

University of Missouri
REQUEST FOR INFORMATION # 23022
Contract Management System
Dated: August 26, 2022
Due Date: 16 September 2022 02:00 PM CST

Introduction

The Curators of the University of Missouri on behalf of the University of Missouri School of Medicine are requesting information for a Contract Management System. The purpose of this RFI is to identify vendors and products capable of addressing the needs of the University of Missouri School of Medicine for various academic medical contract types.

The University of Missouri School of Medicine is looking for a contract management system specific to managing various contracts via contract creation, workflow, electronic signature, and other features to help manage the life cycle of the contracts.

Please complete this RFI and return it by 2 p.m. Central Time on 16 September 2022. Submit responses to Carla Gilzow at crgnn7@umsystem.edu

Goals and Purpose

University of Missouri School of Medicine is seeking proposals from qualified suppliers to provide, install, implement, support, and maintain a proven, state of the art contract management system. University of Missouri School of Medicine estimates the contract volume to between eight thousand and twelve thousand contracts. Suppliers should provide the following:

1. Database
 - a. Central Repository with entire contract history including detailed lifecycle information regarding
 - routing
 - approvals with date/time
 - expiration of the contract
 - b. Easily searchable database including
 - keyword search and ability to add #TAGS for tracking
 - ability to sort and filter "like" contracts based on
 - (1) the Vendor
 - (2) the Department
 - (3) the type of service
 - c. Central Repository of current contract template versions
 - d. Ability to calculate expected payments and difference between prior and current contracts
 - e. Compatible with Microsoft-Word and Adobe Portable Document Format
 - f. Smartphone accessible with smartphone application
 - g. Barcode assignment which directs user to website to view contract information & activity.
2. Security

- a. Role-based data structure and functionality
- b. Authorization levels set for each user
- c. Import and export of data elements
- d. Outside Party Interface (such as an API)

3. Workflow

- a. Integration with Outlook/Exchange
- b. Customizable to specific MU needs
- c. Electronic/ Automation of signature process
 - Internal and external
- d. Easy extraction of contract with ability to
 - identify status
 - identify assignment
 - assign or modify assignment
 - include comments between users
- e. Online negotiation portal
- f. Contract Origination
- g. Phase and Completion tracking
- h. Compliance Tracking
- 1. Automated Review Process
 - a. Auto-email notices for due items or changes
 - 1. On-demand, ad-hoc workflow
 - 2. Automated and Integrated Actions with Messages/Notification

4. Documents

- a. Full-Text Search
- b. Filter agreements based on certain risk criteria
 - cost of the service
 - whether we are contracting with a healthcare provider or entity
 - the type of service (for example, rewards & recognition services are likely lower risk than patient services)
- c. Edit contract/agreement capabilities within the software
- d. Ability to create and store templates
- e. Automated document generation using editable templates
- f. Version control

5. Reporting

- a. Role-based dashboards
- b. Reporting analytics

- c. Deep dive analysis
 - d. Ability to pull reports by multiple data points
 - e. Compliance Management
6. Business Model
- a. Product upgrades included in license fee
 - b. Provide fee structures for licensing/use
 - Prefer Unlimited users versus being charged a fee per user
 - c. Twenty-four hour and seven-day (24/7) customer support

Acknowledgment

Please acknowledge receipt of this document by sending an electronic letter of receipt to Carla Gilzow. crgnn7@umsystem.edu

Questionnaire

Company Experience and References

1. Provide a general overview of your company's experience in providing a Contract Management Software solution that is similar in size and scope to the University of Missouri include volume level of contracts.
2. What do you consider your market differentiator(s) for your company's contract management solution? i.e. what features/functions set your product apart from other contract management solutions specific to contracts?
3. Please provide a current list of your Academic Health Care Institution clients that are similar in size and scope to the University of Missouri.
4. Provide a list of existing clients that are using the contract management solution that your company offers.

Features and Integrations

1. Explain how you've implemented workflow in your software solution and how it differentiates your product from other solutions for Contract Management competitors.
2. Describe your solution's process for notifying users of software updates.
3. Describe your solution's customization capabilities. Provide screenshots of this process.

4. Describe how you've implemented electronic signatures in your solution. Does it require separate licensing or additional cost to use and implement?
5. Describe your solution's ability to produce reports. Provide a sample of the various reports that are available within your system.
6. Provide a list of all interfaces including mobile devices and browsers that interact with your solution.
7. Describe and provide an example of your solutions usage reporting and licensing structure.

Implementation and Training

1. Describe and provide an example implementation timeline with milestones, project plans, 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 as the University.
3. Describe training and deployment assistance during implementation. Confirm support during business hours and availability onsite implementation teams
4. Describe the resources that are available for ongoing training of new hires and annual competency assessment.

Support

1. Describe your solution's self-help training. Is there a "Help" module built into the application? Provide screenshots of this process.
2. Describe ongoing support services.
3. Provide standard support and maintenance agreement options and example terms of each.
4. Provide your solution's standard service level agreement.
5. Describe or include your product's foreseeable enhancement roadmap.

Pricing

- 1) Please provide pricing detail for each of the following items:
 - a. Total Year 1 estimated cost \$ _____

- 2) Volume based pricing
 - a. 50 users \$ _____
 - b. 100 users \$ _____
 - c. 150 users \$ _____
- 3) Breakdown below
 - i. Software Application \$ _____
 - ii. Hardware (breakdown) \$ _____
 - iii. Implementation \$ _____
 - iv. Training \$ _____
 - v. Maintenance & Support(bulk hourly rate) \$ _____
 - 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 Carla Gilzow, crqnn7@umsystem.edu