

# **REQUEST FOR PROPOSALS**

**For**

**CBH Secure Portal**

**Issued By**

**COMMUNITY BEHAVIORAL HEALTH**

**Date of Issue:**

**May 10, 2021**

**(Revised June 4, 2021)**

**Applications must be received no later than  
2:00 p.m. on June 22, 2021**

**All questions related to this RFP should be submitted via e-mail**

**to Hans Leach at [hans.leach@phila.gov](mailto:hans.leach@phila.gov)**

**EQUAL OPPORTUNITY / AFFIRMATIVE ACTION EMPLOYER:  
WOMEN, MINORITY INDIVIDUALS, AND PEOPLE WITH DISABILITIES  
ARE ENCOURAGED TO RESPOND**

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## 1. Introduction

Community Behavioral Health (CBH), a Behavioral Health Managed Care Organization (BH-MCO) for the Pennsylvania HealthChoices Program, is seeking a vendor to create a secure provider portal to support its business operations and streamline communication with its provider network.

Many healthcare payors in the United States have incorporated portals into their business operations to increase the efficiency and effectiveness of private communication between the insurance company and contracted providers. These portals may also serve as marketing tools, vehicles to support wellness initiatives, platforms for new policy notifications, and mechanisms for gathering and validating data.

This document serves to describe the project for which we are requesting bids. It is the objective of CBH to approach this project as an iterative process, which is detailed in Section 2.2.1. We recognize that details described here may vary based on vendor recommendations or relevant field research. As such, vendors may suggest alternative approaches that promote optimal solutions.

## 2. Guide to this RFP

This document conveys our vision for the portal. We have included a background section about our organization and information about core portal requirements. **To support vendors in developing a response to this RFP, a more detailed list and visual representation of CBH data systems will be made available upon request. If you would like to access this document, please contact Hans Leach ([hans.leach@phila.gov](mailto:hans.leach@phila.gov)). You will be required to complete a Non-Disclosure Agreement (NDA) prior to receiving access to this information.**

Please read all sections so that your response is comprehensive.

### 2.1. Project Overview

CBH is a 501(c)(3) organization under contract to the City of Philadelphia, through the Department of Behavioral Health and Intellectual disAbility Services (DBHIDS), to administer the behavioral health Medicaid program for Philadelphia. CBH contracts with providers to deliver behavioral health treatment to members and is currently seeking a secure method for interacting with its contracted providers.

It is our intention to use this secure portal to allow providers to share information with CBH that will contain Protected Health Information (PHI) and Protected Individual Information (PII). Therefore, this portal must be fully encrypted during information transmission, upload, and download. As part of this overall solution, we are seeking a process for login credentials management for individuals and the ability to delegate credentials management for our contracted facilities (see “Security Requirements” in [Section 2.2.3](#) for examples).

Given the scope of data access that will be part of this project, we expect to self-host the data; however, we are seeking additional information about hosting options and secure data management to optimize user experience on the website. Given the complexity of this project, we are seeking

vendors who have significant experience building portals. CBH will consider both off-the-shelf products as well as custom development solutions.

## 2.2. Overview of Functionality

The portal should be accessible as a website with valid encryption certificates and served out as a hyperlink from the primary CBH website ([www.cbhphilly.org](http://www.cbhphilly.org)). Using a reference database supplied by CBH, upon successful authentication into the system, the user should be able to:

1. Manage information about their specific facility and/or set of associated service locations.
2. Manage information about themselves if they are an individual practitioner.
3. Review information about their contracts at the facility level and at the service location level.
4. Retrieve information that their organization users have input into the system.
5. Exchange data via a cloud-based platform and/or link out to third-party software systems.
6. Retain and store documents as needed based on CBH policies and procedures.

### 2.2.1. Project Development

To achieve the above functionality, we anticipate that project development will require an iterative process. Portal core features, however, should include the ability to share documents with, or request documents from providers, as well as push out messages as notifications to providers. As the project progresses, we anticipate that the portal will need to be integrated with other existing software applications to support two-way data integration through a single sign-on feature to promote a seamless user experience. **Therefore, systems integration capability is a core requirement.** For the purposes of this RFP, systems integration refers to the joining of disparate software applications either physically or functionally to act as a coordinated whole. **For more information about CBH's existing information technology systems, please contact Hans Leach ([hans.leach@phila.gov](mailto:hans.leach@phila.gov)) per [Section 2](#).**

### 2.2.2. Business Use Cases

Contracted providers<sup>1</sup> may share data and documents with CBH staff and CBH staff may share data, documents, and notifications with providers.

