**Allegheny County**

**Department of Human Services**

**Request for Proposals Q&A**

RFP for Client Management Information System Implementation and Support Services

**November 27, 2019**

| # | Question | Response |
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| 1 | Kindly confirm if this is an international bid or limited to USA registered companies only. | International companies may submit proposals in response to this RFP. |

**December 2, 2019**

| # | Question | Response |
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| 2 | Salesforce is a monolithic web application designed for sales teams. We respectfully believe it is a really bad idea to build a client and case management system on a sales CRM. Would the County reconsider this decision and allow the submission of solutions on platforms that are designed for human services rather than sales? | No. In April of this year we issued an open-ended RFP for a Client Management Information System. We received 30 proposals that presented a mix of software-as-a-service and platform-as-a-service solutions using a variety of platforms. Ultimately we determined that that RFP as-issued did not accurately reflect our organization's needs and did not award a contract under that RFP. However, through the process of reviewing those proposals and presentations and conducting extensive due diligence, we concluded that Salesforce is the platform best suited for DHS's needs at this time. |
| 3 | Can the County share the rationale behind using a sales CRM for social and human services tracking? | Please refer to Question #2 |
| 4 | Is there a desired go-live date? | This will be dependent upon the agreed upon scope and implementation plan. |

**December 6, 2019**

| # | Question | Response |
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| 5 | Would the County please consider extending the deadline by four weeks? | We will extend the deadline by two weeks (from January 8, 2020 to January 22, 2020). Please note there are page limits on the response which should help ensure responses are concise and relatively short. |

**December 11, 2019**

| # | Question | Response |
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| 6 | RFP Page 5 (of 40) states, "While proposers may respond to both the Implementation Services and Architecture and Governance Support Services portions of this RFP, DHS values Architecture and Governance Support Services that can be provided completely independent of the solution." Would DHS please confirm that if a vendor submitted both the Implementation Services and Architecture and Governance Support Services proposals that each response will be evaluated independently and will be considered for either award? | Yes, correct. Please also see Section 6 of the RFP, Proposal Requirements and Evaluation Criteria, and the Response Form for detailed evaluation information. |
| 7 | The implementation tab of the pricing workbooks ask for labor costs per year to implement the required functionality... Is the expectation to price a complete implementation year 1 for all of the functionality and then provide price for O&M costs for future years? Or, is the expectation to provide a phased deployment strategy? If the expectation is to provide a phased deployment strategy, would DHS please indicate which functionality should be deployed per year? | DHS expects to have a fully functioning Client Management Information System (CMIS) in the first year. The initial deployment of the CMIS may include shallow data elements, limited workflows and basic reporting capabilities, but all of the core and supporting features and identified integrations should be present. DHS would like to iterate on the CMIS in future years and build out certain areas to have, for example, a more robust assessment or set of reports, based on user feedback and need. |

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| 8 | During the implementation we expect that a number of Organizational Change Management planning and implementation activities will be required to successfully implement the new DHS solution. Can DHS please describe what organization(s) will be responsible for these activities and should those activities be scoped as a component of the Technical Architecture and Solution Governance Advisory Services part of the proposal? | By default this responsibility would fall to DHS, but DHS welcomes any support services to assist in the planning and execution of Organization Change Management activities. Proposers are free to submit optional services to DHS for consideration as part of their proposals. |
| 9 | The critical activity of testing has been identified in the Implementation Services component of the RFP. Does DHS anticipate testing planning, QA, or other forms of oversight support as a part of the Technical Architecture and Solution Governance Advisory Services part of the proposal? | DHS does not anticipate these services being needed by the Technical Architecture and Solution Governance Advisory Services vendor, however proposers are free to submit optional services to DHS for consideration as part of their proposals. |
| 10 | For purposes of scoring and evaluation for Technical Architecture and Governance Advisory support services, should we assume pricing for a 1 year implementation? Should we offer proposed costs for additional periods? | Please refer to Question #7. |
| 11 | For scope planning and comparison purposes, can DHS please provide the initial list (or targeted list) of County Departments where the Couty intends to implement the DHS solution? | This has not yet been determined, but there are various program offices within DHS that could use the DHS solution. These program offices include: Office of Community Services, Office of Behavioral Health, etc. (Refer to the following for more details: https://www.alleghenycounty.us/Human-Services/About/Offices.aspx) |

