

**CBH Member Portal and Provider Portal**

---

<b>Date of Issue:</b>	<b>April 18, 2023</b>
<b>Applications must be received no later than:</b>	<b>2:00 PM EDT May 23, 2023</b>
<b>Submit all RFP-related questions to:</b>	<b>Hans Leach</b> <b><u><a href="mailto:hans.leach@phila.gov">hans.leach@phila.gov</a></u></b>

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

**CBH Member Portal and Provider Portal****TABLE OF CONTENTS**

1. Introduction.....	3
1.1. Statement of Purpose.....	3
1.2. Request for Proposals.....	3
1.3. Monitoring.....	3
1.4. Reporting Requirements.....	3
1.5. Compensation/Reimbursement .....	3
1.6. Organization and Personnel Requirements .....	4
1.7. General Disclaimer.....	4
2. Guide to this RFP.....	4
2.1. Project Overview.....	4
2.2. Overview of Functionality .....	5
3. Scope of Work .....	9
3.1. Project Management.....	9
3.2. Target Timeline and Milestones.....	9
3.3. User Experience (UX) Expertise and User Interface (UI) .....	10
3.4. Front-End Coding.....	11
3.5. API Integration and Data Base Management.....	11
3.6. Security .....	11
3.7. Testing and Quality Assurance .....	11
3.8. Browser Support.....	11
3.9. Software Training.....	11
3.10. Portal Management .....	11
3.11. Understanding the Scope of Work and Requisite Experience .....	13
4. Proposal Format, Content, and Submission Requirements; Selection Process .....	14
4.1. Required Proposal Format.....	14
4.2. Proposal Content .....	14
4.3. Submission Process and Procurement Schedule .....	16
4.4. Selection Process.....	17

## CBH Member Portal and Provider Portal

---

### 1. INTRODUCTION

#### 1.1. Statement of Purpose

Community Behavioral Health (CBH), a Behavioral Health Managed Care Organization (BH-MCO) for the Pennsylvania HealthChoices Program, is seeking a vendor to implement a secure, HIPAA compliant member and provider portal to meet Interoperability and State regulations, streamline member communications, and support its business operations and communication support for 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 or covered members. 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 to allow for continued growth and adaptation of emerging business requirements.

#### 1.2. Request for Proposals

CBH anticipates selecting one vendor to provide all the products and services specified in this RFP.

#### 1.3. Monitoring

The CBH Provider Operations and Member Services Departments will be managing the contract. An individual from each unit will be identified as the point person for the work to be conducted under the contract that is developed through this RFP and will monitor those activities for the duration of the contract.

#### 1.4. Reporting Requirements

Written progress reports will be required on a mutually agreed upon periodic basis to document the progress of the work to be performed but will be no less frequent than bi-monthly. In addition, CBH may request additional reports over the course of the contract.

#### 1.5. Compensation/Reimbursement

A cost proposal must be provided based upon your best understanding of the scope of the project and the services to be delivered. This should be presented as the total cost, itemized by each phase of the project (i.e., expected project deliverables detailed in Section 2 and 3), and further by a detailed list of charges for services, including hourly personnel rates for all staff assigned to this project, subcontractor fees, reimbursable expenses and other miscellaneous costs and fees. Services for the proposed project will be reimbursed as they are incurred through submission of invoices to CBH.

## CBH Member Portal and Provider Portal

---

While CBH may award a contract based on the initial offer, Applicants should make their initial offers on the most favorable terms available. CBH reserves the right, however, to have discussions with those potential consultants falling within a competitive range, and to request revised pricing offers from them and to make an award or conduct negotiations thereafter.

### 1.6. Organization and Personnel Requirements

CBH is seeking a vendor with the requisite skills and abilities to perform the work being sought through this RFP. The selected vendor must have at least three to five years of experience implementing Provider and Member Portals. Applicants should include any credentials from any certifying organization that attest to the capabilities of the organization or of any of the individuals employed by the organization that will be working on the proposed project. (*For more specific details, please refer to section 4.2.3.*)

### 1.7. General Disclaimer

This RFP does not commit CBH to award a contract. This RFP and the process it describes are proprietary and are for the sole and exclusive benefit of CBH. No other party, including any Applicant, is intended to be granted any rights hereunder. Any response, including written documents and verbal communication, by any Applicant to this RFP, shall become the property of CBH and may be subject to public disclosure by CBH.

## 2. GUIDE TO THIS RFP

This document conveys our vision for the portals. We have included a background section about our organization and information about core member and provider 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 at [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 both member and provider networks to increase transparency across multiple functional areas within CBH related to performing key tasks associated with daily operations.

It is CBH's intention to use both secure portals to allow members and 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 the overall solution, CBH is seeking a process for login credentials management for individuals and the ability to delegate credentials management for our contracted facilities (see section 2.2.6. for examples).