Upon login, the portal should allow providers to:

1. Securely send documents to CBH that may contain clinical data.
2. Complete forms/documents, report incidents, submit and update business and clinical information, and support other business operations in real-time.
3. Access other third-party CBH software systems to perform routine business operations.
4. Access portal notifications and alerts.

Upon login, the portal should allow CBH to:

1. Securely send documents to providers that may contain clinical data.

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<sup>1</sup> Only contracted providers should have access to this portal. This includes both in-network providers and out-of-network providers with a contractual agreement with CBH.

2. Receive requests, documents, and data from providers.
3. Route requests, documents, and data to other CBH staff.
4. Send notifications to providers.
5. Send alerts to providers in the event of an emergency.
6. Send emails to providers to direct them to the portal if they have notifications or alerts.
7. View provider portal utilization metrics and analytics.

### 2.2.3. Security Requirements

We expect that the response will allow for CBH ownership of designating role-based access to this portal. For example:

1. Designated CBH staff members may grant other CBH staff members access to the portal and subsequent permissions within the portal based on their role.
2. Contracted providers may sign up for and access the portal directly. Providers may then assign permissions to other affiliated, approved providers.
3. Contracted providers can access document templates, edit them, and share them back with CBH through the portal. Once shared, designated CBH staff should receive a notification the document has been viewed, edited, and/or completed.
4. Designated CBH staff may target the sharing of documents to specific providers at the facility or individual-provider level.
5. Contracted providers may request information from specific CBH staff.
6. Upon login, permissioned providers may link out to other software systems from the portal landing page. Ideally, this will occur through a single sign-on feature (See Section 2.2.1 regarding systems integration).

## 3. Scope of Work

### 3.1. Project Management

We expect that the response will include details about the strategy the Applicant will use to set goals and produce regular reports on the progress of the project. We expect that the Applicant will designate one individual as a Project Manager and/or primary point of contact throughout the project.

### 3.2. Target Timeline and Milestones

We expect that this portal will be developed and implemented in phases. At a high level, we expect the following milestones to be reached by the associated due date:

Milestone	Due Date
Portal Design and Development	10/29/2021
User Experience and Site Testing	1/31/2022
Portal Go-Live	2/1/2022
Portal Use Training	4/29/2022
Post-Implementation Period	TBD

The selected Applicant will be evaluated for reaching the above milestones. Failure to meet these milestones may result in remedies that include rescinding the award for this RFP. Meeting the above milestones will also be contingent on CBH putting forth a good-faith effort to provide sufficient and necessary information, including technical support, to the selected Applicant. Applicants are welcome to propose an alternative timeline and should provide a detailed justification if selecting to do so.

**Please note that we expect there to be a post-implementation period during which ongoing support will be needed. We expect that the Applicant clearly outlines their plan for providing support to CBH during this post-implementation period.** This plan should also include a transition strategy for handling the following events as they may affect the requested product: (1) The Applicant becomes insolvent or bankrupt; (2) The Applicant's business is acquired by another party.

### **3.3. User Experience (UX) Expertise and User Interface (UI)**

We expect that the response will include details about optimization of the UX, including testing with focus groups. Proper UI standards should be in place. Overall UI should be aligned with CBH branding and security standards.

### **3.4. Front-End Coding**

We expect that the response will include technical expertise in the creation of secure portals that include search engines and data capture tools. All front-end coding should follow Open Web Application Security Project (OWASP) security guidelines, with proper code review and security testing in place in addition to regular quality control measures.

### **3.5. API Integration and Data Base Management**

We expect that the response will discuss both the capability to exchange data via a CBH cloud-based data platform(s) and link to third party software systems as defined by the use cases and security requirements mentioned in Sections 2.2.2 and 2.2.3. Connection to the database layer should be flexible enough for future non-structured database utilization.

### **3.6. Security**

The portal must be built and maintained in a secure environment. Access to the information behind the portal should require a multi-factor authentication process to satisfy the assurance of privacy of the data. We expect that the website will be fully protected with no access allowed except for authenticated users. We expect security standards for the website and encryption at the data-in-transit level. We expect that the response includes a description of the Applicant's experience with secure Software Development Life Cycle (SDLC), including, but not limited to, coding standards for security and performance.

### **3.7. Testing and Quality Assurance**

We expect that the response will include a testing and Quality Assurance (QA) strategy.

### **3.8. Browser Support**

We expect that the system will handle multiple browser-support options and the potential for mobile device access in the future.