**December 19, 2019**

| # | Question | Response |
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| 12 | We need details about the integration requirements, system by system. An example of high level information that we would need for each in scope integration follows.<br><br>Example System: DHS's Master Provider Enterprise Repository<br>a) Upon record update in Salesforce (SFDC), a real-time push is to be made to REST/SOAP API.<br>b) Once daily, bulk diff. is to be performed between MPER and SFDC. Updates or inserts to be made appropriately in SFDC.<br>c) Etc. | This would be worked out through initial discovery and planning sessions, ideally with the vendors selected. One of our most important IT assets is our Master Client Index (MCI) - which is our unique identifier for an individual across our various systems - at the very least the solution would have to integrate with this IT asset in real time. ACDHS currently has an MCI service that can be leveraged. For the most part, services would have to be developed to integration this solution int our existing IT ecosystem. ACDHS is committed to building out this integration capability for purposes of this solution, as well as other use cases across our IT ecosystem. |
| 13 | Can we assume the presence of an ESB API/Orchestration layer? Please confirm. | ACDHS does not have an ESB nor API/Orchestration layer at this time, but would be open to considering options around this as it could help our broader IT ecosystem. |
| 14 | What does Electronic Signature mean? An image-based "Finger Sign" or an email-based "DocuSign" approach? | Electronic signature means the ability to record in the CMIS when an individual acknowledges the review, receipt or approval of documentation. ACDHS envisions being able to capture a client's signature (for service-related documentation authorization and acknowledgement) or a worker or supervisor's signature (for service-related documentation submission or approval). Depending on the individual using the electronic signature, it could take the form of a "Finger Sign" or "Docusign." |
| 15 | When communicating with an individual (e.g. Client) via "Letter," simple Document Merge (aka Conga Composer or DrawLoop) to a .PDF is assumed sufficient. Please confirm. | Yes - today cognos is used to generate much of our letter correspondence, we would be open to exploring this proposed approach further. |

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| 16 | Is Platform Shield Encryption under consideration? Is encryption at rest a requirement? | Data security and data privacy are of utmost importance to DHS. Implementation of specific security controls such as Shield Platform Encryption or encryption at rest will be evaluated and designed in consultation with our implementation partner(s) along with risk and regulatory analysis to be completed during the implementation phase. |
| 17 | User Experience and Usability: We will leverage as much standard functionality as possible, and where we do need to go custom we will rely on Salesforce styling so as to deliver a consistent look and feel throughout the application. We assume this is acceptable. | Yes. |
| 18 | User Experience and Usability: Solution performance (e.g. load a specific Page within 2 seconds) is a good goal, but as an implementor we cannot guarantee specific benchmarks as performance ultimately depends on things outside of our direct control such as 1) the Salesforce service itself, 2) Internet Traffic, 3) Client Browser and Hardware. We assume this is acceptable. | Understood that more than just solution performance goes into a page's perceived performance. We would have discussions around the right constraints and reasonable benchmarks to conduct performance testing. |
| 19 | Audit Logs and Event Tracking: There are limitations to the amount of data that can be stored on the platform. For example, standard Field History Tracking is limited in the number of fields per table that can be tracked, and the persistence of the records on platform. Is this something that we can openly discuss during initial discovery and analysis? | Yes. |

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| 20 | Usage Analysis Capability: Session time can be tracked, and User Actions can be tracked…but measuring the time users spend on unique screens/forms/in workflows will be a challenge. How critical is this requirement? | It is important for ACDHS to measure the friction, or how efficient, the solution is to the end user completing their given goal/objective. ACDHS is open to discussions and different approaches to achieve this. |
| 21 | Reporting: Does the requirement for data analysis refer to complex data visualizations or standard transactional reports/dashboards? The question is being asked to determine if tools such as Tableau may be needed. | ACDHS already has Tableau and uses it extensively. |
| 22 | Do you have/use any middleware solutions for integrations currently? | See Question #13. |
| 23 | Will we have the opportunity to do an in person presentation of the Proposal and Discovery? We enjoy a face to face approach early on in the process in order to establish a good basis of relationship. | Please refer to Section 8 of the RFP. |
| 24 | How will new project requirements be handled if discovered outside of the RFP and project proposal? Would they be handled through a bank of extra hours? | ACDHS is open to considering different project and cost approaches, including capacity based (where effort is locked and scope is somewhat flexible) or a more fixed project scope and cost approach (where additional resources could be planned for to support growth in scope). |
| 25 | How many data sources will be imported into Salesforce (estimated) and what is the data format? | This has not yet been determined. A majority of our custom built applications to date use Oracle databases, which are hosted on on-prem Microsoft servers. We are currently planning to migrate our server platform to Azure. We are always assessing our current tech stack and considering if any other technology changes make sense for ACDHS. We will assess which data needs to be migrated to Salesforce and what data needs to be integrated with the Salesforce solution. |

