

California Mental Health Services Authority (CalMHSA)

# Request for Proposals (RFP)

## INTEROPERABILITY SOLUTION

*Applications due by 5:00 p.m. PST on Monday, November 13, 2023.*

*Potential responders must submit proposals only through CalMHSA's e-Procurement Portal at <https://calmhsa.bonfirehub.com/>*

*The RFP does not constitute a contract or an offer. In addition, any contract awarded because of this RFP is subject to any additional restrictions, limitations, or conditions required by CalMHSA in any manner. CalMHSA reserves the right to make one award, multiple awards, or to reject all proposals, in whole or in part, submitted in response to this RFP.*

*CalMHSA reserves the right to amend this RFP via written addendum.*



## 1. Interoperability Solution RFP Summary

The California Mental Health Services Authority (CalMHSA), a Joint Powers Authority (JPA), serves California Counties and Cities as an independent administrative and fiscal intergovernmental structure for jointly developing, funding, and implementing mental health services and educational programs at the state, regional, and local levels. (See Gov. Code §6500 et seq.)

To support County Behavioral Health with meeting federal and state interoperability requirements, as well as facilitating use cases that require the need to exchange relevant data, CalMHSA is seeking through this RFP to procure an interoperability and eMPI software solution (the “Solution”) and related profession services. The desired Solution will be used to facilitate the technical data exchange of protected health information (PHI) and personally identifiable information (PII) between disparate systems as well as connect to larger national exchange networks.

This RFP is issued for the purpose of soliciting responses from interested entities with the experience and capacity to provide interoperability capabilities in alignment with federal and state requirements. This request does not commit CalMHSA to contract for any supply or service whatsoever. In addition, applicants are advised that CalMHSA will not pay for any information or administrative costs incurred in response to this RFP; all costs associated with responding to this RFP will be solely at the interested party’s expense. Not responding to this RFP does not preclude participation in any future RFP, if any is issued.

## 2. Project Scope of Work

CalMHSA, as a direct technology partner to several County Behavioral Health agencies, strives to continually enhance, innovate, and add value to the services and solutions we provide to our partners and communities. To that end, CalMHSA seeks a software solution to assist us in the creation and deployment of advanced interoperability and eMPI infrastructure.

The primary requirements of the RFP and Solution are as follows:

**INTEROPERABILITY REQUIREMENTS.** Pursuant to Section 3.6., below, please use the attached Excel spreadsheet response template to respond to items 1 – 6 of this section, including all subparts. For each item, please respond “Yes” or “No” in the specified column to indicate Applicant’s ability to comply with each requirement. Please further respond to each item by providing a narrative response in the specified column explaining in detail how Applicant will meet said requirement.

1. Applicant has security controls and infrastructure or configurations present to limit access to the data as appropriate for users, roles, rights and/or as applicable for regulatory and/or industry standard I.T. protocols and other agreed upon requirements such as, but not limited to:
  - 1.1. HITECH
  - 1.2. NIST
  - 1.3. CIS
  - 1.4. Role-based Access Controls
  - 1.5. HIPAA
  - 1.6. 42 CFR Part 2
  - 1.7. California Data Exchange Framework (DxF) Policies and procedures
  - 1.8. Other (please list)

2. Applicant has technology capable of meeting Federal and State interoperability and data exchange requirements, including but not limited to:

- 2.1. California Data Exchange Framework

- 2.1.1. This includes interface development related to establishing an XCA/XCPD interface with an external partner/network (i.e. eHealth Exchange, Carequality, etc.).
- 2.1.2. Full Implementation of the Solution, including production level XCA/XCPD channels must occur by no later than March of 2024. Functional XCA/XCPD endpoints are needed for the subsequent California Trusted Exchange Network (CTEN) certification.
- 2.1.3. Applicant must commit to assisting CalMHSA in becoming CTEN certified within three (3) months after implementation of fully functional XCA/XCPD capabilities.
- 2.1.4. Applicant must have previous experience working with all IHE profiles.
- 2.1.5. Applicant must have previous experience onboarding to a national network such as eHealth Exchange/Carequality and have assisted other clients with obtaining CTEN certification.
- 2.1.6. Applicant must have previous experience developing FHIR APIs.