### **3.9. Software Training**

We expect that the design encompasses online aids to assist users, help functions that are context-specific, and mechanisms for assisting users in navigating the website. These help functions should be configurable by CBH staff.

### **3.10. Portal Management**

#### **3.10.1. Content Management**

We expect that the response will include the ability of CBH to manage content on the website, including sending notifications, bulletins, and other alerts as desired.

#### **3.10.2. Authentication Complexity**

One of the barriers to creating a standard model of insurance portal in the Medicaid/public-sector environment is that the contracted providers are primarily facilities rather than individual practitioners. This makes the authentication and permissions granting functionality technically complex.

For example:

Clinician A is providing services to Jane Doe in a clinic that is part of Facility 123. When the clinician logs into the portal, there is no way to determine:

1. If that clinician is providing services to that member.
2. Where that clinician is affiliated so that accurate permission to see clinical information about Jane Doe is authenticated.

Therefore, we are requesting a Facility Administrator model. In this model, the organization, at the main facility level (not at the service location level), is asked to assign a Facility Administrator. The Facility Administrator is granted the ability to invite clinicians within their service organizations to the portal and to grant them the ability to manage their user IDs and passwords. The Facility Administrator is also responsible for ending a specific user's access to the portal if their employment status ends. This agreement comprehensively puts the responsibility for user account management solely on the organization.

However, to ensure CBH acts as a good data steward, individual users within a facility are limited to only viewing data that they have entered. They should also have access to their specific facility-level reports.

### **3.10.3. Ongoing Support and Development**

We expect that the response will include a proposed plan for additions, changes, and potential new use cases that arise. The response should include a detailed pricing structure for this ongoing support and development.

### **3.10.4. Site Maintenance**

We expect that the response will include a policy for responding to requests or inquiries from CBH. This policy should include an approximate timeline according to which issues will be resolved as well as an accompanying pricing structure. We also expect that the response will include schedule details about any system downtime required for updates.

### **3.10.5. Engagement Metrics**

We expect that the response will include a proposed solution for measuring user engagement within the portal. These engagement metrics may include views, downloads, time on pages, or other metrics that may indicate utilization and adoption of the portal.

## **3.11. Understanding the Scope of Work and Requisite Experience**

Responses will be evaluated on demonstrated comprehension of the above “Scope of Work,” including the following (not in order of importance):

1. Experience with equally technically challenging and complex projects
2. Detailed work plan with timelines that include the post-implementation period
3. Responsiveness to the functionality requirements
4. Realistic and detailed budgets with milestones
5. Willingness to agree to payments based on milestones
6. Significant familiarity with state and federal privacy and security standards
7. Experience with UX design
8. Experience developing portals
9. Experience working with Managed Care Organizations (MCO) and/or other insurance payors
10. Experience using modern technology as best practice
11. Experience with secure Software Development Life Cycle (SDLC), including, but not limited to, coding standard for security and performance

*Please see Section 3.2.2., “Project Understanding and Proposed Scope of Work,” and Section 3.4.2., “Scoring by Review Committee,” for additional information relating to this section.*



## **4. Proposal Format, Content, and Submission Requirements; Selection Process**

### **4.1. Required Proposal Format**

#### **4.1.1. Proposal Cover Sheet**

The cover sheet (see Attachment A) should be completed with the Applicant's information and included as the first page of the proposal.

#### **4.1.2. Table of Contents**

A table of contents should be included as the second page of the proposal, with each section of the proposal included and with a page number for the first page of each section.

#### **4.1.3. Format Requirements**

Proposals must be prepared simply and economically, providing a straightforward, concise description of the Applicant's ability to meet the requirements of the RFP. Each proposal must provide all the information detailed in this RFP using the format described below. The narrative portion of the proposal must be presented in print size of 12, using Times New Roman font, single spaced on 8.5" by 11" sheets of paper with minimum margins of 1". For each section where it is required, the Applicant must fully answer all of the listed questions in the outline form in which they are presented in the RFP. Answers to each question must be numbered/lettered and correspond to the numbered/lettered questions in this RFP. Failure to number and letter the questions or to respond to all questions may result in the proposal being considered non-responsive. Each attachment, appendix, or addendum must reference the corresponding section or subsection number.

Applicants are required to limit their narrative responses to 25 single-spaced pages. This page limit includes Sections 4.2.1. to 4.2.5. below. There are no limitations for the cost proposal and operational documentation and requirements (Sections 4.2.6. and 4.2.7). If you have responded to a requirement in another part of your proposal, make reference to that section and do not repeat your response. Applicants whose narrative exceeds 25 single-spaced pages may have their proposals considered non-responsive and be disqualified.