| # | Question | Response |
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| 26 | How do MPER and MCI integrate (connect) to the other DHS applications? | While ACDHS does have some web services that are used to integrate enterprise components with IT applications (such as MCI), these web services might have to be modified or extended some to support integration with Salesforce. In addition, some ACDHS applications access other applications/enterprise components through direct database links and connections - this approach will not be used in our ongoing integration work. |

**December 20, 2019**

| # | Question | Response |
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| 27 | What will be the County's level of involvement from a governance perspective - i.e. will the county be involving a Project Manager and Product Owner to work with the team and will they be dedicated or partially allocated. Additionally, what level of access will the vendor team have to the key stakeholders for the project, including key persons from the DHS and providers. | The county will have a high level of involvement in governance processes. A Project Manager and/or Owner will be dedicated. The Successful Proposer(s) can have access to key stakeholders if it makes sense for the overall delivery and governance of the solution. |
| 28 | Does the County plan to carry out specific testing activities themselves or is the County looking for the vendor to carry out all such activities? | Currently DHS writes and executes UAT test cases on new and updated IT application functionality. DHS assumes the Successful Proposer might carry out other forms of QA testing (unit testing, integration testing, regression testing, performance testing) in order to provide a high-quality solution to DHS. Proposers are free to submit optional services to DHS for consideration. |

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| 29 | We understand that programs will be "Onboarded" (~20% customization for the program-specific functions) to the system over a period of time however, for each program, does the County have a preferred roll-out method? Is a roll-out typically done for all users in a program at once (Big Bang) or is it a more incremental approach. | DHS is open to considering different implementation approaches. |
| 30 | Are there any legislative requirements regarding data migration and retention that must be met? How much data does the County plan to migrate to new system including open cases and historical data. | Please refer to Question 25. |
| 31 | Is the County interested in providing Self-registration capabilities for end-users/citizens on the Citizen Portal? | This is a possible capability that DHS would consider for future implementation. |
| 32 | Can the County please provide more information on the MCI and MPER systems? What are the current technologies used by these systems/applications? Do these systems have the ability to use web services APIs? What messaging formats are currently used by these applications/systems (for example XML/ JSON)? | MCI and MPER systems are built in .NET technology and currently housed within Oracle databases. These systems do have the ability to integrate via APIs. A few REST API services already exist for MCI and MPER, and might have to be further extended based upon the solution's needs and design. These APIs currently return data in JSON format. |
| 33 | What is the County's vision for integrating the new Salesforce based HHS application with the MCI and MPER systems? Would it be Real-time or Batch/Asynchronous? | Ideally it would be real-time. |

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| 34 | Are you expecting to provide / implement Salesforce portal solutions for user groups? If yes, are you looking to implement any custom UI solution for the portals? Also can you please elaborate on the functional requirements for the portal solutions please? | We are not clear on what a portal solution is referring to, so are unable to adequately respond.  We are open to considering custom solutions on top of the Salesforce platform, but we must weigh any such solutions through the lens of a total cost of ownership and pass through a governance process to confirm value. |
| 35 | Can you please elaborate on the aspects of support you are looking from governance start up and support? | In some ways, the technology implementation of this solution is relatively easy - the tools and technology are readily available.  We believe adequate and well-thought-out governance processes, which serve to control solution capability in balance with a solution's total cost of ownership and maintainability are critical to this solution's success.  Thus, we are seeking support in designing and implementing these governance processes. |
| 36 | Is DHS looking only for staff support or expecting the vendor to also provide with the required solution for CMIS | We are expecting the Successful Proposer to implement a Salesforce-based CMIS solution. |
| 37 | Can you please confirm on what Salesforce platform has been finalized for the CMIS solution. | Proposers may propose any CMIS solution built on the Salesforce platform. |
| 38 | Can you please let us know the number of interfaces that are required for integration with the base CMIS application? Can you also please elaborate on your integration methodology? Do you have any integration middleware for the same? | Please see questions 13 and 26. |
| 39 | Can you please let us know if data migration is in scope of the services required? If yes, can you please let us know the volume of data required to be moved into the new CMIS platform? Are we expected to do any additional cleaning / de-duplication, data massaging as a part of the data migration activity? | Please refer to Question 25. |

