RFP Response Form

Homeless Management Information System (HMIS)

PROPOSER INFORMATION

Proposer Name: EccoVia Inc. DBA Eccovia Solutions

Authorized Representative Name & Title: Norm Warren, Account Executive

Address: 545 East 4500 South, E-260, Salt Lake City, UT 84107

Telephone: Office: 801-290-5496

Email: nwarren@eccoviasolutions.com

Website: EccoviaSolutions.com

Legal Status: ☒ For-Profit Corp. ☐ Nonprofit Corp. ☐Sole Proprietor ☐Partnership

Date Incorporated: 1983—State of Utah

REQUIRED CONTACTS

	Name	Phone	Email
Chief Executive Officer	Carl Champagne	801-290-5477	cchampagne@eccoviasolutions.com
Contract Processing Contact	Shelly Gundry	385-218-5725	sgundry@eccoviasolutions.com
Chief Information Officer	Daniel O'Connor	801-290-5481	doconoor@eccoviasolutions.com
Chief Financial Officer	Terry Johnson	801-290-5484	tjohnson@eccoviasolutions.com
MPER Contact*	Stephanie Morey	385-722-5984	smorey@eccoviasolutions.com

** MPER is DHS's provider and contract management system. Please list an administrative contract to update and manage this system for your agency.*

BOARD INFORMATION

Provide a list of your board members as an attachment or in the space below.
[redacted]

Board Chairperson Name & Title: [redacted]

Board Chairperson Address: [redacted]

Board Chairperson Telephone: [redacted]

Board Chairperson Email: [redacted]

RFP Response Form

Homeless Management Information System (HMIS)

REFERENCES

Provide the name, affiliation and contact information [include email address and telephone number] for three references who are able to address relevant experience with your organization.
Please do not use employees of the Allegheny County Department of Human Services as references.

- City of Philadelphia, Office of Homeless Services – Okestra Soneyin, Director of HMIS – [redacted]
- Commonwealth of PA, Dept. of Community and Economic Development – David Weathington, HMIS Admin – [redacted]
- State of Georgia, Housing and Finance Authority – Jeanette Pollock, Special Projects Manager – [redacted]

PROPOSAL INFORMATION

Date Submitted 2/23/2018

Amount Requested: See Pricing Attachment

Proposal Abstract:
Please limit your response to 750 characters
ClientTrack HMIS is a flexible case management solution that focuses on meeting the needs of HMIS continuum member agencies and their community partners. Some of our key clients include Commonwealth of Pennsylvania, City of Philadelphia, City of Houston, and states such as Georgia and Utah.

ClientTrack includes a built-in, customizable coordinated entry tool that facilitates quick identification and prioritization of individuals in order to match the right resources with the right individuals. ClientTrack is configured to meet the latest HUD HMIS data standards, and comes with all the latest HUD compliance reporting requirements pre-configured. In addition, ClientTrack enables:

- Improved data quality
- Consistency in data collection and reporting
- Cross-agency data sharing
- Real-time referrals and provider communication
- Data analysis and custom reporting

RFP Response Form

Homeless Management Information System (HMIS)

CERTIFICATION
Please check the following before submitting your Proposal, as applicable:

☒ I have read the standard County terms and conditions for County contracts and the requirements for DHS Cyber Security, EEOC/Non-Discrimination and HIPAA.

☒ By submitting this proposal, I certify and represent to the County that all submitted materials are true and accurate, and that I have not offered, conferred or agreed to confer any pecuniary benefit or other thing of value for the receipt of special treatment, advantaged information, recipient's decision, opinion, recommendation, vote or any other exercise of discretion concerning this RFP.

ATTACHMENTS
Please submit the following attachments with your Response Form. These can be found at http://www.alleghenycounty.us/dhs/solicitations.

- MWDBE documents
  NOTE: Eccovia Solutions qualifies as a Small Business Enterprise in the State of Pennsylvania. Our certificate expired a few months ago, but we can renew it if need be
- Allegheny County Vendor Creation Form
- 3 years of audited financial reports
- W-9

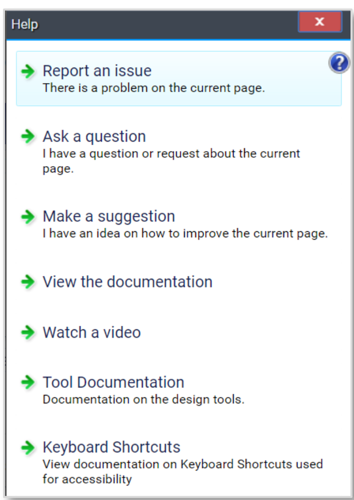
REQUIREMENTS

Please respond to the following. The maximum score a Proposal can receive is 200 points. Your written response to this section should not exceed 15 pages; you may attach screen shots or other visual aids as needed. These will not count toward the page limit.

A. Administrative

1. Describe your capacity and approach to providing quick and responsive customer support. Please provide a concrete example and also describe how you will work with DHS staff and end users.

Issues submitted to the ClientTrack support team are reviewed within five (5) business hours and assigned to an appropriate technician to be resolved accordingly.



If an authorized user reports an issue with the Application, ClientTrack will:

- Triage the problem reported by the authorized user
- Diagnosis/perform a root cause analysis
- Develop a workaround (if necessary)
- Develop a resolution by updating configuration or code if necessary
- Test the resolution
- Communicate with the authorized user the resolution or workaround and if need be, obtain approval for syncing the resolution to production

ClientTrack will work continuously to resolve the issue until is it solved to the authorized user's satisfaction. ClientTrack will close the issue Ticket after the fix has been applied.

Integrated Ticketing System

Your ClientTrack solution includes an Integrated Ticketing System. This system enables users to ask questions, make suggestions, or report issues from within the software. If you are experiencing problems with ClientTrack, you can submit a Ticket.

Simply navigate to the relevant area of the application in which you are experiencing an issue, and select **Help** in the top right-hand corner of your screen. You will be presented with a dialogue box designed to guide your request for help.

Once you click to report an issue, ask a question, or make a suggestion, you can then complete basic information about your request, including a description, a screenshot, and information about how to best contact you for further clarification.