## CBH Member Portal and Provider Portal

---

Given the scope of data access that will be part of this project, we expect to self-host the data and, given the complexity of this project, are seeking vendors who have significant experience with administering provider and member portals. CBH will only consider off-the-shelf product solutions.

### 2.2. Overview of Functionality

#### 2.2.1. Member Portal

It is CBH's intention to use the secure member portal to be in compliance with the CMS Interoperability and Patient Access Final Rule (CMS-9115-F) and to allow CBH to share information with members.

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

1. View and manage their demographic information
2. View their claims history information
3. View and interact with provider directory
4. View personal clinical information
5. Assign an authorized representative
6. View prior authorization requests, approvals, and denials
7. Submit and track status of complaints and grievances
8. Submit ICP consent forms
9. Initiate process for correcting information within the portal
10. Receive and review member notifications
11. View member newsletter
12. Participate in surveys
13. Utilize screening tools
14. Send secure messages to CBH
15. Receive health education content

## CBH Member Portal and Provider Portal

---

16. Schedule appointments and receive appointment reminders

### 2.2.2. Provider Portal

It is CBH's intention to use the secure provider portal to be in compliance with the CMS Interoperability and Patient Access Final Rule (CMS-9115-F), as well as PA Senate Bill 225 PA, which reforms the prior authorization process to expedite approval of patient care and reduce administrative burdens for hospitals, physicians, and other health care providers. The Bill requires insurers to make available an electronic communications network that permits prior authorization requests to be submitted electronically, and authorizations and adverse determinations to likewise be returned electronically.

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

1. Create prior authorization requests
2. Submit prior authorization requests
3. Review prior authorization requests
4. Download authorization inquiries and reports
5. View information necessary to request a peer-to-peer review
6. View contact information for CBH's relevant clinical or administrative staff
7. Access to CBH's applicable medical policies, including clinical review criteria used in the development of the policy
8. View and interact with a Provider Directory that includes data on CBH's network of contracted providers
9. Exchange data via a cloud-based platform and/or link to third party software systems
10. Retain and store documents as needed based on CBH policies and procedures
11. View and download listing of contracted services

### 2.2.3. Optional: Electronic Health Record (EHR) and Telehealth Capabilities

While not a requirement in this proposal, solutions may describe how the portal would be able to integrate with providers' current EHR systems to help to better streamline information exchange between CBH and providers' existing EHRs (e.g., streamlining steps in certain processes that require download/upload by the provider from their current EHR system to the portal). Likewise, solutions may address how the portal would integrate with providers' existing telehealth platforms.

## CBH Member Portal and Provider Portal

---

While also not a requirement, Applicants may also describe how their portal would potentially be able to host EHR and telehealth platforms, should CBH decide to incorporate this in the future.

### 2.2.4. Project Development

To achieve the above functionality, we anticipate that project development will require an iterative process. Member portal core features, however, should include the ability to view and manage demographic information, and view and interact with the provider directory, member claims history, and personal clinical information. Both portals will need to interface with CBH's public website for secure log in capabilities.

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. For example, the Provider Portal will need to interact with our clinical data system to assist with documentation upload/download to satisfy regulatory processes. **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 at [hans.leach@phila.gov](mailto:hans.leach@phila.gov).

### 2.2.5. Business Use Cases

#### 2.2.5.1. Member Portal

Covered members may access their data and documents via the portal and CBH staff may share data, documents, and notifications with members.

Upon login, the member portal should allow members to:

1. Submit an authorized user request
2. View their claims information
3. View their clinical information
4. Search the CBH provider directory

Upon login, the member portal should allow CBH to:

1. Post necessary documents and data into a specific member's portal
2. Review any submissions a member has entered
3. Send a member or members notifications

## CBH Member Portal and Provider Portal

---

### 2.2.5.2. Provider Portal

Upon login, the portal should allow providers to:

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

Upon login, the portal should allow CBH to:

1. Securely send documents to providers that may contain clinical data
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 emails to providers to direct them to the portal if they have notifications or alerts
6. View provider portal utilization metrics and analytics

Contracted providers may share data and documents with CBH staff and CBH staff may share data, documents, and notifications with providers.

### 2.2.6. Security Requirements

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

#### 2.2.6.1. Member Portal

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. Members will gain access to the portal upon confirmation of coverage. Members may submit a request for an authorized user.



**CBH Member Portal and Provider Portal**

---

- 3. Designated CBH staff may target the sharing of documents to specific members.

**2.2.6.2. Provider Portal**

- 1. Contracted providers may sign up for and access the portal through their Provider Representative. Providers may then assign permissions to other affiliated, approved providers within their agency (See Section 3.10.2. for more details).
- 2. 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 that the document has been viewed, edited, and/or completed.
- 3. Designated CBH staff may target the sharing of documents to specific providers at the facility or individual-provider level.
- 4. Contracted providers may request information from specific CBH staff.
- 5. 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 (regarding systems integration).