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| 40 | Can you please let us know your strategy for Data storage? Are you looking for external data storage / archival solutions to be proposed by the vendor | We are not necessarily looking for external data storage/archival solutions to be proposed, though Proposers may include optional services/solutions for consideration. |
| 41 | Are there any data encryption solutions required for the CMIS platform? If yes, are you expecting the vendor to provide any recommendations on the encryption products & services? | Please refer to Question 16. |
| 42 | System users: Can you please confirm on the number of profiles and different types and # of users for the CMIS platform? | Please refer to Appendix C of the RFP. This provides different profile types and number of users from years 1-5. |
| 43 | Mobile: Are you looking for any custom mobile solutions to be additionally developed? Or would this be the native Salesforce mobile app? | DHS is not looking for a custom mobile solution along with the initial deployment of the CMIS. However, this is a possible capability that DHS would consider for future implementation. |
| 44 | Reporting capabilities: Can you please confirm on the # of reports / dashboards you are currently looking to generate? Are you also expecting for any additional reporting functionalities apart from the standard reports that Salesforce offers? | This will be dependent upon the agreed upon scope and implementation plan. |
| 45 | Support: is it a fair assumption that from a technical support perspective, DHS is looking for a L2/L3 support to be offered by the vendor? Also do you currently have any tool to capture the support cases and share it with the support team or are the vendors expected to provide the same? | Yes, for technical support DHS would consider L2/L3 support. Currently DHS uses a combination of EasyVista to track service tickets and Microsoft Team Foundation Server (TFS) to track bugs, feature requests, and user stories, and test cases being developed for eventual release to production. |

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| 46 | In Subsection C. Data Housing in Section 5.1 - Technical Considerations, the RFP states that "The Solution will be hosted on Salesforce's public cloud, whihc is HIPAA, FedRamp, NIST, ISO-27001, ISO-72017 and ISO-27018 certified."<br><br>Salesforce GovCloud is FedRamp certified whereas the public cloud is not. The cost to host CMIS in GovCloud will be higher but it is FedRamp certified. Please clarify whether the County wants the application hosted in Salesforce's GovCloud or public cloud. | The Salesforce Government Cloud is a portion of Salesforce's multitenant public cloud infrastructure, specifically partitioned for use by Federal, state, and local government agencies.  While DHS does anticipate primary use of the Government Cloud, we also understand that not all features and capabilities of Salesforce are available in that environment. We are therefore open to thoughtful, risk vs. benefit analysis and guidance from our partners when considering use cases that may require a non-government cloud solution. |
| 47 | Under Year 1 in Appendix C: Assumptions for Cost Proposal Response Template (page 40), the RFP states that "The design and implementation phases of the 'core' Solution (as defined in Section 2.2 - including MCI and MPER integration) will be completed and CMIS will be used by two programs/providers. All the core functionality may not be utilized by these initial programs/providers."<br>Can the County specify which of the following are to be estimated/implemented Year 1? Further specification will help the County evaluation all contractors at the same level:<br>- What are the various interfaces (Request/Response) that are to be costed for MCI and MPER? Example: Registration/Inserts, Updates/synchronization, Search, Send Program Information, etc.<br>- What are the programs that Contractors should estimate/implement for Year 1? Example: Housing assistance program, one-time assistance | **-What are the various interfaces (Request/Response) that are to be costed for MCI and MPER?**<br><br>MCI<br>Master Client Index (MCI) is the enterprise repository of key client demographic data for individuals served by DHS. Various systems reference the unique client identifier used by the MCI, thus enabling DHS to understand services to the same individual across human services programs.<br><br>DHS has established two web services for use with the MCI.  One web service enables a calling (local) system to pass known client information to the MCI; at a minimum, First Name, Last Name, Date of Birth, and Gender. The web service returns to the calling system a set of potential client matches, each accompanied by a percentage score of up to 99%. The percentage score is how a user of the calling system makes the decision to associate a local client record to a known MCI record, or to create a new MCI record. Established business rules enforce decisions |

