

Request for Information (RFI) # ODM R-1617-1020

Customer Relationship Management (CRM) for Medicaid

Section I – General Information

The Ohio Department of Medicaid (ODM) releases this Request for Information (RFI) for the purpose of gathering information about platforms available in the market place that will support our Customer Relationship Management (CRM) initiative for the Ohio Department of Medicaid. As vendors come and demonstrate their feature and technical capability, the CRM workgroups will be able to further refine our requirements with the knowledge of what is possible besides what they already know. We are also seeking a rough estimate of the cost associated with the system and related technical services.

The depth of knowledge and experience present in the collective CRM vendor community provides an excellent opportunity to gather relevant and valuable information to help inform the development process connected with this project. This RFI is only the first significant effort to reach out to, and draw on, that expertise.

Respondents should note that no contract will be awarded pursuant to this RFI and that responding to, or not responding to, this RFI will neither increase nor decrease any respondent's chance of being awarded a contract from a subsequent solicitation by ODM. Please be advised as well that the contents of your response will be considered public information and will be made available upon request by Interested Parties.

Interested Parties may ask clarifying questions regarding this RFI. To ask a question, Interested Parties must use the following Internet process:

- **Access the Ohio Department of Medicaid Web Page at: www.medicaid.ohio.gov**
- **Under the Resources tab**
- **Go Down to Legal and Contracts**
- **Select RFPs in the pop-up menu**
- **Click the Link to the actual RFI**
- **Select "Submit Inquiry" near the bottom of the web page**
- **Follow instructions for submitting questions; or, to view posted questions and answers, select "View Q and A" near the bottom of the Web Page**

Questions about this RFI must reference the relevant part of this RFI, the heading for the provision under question, and the page number of the RFI where the provision can be found. The Interested Party must also include the name of a representative of the Interested Party, the company name and business phone number. ODM may, at its option, disregard any questions which do not appropriately reference an RFI provision or location, or which do not include identification for the originator of the question. ODM will not respond to any questions submitted after 8:00 a.m. on the date the Questions and Answers (Q&A) period closes.

ODM responses to all questions asked via the Internet will be posted on the DAS and Medicaid websites dedicated to this RFI for reference for all Interested Parties. Interested Parties questions

shall only be answered inside this forum. Clarifying questions asked and ODM responses to them comprise the “ODM Q&A Document” for this RFI.

Vendor proposals in response to this RFI are to take into account any information communicated by ODM in the Final Q&A Document for the RFI. It is the responsibility of all Interested Parties to check this site for responses to questions, as well as for any amendments or other pertinent information regarding this RFI.

Anticipated Timetable

DATE	EVENT/ACTIVITY
10/03/2016	ODM releases the RFI to the Vendor Community on the DAS and ODM websites: Q&A period opens -RFI becomes active -Interested Parties may submit inquiries.
10/17/2016	Q&A period closes; 8 a.m. (for inquiries for RFI clarification) -No further inquiries will be accepted -ODM will provide answers to the inquiries as they come in and that will make up the Final Q&A Document
10/24/2016	Deadline for Interested Parties to submit responses to ODM (3 p.m.)
11/7/2016- 11/18/2016	Qualifying Vendor Demonstrations

Section II – Background

Launched in July 2013, the Ohio Department of Medicaid (ODM) is Ohio’s first Executive-level Medicaid agency. With a network of more than 83,000 active providers, ODM delivers health care coverage to 2.9 million residents of Ohio on a daily basis. Working closely with stakeholders, advocates, medical professionals, and fellow state agencies, the agency continues to find new ways to modernize Medicaid in Ohio. In order to effectively capture and respond to inquiries originating from multiple stakeholders, ODM is looking to implement a CRM system that will manage a range of disconnected, often manual contact and inquiry processes, from various stakeholders. ODM has multiple contact centers, ticketing systems and application systems where contact/case information resides, but is not integrated. ODM also envisions that the CRM will be able to integrate with other systems, both current and future, to maximize data sharing and reporting. The CRM will be a crucial tool in the ability to efficiently manage client contact, communication and reporting.

