



COMPETITIVE BID

FOR

LEGACY SYSTEMS ARCHIVE SERVICES

20-LSAS/MG

December 20, 2019

***HEALTH CARE DISTRICT OF PALM BEACH COUNTY
1515 N. FLAGLER DRIVE, SUITE 101
PALM SPRINGS, FL 33401***

PART 1 GENERAL INFORMATION

1-1 Purpose of Competitive Bid

The Health Care District of Palm Beach County, Florida (hereinafter the District), is requesting bids from qualified Respondents for an archiving partner who can provide archiving services to consolidate data from multiple sources into one unified archival system.

The District is a political subdivision of the State of Florida which was established as an independent taxing district by special law approved by Palm Beach County voters (Palm Beach County Health Care Act, 1988).

The District was founded in 1988 to ensure access to a comprehensive health care system and the delivery of quality services for the residents of Palm Beach County. The District accomplishes its mission through various programs and services, including an integrated Trauma System, School Nurse program, Skilled Nursing Facility, and Lakeside Medical Center, its hospital located in rural, western Palm Beach County. The District also offers health coverage to eligible uninsured Palm Beach County residents as well as operates nine Federally Qualified Health Centers to provide primary and preventive medical and dental services for medically needy patients. Additional information about the District is available on its website, www.hcdpbc.org.

1-2 Competitive Bid Submission

Bids must be received by 5:00 P.M. local time on the date listed in the Competitive Bid Timetable (Section 1-5) Competitive Bids received after the deadline will not be considered. Competitive Bids must be emailed to purchasing@hcdpbc.org Please submit your bid with a request for delivery receipt of your email.

1-3 Competitive Bid Withdrawal

Respondents may withdraw their Competitive Bid by notifying the District in writing.

1-4 Competitive Bid Disclosure

All Competitive Bids received shall be subject to public disclosure consistent with Florida's Public Record Act, Chapter 119, Florida Statutes and specifically section 119.070(1)(b), Florida Statutes, regarding competitive solicitations. If a Respondent believes its Competitive Bids (or any portion thereof) is exempt from public disclosure beyond the limited exemption set forth in section 119.071(1)(b), Florida Statutes, the Respondents must invoke, in writing, the exemption(s) to disclosure provided by law in their Competitive Bid by providing the specific statutory authority for claimed exemption(s), identifying the data or other materials to be exempted, and stating the reasons why such exemption from public disclosure is necessary. Failure to do so may result in the Respondent waiving an applicable exemption (if any).

The District has the right to use any or all information/material submitted in response to this bid. Disqualification of a Respondent does not eliminate this right.

The selected Respondent will be offered a contract for 5 years, which may be renewable by mutual agreement of the parties. Option for renewal will only be exercised upon mutual written agreement and with all original terms, conditions and unit prices adhered to with no deviations. Any renewal will be subject to appropriation of funds by the District. The standard District contract will be utilized. However, the District, in its sole discretion, reserves the right to negotiate terms and conditions with the successful Respondent.

1-5 Competitive Bid Timetable

The District and Respondents shall adhere to the following schedule in all actions concerning this Competitive Bid:

Event	Date
District issues Competitive Bid	December 20, 2019
Competitive Bid Due Before or Until 5:00 PM Local Time	January 31, 2020

1-6 Delays

The District may delay or modify scheduled event dates (Section 1-5) if it is to the advantage of the District to do so. The District will notify Respondents of all changes in scheduled due dates by posting changes on the District website (www.hcdpbc.org).

1-7 Oral Presentations and/or Interviews

At its sole discretion, the District may invite all or a short-listed Respondents to conduct oral presentations or interviews. Presentations or interviews provide an opportunity for Respondents to clarify their Competitive Bid for the District. The District will schedule any such presentations or interviews.

1-8 Acceptance or Rejections of Bids

An evaluation team comprised of District staff and other relevant members as determined by the District will evaluate the Competitive Bids to select a firm. The District, in its sole discretion, reserves the right to select one or multiple Respondents and to negotiate terms with such Respondent(s)...

The District will make every effort to seek clarification but reserves the right to reject bids for non-compliance with the stated requirements.

1-9 Sworn Statement on Public Entity Crimes

The Respondent shall be required, pursuant to section 287.133, Florida Statutes, to execute the attached "Sworn Statement on Public Entity Crimes" (**Exhibit "A"**) upon submission of its Competitive Bid. By executing this sworn statement, the Respondent is

affirmatively stating that neither it nor an affiliate (as defined by the statute) has been convicted of a public entity crime within the last thirty-six (36) months and that it is not barred from entering into a contract with the District. The Respondent further acknowledges that any misstatement or lack of compliance with the statute shall result in the contract being null and void and/or subject to immediate termination by the District. In the event of such termination, the District shall not incur any liability for any services or materials furnished by the Respondent.