| # | Question | Response |
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| | | at certain percentage thresholds. |
| | | A second web service is used to both insert and update information in the MCI. An insert occurs when a calling system creates a new client record in the MCI. An update occurs when a calling system updates a client record in the MCI. |
| | | Proposers should include these MCI integrations in their Year 1 costs. |
| | | MPER<br>Master Provider Enterprise Repository (MPER) is a centralized repository of provider, contract, service, service offering, allocation and facility information that is used by multiple program offices to perform essential business operations. Various systems reference the unique provider identifier used by the MPER, thus enabling DHS to understand services rendered by the same provider across human services programs. The use of a unique provider identifier is also integral to administrative functions such as contracting and billing. |
| | | DHS does not yet have established web services for use with the MPER. DHS may develop such services concurrent with this project and thus have them available for use by the CMIS. Fundamentally, DHS wants to ensure that the CMIS stays up to date with basic provider information such as the Master Provider Identifier, Addresses, Services, etc. Absent formal web services, this may be done through periodic quality assurance queries. |
| | | Discussion about integration with MPER will unfold as the project proceeds. For the purpose of Year 1 costs, assume that level of |

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| | | effort associated with MPER integration will be comparable to that of MCI integration.<br><br>**- What are the programs that Contractors should estimate/implement for Year 1? Example: Housing assistance program, one-time assistance**<br><br>It is the expectation that in Year 1, the design and implementation phases of the Core Solution will be completed and CMIS will be used by two programs/providers.<br><br>It is not yet determined which programs/providers will use the CMIS in Year 1. Our objective is minimize the need to deviate from the Core Solution when implementing programs/providers. At a minimum, we expect that 80% of the functionality for the two programs/providers in Year 1 would be inherent in the Core Solution. |
| 48 | If vendors wish to submit for both the Implementation Services and the Technical Architecture & Governance Advisory Support Services, can Vendors provide more than 3 references since we may have references that are common between the two, and other references that may be unique to each proposal response? | Yes; please clearly identify which part of the proposal each reference is relevant to. |

**January 8, 2020**

| # | Question | Response |
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| 49 | Due to the influx of Q&A and the impacts on our proposed solution(s), would DHS please consider extending the submission deadline by one (1) week, to January 29th? | Given that we have already extended our timeline by extending the original submission deadline of January 8 two weeks to January 22, we do not wish to further extend the deadline. |

**January 9, 2020**

| # | Question | Response |
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| 50 | Does the county currently have any contracts with Electronic Signature providers? Are there specific regulatory requirements or other requirements that must be met with regards to electronic signatures? Is the intent to capture signatures "In Person" while in front of the client? | Allegheny County contracts with DocuSign.  Further signature requirements need to be further defined |
| 51 | Does the county envision moderation/management/compliance processes for text, email and other internal communications using the platform (such as Live Chat or Chatter)? Are there established guidelines for communication compliance that can be shared? | The County would be open to these capabilities in interacting with clients.  There is no current established communication guidelines with regard to these potential new communication channels that CMIS might enable. |
| 52 | Who are the decision makers for this RFP? | Please review Section 8 of the RFP, How We Will Evaluate Your Proposal. The Evaluation Committee will be composed of subject matter experts from across DHS, as well as representatives from DHS's contracted providers |
| 53 | RFP Section 4.1: Where are the stakeholders located that these processes involve? Will any travel be necessary? | CMIS stakeholders are primarily located in Allegheny County.  We are open to different service delivery methods, whether that be in person or remote - there may be specific times that travel to Allegheny County would be beneficial but this is pending future planning |

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| 54 | RFP Section 4.2D: Referrals - Can more clarity be provided? | The same individual or household may be referred for and receive the same service multiple times over a period of time. Each time a referral for a service is made, a record would be created for the individual and the service they are to receive. There are times when DHS would want the ability to collect all of the records for an individual or household in one case and view, from a historical perspective, the services provided at different points in time. There is also a use case where each record would be considered its own case, in which a single service episode (explained further in question 82) would be separate from other services provided to the individual or household, present or past. |
| 55 | Section 4.3A implies that a master table will exist somewhere documenting services by provider and their criteria for eligibility. This also implies some type of normalized meta data structure to describe this criteria mapping by service and provider. Does this already exist or will it need to be designed? Furthermore will Service Providers be allowed to edit and update their own entries in the system? Is this the same requirement as 4.9A? | A master table will exist with facility details, service eligibility and capacity within the solution, MPER (see Appendix A) or a combination of both. Service providers should be able to edit this information in either location. It is the same requirement as 4.9 A. |
| 56 | RFP Section 4.4A: What is meant by Natural and Professional Supports? | Supports are a way of categorizing individuals who are not part of a household, but play a supportive role (i.e. financially, emotionally, physically) for the individual or household who is receiving services. Natural supports would be un-paid individuals, such as family, friends or neighbors. Professional supports would be individuals who assist as a part of their job duties, like a case manager, therapist or teacher. |