Section III - CRM Minimum Requirements

Below are the minimum solution requirements that the vendor must be prepared to acknowledge compliance with at the time of on-site presentation:

1. Contact management, Outlook integration, ACD/IVR integration, Account management, Opportunity Management, Reports, Dashboards, Case management, Knowledge base, Chat, Mobile capable, Workflow, Escalations, Email marketing integration, Geocoding and geographic community outreach capabilities, Multiple application interface;
2. Absolute adherence to statutory compliance measures to include: audit trails, rules based policy enforcement, privacy, etc.;
3. Periodic redesign of work flow processes and adaptation to changing regulations;
4. Ability to integrate previously disparate departments and stand-alone information systems;
5. Ability to support horizontal (interagency) and vertical (municipal, state and federal) collaboration programs;
6. Ability to accommodate centralized shared services departments and functions;
7. Ability to use automation in order to increase productivity and achieve increased workloads with same or fewer resources; and
8. Ease of use, intuitive navigation, and on-demand help and reference materials.

Section IV - Trade Secrets Prohibition; Public Information Disclaimer

Vendors are prohibited from including any trade secret information, as defined in ORC § 1333.61, in their responses. ODM shall consider all responses or similar responses voluntarily submitted to any ODM procurement document to be free of trade secrets, and such proposals if opened by ODM, will in their entirety, be made a part of the public record, and shall become the property of ODM.

Any submissions received in response to this RFI that are opened and reviewed by ODM, will be deemed to be a public record pursuant to ORC §149.43.

Section V - Submission

ODM requests submissions in electronic (e-mail) format to the OCP Bid Mailbox located at:

ODM_Bid-Request@medicaid.ohio.gov

The vendor's total submission must be received by the Office of Contracts and Procurement (OCP) no later than **3:00 p.m. on October 24, 2016**. Fax or hard copy submissions are not accepted, nor e-mail submissions to any address other than the email address listed above.

Please convert the entire submission into one single secure .pdf document and attach it to the e-mail. All submissions must be received by OCP by the specified deadline. Materials received after the date and time as stated above will not be added to any previously received submissions.

OCP will accept e-mail submissions only. Confirmation of e-mailed submissions will be provided within two working days of receipt.

Vendor must provide documentation to support that the vendor meets the following minimum requirements in order to be considered for an on-site demonstration:

<p>Minimum Vendor Experience</p>	<p>Vendor must have at least 5 years of experience in providing CRM solutions with similar functionality to the business requirements listed in Section III.</p>
<p>Minimum Feature Requirements</p>	<p>Contact management, Outlook integration, ACD/IVR integration, Account management, Opportunity Management, Reports, Dashboards, Case management, Knowledge base, Chat, Field service, Workflow, Escalations, Email marketing integration, Geocoding and geographic community outreach capabilities, Multiple application interfaces.</p>
<p>Security</p>	<p>Security: Must be NIST compliant and protect Personal Health Information (PHI) and Personally Identifiable Information (PII) data.</p> <p>Audit Trail: System should log administrative and user actions and be able to report on logged items.</p> <p>Encryption/Storage: System provides encryption capabilities for stored data to ensure that data at rest is protected.</p> <p>Encryption/Transmission; System provides encryption capabilities for the transmission of data to ensure that information is secure in transit.</p> <p>Access Control: System is configurable to enable users and or role based permissions to control what system features and data, users can access.</p>
<p>Nonfunctional Requirements</p>	<p>Scalability: System must be easily scalable to over 5,000 users and over 1,000,000 records.</p> <p>Disaster Recovery: Vendor must be able to maintain redundant data centers with less than one hour failover time.</p> <p>Must adhere to Medicaid Information Technical Architecture 3.0 Framework.</p> <p>Software applications must meet mandated security compliance, including NIST C & A (National Institute of Science and Technology, Certification and Accreditation) and Health Insurance Portability and Accountability Act to protect PHI and PII data.</p>

System cost	<p>Please provide rough estimate of the cost for system licenses and associated hardware and software for implementation. Is your system an on premise, cloud based or a hybrid deployment?</p> <p>If the solution is available "as a service", a rough estimate for the service and what the service includes should be provided.</p>
Additional Optional Vendor Information	<p>Customer Base: Does your business have a customer base in the Health and Human Services industry (particularly in HHS cloud space)? Name your largest clients and the associated systems' scalability.</p> <p>Past Performance: Proof of recommendation by other HHS customers.</p> <p>Maintenance: Does the vendor offer maintenance contracts/maintenance/community support?</p>

