

1. **How many employees does CBH have, and how many users do you foresee having access to the document storage solution? If possible, please provide a breakdown of the user base (expected usage rate, department, role, etc.).**

Out of 600+ employees, 200+ employees will potentially need access.

2. **Will users need to be segmented by certain document types (e.g., User A can only see document type 1, and User B can only see document type 2)?**

Yes.

3. **Will the users be associated with one domain (CBH)?**

Yes.

4. **How many external users would be accessing the solution?**

Zero.

5. **What types of “Accessibility” capabilities is CBH looking for? Does the vendor need to ensure the documents are usable by individuals with disabilities?**

The vendor must ensure that the service is compatible with any computer-based accessibility setting.

6. **Can you describe the ideal user experience for uploading, searching for, and retrieving a document?**

Larger uploads may happen from sources such as internal drives. After that, multiple individual files will be uploaded as they are scanned. Searches should be completed by looking up member names, ID numbers, or provider locations, using OCR. To retrieve a document, clicking and opening once logged in should be easy.

7. **What devices and platforms will your users use to access the system (e.g., desktops, tablets, mobile devices)?**

Desktops connecting directly to scanners

8. **Are there any specific accessibility standards that the solution must adhere to?**

No current policy is in place.

9. **How much data will initially be uploaded into the storage system?**

The initial upload will encompass 105,000+ files with a total size of 544.73 GB. After this, more bulk uploads will need to be performed.

10. How many document types would be in scope for this project?

.docx, .xlsx, .pdf, .jpg, .png

11. How many fields would be required to be indexed from the scan of a document?

OCR required, entire documents need to be searchable

12. What types and formats of medical records will be stored in the new solution?

Scanned paper documents

13. Where is the content stored today that would be migrated to the new information system?

Iron Mountain cloud service, Box, paper records

14. Which are the applications that will consume this data/documents?

Box

15. What are some required integrations with the solution?

Active Directory, Okta

16. What SSO tool does CBH use?

Okta

17. What are your specific requirements for data encryption, both in transit and at rest?

AES256, tables should be encrypted for backend databases

18. What are your Recovery Time Objectives (RTO) and Recovery Point Objectives (RPO) for different types of medical records?

One hour each

19. Are there any specific data sovereignty or residency requirements for your medical records?

No offshore storage allowed

20. Can you describe your current policies and procedures for document retention and destruction? Are these policies uniform across all types of medical records?

Policies are uniform across medical records except for minor medical records. Current policy requires storage for a set number of years and then destruction.

- 21. Would you want a copy of all your documents in a secondary environment for disaster recovery requirements?**

Yes.

- 22. How do you manage patient consent and data sharing agreements?**

Business Associate Agreements

- 23. When ‘data’ is noted in this question, does it refer to “documents” or discreet, structured data?**

Both

- 24. Does CBH currently have an OCR application to which the new document storage solution would be integrated, or is there a desire to take advantage of OCR functionality with the new document storage solution?**

A new OCR application is needed for this solution.

- 25. Will the documents only be uploaded electronically, or will physical documents be shipped to the vendor for scanning, processing, and retention?**

CBH’s current focus is transitioning from one cloud storage to another and maintaining a retention policy. However, scanning and processing can be included in responses, as that is a next step for this project.

- 26. What is the desired SLA from when the document was received to when it should be available in the repository?**

Immediate

- 27. Would redaction be needed for all documents being loaded to the archive?**

No.

- 28. What should the end-to-end solution look like? Is it just storing files, or should it contain a UI to upload the files, parse them via OCR, and store relevant fields in a database?**

The end-to-end solution will allow users to upload and parse them via OCR and store relevant fields in a database.

- 29. Are you looking for any information search capabilities from the data/documents that are stored?**

Yes, the solution must be able to use OCR to identify names, dates, etc.

- 30. What AI capabilities are you looking to incorporate into this solution? Are you using AI today? If so, which provider(s) and for what?**

We are not currently officially using AI, but we are open to examples of how it could help the business.

- 31. Do you have an in-house team to manage the data migration, or will you require assistance from a professional services provider?**

Professional services provider required

- 32. What are the primary business objectives you hope to achieve by consolidating your medical records into a single storage solution?**

CBH aims to consolidate all member records in one service rather than across multiple services. This will improve workflows and increase security for member records.

- 33. How do you envision this new solution improving the day-to-day work of your clinical and administrative staff?**

Utilizing one service rather than multiple will allow the clinical and administrative staffs to spend less time looking for member records and more time reviewing them.

- 34. What are the key performance indicators (KPIs) you will use to measure the success of this project?**

CBH will measure success using cost savings, time saved retrieving records, and reduction in security incidents as the KPIs.

- 35. How often do you plan to access this data?**

Daily