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| 57 | RFP Section 4.4C: Is the indication of notifying invitees by Letter a requirement for document generation from the system? If so to what extent should this be automated? | If notifying an invitee via letter, a document would need to be generated from the system. The letter would likely be a standard template with meeting details and other information populated based on what is entered into the solution. The letter would be generated by the user performing an action and would not need to be automated. |
| 58 | RFP Section 4.4D: Are there more detailed guidance documents on Document Storage requirements. Does the county already have other contacts or systems for digital document storage and retrieval that could be leveraged for the solution? Is it the desire of the County that ALL client records should be stored electronically IN salesforce for each client OR can integrations to electronic document storage solutions be used? | DHS has an electronic document management system called OnBase that stores, organizes and retrieves electronic documents related to clients and the various services they receive. Besides being a direct repository for electronic documents, a large majority of the existing DHS applications integrate with OnBase as well. The use case referenced is related to information that cannot be directly entered into the solution, but is a valuable part of the record, such as medical records, signed releases of information/consent or legal documents. DHS does not want to place limitations on what can be stored electronically outside of specific files types and sizes. However, integration with OnBase will not be a part of the initial solution deployment. |
| 59 | RFP Section 4.5: Assessments come in all shapes and sizes and media. Is there a comprehensive list of the types and forms of assessments and their results that need to be stored? If assessments occur on paper is the County indicating that some form of ORC, Scanning, or other document digitization technology must be used? | DHS has provided a list of assessment examples in section 4.5. This is not an exhaustive list and every assessment will not be built into the Solution. We hope to leverage electronic document storage (see question 58) to house assessments that are not able to be entered directly into the CMIS. |

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| 60 | RFP Section 4.6C: Does a "snapshot" mean saved versions of the same plan over time as changes are made? On what frequency? Are there other similar requirements for other stored data in the system and if so what information needs snapshots? | A "snapshot" does mean a version of the case plan which captures the changes that were made at a particular point-in-time. Each program/provider will have a different frequency they are updating and saving the case plan. We would want to see a snapshot of any assessment completed within the CMIS and the frequency will vary as well. The saving of changes to a case plan or assessment will occur when the user performs an action and will not have to be automated. |
| 61 | RFP Section 4.10A - Does the County want to consider a Meta Data backup service to protect system meta data and enable recovery of meta data that was changed or deleted? i.e. a master source control system for the county Salesforce instance? | Proposers may include optional services fo consideration. DHS would be open to considering any additional services that would allow full transparency to the configurations made to the solution over time. |
| 62 | RFP Section 4.12A: Implies document generation. | Unclear what the question is; we are unable to respond. |
| 63 | Will all participants be required to authorize/provide consent for storage and use of their data in the system? If so, how will this occur? | No. |
| 64 | RFP Section 5.1: Will the team have access to and support from the internal DHS IT teams if needed for any integrations, etc? | Yes, as it makes sense with the selected implementation strategy. See Question 27. |
| 65 | RFP Section 5.1 D: Is there a preferred method for maintaining documentation? | Allegheny County is open to considering different documentation methods. |
| 66 | RFP Section 5.1 E, Data quality calls out De Duplication specific to clients and households. Are there other similar requirements? | Other data quality topics can be explored further during discovery and requirement activities. |
| 67 | RFP Section 5.1 I. Implies Offline Access …. Is this correct? Is the expectation to provide an On Device offline application in addition to the core connected applications for online use? | The solution could provide offline capabilities, which would greatly increase the value and utility of the solution - however this is not a mandatory requirement in the initial launch. |