- 2.2. CMS Interoperability

- 2.2.1. Applicant must have the ability to develop the following technical components by March 2024:
  - 2.2.1.1. Patient Access API in alignment with HL7 FHIR implementation guide.
  - 2.2.1.2. Provider Director API in alignment with HL7 FHIR implementation guide.
  - 2.2.1.3. Data must comply with USCDI standards.
  - 2.2.1.4. Applicant must have previous experience normalizing data to conform to industry standards (i.e. USCDI).

- 2.3. Applicant's proposal must include a Patient Identity Management, or Enterprise Master Patient Index (eMPI) component. The Solution should include the following:

- 2.3.1. The ability to store and manage robust person information from multiple systems including but not limited to name, address, DOB, SSN, MRN, phone numbers, MRN's, Insurance ID's, etc.
- 2.3.2. The ability to assign an enterprise identifier for each unique client across multiple data sources.

2.3.3. The ability to configure client matching criteria.

2.3.4. A mechanism for client reconciliation/remediation.

3. The Solution must allow for detailed auditing of all access to the system, users, or other methods.
4. The Solution must be scalable and have SLA levels that are adequate and enforceable for system availability, performance, issue resolution, and includes robust disaster recovery.
5. The selected Applicant must be able to execute a contract with two weeks of award.
6. Please indicate Applicant’s ability to deliver all of the stated requirements of this RFP by no later than the provided deadlines in alignment with regulatory requirements.

### 3. Requested Information

The following response components are required for each Scope of Work. CalMHSA is not responsible for costs associated with the development of responses nor delivery of the same.

Please submit the following components as part of your response. Please use the attached Excel spreadsheet response template to respond to Question 6., below:

1. Cover Sheet.
2. Narrative description of Applicant’s background information, to include, but not be limited to, previous experience designing, implementing, and supporting interoperable solutions both in a healthcare and non-healthcare setting.
3. Implementation roadmap and high-level tasks/milestones, including a timeline for designing and implementing the desired interoperability and eMPI solution based on the scope of work provided in this RFP.
4. A proposed total budget for the Project Scope of Work as stated in Section 2, above.
5. Three (3) signed letters of support, including references from organizations with whom the Applicant has contractual or other business relationships who can substantiate the Applicant’s capacity to provide such services as described in the Project Scope of Work, as described in Section 2, above.
6. Please use the attached Excel spreadsheet response template to respond to each of the Interoperability and eMPI requirements listed in Section 2, above. For each of the 6 items and subparts, please respond “Yes” or “No” in the specified column to indicate Applicant’s ability to comply with each requirement. Please further respond to each item by providing a narrative response, in the specified column, explaining in detail:
  - a. Applicant’s experience providing applicable services, including relevant examples;

- b. How Applicant will meet said requirement, and;
- c. Any specific deficiencies that would prohibit Applicant from meeting the requirements identified.

#### **4. Minimum Requirements**

Applicant must meet the requirements below otherwise they may be considered non-responsive, and the proposal may be rejected at CalMHSA's sole discretion.

1. Applicant must have a minimum of five (5) years of experience in designing and implementing interoperable solutions as requested in the scope of work.
2. Applicant's staff must be located within the continental United States.
3. Applicant must not currently have a Settlement Agreement or Claim against them with any of CalMHSA's member counties or any state agency. If there are current claims against the Applicant in excess of \$10,000 within the last Five (5) years, Applicant must disclose claims information as part of their response submittal.
4. Financial Information: Applicant is required to submit copies of Applicant's most recent audited financial statements.

#### **5. CalMHSA Rights and Responsibilities**

CalMHSA is not responsible for representations made by any of its officers or employees prior to the execution of the Agreement unless such understanding or representation is included in this RFP or any written addenda to this RFP.