Your local System Administrator is alerted upon submission of your issue. If they are unable to fix the issue themselves, they can submit the ticket to Eccovia Solutions for further assistance.

Once the ticket is submitted, the user receives an email about the issue and can track the status of the issue's resolution within the ClientTrack application. Users receive constant communication about the issue via email any time the status of the issue changes (e.g. when the issue is assigned, resolved, etc.)

2. Describe what documentation you will provide to support administration and use of the software.

ClientTrack users receive instant access to the *ClientTrack User Guide*, by clicking the Help icon and clicking "View the Documentation." This guide gives information and guidance on (among many more topics) reporting modules and workflow for entering client information.

ClientTrack will provide an *HMIS Reporting with ClientTrack Guide*. This guide will outline the HMIS Reports in your ClientTrack solution. The guide will also instruct users on features of ClientTrack reports, including drilldown, report exports, and more.

ClientTrack will provide a *HMIS Data Collection Guide*. This guide will describe the ClientTrack workflows used to collect HMIS data including federal partner variations (for example, RHY). This guide will meet the needs for both the workflow for entering client information and the user manuals specific to HMIS data entry.

B. HUD Compliance

1. Describe how your software adheres to current HUD data and technical standards and your process for ensuring it adheres to all future standards.

The ClientTrack solution conforms to all HUD data and technical standards, and is updated in an ongoing basis as HUD standards change. All HUD reporting can be accomplished by DHS HMIS administrators, including the most recent HUD CSV standard. Forty percent of all Eccovia Solutions clients utilize ClientTrack for either HMIS or housing-associated case management that requires some form of HUD compliance. Whenever HUD reporting or compliance standards change, a work request is completed by Eric Wilka, HMIS Product Manager. This work order is then processed through software development with iterative testing (scrum/agile) before being released to clients.

2. Describe your approach to keeping your HMIS up-to-date with all HUD-mandated requirements in a timely manner, as established by HUD.

Improving our HMIS solution is a top priority for Eccovia Solutions. The ClientTrack solution conforms to all HUD data and technical standards. As an active participant in the HMIS vendor community and the monthly Vendor calls, Eccovia Solutions receives the most up-to-date information on new reporting standards. Once released, the Eccovia team begins work using an agile development method. Engineers work with subject matter experts to develop reports accurately and as quickly as possible. Compliance updates take priority for HMIS work to ensure on time deployments.

3. Describe your approach to participating in HUD's monthly HMIS vendor calls and meetings. (e.g., who from your firm participates, and how often?)

   Eccovia Solutions' HMIS Product Manager, Eric Wilka, attends all HUD monthly HMIS vendor calls.

- Six years' experience configuring ClientTrack for HMIS solutions
- Four years' experience as a HUD technical expert
- Two years' experience in software design and UIX development
- Experience managing state-wide HMIS systems
- Has worked directly with HUD to keep the ClientTrack solution compliant
- Collaborated with the Partnership Center in creating common report definitions used by all HMIS vendors

C. Usability/Functionality

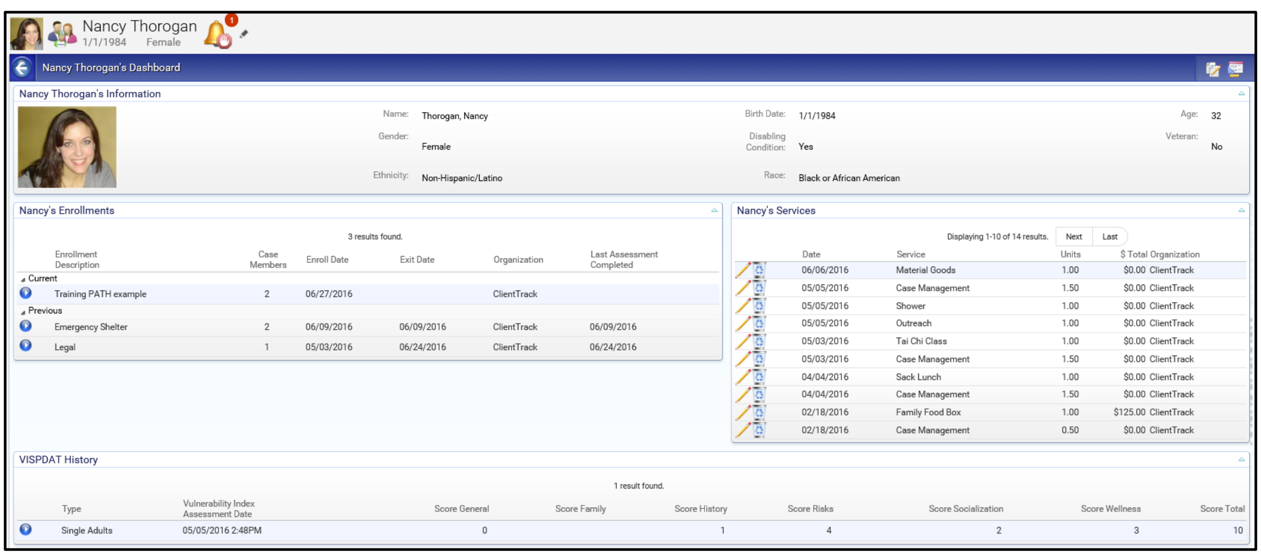
1. Describe how DHS will be able to access all underlying data.

Eccovia Solutions will provide an HMIS data dictionary to the DHS. System administrators with configured permissions/rights will be able to access DHS data at any time.

