University of Missouri Health Care
REQUEST FOR INFORMATION # 6042
AUTHORIZED MEMBER VETTING SOLUTION
Dated: 28 FEBRUARY 2020
Due Date: 03/20/2020
Time: 3:00 PM CDT
Introduction
The Curators of the University of Missouri on behalf of MU Health Care is requesting information for an Authorized Member Vetting Solution. The purpose of this RFI is to identify vendors and products capable of addressing the needs of MU Health Care.

The University reserves the right to make an award as an outcome of the request for information.

Please complete this RFI and return it by 3 PM CDT on March 20, 2020. Responses must be submitted by email to rogersk@umsystem.edu, Subject Line: RFI #6042.

Definitions

Vetting: Process of conducting various background checks and verifying any requirements prior to awarding individuals access to MUHC facilities.

Authorized Member: Employees and non-employees awarded access to MUHC facilities for the purpose of working or observing onsite in some capacity (i.e. clinical students, volunteers, agency temps, observers).

Goals and Purpose
MU Health Care (MUHC), an academic health system with a mission to save and improve lives, seeks proposals from qualified vendors to provide a proven, web-based solution for vetting Authorized Members. MUHC currently uses manual processes to collect and process vetting requirements for potential Authorized Members. The selected solution must be a highly automated, customizable web-based platform, accessible to both employees and non-employees, that will manage the vetting, keying, workflow processing and ongoing maintenance of all Authorized Member appointments. This system must improve the experience for our customers and improve efficacy for staff managing the process. The system should provide the following:

- Authorized Member needs:
  - Submission of materials
    - Single, centralized portal for Authorized members to submit documentation and information
    - One landing page regardless of Authorized Member type
    - User login setup, giving users ability to return and review status or complete additional submissions
    - Ability to save incomplete submissions to complete at a later time
    - Authorized Member-facing status of submission
    - Forms that auto-populate certain fields based on information already completed
    - E-signature capability on required forms
  - Scheduling capabilities
    - Ability to self-schedule required appointments with HR or Staff Health
    - Scheduling must work in collaboration with MS Office Outlook
• Automated confirmations / reminders / updates
  ▪ Reminders/notifications for completing partial submissions
  ▪ Customizable/automated update notifications based on steps/statuses in the process
    • Notification of successfully completed requests
    • Directions/instructions for picking up photo ID badge or attending New Staff Orientation upon completion of vetting
    • Rejection notification following failed vetting requirements
    • Notification of purging incomplete/stagnant submissions after specified period of time

• MUHC needs:
  ▪ Customizable, automated workflows
    ▪ Workflows tailored to the specific vetting requirements of different Authorized Member types
    ▪ Smart forms with qualifying questions that determine which fields/pages individuals must complete
    ▪ Required fields within the application to eliminate partial submissions
    ▪ Required fields for specific document uploads and workflow types
  ▪ Submission management and tracking
    ▪ Date and time stamps for submissions
    ▪ Automated tracking of submission progress based on completion of defined steps
    ▪ Dashboard or queue showing the status of submissions in process
    ▪ Automatic purge or rejection of incomplete/stagnant submissions after specified period of time
    ▪ Auto-generation of documents for keying appointments into PeopleSoft HR
    ▪ Ability to send and track correspondence thru the application
  ▪ Scheduling
    ▪ Ability for HR or Staff Health to manage scheduled appointments or schedule on behalf of Authorized Members
  ▪ Ongoing maintenance of Authorized Member appointments
    ▪ Ability to designate Authorized Members as active or inactive
    ▪ Reminder notifications for expiration of active Authorized Member appointments
  ▪ Integrations
    ▪ Scheduling functionality integrated with MS Office Outlook
    ▪ Ability to create individual or batch extracts of documentation for transactional processes in PeopleSoft HR
    ▪ Ability to generate tickets into the HR shared services system (AskHR)
    ▪ Ability for information to feed into Microsoft PowerBI for enterprise reporting

Acknowledgement
Questionnaire

Company Experience and References

1) Provide a general overview of your company’s experience in providing an Authorized Member Vetting Solution in a health system setting. Specifically illustrate experiences similar in size and scope to MUHC.
2) What do you consider your market differentiator(s) for your company’s Authorized Member Vetting Solution? (i.e. what features/functions set your product apart from other vendors?)
3) Provide four (4) references of your customers that have purchased products and services similar to that being proposed in the RFI. Include contact names, telephone numbers, and physical addresses.
4) Describe how your courtesy appointment processing solution will assist MUHC in improving cost and throughput metrics, including but not limited to the reduction of manual transactions by 50%.
5) Can you give examples of how your product has improved the experience for all users?

Features and Functionality

1) Workflow
   a. Does your Authorized Member Vetting Solution support customizable workflows tailored to specific appointment types?
   b. Does your Authorized Member Vetting Solution maintain “smart forms” that facilitate qualifying questions to determine which pages the Authorized Member will complete?
   c. Does your Authorized Member Vetting Solution support a method for tracking progress based on the completion of defined steps?
   d. Does your Authorized Member Vetting Solution allow the Authorized Member to save an incomplete submission for completion later?

