



# CRISP

## Request for Proposal

### CRISP COVID Scheduling

November 2, 2020

All responses due no later than **Friday, December, 18, 2020, at 5pm EST**

You are invited to submit a proposal for COVID-19 patient scheduling and site logistics management tool where patients can securely schedule, and sites can manage the flow of patients. Your proposal should describe how it will meet Chesapeake Regional Information System for our Patients (CRISP) requirements as described herein. All proposals should be submitted electronically to: [mandy.williams@crisphealth.org](mailto:mandy.williams@crisphealth.org)

Should you have any questions concerning the preparation of your proposal, please do not hesitate to contact us.

Contact: Mandy Williams

Email: [mandy.williams@crisphealth.org](mailto:mandy.williams@crisphealth.org)

Please note that this Request for Proposal does not constitute a guarantee on the part of CRISP that a contract will be awarded. No payment will be made for costs incurred in the preparation and submission of a Proposal in response to this Request for Proposal.

**THIS IS NOT AN ORDER OR A CONTRACT**



# CRISP

## CRISP Background

CRISP is a 501(c)(3) non-profit company that currently provides the health information exchange service and solutions to Maryland, West Virginia, Washington D.C., and Maine. CRISP enterprise receives healthcare data from thousands of healthcare providers across the region. Inside CRISP technology infrastructure, this data is spread across multiple data centers (co-lo, Azure, AWS, as well as vendor-managed clouds), systems, databases, and data formats (Flat-file, XML, JSON, relational databases, etc.).

## Project Objective

CRISP is looking for a partner to further develop and support a COVID-19 specific Microsoft scheduling tool and its various components including multiple scheduling workflows, auto generated and routed lab orders, backend administrative tools, and SMS text results delivery. CRISP. The vendor must be able to support the current functionality with flexibility for future enhancements. CRISP is looking for a provider to enhance and support the current tool, built upon Microsoft Power Apps and Microsoft CRM.

## Project Deliverables

Continued development and support a secure patient facing self-scheduling, site specific, testing tool for current COVID-19 testing sites and any repurposed need in the future.

There are two workflows to support: with testing orders and without testing orders. The workflow without testing orders allows walk in appointments to sites who support it.

### Scheduling Tool Performance:

1. Provide a scheduling link via SMS text to patient that once clicked:
  - a) A calendar opens for ease of scheduling
  - b) Testing site locations, times, and appointment availabilities are all presented as options at the time of patient scheduling
  - c) Trigger automatic lab order form upon successful appointment schedule/patient registered (provider orders, self-schedule, walk in appointment)
    - auto-route lab orders to the chosen/identified testing site
  - d) After completion, the test site appropriately identifies the correct lab and auto sends the test there, once submitted
  - e) Produce appointment confirmation at the conclusion of a successful appointment schedule
2. The scheduling tool provides backend administrative functions and tools.  
**Administrative functions must include but are not limited to the following:**
  - a) Admin has access to all appointments (self-scheduled, provider, walk-in)
  - b) Calendar Management: Edit appointments (schedule, cancel, reschedule)



- See appointments available
  - Add/remove testing sites
  - See testing kits available, per site (ability to change/update as needed)
  - Limited back end view for call center (to edit appointments as needed)
  - All fields exportable to Excel
3. **On-site technical support for testing must enable the following:**
- a) Edit patient information within the system as needed
  - b) Edit appointment information as needed reschedule (to a different day/time/site), cancel appointment, check-in and complete the appointment
  - c) Run daily statistics regarding site specific analytics (exportable to Excel)
4. **Results delivery requirements include but are not limited to:**
- a) Opt-in SMS text message option to receive results
    - On site staff to capture (Y/N) option from patient
    - Patient opt in/out of receiving their results via text message
  - b) System must be able to handle patient matching
  - c) Excel export functionality capturing this info/auto push to SFTP
5. **Technical Requirements:**
- a) Integrate with CRISP infrastructure, which includes but may not be limited to:
    - SAML 2.0 Integration (ULP)
    - OAuth 2.0 Integration
    - Integrations with RESTful Application Programming Interfaces
    - Ability to capture and expose audit logs based on access in a manner that conforms with Accounting of Disclosure Standards
    - Conforms to CRISP security policies, performance standards and code review
  - d) Provide an audit log of access
  - e) Conform to CRISP security policies, performance standards, and code review
  - f) Use industry accepted User Experience Guidelines and must include:
    - Mobile first design
    - Responsive design
  - g) Ability to show that code base was tested for any known bugs based on industry standards
  - h) Provide the following documentation artifacts:
    - User Guide
    - API Documentation
    - Any workflow and other diagrams as applicable