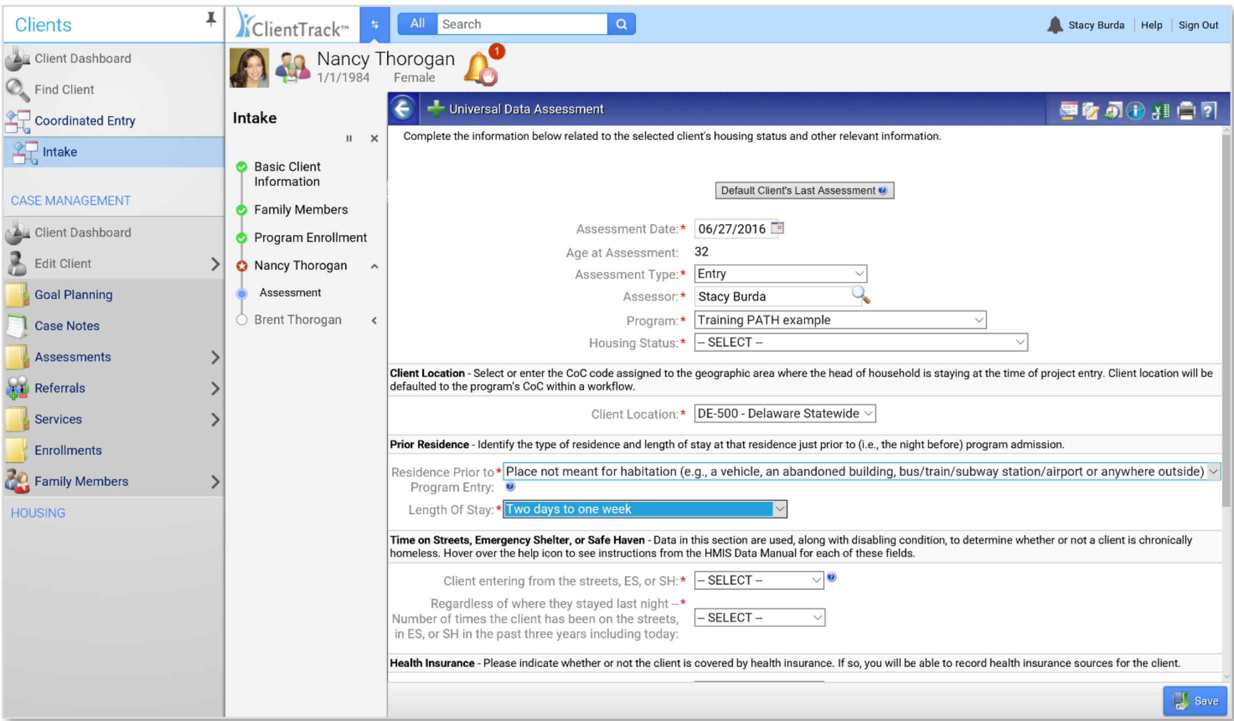
2. Describe your experience in user interface design, user experience design, usability and information architecture and provide examples.

The ClientTrack solution is one of the most widely used HMISs in the U.S. This is due, in part, to its user-friendly interface. Below, we have included some sample screenshots.

ClientTrack's Dashboards provide a "profile page" displaying the most important and relevant information to the user, such as an overview of their demographics, program enrollments, and services received.



ClientTrack Intake records a unique Master Assessment each time an intake, follow up, or exit assessment is completed, recording the creation date/time and updated date/time. Each time new information is collected, Point-In-Time Assessments are recorded, allowing for historical review of changes.

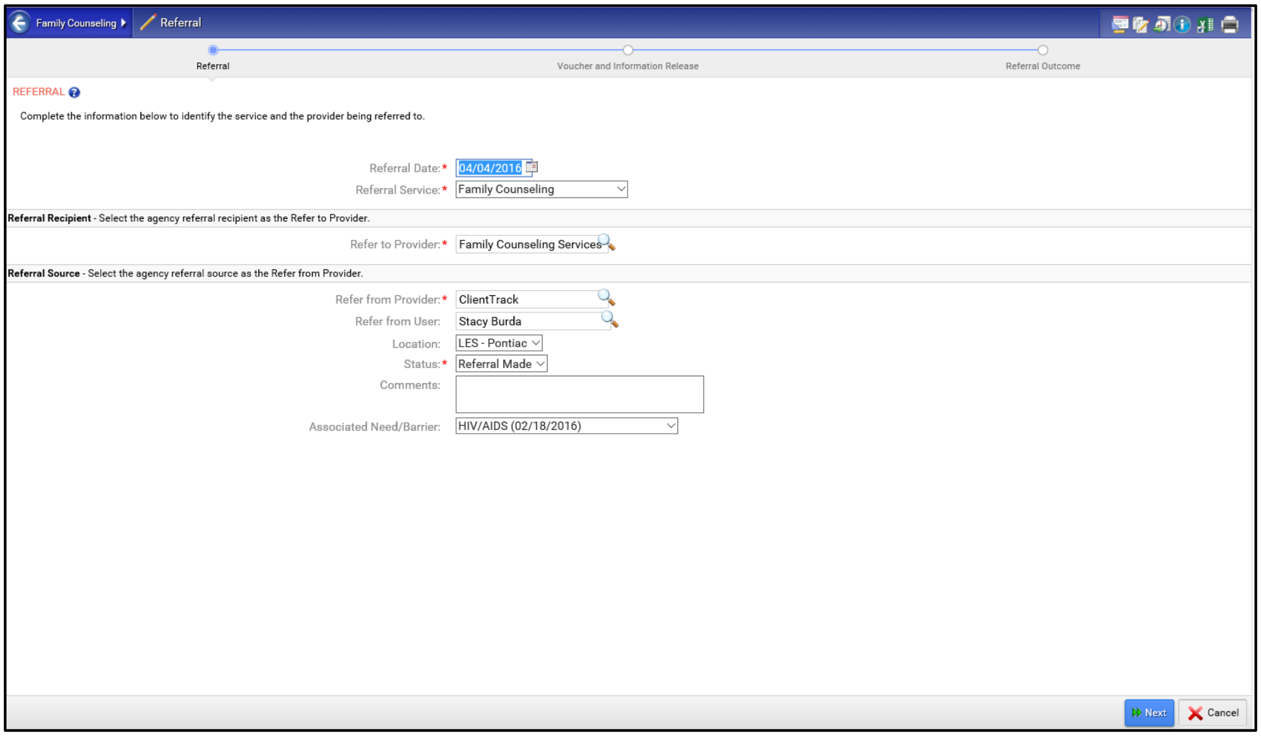


The Intake workflow step-by-step process is shown with Universal Data Assessment step in progress.

