



REQUEST FOR PROPOSAL (RFP):

*Integrated Electronic Health  
Record System Requirements  
Gathering and Selection*

*March 20, 2020*



## About Us

Milton Hershey School (MHS) is one of the world's best private schools, offering a top-notch education and positive home life to children in pre-kindergarten through 12<sup>th</sup> grade from families of lower income at no charge.

Our commitment to excellence shows in everything we do, and for more than 105 years, we have been providing a brighter future for our students, offering:

- An excellent education, driven by technology and state-of-the-art facilities.
- A supportive community of teachers, houseparents and staff who care deeply about the success of each student.
- Innovative learning techniques that prepare our students to be competitive in a global marketplace.
- Access to sports, music and the arts.
- Nurturing, family-like homes.
- A social and emotional learning curriculum that supports the character and leadership development of our students.

- Advanced learning while in high school and extensive support after graduation that includes the opportunity to earn college scholarships.

All of this at no cost to our students' families.

Created in 1909, the school is funded by a trust established by the generosity of chocolate industrialist Milton S. Hershey and his wife, Catherine (Kitty). There is no other home and school quite like Milton Hershey School.

“Every Hershey's product you've enjoyed has helped support children in need through Milton Hershey School. Thank you for making a difference!” — Hershey's wrapper

For more information, please visit [www.mhskids.org](http://www.mhskids.org).

## Project Overview:

Milton Hershey School maintains and tracks all student related healthcare information that is provided to our students both internally, as well as from external health care providers. Currently, several different systems are utilized to record information which is utilized by the School and our healthcare providers. Our student population will grow to 2,300 students ages 4 through high school graduation (ages 18-20).

### Services Overview

- Number of beds in Health Center – 40
- Three medical clinics in each school building (elementary, middle, senior)
  - Social Work services are offered in all three divisions
- Three dental clinics in each school building. They also provide prevention services in the student homes.
- Psychological Services has offices in all school buildings
- Staff Counts
  - Medical using EHR; 73 nurses, docs, contractors
  - Dental employs 27 full time and contracted dentists, dental/ortho assistants, hygienists, orthodontists, and an office coordinator
  - Psych Services has 49 full time, part time, and contracted clinical (psychologists, school psychologists, psychotherapists), doctoral interns, behavior support specialists, psychiatrists, drug and alcohol specialists, and staff assistants
  - 8 full time social work users, 3-5 interns (document work)
  - Social Work manages occupational therapy with 1 OT contracted staff

**Billing and Insurance** - While currently we do not bill, we need to maintain information on our families' insurance coverage for external providers' use. We need to be able to capture the

insurance information of our families/students. If students receive care off campus, we provide this information to the outside provider. This area of the EMR is also used to capture the electronic prescribing we do to the student's home pharmacy when they go home for vacations/breaks.

### **Current Implemented Systems - Below is a description of each system and how it is used.**

One of the goals of this project is to review the workflow across all medical systems. The team must review, understand, and be able to implement best practices as they apply to the School business model for providing healthcare services to our students. Minimal maintenance and ongoing cost of ownership is essential while maintaining a high level of availability and security.

#### **Centricity (Medical Services)**

- Centricity is used on every student encounter in all 3 clinics for the following:
  - Health Center treatment, phone calls, and orders
  - Medication prescribing and administration
  - Automated emails for appointment reminders and scheduling of student appointments
  - Electronic communications between disciplines
  - Communication with Codonix interface for student data and information
  - Communication with the medication tracking and administration system
  - Storage of student demographics and pharmacy information
  - Provides for lab results interface
  - Provides for houseparent communications of student care plans

#### **Centricity (Dental Services)**

- Centricity is used to review each student's medical history summary prior to rendering dental/orthodontic treatment. Information routinely referenced/ascertained includes, but is not limited to:
  - Student demographics, flags and student care alerts
  - Student medical problems and medical conditions
  - Vitals such as height/weight, blood pressure
  - Allergies, medications, prescriptions, pre/post-surgical orders, and lab results
  - Indications for antibiotic prophylaxis
  - Record of prescriptions from external dental specialists and treatment providers for the purpose of medication review and cross-referencing of drug interactions and tracking
- Centricity also interfaces with Dentrax for the population of student demographics. (The selected system will be compliant with Meaningful Use/HL7 which would afford autopopulation of all medical conditions, medications, allergies, prescriptions and vitals into Dentrax and subsequently into Dolphin computer software systems.)