# CRISP

## General Questions

CRISP requests responses to all questions listed below, and all answers should either be clearly provided within the context of the proposal and/or in their own separate section.

1. What is your company’s Dun and Bradstreet number?
2. Where is your company headquartered?
3. How long has your company been in business?
4. How many employees work for the company?
5. Please describe your work with other HIEs or healthcare entities, if any.
6. Please describe your work with scheduling solutions and results delivery, if any.
7. Please provide 2 references with contact information whom CRISP may contact regarding performance on past projects.
8. Describe your general expertise with Microsoft CRM and Microsoft Power Apps
9. What is the most complex project your firm has delivered that’s based on CRM/PowerApps
10. How would you approach transitioning support and new-development work from the current project team to your team?
11. How would your firm ensure the right mix of newer associates with professionals with deep expertise in our technology?
12. Describe your Support structure and its process for handling tickets, specifically, during development and implementation phases. (Ex. new release)
13. Describe a project you worked on that is most similar to this work?
14. Describe projects you have worked on related to COVID-19?
15. How would you approach estimating the required resources to support the project?
16. How does your firm develop talent within the organization, please focus on this discipline.
17. Have you supported and/or developed anything that is healthcare related?
18. Why are you interested in this work?

## Response Format

CRISP discourages responses that are merely marketing collateral, therefore brochures or other presentations –beyond those sufficient to present a complete and effective proposal –are not desired. CRISP encourages proposals which are concise and of succinct length. Proposals should sufficiently explain how your solution will achieve the goal and deliverables of the project.

***Please provide pricing proposal with submission.***

Response Section	Title	Format
A	Cover Letter	Letter on company letterhead signed by representative with legal contracting capacity. No more than 2 pages.
B	Table of Contents	



# CRISP

C	Executive Summary	No more than 3 pages.
D	Response to Scheduling Tool Deliverables	Pages as required.
F	Response to General Questions	Pages as required.
G	Appendices	
P1	Resource Resumes	Pages as required.
P2	Pricing Proposal	Pages as required.
P3	Acceptance of Terms	Executed copy of Acceptance of Terms (pages 4-5).
P4	Standard Contract	Pages as required.

## RFP Timeline

Event	Dates	Notes
RFP Released Clarifications/Q&A		Published on the CRISP website. Questions will be accepted until 5pm EST on Friday, December 4 <sup>th</sup>
Vendor responses due		Proposals must be submitted via email by Friday, December 18 <sup>th</sup> , 5pm EST.
Vendor selection and contracting		CRISP will contact selected bidders to initiate contracting process. CRISP may reach out to clarify elements of responses prior to selection.
Contract execution		Contract will begin upon execution

## Expected Timelines for Delivery of Solution

Task	Timeframe	Proposed Major Deliverables
Detailed technical SOW and implementation plan		Vendor must be able to support the project immediately upon selection and will work with stakeholders to finalize requirements and begin project kick-off.
Development		Necessary development or configuration, load testing, user testing, performance testing, demonstration of testing to CRISP
Implementation		CRISP will perform a code review using standard security practices and deploy within CRISP Dev and Test environments. Vendor will help CRISP IT team understand how to deploy in Production and will be available to assist with the deployment.
System Training and handoff to CRISP IT Team		Vendor will be expected to make available some documentation and training so that



support can be provided inhouse at CRISP going forward.