ClientTrack Eligibility Engine is leveraged to identify potential eligibility for services and programs. By leveraging data collected, rules designed directly in the system identify pass, fail, or unknown eligibility for items with associated rules, allowing users to review eligibility and track program participation, referrals, and service provision based on eligibility.

Ability to record and track referral data (type, status, follow up)

ClientTrack referrals identify referral date, type of service referring for, status and tracking of appointments, and outcome of the referral. Referrals leverage ClientTrack Provider Management, allowing referrals to providers that offer the services requested. The screenshot below depicts a referral record being created.



Integrated for mobile devices

ClientTrack is natively mobile and can be accessed from any compatible browser. ClientTrack is compatible with the Safari Mobile browser contained on Apple devices running iOS 6.0 or higher and Google Chrome for Android devices.

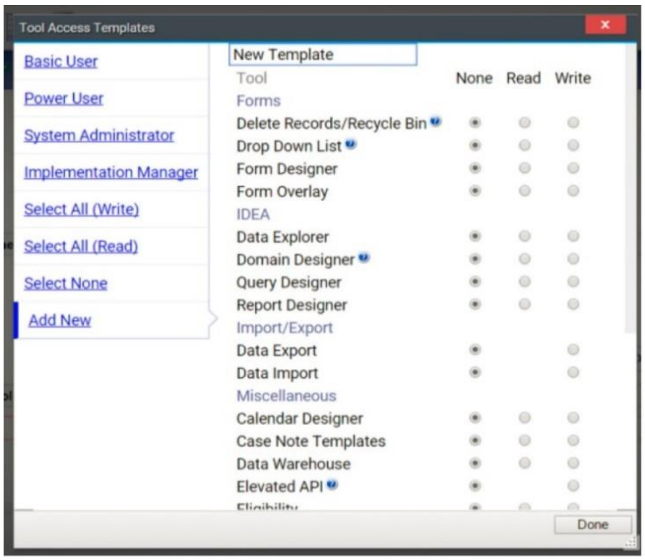
3. Describe how the administrative access allows for efficient management of business operations (i.e., ability to create/edit/delete projects and project level information, ability to add/modify/delete questions for assessments, etc.), including ability to audit client and user activities.

<u>Access Control</u>

The proposed solution includes comprehensive capabilities to provide a robust security and access control model. The ClientTrack solution enables administrators to manage functional access as well as data access, including the ability to create/edit/delete projects and project-level information.

- ***Functional Access***: A user's access to functionality in the application is determined by their assigned workgroup. Workgroups include a compilation of menu items and tabs that include specific functionality (forms, workflows, reports, etc.). When a user is authenticated by the application, the workgroup or workgroups they are assigned to determine what functionality they are able to utilize.
- ***Data Access***: A user's access to data within the application is determined by their assigned security organization. Security organizations may represent any logical division, work unit, or department. When a user is authenticated, the user's organization or organizations determines which data (rows in the database) they are authorized to view.

The ClientTrack solution has a powerful security design mechanism that provides both customizable user access permissions as well as a user workgroup definition and then a user role within that (as shown in the figure below). Further, the workgroup interface can be tailored specifically for one user, so the security can be as open and collaborative as the administrators like—or locked down to only specific clients and data sets.



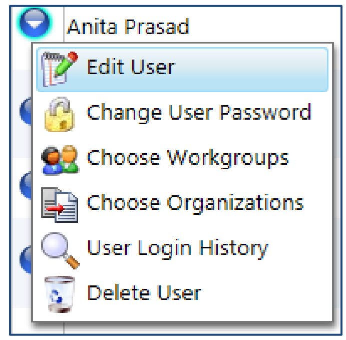


Figure: Setting access permissions in ClientTrack

<u>Audit Trail</u>

ClientTrack uses Change Data Capture to record an audit trail of system changes, including the time and date and the user making the change:

- **Created by/date**, **updated by/date** store data about who created/updated a record and when.
- ClientTrack uses a recyclable delete. When records are marked for deletion, they are not actually wiped from the system, which prevents accidental or unauthorized deletion of records.
- Login events are tracked and stored.
- Login attempts are logged and stored.
- Password change time/date are tracked and stored.
- User states of active/inactive is tracked and stored.
- Data about accessed entities are tracked and stored.

Whether recording confidential client information, financial transactions, or medical billing and reimbursement, ClientTrack maintains an audit trail of user actions and transactions.

The following attributes table goes into more depth on the ClientTrack Automated Audit Trail.

ClientTrack Attributes	Description
Application provides audit reports such as configuration, user accounts, roles and privileges	All transactions are stamped with the user who credit, edit or update data
Auditing and logging an event in the system include the following: • Successful and unsuccessful logons to application • Security configuration changes (add, delete users, change roles/group permissions, etc.) • Sensitive business transactions/functions (e.g., override approvals) • All logged information is handled securely and protected as per its data classification	ClientTrack logs all logins and login attempts. Audit logging can be added on any table using SQL Server Change Data Capture (CDC). Audit logs are saved to the DHS' own database and are protected along with the test of their data.
Audit logs are compliant with the applicable retention schedule and regulatory requirements.	The DHS can determine length of retention within life of contract.

4. Describe the testing and training environments you provide that replicate the live environment.

As a part of implementation, ClientTrack will leverage industry best practices as it relates to ClientTrack environments. The attached pricing includes two environments, Testing/Training and Production. Should DHS desire a third environment, one can be provided at an additional cost.

- Testing/Training Environment (Train) will be the environment that is used to perform administrative tasks such as form creation/modification, report and query design, workflow creation/modification, etc. End user training is also performed in the Train environment. Modifications to the Train environment are moved to the Production environment through a "Sync" process.
- The Production environment is where functionality is available for end users to enter client data are perform reporting activities.

5. Describe your track record of being stable, responsive, and available for use 24/7/365 except for scheduled downtimes.

Eccovia Solutions partners with Microsoft Azure Government Cloud to deliver reliable and secure hosting services. Both Azure and Eccovia Solutions maintain a 99.9% uptime track record. Our Service Level Agreement can be provided upon request.

6. Describe your HMIS's ability to implement data validations to help ensure data quality (e.g., no dates of birth from 1800s, client cannot be a veteran and under 18, etc.).

