

**TOWN OF ARLINGTON
MASSACHUSETTS
PURCHASING DEPARTMENT**

INVITATION TO BID

BID NO. 16-23

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., Tuesday, June 7, 2016**, 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/PATIENT MANAGEMENT SOFTWARE PACKAGE

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

BID # 16-23, Health Record/Patient Management 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

May 12, 2016

**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) and patient management software package that specializes in outpatient behavioral health. Vendors familiar with Massachusetts behavioral health preferred. The proposed EHR software package will replace AYCC's existing EHR software package. The Scope of Services can be found in Section 3.

Contact Information

Project Manager: Patti J Sawtelle
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 ages 3 through 21 and their 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)
- Clinical Director (1 FTE)
- Assistant Clinical Director (.60 FTE)
- Psychologist/Supervisor (.50 FTE)
- 2 Administrative Staff (1.30 FTE)
- 20 part time clinicians (combined approximately 10 FTEs)
- 2 Prescribers (.30 FTE)

The Clinical Director, Assistant Clinical 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.

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

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

Facility

AYCC's office is located within a historic building owned by the Town of Arlington, and AYCC makes use of 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's clinicians counsel roughly 200 clients per week. While administrative and managerial staff work on site at AYCC, FFS clinicians work remotely for some tasks (e.g., completing progress notes, scheduling appointments, emailing clients/staff, etc.). With limited exceptions, client sessions are conducted at AYCC or one of the public schools.

AYCC is credentialed with all major insurance payors, most of which subcontract behavioral health benefits to another insurance payor. 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
- MBHP
- Aetna
- Cigna
- Harvard Pilgrim Health Care
- Optum
- United Healthcare
- Tufts
- Beacon Health Strategies
- MassHealth*

*MassHealth has a complex multi-tier system where mental health benefits can be provided by any one of a number of behavioral health payors, who in turn, have multiple products. For example, with Tufts Health Plan, clients could have a commercial plan, Commonwealth Care, or Medicaid. The authorization requirements, benefits, and billing procedure are different for each product.

3. Scope of Services

AYCC seeks software that provides full functionality, including client intake, insurance processing, clinical management, administrative practice management, and reporting. Key tasks are summarized below:

Intake, Authorizations & Scheduling

Unlike most agencies, AYCC clinician's schedule their own appointments. It is essential the selected software easily allow the clinicians to book both their client appointment and a session room at the same time.

Other key features for the selected software include:

- decrement and manage authorizations
- multi-resource scheduling for the client, clinician, and the session room
- schedule recurring appointments
- manage a waitlist of new clients waiting to be assigned to a clinician
- referral management (i.e., referrals from court, schools, physicians, etc.)
- track scheduled, kept, and canceled appointments
- clinician/administrative dashboard

- appointment reminders by phone, email, and/or SMS

Clinical Information Management

In addition to entering clinical notes, the selected software must have the ability to e-prescribe all medications, including the electronic submittal of controlled medications. Also, the FFS clinician model requires the generation of weekly invoices for individual clinician payments through the Town of Arlington's accounts payable system. FFS clinician rates differ by service and licensure level.

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

- e-prescribing of controlled medications
- menu of behavioral health treatment templates and the ability to modify or create customized treatment templates (e.g., screen building tools)
- easy access to client historical data
- features to capture standard notes and add custom notes for individual sessions, as well as the ability to batch notes for group sessions
- ability to interface to the Massachusetts CANS Virtual Gateway
- weekly FFS clinician invoice report
- voice to text dictation (optional)
- link to State sites, such as CANS and ICC screening tools
- electronic signatures for clients, clinicians, supervisors
- document scanning
- receive and send records to/from external sources, e.g., inpatient/partial day programs

Billing & Collections

AYCC is contracted with most major Massachusetts behavioral health insurers. Requirements vary among insurance payors, and claims must include specific billing codes, such as Modifiers, and Group NPI. Prospective vendors must describe how the software processes client eligibility, claim submittal, and rejections/ resubmittals. AYCC uses Emdeon through its current EHR software. Additionally, vendors must describe the process for receiving and recording insurance and client payments.