## Security

The awarded vendor must conform to CRISP security policies, performance standards, and code review including COMAR (Code of Maryland Regulation Regulation-10.25.18). CRISP will perform a code review using standard security practices and deploy within CRISP Dev and Test environments. The chosen vendor will help CRISP IT team understand how to deploy in Production and will be available to assist with the deployment.

## RFP Terms and Conditions

### *Proposal Response*

CRISP reserves the right to reject any/all responses received in response to this RFP. Any information obtained will be used, along with other information that CRISP deems appropriate, in determining suitability of proposed offer. Bidders whose responses were not accepted will be notified that a selection is made, or if it is decided, that no responses are accepted. CRISP has no obligation to explain the basis of or reasons for the decision it makes relating to the proposals and/or this RFP. CRISP may identify multiple bidders who are determined suitable and negotiate with each of them on parallel tracks, pending a final contracting decision. All responses, assertions, and commitments made in this proposal will be part of any contract.

### *Response Becomes CRISP Property*

All responses become the property of CRISP and will not be returned to bidders.

### *Formal Contract*

A bidder receiving a positive response to their submission should be prepared to immediately begin negotiation of final terms based on the RFP and other mutually agreed terms and conditions, provided that terms described by bidder in their response may be rejected in whole or in part and/or otherwise negotiated by CRISP in the contracting process. In addition, a positive response from CRISP does not assure a bidder that a contract will be entered into; CRISP may discontinue negotiations with a bidder at any time, in its sole discretion.

## **PLEASE PROVIDE A COPY OF YOUR STANDARD CONTRACT DOCUMENTS WITH YOUR SUBMISSION.**

Within five (5) days of receiving a positive response, bidder is expected to notify CRISP in writing of its contract team, which shall include the individual with authority to approve and execute any final legally binding agreement with CRISP.



# CRISP

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Until and unless a formal contract is executed by CRISP and bidder, CRISP shall have no liability or other legal obligation to bidder whatsoever, relating to or arising from this RFP, the RFP process, decisions as to awards resulting from this RFP, or otherwise.

### *Maintaining Pricing*

Prices must remain valid for at least ninety (90) days from the closing. Contract negotiations will include price re-verification if the price guarantee period has expired. CRISP reserves the right to request that a bidder only provide a portion of the proposed deliverables or exclude certain partners. If bidders are unwilling to comply with RFP requirements, terms and conditions, objections must be clearly stated in the Cover Letter to the response.

### *Cost of Response Preparation*

All bidder's costs of proposal preparation and any negotiation will be borne by the bidder.

### *Applicable Law*

The Laws of the State of Maryland shall apply, except where Federal Law has precedence. The successful individual or firm consents to jurisdiction and venue in the State of Maryland. By the signature of its authorized representative, Bidder acknowledges that it understands and accepts the terms of this RFP.