System administrators with correct permissions and training will have access to ClientTrack Form Designer and Data Designer tools. This will enable the system administrator to view the table structure of a form and view the parameters for reports. The system administrator will be able to view each element being used in a report by downloading a flat file of the report.

System administrators will have access to set DHS compliance standards. The application will warn and track any deviation of this standard during the time frame entered. Strict enforcement will prevent any changes that impact compliance. ClientTrack offers other data quality reports such as the Duplicate Client Report and HUD Data Quality report.

7. Describe how your HMIS will allow us to share client level data across service providers, as needed.

The ClientTrack solution offers many levels of security. These of course, will depend on your sharing policies between agencies. Examples could include client records not being shared, only viewable by the agency that created the record, sharing of basic identifying and demographic, or sharing of data on project stays and specific assessments. DHS can also have granular control over what data each agency chooses to share. Ultimately, Eccovia Solutions will work closely with the DHS implementation team to determine the final structure and security model across all participating agencies. These different sharing permissions can be set as a default to make data collection simpler for end users.

8. Describe how your HMIS will allow DHS to upload client level data into the HMIS from external sources (e.g., CSV or XML files from service provider data systems).

ClientTrack includes capabilities to manually import or export processes such as CSV or XML imports or exports. In addition, ClientTrack professional services teams can configure custom import routines that include single-stage or multi-stage capabilities as well as deduplication based upon business rules. Your ClientTrack solution consultant can help outline an appropriate solution to meet the business need.

ClientTrack is also capable of integrating with most systems for automated importing and exporting of data. ClientTrack includes a Service-Oriented Architecture (SOA) that utilises web services to provide real-time access to data within ClientTrack. Using the API, other applications can view data, update data, and create new data within the ClientTrack database. The ClientTrack Professional Services Team is experienced in leveraging other application APIs to access and update data from other databases.

In addition, ClientTrack also supports batch import/export options.

9. Describe how your HMIS provides the ability to de-duplicate client and household records across the HMIS implementation, including system administrator ability to manage client and household duplications to maintain data integrity. Describe your HMIS's processes for de-duplication and monitoring for data quality assurance.

ClientTrack's approach to duplicate client records is twofold:

1. First and foremost, preventative steps are taken when creating intake forms. These forms are configured to search for potential duplicates prior to entering new clients in an effort to prevent duplicate records.
2. Should a duplicate record get created, our Duplicated Client Report and Merge Client function provide authorized users the tools they need to identify and resolve duplicated records, thus maintaining a clean system.

ClientTrack's client **intake form** includes an initial step that checks the database for possible duplicates. The system's duplicate check does not require an additional task to be performed by the end user. The duplicate check is integrated into the task of creating a new client record. Our solution's duplicate client check can search potential matches using Soundex for similar sounding names that may have been spelled differently (e.g., Jon and John). The duplicate client check may also search client aliases.

If a duplicate has been created, the system provides an administrator with the tools necessary to identify and resolve duplicate issues.

The **Duplicated Client Report** allows an administrator to select matching criteria to be used in identifying potential duplicates. For example, an administrator can use a combination of first name, last name, and social security number to identify matches, or just first initial and last name. Once identified, duplicate client records can be merged. The **merge client** process moves all transactional data (for example: assessments, enrollments, services) from the duplicated record(s) to the client record of the administrator's choice.

After moving the transactional records, the duplicated record is marked as inactive and will be inaccessible to end users.

If the client record was duplicated across agencies or programs, the ClientTrack's flexible security model allows the agencies or programs to share the merged client record.

10. Describe how your HMIS allows DHS to add customized fields that are easily reportable.

One of the ten tools in the ClientTrack suite of data designers is ClientTrack Form Designer™. This visual design tool enables Implementation Managers and/or system administrators to create new forms or make configuration changes to existing forms. Administrators have complete control over all elements and element properties, including field placement and type, labels, defaults, required status, display format, and list options. Additionally, Form Designer includes unprecedented access to ClientTrack data design.

Administrators can review existing table structures, create unlimited custom columns, and create entirely new tables. Form Designer creates and manages **standard data entry forms** (entering or updating single records), **multi-edit forms** (adding or editing multiple records at once), **search forms** (displaying data for review), and **report launch forms** (providing prompts for report parameters).

11. Describe how your HMIS allows system administrators to impersonate or shadow end users to assist with troubleshooting (i.e., ability to see system from end user's perspective).

System administrators have access to create/modify user accounts to recreate a scenario to assist with troubleshooting in Production or Training environments. When responding to a support ticket in ClientTrack, the system captures user settings, click trail, and additional data to help administrators troubleshoot any issues. Additionally, system administrators can use a share-screen utility (e.g. WebEx, Microsoft Teams) to work with end users who require assistance.

D. Reporting

1. Describe how you will ensure all HUD-mandated reports are developed, tested and released for use on-time per HUD-defined deadlines.

As an active participant in the HMIS vendor community and the monthly vendor calls, Eccovia Solutions receives the most up-to-date information on new reporting standards. Once released, the Eccovia team begins work using an agile development method. Engineers work with subject matter experts to develop reports accurately and as quickly as possible. Compliance updates take priority for HMIS work to ensure on time deployments.

2. Describe how your HMIS will allow end users to run reports on their own as needed, such as using report input controls (e.g., program, date range, etc.).

ClientTrack comes baseline with over 100 reports, which can be manipulated to show data within a specified date range and for specific programs.

In addition, as explained in E1, ClientTrack's suite of designer tools, including FormDesigner™, DataDesigner™, RuleDesigner™, DataExplorer™, and more, will enable DHS system administrators to configure data fields in forms and assessments, which will provide the necessary data sets for specific reports uniquely useful to the DHS.

3. Describe your HMIS's data analysis and ad hoc reporting tools for use by both system administrators and end users.

Along with built-in reports, ClientTrack includes DataExplorer™, a powerful ad hoc reporting tool allowing users of all levels to be empowered with the ability to create and customize reports.

ClientTrack's powerful ad hoc reporting tool, Data Explorer, allows users of all levels, without any prior knowledge of how databases work, to create ad hoc reports. With the ClientTrack Data Explorer Tool and the in-browser ClientTrack Query Designer, you can quickly build custom reports to assess client outcomes, evaluate program effectiveness, and showcase results with stunning charts and graphs.