CalMHSA has the right to amend the RFP by written addendum. CalMHSA is responsible only for that which is expressly stated in the solicitation document and any authorized written addendum thereto. Such addendum shall be made available to each person or organization which CalMHSA records indicate has received this RFP. Should such addendum require additional information not previously requested, failure to address the requirements of such addendum may result in the Proposal Package not being considered, as determined in the sole discretion of CalMHSA. CalMHSA is not responsible for and shall not be bound by any representations otherwise made by any individual acting or purporting to act on its behalf.

#### **6. CalMHSA Option to Reject Proposal Packages**

CalMHSA, at its sole discretion, may reject any or all responsive Proposal Packages submitted in response to this solicitation. CalMHSA shall not be liable for any cost incurred by an applicant in connection with preparation and submittal of any Proposal Package.

#### **7. Truth and Accuracy of Representations**

False, misleading, incomplete, or deceptively unresponsive statements in connection with a Proposal Package shall be sufficient cause for rejection of the Proposal Package. The evaluation and determination in this area shall be at CalMHSA's sole judgment and its judgment shall be final.

## 8. Submission Instructions and Requirements

### Proposal Timeline

EVENT	Key Dates
RFP Issued	November 3, 2023
RFP Questions Due	November 7, 2023
RFP Questions Answered	November 8, 2023
Deadline for Responses to be Submitted	November 13, 2023
Application Review	November 17, 2023

### Submittal Address

All submissions must be made electronically using CalMHSA's e-Procurement Portal, through Bonfire:

<https://calmhsa.bonfirehub.com/>.

## 9. RFP Questions and Clarifications

All questions and requests must be submitted through CalMHSA's e-Procurement Portal at: <https://calmhsa.bonfirehub.com/>. The deadline to submit questions for this RFP is November 7, 2023. The FAQ responding to the questions will be posted on November 9, 2023, at <https://calmhsa.bonfirehub.com/> and on the CalMHSA website.

To ensure all parties have access to the same information at the same time, except as stated below, CalMHSA will NOT respond to questions as they are received and will not accept telephonic questions.

It is the sole responsibility of the Applicant to refer to the FAQs, which will be posted on CalMHSA's e-Procurement Portal at <https://calmhsa.bonfirehub.com/>.

If Applicant is unable to submit questions via the Bonfire e-Procurement Portal, the Applicant must provide CalMHSA with an email justification at [info@calmhsa.org](mailto:info@calmhsa.org) outlining why the Applicant is unable to do so.

If a question relates to a proprietary or trade secrets aspect of a proposal and the question would expose proprietary information if disclosed to competitors, the Applicant must mark the question as "CONFIDENTIAL." With the question, the Applicant must submit a statement explaining why the question is sensitive. If CalMHSA concurs that the disclosure of the question or answer would expose proprietary information, the question will be answered by email reply, and both the question and answer will be kept confidential. If CalMHSA does not concur regarding the proprietary nature of the question, the question

will not be answered in this manner and the vendor will be notified and asked whether the vendor would like the question to receive a public response or no response at all.

## **10. Withdraw**

Applicant may withdraw or amend its proposal, but only before the Application Submittal Deadline, directly on CalMHSA's e-Procurement Portal at <https://calmhsa.bonfirehub.com/>.

## **11. Review of Applications**

CalMHSA will receive all applications for completeness and adherence to the RFP rules stated in this document. Following the initial review, all qualified applications will be reviewed and scored by a review panel. The evaluation panel will conduct a fair and impartial evaluation of proposals received in response to this RFP.

The review panel is comprised of individuals with varied backgrounds, to include professional expertise, lived experience, personal knowledge, etc. Panelists' information will not be disclosed as a matter of confidentiality. CalMHSA is committed to ensuring the RFP review panel is representative of California's racial, ethnic, and cultural diversity.

