
- features to capture standard notes and add custom notes for individual sessions, as well as the ability to batch notes for group sessions (i.e., enter a group note once and have it apply to all participants in that session)
- ability to interface to the Massachusetts CANs Virtual Gateway to submit the DPH-required CANs reports (optional)
- method for calculating session rate based on insurance plan, type of services and clinician licensure level
- generate weekly FFS clinician invoices
- ability to generate prescriptions and/or progress notes or reports remotely and have them print at AYCC
- voice to text dictation (optional)

Billing & Collections

- identify how eligibility is verified, how claims are submitted to payors, and how remittance payments are received and recorded in the software
- explain process for handling insurance rejections and resubmission
- identify “canned” system reports specific to Behavioral Health

- ability to process a variety of co-payment options, including as an option, processing credit cards payments directly in the vendor's system
- provide for the automated creation of client invoices based on a schedule of codes per type of service rendered by AYCC
- provisions to capture electronic signatures for clients and/or clinicians
- insurance processing
 - o Identify any clearing houses fully integrated with the vendor's product
 - o how vendor handles adding new insurances or other payment sources
 - o how claims are processed for insurances that cannot be accessed online
 - o identify if any of the insurance provides listed in Section 2 (page 2) are not accessible electronically

Administrative

- supervisor approval process of progress notes
- administrative reminders/dashboards to assist in follow-up to make sure clinicians have submitted required reports
- ad hoc reporting
- ability to generate form letters using standard and custom data fields
- provide alerts for specific parameters, e.g., clients whose last physical was more than 12 months ago, clients whose files has not been audited for more a specified number of months, clients whose last prescription has expired, etc.
- Customization:
 - o Discuss AYCC's ability to add/remove data fields from screens
 - o Discuss AYCC's ability to create data fields and tables
 - o Identify how customized fields might complicate upgrades to the product

4. Technical Systems Requirements

The preference is for a cloud or web-based solution that can accommodate laptops or tablet (e.g. iPads & Android) devices.

Hosted solutions requiring VPN access via a Citrix or Remote Desktop client are also acceptable with the costs of the client agents identified in the pricing specifications.

AYCC anticipates migrating existing client demographic and clinical information into the new system; AYCC would provide files in an acceptable format (e.g., .dat, .csv)

All solutions need to accommodate document scanners and signature pads.

If applicable, vendors should discuss how their software will be modified to maintain MSDP certification.

5. Security

The proposed system shall meet HIPAA compliance and provide for the following:

- automatic backup
- all interactions with the proposed system should take place over a secure, encrypted network
- emergency access
- encrypted data transfer
- password protection

- automatic logoff after a specified time of inactivity
- identify parameters for who can see client files and their level of access to their client's files and other client files.
- audit trail /record of chart updates/accesses
- disaster recovery protection
- secure remote access
- unique user IDs
- PCI compliance (for credit card transactions)

6. Implementation, Training, and Ongoing Support

Vendor proposals should include a comprehensive quote for all aspects of implementation. The proposal shall also include a detailed implementation plan (i.e., process, dollars, and hours) identifying:

- approximate dates & times for each step
- specific number hours of training and consulting services
- training methodology (e.g. on-line videos, Webex. Etc.)
- Identify program manager to be assigned to this project and their allocated time to the project
- process for ensuring insurance payors are accepted by vendor software
- Describe technical support – e.g., what support is included in the monthly fee, is there 24/7 live support, etc.

7. Proposal Deadline

AYCC requests that all interested vendors submit their proposals no later than 4:00pm on **Thursday, April 2, 2015** to the following:

Patti J Brennan
 AYCC Vendor Proposal
 27 Maple St
 Arlington, MA 02474

All technical and process questions should be emailed to pbrennan@town.arlington.ma.us.

8. Pricing

All proposals should include the following criteria:

- a detailed proposal of implementation costs and recurring fees
- cost for cloud vs client hosted solutions
- add-on fees or modules (e.g., signature pads, etc.)
- training costs (e.g., vendor site, client site, webinar, WebEx, etc.)
- cost per hour for report creation by vendor
- provide the cost to migrate existing client demographic data and in what form the data must be presented (i.e., excel, .dat file, etc.)
- identify the number of years in business, the current number of clients overall, those in Massachusetts, and those in behavioral health
- provide three references for behavioral health clients; must include at least one client from Massachusetts

- ePrescribing product used and all costs associated with it per physician
- identify if the product is MSDP certified
- identify if the product is “meaningful use” certified
- identify how many licenses AYCC would need to purchase (i.e., are users viewed concurrently or separately)