ClientTrack software improves data quality through efficient data import and export that also reduces duplicated participant counts. Building on the outputs of the Query Designer, Data Explorer uses pre-defined data domains as the building blocks for ad hoc user queries.

Users can choose which data they want to analyze by simply clicking a few buttons; it already knows how these domains relate to each other to ensure that users will not make a mistake. By dragging and dropping, users can analyze millions of different combinations of data. These queries or reports can be saved and shared in a number of ways by users across the system.

4. Describe your HMIS's drag and drop or similar style customizable reporting platform.

We have described DataExplorer™ in our response to D3 above.

E. Integration and Customization

1. Describe your capacity and willingness to provide software customization and custom report development to meet customer needs in a timely manner. Please provide a concrete example.

Eccovia Solutions views projects like this as a partnership. Although we can train DHS staff to take on the role of HMIS Administrator, we understand needs may arise when DHS will need to enlist Eccovia to make configurations to the system or create custom reports. This is something we do with nearly all our clients and it would be no different for DHS. Each request from DHS would be treated like any other project for our Solution Delivery team, meaning we would assign the proper resources to ensure an on-time, quality delivery of the requested functionality or custom report.

Most recently, we implemented a PSH Clearinghouse project for the City of Philadelphia within their HMIS. This was a substantial project that was implemented in just over 90 days.

Eccovia Solutions also offers an HMIS System Administrator Service currently being used by the State of Georgia. Under the direction of Georgia's leadership our HMIS Admin team assumes the role of HMIS Administrator. Additional information on our HMIS System Admin Service can be provided upon request.

2. Describe your HMIS's coordinated entry module AND/OR describe how your HMIS software can integrate with DHS's existing coordinated entry software.

The flexibility of ClientTrack software allows communities to set policies and practices for Coordinated Entry first and then design the software to meet those needs. ClientTrack can be modified to achieve functionality similar to a previous system. Legacy source data can be imported to retain assessment information in additional migrations. The ClientTrack solution comes standard with VI-SPDAT Assessment tools to use in CE or custom CE assessments can be created and integrated in workflows with conditional logic to ensure consistent and accurate data collection. Based on the assessment data, clients can be prioritized for service. Eligibility rules can be created to find the best referral for a client. Security is enforced throughout the whole process so that clients can control what information is shared to other providers. The configurability of the system allows each of these processes to look and feel the way the community needs it to.

3. Describe your HMIS's ability to support data integration with the Data Warehouse and other relevant applications, such as DHS's contract administration software. Describe your methods of integration in detail, such as direct database connection, reports and exports, web services or other application program interfaces (APIs).

Eccovia Solutions has a broad range of experience implementing integrations to support real-time and batch exchange of data between systems. The ClientTrack solution includes a Service Oriented Architecture (SOA) that utilizes web services to provide real-time access to data within ClientTrack.

The SOA framework is also extended beyond the application to provide a robust Application Programming Interface (API) available to other applications. Using this API, other authorized applications can view data, update data, and create new data within the ClientTrack database.

The ClientTrack API includes two primary modes of operation:

- **Form-based:** The forms API replicates the existing business rules and processes of the ClientTrack implementation ensuring that data is viewed and/or entered utilizing processes in the API that closely mirror the existing business logic and forms already in use. This means application developers can save time in creating and maintaining API calls.

- **Procedure-based:** The procedure-based API enables virtually limitless API capabilities by enabling a ClientTrack implementation to create new stored procedures that can be utilized for API access. Developers can call the API method and pass parameters and/or data through to the procedure in order to accomplish any number of tasks capable with SQL.

Examples of API integrations include a bidirectional Police Department integration related to domestic violence crimes with a local victim service provider, FHIR integration for care coordination use case, HL7 lab integration for lab result data, referral data from a web page directly to ClientTrack, delivery route optimization, financial system integrations and integrations with reporting, and other case management solutions.

Another example is a health care coordination agency focused on social determinants of health. We perform bidirectional integration with a data warehouse partner to normalize over 28 data sources and leverage ClientTrack and the data warehouse APIs for a comprehensive exchange of demographic, encounter, and provider data related to a set of identified patients eligible for care coordination. ClientTrack presents the data in usable ways to drive coordination activities and make the data available for analysis and reporting.

ClientTrack aligns integration methodologies with industry best-practice standards such as HL7, FHIR and ANSI X12 for health-related data integrations and HUD regulatory guidance on applicable data sets.

Lastly, the ClientTrack professional services team is experienced in leveraging other application APIs to access and update data from other databases.

ClientTrack's Import/Export features support predefined compliance standard import and export files such as CSV or XML formats. Eccovia Solutions supports custom import or export routines that include single-stage or multi-stage capabilities and deduplication rules aligned with custom specifications.

4. Describe your HMIS's ability to integrate easily with data visualization software, such as Tableau.

We describe the Eccovia Solutions' integration process above. Here, we emphasize that ClientTrack has been integrated with hundreds of different systems, both commercial and legacy, and can likewise integrate with data visualization software.

5. Describe your approach to legacy data migration.

All migrations from legacy systems will begin with an analysis process of the legacy data. Once the analysis is complete a Data Migration Plan and Proposal will be provided based on analysis.

ClientTrack's HMIS CSV 6.1 import tool provides effective data import for HUD standard data. Eccovia solutions will complete setup, mapping and quality assurance for each run of the migration. It is assumed that a minimum of three import runs will take place. Two test runs and a final production run. Eccovia Solutions assumes that DHS will be responsible for all source data cleansing and deduplication efforts.

Should DHS require data outside of what's included in the HMIS CSV 6.1 format, experienced SQL analysis will review legacy data and outline recommendations for conversion of that data. The recommendations will be documented within a proposal and will include firm, fixed-price or time and material bases pricing for the design of the migration mapping (based on final configuration of the ClientTrack solution), preparation of scripts, test run and final run of the migration of data sets outside of the HMIS standard data set.