2) Elements
   a. Does your Authorized Member Vetting Solution include required fields in order to mitigate and prevent partial submissions?
   b. Does your Authorized Member Vetting Solution include date and time stamps to allow verification of submissions and/or completions?
   c. What platforms is your application supported on (for example, a mobile device)?
d. Does your courtesy appointment processing solution support the self-scheduling of appointments by Authorized Members and management of appointments by HR staff?

e. Does your courtesy appointment processing solution include required fields for specific document uploads, including but not limited to CBC results, CBC and caregiver forms, and photo for ID badge?

f. Does your courtesy appointment processing solution include E-Signature capability?

g. Does your courtesy appointment processing solution enable individual or batch extracts for transactional processes in PeopleSoft HR?

3) Tracking
   a. Does your courtesy appointment processing solution maintain the ability to designate appointments as active or inactive and indicate such status?
   b. Does your courtesy appointment processing solution include a dashboard or queue that indicates that status of Authorized Members that are in process?
   c. Does your courtesy appointment processing solution include automated notifications and reminders sent out based on statuses and assigned dates?

4) Maintenance
   a. Does your courtesy appointment processing solution generate automatic notifications or reminders during and after the process to receive direction on extending or terminating active appointments?
   b. Does your courtesy appointment processing solution support the automatic purge of incomplete/stagnant submissions based on pre-determined timeframes?
   c. Does your courtesy appointment processing solution enable the generation of AskHR tickets (an internal IT tracking system that functions as a comprehensive HR request portal)?

5) Inventory
   a. What is the recommended spare part inventory for MUHC to keep on hand for break/fix?
   b. What device support agreements are available?

Integrations & IT

1) MUHC uses MS Office Outlooks Calendar. Is your courtesy appointment processing solution capable of interfacing with this platform?
2) MU uses Perceptive Content, an imaging system, to store documents. Are documents easily extractable from your courtesy appointment processing solution?
3) Please describe any hardware requirements for your Authorized Member Vetting Solution.
4) Please describe any device or version requirements for your Authorized Member Vetting Solution.

Implementation & Training

1) Describe and provide an example implementation timeline with milestones, project plan and estimated deliverables.
2) Provide an example list of product support and resources that are offered during implementation for the solution that is similar in size and scope to MUHC.
3) Describe training and deployment assistance during implementation.

Data & Reporting

1) Describe your reporting platform.
2) Provide a list and brief description of reports that can be run out of your Authorized Member Vetting Solution.
3) Does your system provide the ability to dynamically search all data, create, and modify custom reports? If so, explain the process. Can report templates be saved?
4) Does your system interface with third party reporting applications and/or reporting tools (e.g. Excel, data dumps, etc.)? If so, please describe.
5) Can data and reports be printed and/or exported in multiple formats (PDF, MS Excel, Word, etc.)? If so, please explain.
6) Describe how a report can be generated for user access, security rights, and for other auditing purposes.
7) What databases are used for custom report writing and aggregation?

Support

1) Describe your solution’s self-help resources for troubleshooting with the application.
2) Provide standard support and maintenance agreement options and example terms of each.
3) Provide your solution’s standard service level agreement.
4) Is there a support team available to assist users in troubleshooting problems with the solution? Describe the process clients go through to log support tickets and summarize the ticket resolution process.
5) What are the support hours, methods of support (phone, email, live chat, portal for FAQ, on-site), levels of support, escalation procedure and issue priority determination? Where are your support facilities located?
6) Describe or include your product’s foreseeable enhancement roadmap.
7) How often is your software updated? Describe the update process. How do clients provide feedback or updates and how is that feedback incorporated in future updates? Please list dates and code release notes for releases for the prior two years.
8) What resources are dedicated to our account post go-live?
9) How is data stored, protected and housed (remote or local hosting)?
10) Are there on-demand resources to provide ongoing training such as videos, quick reference guides, manuals, online courses, onsite course? If so, please describe.
11) Is there the possibility of becoming a testing partner for your courtesy appointment processing solution?
12) Does your solution support remote sessions for support with the ability to remote into the solution to see reported issues from staff?
13) Does your company provide quarterly best practice webinars?
14) Does your company share best practices and support client networking events?
15) Describe your downtime solution.

Pricing

1) Please provide pricing detail for each of the following items:
   a. Total Year 1 estimated cost $________________
   Breakdown below
      i. Software Application $____________________
      ii. Hardware (breakdown) $________________
      iii. Implementation $________________
      iv. Training $________________
      v. Maintenance & Support $________________
      vi. Travel cost if applicable $________________
      vii. Any additional cost not listed $________________

   b. Maintenance & Support Year 2 $________________
   c. Maintenance & Support Year 3 $________________
   d. Maintenance & Support Year 4 $________________
e. Maintenance & Support Year 5 $________________

Questions and Contact Information

If you have questions about this RFI please contact Kyla Rogers (rogersk@umsystem.edu).