The software must also include:

- check client insurance eligibility
- add multiple insurances for a single client for a single session
- payment options, including multiple payment sources for one session (co-pay, grant, discount, etc.)
- client invoices/statements
- insurance processing, please explain
 - insurance claims process (third party clearing house, direct software billing, etc.)
 - claims processing for insurances not included in the software

Administrative

Administrative staff must be able to send forms to clients, schools, physicians, etc. The selected software must also provide reminders and alerts to staff and clients. Additionally, the software must have a mechanism for notifying supervisors when notes are ready for approval. Additional administrative needs follow:

- client portal
- notification system for new clients assigned to clinicians
- supervisor approval process of progress notes, including notification of when a progress note is available for approval

- detailed productivity reporting
- administrative reminders/dashboards for clinician follow up
- demographic data, such as client age, gender and ethnicity (as reported), insurance type
- 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 six months, clients whose prescription has expired, etc.
- authorization tracking
- custom reporting (identify what fields are reportable)
- list of system reports

Data Migration and Customization:

AYCC currently utilizes an electronic health system. Key demographic and insurance information must be migrated. Additionally, certain clinical information must also be migrated.

As new programs are implemented, AYCC will need to modify screens or generate new reports. Prospective vendors should discuss their software’s ability to add/remove data fields from screens and tables and the creation of new reports. Vendors should also discuss how customization affects product upgrades.

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

- Current Meaningful Use certification
- 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

4. Security

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

- automatic backup
- secure, encrypted network
- emergency access
- encrypted data transfer
- password protection
- automatic logoff after a specified time of inactivity
- administrative rights for access to client files, tables, etc.
- audit trail /record of chart updates/accesses
- disaster recovery protection
- unique user IDs
- PCI compliance (for credit card transactions) optional

5. Cloud/Web Solutions and Operation Systems Requirements

The preference is for a cloud or web-based solution that can accommodate laptops or tablet (e.g., iPads & Android) devices. Software must also work in Windows 8 or higher or Mac operating systems.

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). Vendor should identify their plans and resources allocated to data migration.

All solutions need to accommodate scanners and signature pads.

6. Product Demonstration

Vendors must provide a product demonstration that specifically demonstrates the following:

- new client entry
- waitlist management
- insurance eligibility screening, authorization management, claims submittal, and reimbursement
- multi-resource scheduling – i.e., scheduling a clinician’s time and a session room
- creation of intake or progress note with posted billing charge
- Supervisor approval
- FFS invoice generation
- reporting

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

7. Vendor Management

Proposals must include a detailed implementation plan describing the implementation process, including timeline for deliverables, training and data migration. Training should be identified in hours, method (tutorials, WebEx, onsite, etc.). Technical support during and after implementation should also be detailed in the proposal. Vendor should also identify any components that are subcontracted to a third party.

Please provide an organizational chart for your company and a curriculum vitae for staff assigned to the project implementation (hours allocated, experience, etc.). Vendors should also identify the number of years in business, the current number of clients overall, those in Massachusetts, and those in behavioral health. Also, please provide three references for behavioral health clients with at least one client from Massachusetts.

Vendors should also identify if the product is “meaningful use” certified and the year last certified.

8. Proposal Deadline

All interested vendors must submit their proposals no later than 2:00pm on **Thursday, May 5, 2016** to the following:

Domenic Lanzalotti
Town of Arlington
Massachusetts Ave
Arlington, MA 02476

Proposals may be delivered by mail, express service, courier or by person. Proposals received after the deadline will not be considered. Proposals missing the Collusion Form, attached to this document, will also not be considered.

All technical and process questions should be emailed to pbrennan@town.arlington.ma.us. Addendums will be posted on the Town's website at www.arlingtonma.gov

10. Pricing

Valid proposals must include detailed implementation and recurring (maintenance) fees.

All proposals should include the following criteria and each vendor must complete the Pricing Requirements table attached as attachment 1.

- add-on fees or modules (e.g., signature pads, etc.)
- training hours including locations (e.g., vendor site, client site, WebEx, etc.)
- cost per hour for report creation by vendor
- cost to migrate existing client demographic data and in what form the data must be presented (i.e., excel, .dat file, etc.)
- E-Prescribing product used and all costs associated with it per physician
- identify the number of licenses AYCC would need to purchase and if user licenses can be concurrent or individual

**Arlington Youth Counseling Center
Pricing Requirements**

Pricing Details	Hours	Dollars
Training Costs		
WebEx		
Onsite		
Other: _____		
Implementation Fee (List Inclusions)		

Data Migration		
Number of fields or number of hours allocated		
1a. Total Startup Cost		
Recurring Fees for 12 month period		
Flat Rate		
Cost per License		
Concurrent Licenses Y/N		
E-Prescribing Cost/Prescriber/Month		
Insurance Processing		
Cost per Eligibility Check		
Cost per Claims Processed		
Other _____		

Report Creation \$/hour		
Other Costs (Please list below)		

1b. Total Recurring Fees		
Total Cost (1a. + 1b.)		

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**