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| 68 | RFP Section 5.2 D Implies use of one or more FULL sandboxes. Has the county already considered this? | Yes - we are open to considering various support environments depending upon the proposed solution and methodology to introduce, test, and deploy changes to the solution |
| 69 | RFP Section 6.1A: Use of the specific application, or similar Salesforce implementations? | Preferably salesforce implementations |
| 70 | RFP Section 6.2A: Will the team be empowered to make the necessary changes to the business in order to implement identified improvements to the current processes prior to automation? | Yes, business changes could be made if it makes sense to ACDHS's objectives |
| 71 | RFP Section 9.1 - Which women-owned certifications are acceptable? | Allegheny County is part of the Pennsylvania Unified Certification Program and certified M/W/DBEs can be found through the website (www.paucp.com). Please note that other M/W/DBE certifications are reviewed and accepted on a case-by-case basis. Allegheny County will not accept any "self certifications" or "certification registrations." Please see also the MWDBE materials provided on our Solicitations webpage under "Required Documents." |
| 72 | RFP Section 9.2 HIPPA Compliance ... How will this be confirmed? | Allegheny County's contractual HIPAA requirements can be found in the Incorporated Standard Federal Terms and Conditions on the Solicitations webpage under "Required Documents," beginning on page 7. All contractors doing business with Allegheny County are subject to initial review for compliance with all contractual requirements including the HIPAA requirements, as well as ongoing contract monitoring. |
| 73 | RFP Section 9.3 Cyber Security ... Is this specific to the solution being proposed or the provider? | Section 9.3 will apply to the selected proposer as a contractual requirement. |

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| 74 | Appendix A - Technology Used …. Can the county provide more information on this listing? How is the technology used specific to the user stories in the RFP or other requirements laid out in the RFP? How does this technology map to the current systems listed in the Appendix? | This section is meant to help educate potential responders on our existing IT ecosystem and technologies used. The user stories in the RFP are not meant to be conflated with the current technologies used at ACDHS. |
| 75 | How and when are client created in the application? What is a MCI Id? How does it impact services received? | An MCI ID === a Master Client Index Identification, which is meant to serve as a digital representation of a unique client or collateral. MCI IDs can be created or associated to clients at various places within our applications. Services are almost always associated to a client's MCI ID. |
| 76 | Can a Referral be raised for a non-existing client? Who will create the client information the referrer or the worker? | In general we send referrals for clients who have an MCI ID, but not always necessary. Who will create clients and send referrals is dependent upon a given use case. |
| 77 | Can one client or household participate or receive more than 1 service simultaneously? What happens if they receive additional referrals? | Yes, clients or households could receive more than 1 service simultaneously. |
| 78 | What Electronic Signature solution is currently used? How is it used? | See Question 50. |
| 79 | Will the client have access to the application? What activities can the client perform in the application? | In the initial release, no - but client access could be extended in the future |
| 80 | How will the Referral be created by non DHS providers? | This can be discussed further in future discovery or requirement sessions |
| 81 | Will 3rd party providers have access to the application trough community? What activities can they perform in the application? | Yes, DHS contracts with various service providers, who would have access to this solution. The specific activities and capabilities extended to contracted providers would be determined in future discovery and requirement sessions |

| # | Question | Response |
|---|----------|----------|
| 82 | What is a Service Episode and how is it different from Service Plan? | A Service Episode is a period of time from when an individual or household is referred to or begins engaging in a service to when they are discharged (voluntarily or involuntarily. A Service Plan is an electronic document where the individual or household's service-related goals are entered and progress is assigned to each goal. |
| 83 | On the MWDBE requirement, do the MWDBEs have to be certified in Pennsylvania or would MWDBEs certified in other states meet the requirement? | See Question 71. |
| 84 | We are a Unified Certified MBE Firm that can either partner with another firm or bid direct. Is it acceptable to do both? | Yes. Please also carefully review the MWDBE materials provided on our Solicitations webpage under "Required Documents." |
| 85 | Who are your current providers for the services you're requesting? | None, we do not currently have a comprehensive CMIS on the Salesforce platform. |
| 86 | I don't know if I missed this, but are there any government clearances required? (Such as Homeland Security) | No. |

**Amendment – December 6, 2019**

We amended the RFP and website to reflect a new proposal submission deadline of 3 p.m. Eastern time on January 22, 2020 (previously January 8, 2020), in accordance with our response to Question 5.

Correspondingly, we updated the deadline to submit questions to January 8, 2020 (previously December 20, 2019) and the estimated award decision/notification date to April 2020 (previously March 2020).