Bidder: \_\_\_\_\_

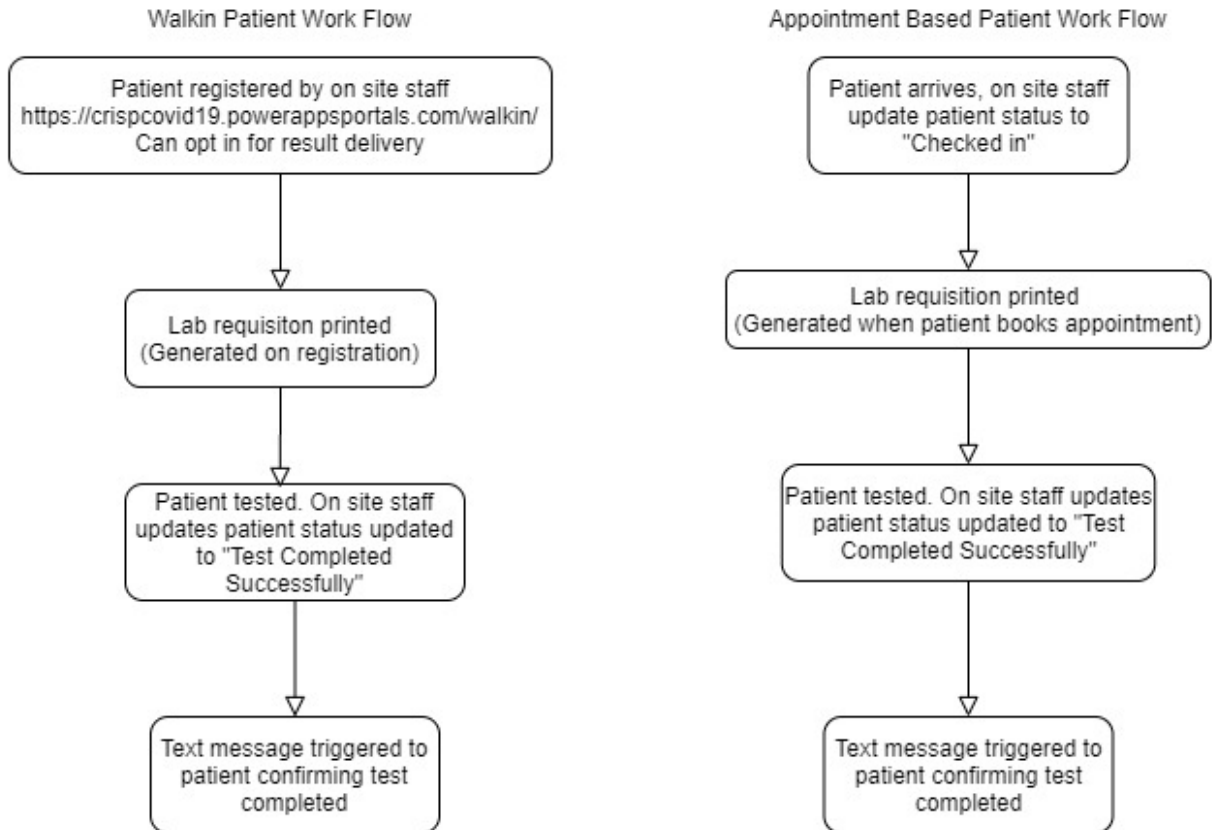
By: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