1-10 Code of Ethics

This Competitive Bid is subject to the State of Florida Code of Ethics for Public Officers and Employees (Part III, Chapter 112, Florida Statutes). Accordingly, there are prohibitions and limitations on the employment of District officials and employees and contractual relationships providing a benefit to the same. If any Respondent violates or is a party to violation of the Code of Ethics with respect to this Competitive Bid, such Respondent may be disqualified from selection; a resulting contract may be terminated; and, may be further disqualified from bidding on any future work, goods, or services for the District. Respondents are highly encouraged to review the Code of Ethics in order to ensure compliance with the same.

1-11 Conflicts of Interest

The Respondent shall be required to complete the attached "Conflicts Disclosure Form" (**Exhibit "B"**) upon submission of its Competitive Bid. Respondents must disclose in their Competitive Bid the name of any officer, director, or agent who is an elected official, appointed official or an employee of the District. Further, Respondents must disclose the name of any elected official, appointed official or employee of the District, who owns directly or indirectly, any interest in the Respondent's firm or any of its branches. Respondents must complete this form even if they have no conflicts to disclose.

In addition, Respondents will be disqualified from selection if Board Members for the Respondent organization are employed by or serve on a District or District subsidiary Board or Committee.

1-12 Non-Collusion

By submitting and signing a Competitive Bid, the Respondent certifies that its Competitive Bid is made without prior understanding, agreement, or connection with any corporation, firm or person submitting an offer for the same materials, services, supplies, or equipment and is in all respects fair and without collusion or fraud. No premiums, rebates, or gratuities are permitted, either with, prior to, or after any delivery of material or provision of services. Any violation of this provision may result in disqualification from selection; contract cancellation; and/or, return of materials, or discontinuation of services and possible removal from the District's Vendor/Bid List(s).

1-13 Subcontracting

Respondents submitting Competitive Bids may subcontract portions of the engagement to subcontractors. The name of the proposed subcontractor(s) must be clearly identified in the Competitive Bid. Once contract negotiations have begun, no additional subcontracting or changes in subcontractors will be allowed without express prior written consent of the District.

PART 2
PROJECT DESCRIPTION AND SCOPE OF REQUIRED SERVICES

2-1 Background

The Health Care District of Palm Beach County is seeking an archiving partner who can provide archiving services to consolidate data from the following sources into one unified archival system.

- Inpatient Electronic Health Record
- Emergency Room Electronic Health Record
- Surgery and Anesthesia Electronic Health Record
- Radiology Information System
- Ambulatory Electronic Health Record
- Long term Care Electronic Medical Record
- Dental Electronic Medical Record
- Managed Care application

Systems that are being considered for archival are listed below. This list may change.

2-2 Specific Requirements

Systems that are being considered for archival are listed below. This list may change.

Vendor	Product & Version	# Beds / # Providers / # Patients / # Claims	Modules to be Archived
MEDHOST	HMS v <u>2018 R1</u>	70 beds 130K Patients 126 Providers 553K Claims	Inpatient EHR
MEDHOST	EDIS v <u>2017 R2</u>	22 beds 41K Patients 100 Providers	Emergency Dept
MEDHOST	PIMS v <u>2017 R2</u>	3212 Patients	Perioperative
medQ Inc.	medQ v__	26 providers	Radiology
Allscripts	Pro EHR v <u>16.0</u>	135K Patients 47 Providers	Legacy EHR
Allscripts	Practice Management v <u>14.1</u>	47 Providers 468K Claims	Legacy EHR & PM
Athenahealth	Athenahealth v <u>19.3</u>	188K Patients 87 Providers 440K Claims	EHR & PM
eHealth Solutions Inc.	MatrixCare v <u>2019 R3</u> (formerly SigmaCare)	120 beds 314 Patients 20 Providers 5K Claims	Long Term EHR

Vendor	Product & Version	# Beds / # Providers / # Patients / # Claims	Modules to be Archived
Yardi	Optimus EMR	346 Patients 16 Providers 367 Claims	Legacy Long Term EHR
Optima Health Solutions	Rehab Optima v <u>8.0.0.97</u>	314 Patients 20 Providers	Rehabilitative Therapy
Henry Schein	Dentrix v <u>8.0.96.553</u>	17 Providers 159K Patients 112K Claims	Dental
Connectria, EMS	Diamond v <u>13.0</u>	5000 Providers 300K Members 3000K Claims 162 GB	Managed Care

Vendor and Product Profile

Using the template below, please provide the requested information on your organization. Your response to a specific item may be attached to this section as an additional page if necessary.