### **4.2. Proposal Content**

The proposal should follow the format below. Information should be complete and demonstrate that the consultant can perform the required work in a professional manner.

#### **4.2.1. Applicant Profile/Statement of Qualification/Relevant Experience**

Provide company contact information, including how long you have been in business and the specific services you provide. Please provide a brief narrative description of the purpose, corporate status (profit or non-profit), and organizational structure of the company. Organizational charts may be used to support appropriate aspects of this narrative and may be included as an attachment

to your proposal. Identify and briefly describe related work completed in the last three years. Describe only work related to the proposed effort and include any examples of similar work in governmental, non-profit, or human-services-related organizations. Include evidence of satisfactory and timely completion of similar work performed for past projects.

#### **4.2.2. Project Understanding and Proposed Scope of Work**

Prepare a brief introduction, including a general demonstration of understanding of the scope and complexity of the required work. Provide a description of how the proposed services will be provided, including how the work will be developed, shared, and mutually agreed upon with CBH. Please include a description of each item identified in the scope of work section (see Section 2.3., “Scope of Work,” above) and describe creative solutions and alternative approaches where feasible.

#### **4.2.3. Personnel**

Identify key personnel who will be assigned to this project. Detail their experience in work related to the proposed assignment. Specify the Project Manager and/or individual who will serve as a contact person. Provide resumes and job descriptions for all individuals proposed to participate in the project. Provide copies of certifications of any individual whose job description requires a certification. In this section, also state the intention, if that is the case, to utilize subcontractors to perform any of the work for this project. For each subcontractor, provide the name and address of the subcontractor, a description of the work the subcontractor will provide, and whether the subcontractor is a minority-, woman-, or disabled-owned business.

#### **4.2.4. References**

Please include at least three references, with contact information, from organizations that have used your organization’s services in the past three years and have been customers for a minimum of 12 months.

#### **4.2.5. Project Plan and Timeline**

Provide a description of the project plan and timeline for the portal solution being sought through this RFP. This project plan and timeline should include the post-implementation period.

#### **4.2.6. Cost Proposal**

Please provide a cost proposal based upon your best understanding of the scope of the project and the services to be delivered. This cost proposal should include the total estimated cost for this project, itemized by the expected project milestones outlined in your proposal or in another comprehensive manner. This cost proposal should also include the provision of a detailed list of charges for services, including post-implementation system maintenance. The list of services should include, but not be limited to:

- a. Hourly personnel rates for all staff assigned to this project, including post-implementation staff (e.g., database administrators)
- b. Fees for subcontractors
- c. Reimbursable rates for expenses such as printing, copies, etc.
- d. Other miscellaneous costs and fees

Final rates will be determined in negotiations with the qualified Applicant after the proposal submissions have been reviewed and contract negotiations have begun. Although CBH may begin contract negotiations based on the submitted proposal, CBH reserves the right to have discussions with those Applicant(s) falling within a competitive range and to request revised pricing offers from them and to make an award or conduct negotiations thereafter.

#### 4.2.7. Operational Documentation and Requirements

Please make sure to include completed and signed (where applicable) attachments with your submission:

- Attachment A: CBH Administrative RFP Response Cover Sheet
- Attachment B: City of Philadelphia Tax and Regulatory Status and Clearance Statement
- Attachment C: City of Philadelphia Disclosure Forms (forms attached separately as a PDF)
- Attachment D: City of Philadelphia Disclosure of Litigation Form
- Attachment E: Acknowledgement of CBH Administrative Procurement Terms/Conditions
- Attachment F: Attestation that Applicant Meets Minimum Technical Requirements

Additionally, in this section, please include the following information, either within the section itself or by reference to an attachment to your proposal:

- Tax Identification Number
- Letter attesting that all required federal, state, and local taxes (including payroll taxes) for the past 12 months have been paid
- In the case of for-profit organizations, group, or individual practices, disclosure of any person or entity holding any shared ownership or controlling interest of 5% or more of the company
- MBE/WBE/DSBE Status (for-profit Applicants)

#### 4.3. Submission Process and Procurement Schedule

The anticipated procurement schedule is as follows:

RFP Event	Deadline Date
RFP Issued	May 10, 2021
Deadline to Submit Questions	May 21, 2021
Answers to Questions on Website	May 25, 2021
<b>Application Submission Deadline</b>	<b>June 22, 2021 at 2:00 p.m.</b>

Applicants Identified for Contract Negotiations	August 13, 2021
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CBH reserves the right to modify the schedule as circumstances warrant.