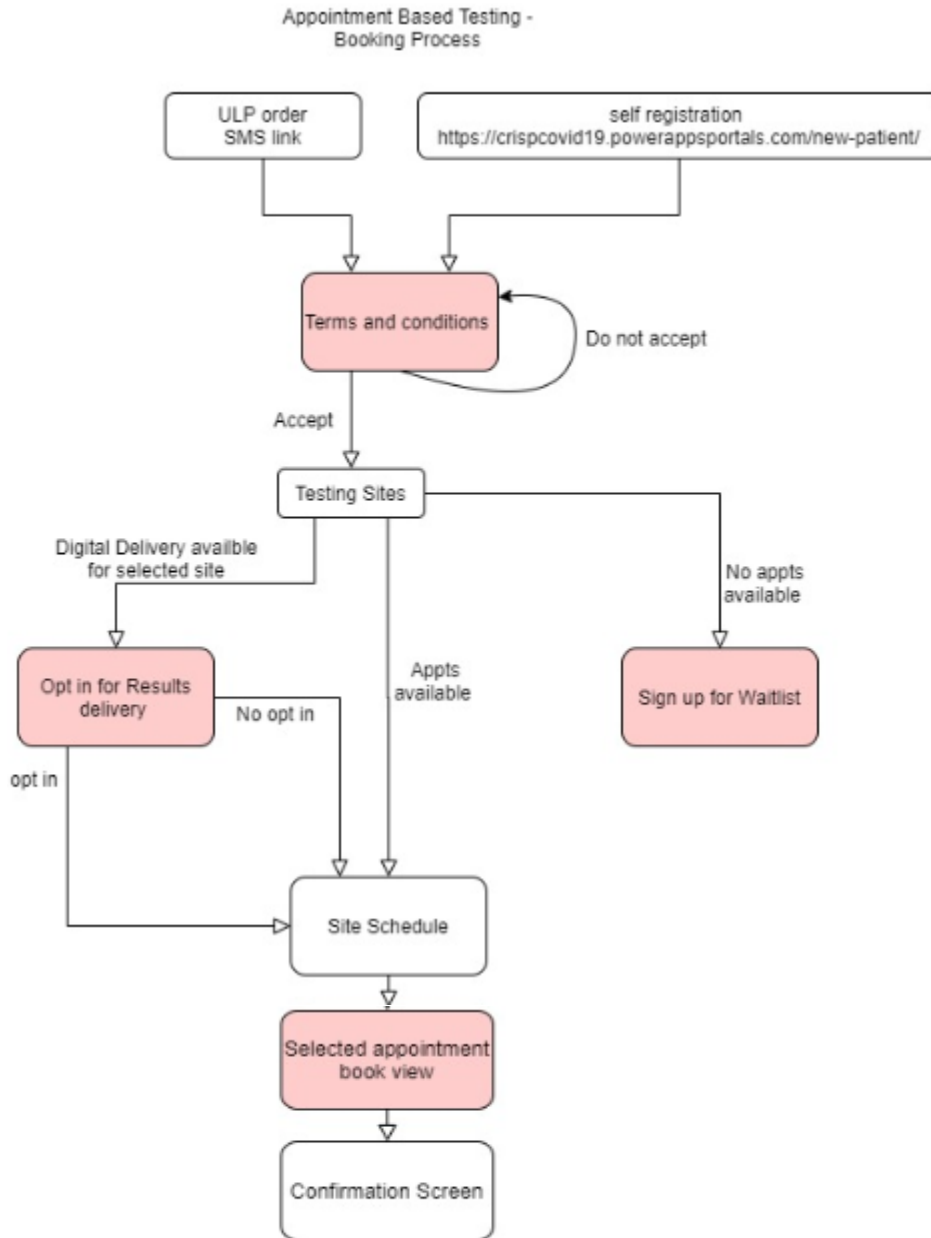
### On Site Work Flows







## APPENDIX 2 PATIENT WORKFLOW





Scheduling Requirements	Yes/No	Technical Requirements	Yes/No	Notes
<p><b>SELF Schedule:</b> Patient schedules via SMS text link OR public facing site:</p> <ul style="list-style-type: none"> <li>• Calendar</li> <li>• Show testing locations available</li> <li>• Show appointments available, per site</li> <li>• Capture basic demographics, insurance information, referring physician information</li> <li>• Send confirmation of scheduled appointment with instructions and reschedule link via text/email</li> <li>• Patient can cancel and reschedule his/her appointment using link from confirmation.</li> <li>• Send appointment reminder</li> </ul>				<p>Patient can only register for one appointment.</p> <p>Patient cannot register for appointments before current date and time.</p>
<p><b>Walk In:</b> Onsite team able to:</p> <ul style="list-style-type: none"> <li>• Register the patient, without a provider order (some static fields, other manual entry)</li> <li>• Lab form auto generated on registration and available for on-site staff to print</li> <li>• Complete the onsite testing</li> <li>• End the appointment/check patient out</li> </ul> <p><b>Enhancement:</b> Want both walk in and appointments to utilize one canvas app build. (Currently, for site that offer both (walk-in and appointment) the apps used are dependent of type of appointment) though they stored in one place). Walk-in canvas app presents more robust information.</p>				
<p><b>Call Center:</b> Team is able to:</p> <ul style="list-style-type: none"> <li>• Search for the patient (on the backend admin tool) to see whether orders have been placed or not (Type: ULP and/or if provider name is listed).</li> <li>• Schedule a patient with or without provider orders (<i>using new patient SMS text link</i>)</li> </ul>				