Selection will not be based exclusively on price or highest score. Other factors will be considered including, but not limited to, Applicant's experience and proposed implementation timeline and ability to meet necessary deadlines. CalMHSA reserves the right to negotiate with applicants who, in the opinion of the review panel, have submitted the best proposal in an attempt to reach an agreement. If no agreement is reached, CalMHSA may negotiate with other applicants or may choose to extend the proposal period. CalMHSA also reserves the right to meet with vendors to gather additional information. Additional information may include, but is not limited to, a demonstration of skills described in the proposal.

## **12. Protest Procedures**

Protests must be received no later than five (5) business days after the Notice of Intent to Award is posted on the CalMHSA website. The sole bases for protest are that the award was (1) in violation of law, (2) in violation of the provisions of this RFP, or (3) in violation of CalMHSA's procurement process. All protests must be in writing and (1) state in detail each and every ground asserted for the protest, citing to the law, RFP provision, or particular provision of the procurement policy on which the protest is based; (2) explain why the error prevented the aggrieved organization from being awarded the contract; and (3) identify the remedy sought.

Written protests can be sent to the following:

Via Email:

[info@calmhsa.org](mailto:info@calmhsa.org)

Via Certified Mail:

CalMHSA  
Attn: Senior Corporate Counsel  
1610 Arden Way, Suite 175  
Sacramento, CA 95815

Within 14 days of receipt of any protest, CalMHSA's Executive Director will provide a written decision which shall be final upon transmission to the protesting party. If the Executive Director determines that the error identified by the protesting party has deprived that party from receiving the contract, the Executive Director may act to rectify the error, including but not limited to: cancellation of the RFP or proposed contract, correction or other revision of the awarded contract, termination of an improperly awarded contract, or affirmation of an existing contract if the discovered defect is immaterial or the Executive Director determines that affirmation is in the best interest of CalMHSA.

### **13. Notice Regarding Public Records Act Requests**

CalMHSA is subject to the Ralph M. Brown Act and the California Public Records Act. All proposals received for this RFP are ultimately subject to public review; however, during the competitive bid process, all proposals will be kept confidential. Upon award and execution of the contract by awardee(s), all proposals and supplemental information will be subject to public review, with the exception of those elements of a proposal which contain elements that are clearly marked as confidential or trade secrets. Any such designation should be accompanied by a brief explanation of the reason the information is non-public and protected from disclosure under California law. CalMHSA reserves the right to disregard such designations if they have been applied indiscriminately to non-protected information, and in no event shall CalMHSA, its agents, representatives, consultants, Directors, or Officers be liable to a responding party for the intentional or inadvertent disclosure of all or a portion of a proposal submitted under this RFP, regardless of whether it was marked as confidential or trade secret.

Although the California Public Records Act allows certain confidential or trade secret information to be protected from disclosure, CalMHSA may not be in a position to establish that the information submitted is protected. If CalMHSA receives a request for public disclosure of all or any portion of a proposal that has been designated as exempt from disclosure, CalMHSA will use reasonable efforts to notify the responding party of the request and give such party an opportunity to assert, at its own expense, a claimed exception under the California Public Records Act or other applicable law within the time period specified in the notice issued by CalMHSA and allowed under the California Public Records Act.

### **14. Format of Proposals**

Proposals must be submitted through CalMHSA's e-Procurement Portal at: <https://calmhsa.bonfirehub.com/>. Submissions by other methods will not be accepted. Internet Explorer 11, Microsoft Edge, Google Chrome, or Mozilla Firefox are recommended. JavaScript must be enabled.

Browser cookies must be enabled. Applicants should contact Bonfire at [Support@GoBonfire.com](mailto:Support@GoBonfire.com) for technical questions related to submissions or visit Bonfire's help forum at: <https://bonfirehub.zendesk.com/hc>.

Submission materials should be prepared in the file formats listed under Requested Information for this opportunity in the Bonfire Portal. All PDFs documents must be formatted in Times New Roman, 12 pt. font, double spaced, unless otherwise indicated in the Requested Information. The maximum upload file



size is 1000 MB. Documents should not be embedded within uploaded files, as the embedded files will not be accessible or evaluated.