**3. SCOPE OF WORK**

**3.1. Project Management**

We expect that the response will include details about the Applicant’s strategy to set goals and produce regular reports on the progress of the project. We expect that the Applicant will designate *at least one* individual as a Project Manager and additional primary point of contacts throughout the project’s lifecycle. Because there are two portals being built out, it is the expectation that the Applicant’s strategy will apply appropriate staffing the manage both complex requirements.

**3.2. Target Timeline and Milestones**

We expect that both portals will be developed and implemented in phases. At a high level, we expect the following milestones for the first iteration of each portal to be reached by the associated due date:

<i>Provider Portal Milestones</i>	<i>Target Finish Date</i>
Portal Design and Development	11/2023
User Experience and Site Testing	03/2024
Portal Use Training	06/2024

## CBH Member Portal and Provider Portal

<i>Provider Portal Milestones</i>	<i>Target Finish Date</i>
Portal Go-Live	09/2024
Post-Implementation Period	TBD

<i>Member Portal Milestone</i>	<i>Target Finish Date</i>
Portal Design and Development	11/2023
User Experience and Site Testing	12/2023
Portal Use Training	1/2024
Portal Go-Live	3/2024
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.

## CBH Member Portal and Provider Portal

---

### 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 2.2.3 and 2.2.4. 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.

### 3.9. Software Training

We expect that the design encompasses online aids to assist users (i.e., translation services and text to talk), 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 portals, including sending notifications, bulletins, and other alerts as desired to both members and providers.

## CBH Member Portal and Provider Portal

---

### 3.10.2. Authentication Complexity

#### 3.10.2.1. Member Portal

For the Member Portal, authentication will need to occur at several points in coverage:

1. When a new member is covered by CBH and requests a new portal account
2. When a covered member appoints an approved authorized user/power of attorney
3. When a child ages into the age of consent to manage their own portal
4. When a member is no longer eligible

Therefore, we will need integration with CBH eligible member data sources for ongoing maintenance.

#### 3.10.2.2. Provider Portal

Contracted providers are primarily facilities rather than individual practitioners, making 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, or
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.

## CBH Member Portal and Provider Portal

---

### 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 down time 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 portals, such as unique logins and user accounts created. Metrics will be needed from Members, Providers and CBH Users.

## 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 standards for security and performance
12. Experience with utilizing multiple organizational data systems

*Please see Section 4.2.2., “Project Understanding and Proposed Scope of Work,” and Section 4.4.2., “Scoring by Review Committee,” for additional information relating to this section.*

## CBH Member Portal and Provider Portal

---

### 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

## CBH Member Portal and Provider Portal

---

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 and the technical specifications of the proposed solution. Please include a description of each item identified in the scope of work section (see Section 2. Guide to this RFP and Section 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, women, or disabled owned business. A RACI document should be submitted outlining expected personnel, working location, role, and responsibilities for the project work.

### 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 sample of the project plan and timeline that includes staffing for the portal solution being sought through this RFP. This project plan and timeline should include resourcing for the implementation of the two portals in tandem and 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:

1. Hourly personnel rates for all staff assigned to this project, including post-implementation staff (e.g., database administrators)
2. Fees for subcontractors
3. Reimbursable rates for expenses such as printing, copies, etc.

**CBH Member Portal and Provider Portal**

---

**4. 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.

**4.3. Submission Process and Procurement Schedule**

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](#)
- ➔ Attachment D: [City of Philadelphia Disclosure of Litigation Form](#)
- ➔ Attachment E: [CBH Administrative Procurement Terms and Conditions/Acknowledgement Form](#)
- ➔ Attachment F: [Attestation of 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)

<i>RFP Event</i>	<i>Deadline Date</i>
RFP Issued	April 18, 2023
Deadline to Submit Questions	April 28, 2023
Answers to Questions on Website	May 8, 2023



**CBH Member Portal and Provider Portal**

<i>RFP Event</i>	<i>Deadline Date</i>
Application Submission Deadline	2:00 p.m. EDT on May 23, 2023
Applicants Identified for Contract Negotiations	July 7, 2023

*CBH reserves the right to modify the schedule as circumstances warrant. Please note that only electronic submissions will be accepted for this RFP as described below.*

This RFP is issued on April 18, 2023. 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. EDT on May 23, 2023. Submission requirements:

- ➔ Subject lines should say “CBH Member and Provider Portal RFP.” Applications submitted by any means other than e-mail 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.

## CBH Member Portal and Provider Portal

---

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
- ➔ Appropriateness of staffing to complete the project.

#### 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

## CBH Member Portal and Provider Portal

---

### 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 by 5:00 p.m. on April 28, 2023. 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 8, 2023. 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.*