Section VI – On-Site Demonstration

Each vendor that passes the mandatory minimum qualifications may be scheduled for an on-site demonstration at the Ohio Department of Medicaid located at 50 West Town Street, Columbus, Ohio 43215, which will allow the vendor the opportunity to demonstrate their tools and capabilities to ODM. Demonstrations will be scheduled between November 7th and 18th 2016, and each qualified vendor chosen will be allotted three (3) hours of time, and will be expected to demonstrate the below referenced requirements and any additional functionality that the vendor deems appropriate:

Business Requirements:
Ability to provide real-time notification on receipt of a new contact via multiple channels
Track all email correspondence with the case
Ability to audit and track all transactions
Ability to create/track case and attach relevant collateral documents (i.e. Media files/collateral to interactions)
Ability to track multiple inquiries and be able to report in aggregates
Ability to drill down from dashboards to individual inquiries
Ability to support workflows
Ability to support multiple contact centers and all their unique activities
Ability to define and manage business rules and thresholds for Service Level Agreement metric notifications
Ability to report on Key Performance Indicators information for calls/case processing
Ability to design/display separate screens for each stage of process
Ability to track Service Level Agreement metrics based on predefined parameters
Ability to configure escalation rules and skill sets required for skill based routing functionality
Ability to integrate with external contact center solutions and peripheral systems
Ability to notify multiple stake holders at various stages in workflow
Ability to analyze customers interaction history over time
Ability to support predefined templates (support multiple media types) that could be used in notifications in workflows
Ability to track all faxes pertaining to case
Ability to integrate email to CRM application
Ability to hold training sessions for agents and subject matter experts (SMEs)
Ability to drag and drop supporting documentation of various file types
Ability to integrate with Fax servers
Ability to interface with PeopleSoft
Ability to integrate with Microsoft Office 365 applications
Ability to interface with other Medicaid applications to organize customer information

Ability to interface with ACD/IVR systems
Ability to support standard and ad hoc reports
Reporting capability to support productivity and performance initiatives
Ability to support business intelligence and predictive analytics
Ability to have security controls in place for access and defining data definitions
Ability to integrate with existing IVR solutions and provide a robust Telephony-Computer Telephony Integration solution
Ability to Integrate with existing telephony-ACD systems
System must use industry standards (i.e. BPMN, BPEL, XML, SOAP) which allows for portability of information between various technologies
Ability to manage transactions that span across multiple participants and organizations
System must support interoperability standards to share workflow information with other systems including PeopleSoft
Ability to integrate with other applications using standard interoperability protocol.
Integrate the CRM functionality with multimedia communications such as email, fax, Medicaid Portal, and phone to integrate electronic channels with existing call center functions and provide a single process to handle stakeholder interactions with computer telephony integrated with the ACD systems, IVR, Centrex phone and desktop computer.
Ability to interface with multiple external data sources
Provide near real-time reporting capability regarding customer service and delivery to include performance, diagnostic and participation metrics
Ability to create portal application/s for various stakeholders
Deduplication capabilities for business processes
Ability to geomap based on aggregates
Ability to integrate with social media communication platform
Incorporate State, Federal and HIPAA security procedures and protocols into CRM correspondence tracking to support role-based access.
Automate interfaces with external healthcare data sources
Ability to survey and track to generate performance information
Data gathering / transmission by hand held wireless technology(mobile first), systems or other mechanisms
Ability to create knowledge articles and publish them
Use geo-mapping to define users to be contacted
CRM should support integration with geo-mapping tools. Geo mapping can include drawing on a map, using zip code, area code, prefixes, etc. to identify users to be contacted
CRM should be able to create files or update a data source (used by the outbound communications solution)
The CRM solution should integrate with external ODM's outbound communication toolsets (e.g. email, dialer, contact center, chat, etc.) via standard or custom integration techniques as defined by ODM and the vendor
The outbound communications initiated via the Geo-mapping requirement, should allow flexibility for manual and automated ticket / incident tracking
CRM should be able to report on the success of the campaign, down to the individual record if the communication was received (and/or acknowledged)
The CRM should serve as a repository of customer/constituent data that can be used to create and augment geo-mapped lists for outbound campaigns
CRM should support integration for outbound channels (voice, short message service, social media, and email)

We hope that the issuance of this RFI will generate constructive and substantial comment from all of the stakeholders with an interest in the development, design and ultimate implementation of this specific project. We intend to use the comments and suggestions received to inform and guide the next steps in the procurement process, as well as to facilitate and inform further conversations with stakeholders.

Thank you for your interest in this project.