Note: Additional discussion may be required if DHS is only able to provide data in the HMIS CSV 5.1 format

F. Budget

1. Provide a budget narrative that clearly explains and justifies the line items in your proposed budget.

Eccovia Solutions is proposing a complete HMIS solution with coordinated entry features enabled as defined within the scope of work. Eccovia Solutions recommends aligning the deployment of the HMIS and Coordinated Entry for daily use due to the current systems in place and efficiency in migration, maintenance and management of ClientTrack as the single HMIS and Coordinated Entry solution.

Implementation Deliverables

Project Initiation

During the initial phase of the project, an Eccovia Solutions Project Manager will be identified and assigned to your project and will be your primary point of contact throughout the implementation. The Project Manager will schedule and conduct a project kick-off call. This project call will serve to review project resources, review contract deliverables, review the estimated schedule and establish dates/times for ongoing project meetings and analysis efforts.

Project Requirements Elicitation - Onsite

Initial requirement discovery and specification will create the initial setup data requirements.

Requirements Discovery

Utilizing this Scope of Work as a guideline, an Eccovia Solutions Business Analyst will meet with critical stakeholders, subject matter experts and other persons deemed relevant to gain a detailed understanding of your organization’s HMIS setup data requirements and Coordinated Entry Process based on this scope of work. The outcome of this analysis will be utilized to map the core requirements of your organization’s operation in order to plan and setup the system.

Project Requirements Specification

Requirement Specification

Utilizing the information derived in the Analysis Sessions, an Eccovia Solutions Business Analyst will draft the HMIS Solution Design document. This document will define how each of the deliverables from the statement of work will be met through the solution. In addition, specification will lay out the security model for the solution. Your ClientTrack security model will help balance the needs of confidentiality and collaboration by determining sharing and access rules for data in your ClientTrack solution. An Eccovia Solutions business analyst will analyze your security requirements and design a security model that will meet these requirements.

Finalized Project Control Documents

Once the Solution Design document has been finalized, your Eccovia Solutions Project Manager will provide updated project control documents, including a finalized Initial Project Plan, based on the outcomes of the Requirements Specification phase of the project.

Project Business Analysis

Utilizing the solution design document, an Eccovia Solutions Business Analyst will provide up to One Hundred Thirty (130) hours of business analysis services to design and implement all modules noted within this scope of work. Business analysis involves identifying task/data relationships, constraints, data modeling, forms and views as well as collaboration with both the Eccovia and DHS project teams and identifying potential scope changes.

Setup Data Management

Setup Data Management includes project support for all activities necessary to ensure setup data is implemented correctly. This includes acquisition, input and/or upload of Setup Data and training your local administrator(s) on setup data linkages. Setup Data includes the following types of data:

Users, Grants (Optional), Programs/Projects, Providers and Services

ClientTrack HMIS Essentials

The following existing, baseline features will be deployed. No configuration of baseline features is provided within this deliverable. Baseline data collection tools are maintained for future released of HUD HMIS compliance requirements, and all HMIS reporting and exports leverage baseline elements, ensuring effective reporting.

The following existing tools are available within ClientTrack HMIS Essentials as deployed:

- HUD Intake, Update/Annual and Exit Workflows - ClientTrack utilizes workflows that streamline any common process into a step-by-step workflow providing ease-of-use. The use of conditional logic and required fields throughout the workflows ensures each necessary data point and step is completed for reporting purposes, and only applicable data is requested. Each point-in-time assessment is captured as a separate record to maintain history and report accurately for HMIS compliance and internal program needs. ClientTrack utilizes project/program type and funding sources throughout the process to trigger the steps the user sees and the fields that are required or optional to collect. The RHY Data Intake is specifically designed for RHY grantees.
- Case Management - ClientTrack is a case management software solution, so every client we have is being given our case management support in some way. Developed and engineered for more than a dozen years by experts in both human services and technology, the ClientTrack solution helps organizations improve efficiency in day-to-day tasks, such as determining eligibility, developing case notes, tracking client progress, measuring outcomes, and providing referrals.
- Housing - Facility and resident tracking for shelter, transitional housing and permanent supportive housing programs can not only provide flexibility in tracking bed nights, but also provide key tools for housing programs. ClientTrack's visual display provides a facility layout view for facility, room/unit and bed details when beneficial. ClientTrack provides current resident lists, facility logs and incidents as well as utilization, turn away and other housing reports. Waiting lists, reservations and check in (individual, batch check in and family check in) features are also available.
- Reporting - ClientTrack provides real-time reporting tools to all users within the system. HMIS reports are accompanied by standard reports to provide agencies with critical data to meet their programmatic needs in addition to HUD compliance requirements. In additional Data Explorer provides ad-hoc reporting capabilities in real-time data. All baseline HMIS domains will be deployed.
- Workgroups - ClientTrack HMIS provides role-based access to features through Workgroups for Emergency Shelters, Outreach, Lead Agencies, and HMIS programs.

Data Migration Analysis

DHS is interested in migrating data from two (2) existing systems: HMIS and Coordinated Entry. Eccovia Solutions will conduct a Data Migration Analysis of the legacy data. DHS is responsible to provide the complete sample data set early in the elicitation phase. Once the analysis is complete a Data Migration Plan and Proposal will be provided based on analysis.

ClientTrack’s HUD CSV Import tool provides effective data import for HUD standard data. Any additional elements needed or of any other file type provided will be analyzed by an experienced SQL analysis who will review legacy data and outline recommendations for conversion. The recommendations will be documented within a proposal provided as a result of the analysis and will include firm, fixed price or time and material bases pricing for the design of the migration mapping (based on final configuration of the ClientTrack solution), preparation of scripts, test run and final run of the migration of data sets outside of the HUD standard data set.

HUD HMIS CSV Standard Format Data Migration

Eccovia Solutions will complete setup, mapping and one initial migration run, one additional test run and a final migration run as well as quality assurance testing for each run. DHS is responsible for all source data cleansing efforts and providing three (3) full migration files: 1 for initial run, 1 for additional test run and one final to align with deployment for daily use. Both subsequent files must be in the same format with no additions, subtractions or removals of columns or unmapped values. Each file is anticipated to have additional record rows as new data is entered in the existing system through the cutoff date for the provision of the final file.