*Please note that due to office closures surrounding the COVID-19 public health emergency, only electronic submissions will be accepted for this RFP as described below.*

This RFP is issued on May 10, 2021. In order to be considered for selection, all applications must be delivered to [hans.leach@phila.gov](mailto:hans.leach@phila.gov) no later than 2:00 p.m. on June 22, 2021. Submission requirements:

- Subject lines should say “CBH Secure Portal RFP.” Applications submitted by any means other than email will not be accepted.
- Applicants must submit an electronic version of the application prepared as a PDF document; this submission will be considered the original and should include all signed documents noted in Section 4.2.7., “Operational Documentation and Requirements.”
- Applications submitted after the deadline date and time will be returned.
- The individual Applicant or an official of the submitting agency, authorized to bind the agency to all provisions noted in the application, must sign the cover sheet of the application (see Attachment A).

**4.4. Selection Process**

An application review committee will review all responses to this RFP. Based on the criteria detailed below, the committee will make recommendations concerning the submissions that are best able to meet the goals of the RFP.

Submissions will be reviewed based upon the merits of the written response to the RFP as well as a technical demonstration (See Section 4.4.2.1.).

Specific scoring criteria upon which the review will be based include the following.

**4.4.1. Threshold Requirements**

Threshold requirements provide a baseline for all proposals, which means they provide basic information that all Applicants must meet. Failure to meet all of these requirements may disqualify an Applicant from consideration through this RFP. Threshold requirements include timely submission of a complete application with all sections outlined in Section 3., “Scope of Work,” and in Section 4., “Proposal Format, Content, and Submission Requirements; Selection Process” completed.

Threshold requirements include having the requisite experience and qualifications to implement the program and being a vendor in good standing with the City and CBH.

Threshold requirements also include consideration of the Applicant’s financial status, including any potential delinquencies to the City and CBH. Proposals may be rejected if, in CBH’s judgment,

the Applicant has failed to provide all information required by this RFP; has been delinquent or unfaithful in the performance of any contract with CBH or others; is delinquent, and has not made arrangements satisfactory to CBH with respect to the payment of City taxes or taxes collected by the City, or other indebtedness owed to the City or other taxing authorities; is not in compliance with regulatory codes applicable to Applicant; is financially or technically incapable; or is otherwise not a responsible Applicant.

As part of the Threshold Review, CBH will check each Applicant against all required Commonwealth and Federal exclusion lists to ensure that the Applicant or its principals are not excluded from receiving federal funds.

#### **4.4.2. Scoring by Review Committee**

Applicants that do not meet all the threshold requirements will have their proposals disqualified. Scoring will be based on both the written proposal and the technical demonstration. For Applicants meeting the threshold requirements, the scoring criteria upon which the review will be based are as follows:

- Demonstrated understanding of the project as indicated by a description of each item in the scope of work section
- Appropriateness of proposed project approach, project plan, timeline and resource estimates, architectural design, and post-implementation strategy
- Demonstrated qualifications and relevant experience
- As stated in the cost proposal section, likelihood that the proposal will provide the best value compared to other submitted proposals

##### **4.4.2.1. Technical Demonstrations**

Applicants that meet all threshold requirements will also be required to record and submit a technical demonstration that complements their written proposal. The demonstration will be factored into the Applicant's overall score. Applicants meeting threshold requirements will be notified after this threshold review, and further guidance will be provided at that time.

##### **4.4.3. MBE-/WBE-/DSBE-owned and Local Businesses**

Special consideration will be given for the following:

- Businesses owned and controlled by minorities, women, and disabled persons
- Philadelphia-based Applicants

##### **4.4.4. Questions Relating to the RFP**

Written requests for access to the CBH Data Systems documents must be submitted to Hans Leach at [hans.leach@phila.gov](mailto:hans.leach@phila.gov). All questions concerning this RFP must be submitted in writing via email to Hans Leach at [hans.leach@phila.gov](mailto:hans.leach@phila.gov) by 5:00 p.m. on May 21, 2021. CBH will respond to questions it considers appropriate to the RFP and of interest to all Applicants, but reserves the

right, in its discretion, not to respond to any question. Responses will be posted on the CBH website by May 25, 2021. Responses posted on this website become part of the RFP upon posting. CBH reserves the right, in its discretion, to revise responses to questions after posting by posting a modified response. No oral response to any Applicant question by any CBH employee or agent shall be binding on CBH or in any way considered to be a commitment by CBH.

*Contact regarding this RFP with CBH or related staff other than the individual named above is not permitted, and failure to comply with this restriction could result in disqualification.*