# CRISP

<ul style="list-style-type: none"> <li>• Terms &amp; Conditions</li> <li>• Agent able to reschedule self-registered patients (via reschedule link)             <ul style="list-style-type: none"> <li>- Ability to cancel and/or reschedule appointment</li> <li>- Edit patient information as needed <i>(typos/misspellings)</i></li> </ul> </li> </ul>				
<b>Lab Ordering</b>	<b>Yes/No</b>			<b>Notes</b>
Auto generated lab requisition form upon patient successful appointment scheduled and walk-in registered ( <i>as soon as the scribe submits the walkup registration, the lab order form should auto-generate</i> ).				Appointment patients- document generated on appointment booked.  Walk-in patients – document generated on registration.
<b>On site team (Walk In) can:</b> <ul style="list-style-type: none"> <li>• Register a patient/auto create the lab order form</li> </ul> <i>Auto generate a lab form and make available to appropriate testing site, upon successful completion of an appointment scheduled for both self-reg &amp; walk in.</i> <ul style="list-style-type: none"> <li>• Include bar code on each test. Bar code is confirmation ID + Date of test</li> <li>• Edit patient information, demographics etc., on the lab order form if/as needed via regenerating an existing lab form once patient details are changed.</li> <li>• Can print the lab order form</li> </ul>				Actively have to hit the regenerate button to update the lab req form.
Lab order form system is able to auto-push the lab form to the appropriate lab (Quest/Lab Corp) once test/appointment is completed.				Each site can appropriately identify the correct lab per test and auto send to lab on Submit.
<b>On Site Testing Support</b>	<b>Yes/No</b>			<b>Notes</b>
System allows on site staff to: <ul style="list-style-type: none"> <li>• Edit patient information within the system as needed</li> <li>• Update status of appointment (canceled, check-in, test completed successfully)</li> </ul>				



# CRISP

<ul style="list-style-type: none"> <li>• Regenerate patient’s lab requisition form as needed</li> <li>• Run daily statistics (site-specific):             <ul style="list-style-type: none"> <li>- Testing kits available per site</li> <li>- Available appointments</li> <li>- Appointments made</li> <li>- Walk Ins/No appointment</li> <li>- No shows</li> <li>- Time from check-in to completed</li> </ul> </li> </ul> <p>*Excel export functionality/auto push to an end destination</p>				
<b>Results Delivery</b>	<b>Yes/No</b>			<b>Notes</b>
<p>Opt-in to results delivery vis SMS message (<i>per site preference</i>)</p> <ul style="list-style-type: none"> <li>• On site staff to capture (Y/N) option from patient (<i>site specific to offer text results opt in option</i>)</li> </ul> <p>-Patient opt in/out of receiving their results via text message</p> <ul style="list-style-type: none"> <li>• System must be able to handle patient matching</li> </ul> <p>*Excel export functionality capturing this info/auto push to SFTP</p>				
<b>Administrator Tools</b>	<b>Yes/No</b>			<b>Notes</b>
<b>Reporting</b>				
Admin has access to all appointments (self-scheduled, provider ordered, walk-in)				
<p>Can build dashboards as desired and can set dashboards up for individual sites (<i>each site equipped with test center backend admin person</i>)</p> <p>-Advanced find tools that allows for parameter adds to look at specific subsets of data</p> <p>-Ability to print/pull analytics from this view</p> <ul style="list-style-type: none"> <li>- Appointment slots</li> <li>- Number of scheduled appointments</li> <li>- Configurable viewing options of the data</li> </ul> <p>(<i>Can view past, present or future</i>)</p>				
<p>Calendar Management: Edit appointments (schedule, cancel, reschedule)</p> <ul style="list-style-type: none"> <li>- Should show location name and appointment date</li> <li>- Create and manage testing kits, testing sites, and appointments</li> </ul>				



# CRISP

Limited back end view for call center ( <i>to edit patient information, edit appointments as needed (cancel &amp; reschedule)</i> )				
Ability to export all reports to Excel				
<b>Analytics</b>	<b>Yes/No</b>			<b>Notes</b>
All appointments (available, scheduled, rescheduled, no shows, walk ins, provider ordered)				
- How many people scheduled?				
- How are the appointments scheduled (self-reg vs. call center)?				
- How many tests were done?				
- How many results came back? <i>positive/negative/not yet resulted (by date and site)</i>				Filter via prescribing physician
- How were the results delivered? <i>text, phone call, portal access/self, provider, other</i>				Filter on any of these options
- Patient How they came into the system (selfReg, ULP, walkin) - Patient created in the system ( <i>when/date</i> ) - Demographics required for lab orders (city/state)				