Allegheny Link Coordinated Entry Assessment

DHS will leverage the identified existing functionality as defined within the functional requirement.

Functional Requirements

- Forms and Assessments –The components below are identified for configuration with the fifty hours:
    - Enrollments – ClientTrack's existing Enrollments form will allow for enrollment into a Coordinated Entry project type for tracking engagement. Eccovia will set up the applicable Coordinated Entry project for tracking.
    - Eligibility Determination
    - Assessments
        - Initial Triage Assessment – Tracking DHS specific diversion and current crisis details.
        - VI-SPDAT and SPDAT – ClientTrack's existing VI-SPDAT and SPDAT assessments will be available for capturing point-in-time assessment details and scoring for prioritization.
- Workflows –The following workflows are included within this use case:
    - Initial Screening for Services
    - Coordinated Assessment Workflow– ClientTrack's existing Coordinated Assessment workflow is a generic workflow walking through the following steps. The workflow will replace the Vulnerability Index with the steps need to complete the individual, family, or youth (TAY) VI-SPDAT

Allegheny Link Coordinated Entry Prioritization, Vacancy and Referrals

DHS will leverage the identified existing functionality as defined within the functional requirement.

Functional Requirements

- Forms and Assessments:
    - Prioritized By Name
    - Referrals
    - Contacts
    - Document Checklist .

Integration Analysis

Eccovia Solutions will provide up to sixteen (16) hours providing initial analysis of integration requirements with existing systems to define the requirements for API or flat file integrations. DHS is responsible to provide a list of systems, data sets, direction and integration method anticipated prior to analysis.

User Acceptance Testing

This phase provides DHS with ten (10) business days to review the final solution. DHS will submit any material issues regarding the functionality through the integrated ClientTrack Ticketing System. Eccovia

Solutions will allocate resources to review the submitted issues and implement changes to the solution for those issues deemed in scope.

Train-the-Trainer Training

This deliverable includes up to twelve (12) hours of on-site training to be provided to selected DHS staff members in a "Train-the-Trainer" type of training model. The purpose of this training is to demonstrate the software, provide walk-throughs of specific use cases, and allow participants to build proficiency through guided exercises. These participants will then act as local experts on the system to provide training and support to their peers. As the date of the training draws nearer, training planning calls will be held with DHS to determine sessions, content and training logistics. Project team members will participate in demonstrations throughout the implementation process providing detailed understanding of the solution prior to end user training.

The following training is currently included as an ongoing available training service for all users:

Data Explorer Training

Data Explorer, ClientTrack's ad-hoc query tool, allows users to quickly access and analyze data by clicking just a few buttons. By dragging and dropping, users can analyze a multitude of different data combinations. Anyone with Data Explorer access can use this user-friendly tool to answer data related questions. ClientTrack Data Explorer video training is offered at no cost to our clients and will provide users with an enhanced view of the data contained within your ClientTrack implementation.

ClientTrack Fundamentals Training

In addition to the training identified above, DHS administrators will attend ClientTrack Fundamentals video training. The ClientTrack Fundamentals Training Series is designed for novice and intermediate users of ClientTrack in a managerial or system administrative role within their Organization. This three-video series educates users on a variety of topics, including general ClientTrack navigation and concepts, set up data (programs, services, grants, users, etc.) and security settings. These three videos are offered at no cost to our clients and will provide the system administrator with a clear understanding of the flexibility, and security, of the ClientTrack platform.

Deployment Support

Eccovia Solutions will assist DHS administrators in deploying the system for day to day operational use. Deployment support includes up to eighteen (18) hours of support during the week of deployment. Additional support will be proposed via a change request.

2. Provide a budget that reflects a realistic estimate of the costs associated with implementing and sustaining the HMIS. (Please provide the budget as an attachment – it will not count toward the page limit).

   See attachment: **Eccovia – Section F.2 Budget**

RFP Response Form

Homeless Management Information System (HMIS)

F. Budget

2. Provide a budget that reflects a realistic estimate of the costs associated with implementing and sustaining the HMIS. (Please provide the budget as an attachment – it will not count toward the page limit).

Eccovia Solutions

Pricing Proposal for Allegheny County DHS - Homeless Management Information System					
Software Licenses / Fees	**Qty**	**Rate**	**Year 1**	**Year 2**	**Year 3**
ClientTrack Essentials Software License	1	$ 189,420.00	$ 189,420.00		
Named User Access Licenses (monthly)	350	$ 41.00	**Included**	$ 172,200.00	$ 172,200.00
ClientTrack Configuration					
Project Initiation	1	$ 2,475.00	$ 2,475.00		
Project Requirements Elicitation	1	$ 7,875.00	$ 7,875.00		
Project Requirement Specification	1	$ 10,125.00	$ 10,125.00		
Project Business Analysis	1	$ 22,500.00	$ 22,500.00		
Setup Data Management	1	$ 6,075.00	$ 6,075.00		
ClientTrack HMIS Essentials	1	$ 3,375.00	$ 3,375.00		
Data Migration Analysis	1	$ 4,455.00	$ 4,455.00		
HUD HMIS CSV Standard Format Data Migration	1	$ 13,500.00	$ 13,500.00		
Allegheny Link Coordinated Entry Assessment	1	$ 22,500.00	$ 22,500.00		
Allegheny Link Coordinated Entry Prioritization, Vacancy and Referral	1	$ 9,000.00	$ 9,000.00		
Integration Analysis	1	$ 4,500.00	$ 4,500.00		
User Acceptance Testing	1	$ 8,325.00	$ 8,325.00		
Train-the-Trainer	1	$ 7,425.00	$ 7,425.00		
Deployment Support	1	$ 4,050.00	$ 4,050.00		
Travel Expenses*		TBD	TBD		
Implementation Total			**$ 126,180.00**		
Professional Services					
End User Training	1	$ 8,250.00	$ 8,250.00		
Administrator Training	1	$ 12,000.00	$ 12,000.00	$ 8,000.00	$ 8,000.00
Annual Total			**$ 335,850.00**	**$ 180,200.00**	**$ 180,200.00**

* Travel Expenses are based on actual expenses and will be billed upon completion of travel