Company Contact Information	
Company Name	
Street Address (Headquarters)	
City, State and Zip Code	
Main Telephone Number	
Website	

Primary Contact Information	
Name	
Job Title	
Street Address	
City, State and Zip	
Telephone Number	
Fax Number	
Email Address	

Company Profile	
How long has the company been in business?	
Has your company acquired, been acquired, merged, or had any "change in control" events within the last five (5) years? (If yes, please provide details.)	
Is your company planning to acquire, be acquired, merge, or have any "change in control" events within the next five (5) years? (If yes, please provide details.)	
How long has the company provided archiving?	
How many customers do you currently serve?	
What is your retention rate for each archiving client of the past three (3) years?	
Total FTEs Last Year	
Total FTEs This Year	
What is the average tenure of personnel?	
How much is spent on R&D?	
Do you employ or utilize off-shore resources?	
Please provide information on any outstanding lawsuits or judgments within the last five (5) years. Please indicate any cases that you cannot respond to as they were settled with a non-disclosure clause.	

Product Information	
Product name and version number	
When is your next version release?	
Describe product enhancements currently under development for release within the next 2 years.	
Is it a Client Server, ASP or Hosted model?	
Can the system be virtualized?	
How is the product licensed?	
If licensed on a 'user' basis, please define a 'user' (FTE, MD, all clinical staff, etc...)	
If licensed on a 'workstation' basis, please define a 'workstation' (computer, tablet, phone, etc...)	

Product Information	
Are licenses concurrent or per user/workstation?	
<p>Was the product (or any of its significant functionality) acquired from another company? If yes, please answer the following:</p> <ul style="list-style-type: none"> • What was the original company's name that developed the product or functionality? • What was the original product's name? • What version did you purchase? 	
List any hardware required to run the application.	
Is the database license included in the solution price?	
List any additional third-party software required to utilize the application and clarify whether they are included in the price of the solution.	
Does the solution require any type of client (Citrix, Clientware, Cisco VPN, etc?)	
List any security enhancements which must be accommodated on workstation s (e.g. active x controls enabled, dot net versions supported, registry modifications, etc.)	
<p>What applications are required or need to be installed on the client workstations?</p> <ul style="list-style-type: none"> • Java • Flash • Adobe Reader • Microsoft Office • Antivirus • Other (Please explain) 	
Is the solution vendor neutral?	
Does the system support the archival of multiple data sources within the same system?	

Product Functionality	
Does the application include a reporting module	
Does the solution store discrete data in addition to documents and images?	
Can the archive accommodate both acute and ambulatory systems?	
List the types of data that can be archived <ul style="list-style-type: none"> • Billing / Revenue Cycle • Clinical / EHR • Human Resources • Accounting Other (Please explain)	
Can we link the system to our existing enterprise reporting tool?	
Describe the record print and export process. Clarify the types of files that the system can produce.	
Will there ever be a charge to copy, move, or retrieve patient data from the product in the future?	
Do you have the ability to create a Master patient Index? If so, describe how demographics are reconciled across multiple systems.	
How is data viewed by the end user?	
Do you have the ability to insert a direct link to your system within the Epic application?	
How is confidential data managed?	
How discrete data is made available?	
How are documents and scanned documents made available?	
How are Medical Records Release requests managed?	
Is there an Audit log?	

Implementation Process

Using the template below, please provide the requested information on your implementation process. Your response to a specific item may be attached to this section as an additional page if necessary.

Data Extraction and Migration – Please outline the process for each of the systems listed within this bid.	
Do you provide data extraction services from the legacy systems?	
If so, please outline any requirements.	
If not, please outline how the data shall be extracted from the legacy system and who should be responsible for these activities.	
Do you have data specifications or formatting requirements that must be met prior to importing data into the archive?	
If so, please provide a copy of the specification and describe how the exported legacy data will be converted into these formats.	
Please outline any additional costs or concerns related to the extraction and migration of data from the legacy systems listed within this bid.	

Implementation and Training	
What is the average implementation timeline for the types of systems included within this bid?	
Outline the vendor roles and responsibilities for a typical archive project.	
Outline the customer roles and responsibilities for a typical archive project.	
Describe your implementation process.	
Describe your testing and validation process.	
<p>What types of training are normally required/provided? Please describe each.</p> <ul style="list-style-type: none"> • On-site • Remote • Video based • Web based • Documentation 	
Will a post go-live assessment be completed after a specified amount of time?	

Future Archive Projects	
Can additional data sources be added to the archive in the future? If so, please describe the process and outline any downtime that will be required.	
Will all archived data sources stored within the same application and database?	

System Support and Maintenance:

Using the template below, please provide the requested information on your system support and maintenance. Your response to a specific item may be attached to this section as an additional page if necessary.

System Support and Maintenance	
How are support requests submitted? <ul style="list-style-type: none"> • Phone • Email • Customer Portal • Etc. 	
What are your hours of support (both staffed and after-hours/on-call)?	
Do you provide any online support (self-help videos, knowledge center, etc?)	
List any support severity levels with descriptions.	
List response/resolution times for each severity level.	
Describe your issue resolution tracking system	
Do you utilize any off-shore resources for support?	
Are future upgrades included?	

System and Data Security:

Please complete the attached Exhibit "D" HCDPBC.IT.1061 IT Security Vendor Questionnaire.

Cost Estimate Template

For each proposed product, please provide cost estimates based upon the information provided within this bid and any additional details provided.

Please use the following template, if possible—or attach a cost estimate proposal that includes answers to each question below.

One-time implementation fees	
Product license fees:	
Implementation fees:	
Other fees (Please Explain):	
Total One-Time Fees:	

Annual fees	
Support and Maintenance:	
Hosting:	
Other fees (Please Explain):	
Total Annual Fees:	

Ten (10) year total cost of ownership	
Year 1 total	
Year 2 total	
Year 3 total	
Year 4 total	
Year 5 total	
Year 6 total	
Year 7 total	
Year 8 total	
Year 9 total	
Year 10 total	
Total Ten Year Cost	

2-3 Insurance

Prior to execution of the resulting contract derived from this Competitive Bid, the Respondent shall obtain and maintain in force at all times during the term of the resulting contract insurance coverage as required herein. All insurance policies shall be issued by companies authorized to do business under the laws of the State of Florida. The Certificates shall clearly indicate that the firm has obtained insurance of the type, amount,

and classification as required for strict compliance with this provision and that no material change or cancellation of the insurance shall be effective without thirty (30) days prior written notice to the District. Compliance with the foregoing requirements shall not relieve the selected Respondent of its liability and obligations under the resulting contract.

A. The Respondent shall maintain during the term of the contract, standard Professional Liability Insurance in the minimum amount of \$1,000,000.00 per occurrence.

B. The Respondent shall maintain, during the life of the contract, commercial general liability, including public and contractual liability insurance in the amount of \$1,000,000.00 per occurrence (\$2,000,000.00 aggregate) to protect the firm from claims for damages for bodily and personal injury, including wrongful death, as well as from claims of property damages which may arise from any operations under the contract, whether such operations be by the firm or by anyone directly or indirectly employed by or contracting with the firm.

C. The Respondent shall carry Workers' Compensation Insurance and Employer's Liability Insurance for all employees as required by Florida Statutes.

D. The Respondent shall maintain comprehensive automobile liability insurance in the minimum amount of \$1,000,000 combined single limit for bodily injury and property damages liability to protect from claims for damages for bodily and personal injury, including death, as well as from claims for property damage, which may arise from the ownership, use, or maintenance of owned and non-owned automobiles, including rented automobiles whether such operations be by the firm or by anyone directly or indirectly employed by the firm.

All insurance, other than Professional Liability and Workers' Compensation, to be maintained by the selected Respondent shall specifically include the District as an "Additional Insured".

PART 3 COMPETITIVE BID REQUIREMENTS

Mandatory Requirements

A Respondent who does not meet all of the mandatory requirements is not considered a responsible Respondent and, in the District's sole discretion, may be deemed ineligible to submit a Competitive Bid for consideration. Respondents must

- Have no conflicts of interest prohibited by applicable law with the District, its Board of Commissioners or Committees, nor with regard to any other work performed by the Respondent for the District.
- Adhere to the instructions in this Competitive Bid for preparation and submittal of a bid.
- Complete all documents listed in Section 3-1.
- Be registered to conduct business in the State of Florida.
- Must have a written quality assurance program with established inspection, test and documentation procedures

CONTENTS OF COMPETITIVE BID

3-1 Mandatory Forms/Attachments

- Exhibit "A" Sworn Statement on Public Entities Crimes
- Exhibit "B" Conflicts Disclosure Form
- Exhibit "C" Required Response Form
- Exhibit "D" HCDPBC IT Security Vendor Questionnaire
- Verification of business registration with Florida Department of State, Division of Corporations (Sunbiz)

3-2 Required Response Items (complete using the corresponding Excel spreadsheet Exhibit "C")

Respondents should provide a detailed description of how the Respondent shall satisfy the Specific Requirements set for in this Competitive Bid (Section 2-2). This portion of the Competitive Bid should be organized according to the items requested below:

- 1 Company Contact Information**
- 2 Primary Contact Information**
- 3 Company Profile**
- 4 Product Information**
- 5 Product Functionality**
- 6 Data Extraction and Migration**
- 7 Implementation and Training**
- 8 Future Archive Projects**

- 9 System Support and Maintenance**
- 10 System and Data Security**
- 11 Cost Estimate**

Completed Exhibit “D” HCDPBC IT Security Vendor Questionnaire