#### **Centricity (Psychological/Behavioral Services)**

- Provides secure electronic records for psychology, behavioral services, psychiatry and drug and alcohol services
- Houses clinical documentation

- Allows for scheduling and appointments
- Allows for electronic prescribing
- Provides a means for electronic dictation
- Provides for management reporting
- Allows for appropriate levels of access
- Provides a Patient Portal

### **Centricity (Social Work Services)**

- Social work utilizes Centricity for the following:
  - Documentation of all social work activity including direct services with students, consultation with agencies as well as other staff.
  - Documentation of progress monitoring
  - Creation of Custody order cover sheets where information is pulled out and disseminated to necessary staff
  - Communication between Student Health Services providers
  - Provides necessary reporting
  - Management of student transitions when leaving MHS
  - Verification of services in place for students.
  - Social Work uses the directives to inform staff of need to know information.
  - Houses authorizations for reference of other disciplines.
  - Used to access student demographics, sponsor information and insurance information.
  - Provides a reference for case management that occurs when students are in the Health Center, using flags to alert staff, since link/access to Codonix isn't working for social work.
  - Social work reviews upcoming appointments for students for the purpose of transition planning,
  - Provides access to medical information such as immunization records and last physical to utilize for the purpose of transition planning
  - Provides for the facilitation of transition between divisions through the use of the Student Health Services Transition Form
  - Provides access to historic records for the purpose of tasks such as disability claims, preparing write-ups for health leave of absence or enrollment dismissals, program referrals, etc.
  - Used specifically for transition planning for seniors as they leave MHS after graduation through a developed process around continuity of care for health services and specialty services.

### **Codonix (Medical Services)**

- Codonix is used on every student admitted to the Health Center, tracking board, census report, nursing, Certified Nurses Assistants (CNAs) and physician documentation, medication administrations, treatment and task documentation

### **Codonix (Psychological/Behavioral Services)**

- Secure electronic records for psychology, behavioral services, psychiatry and drug and alcohol services for students admitted to the MHS Health Center
- Clinical documentation
- Appropriate levels of access

### **Dentrix Enterprise (Dental Services)**

- Dentrix Enterprise is our dental patient database software which features dental practice management and integration with the Dexis imaging system. It also supports multi-location connectivity.
- Dentrix features include:
  - Patient tracking
  - Demographics
  - Document management/organization
  - Appointment scheduling & reminders
  - Dental and periodontal charting
  - Procedural coding and clinical notations
  - Provides for Caries-risk assessment/questionnaires
  - Provides for tracking of patient alerts, referrals
  - Provides for development of queries and customizable reporting
  - Provides treatment planning and office management
- Dexis imaging affords us the ability to capture, view, track, annotate, enhance and present intraoral and extra-oral radiographs and photos.
- *We would like to activate various components such as the Patient Health Assessment, Medical Alerts, ePrescribe, Patient Health Exchange, Caries Risk Outcome Module now, and the Patient Portal in the future.* Levels of access

### **Dolphin (Dental Services)**

- Dolphin is our orthodontic patient database software which features orthodontic practice management and imaging system components and supports multi-location connectivity.
- Management features include:
  - Patient tracking
  - Document management/organization
  - Appointment scheduling & reminders
  - Patient GPS
  - Treatment cards and treatment planning
  - Tracking of procedural/clinical notations; questionnaires; correspondence; alerts; referrals
  - Development of queries and customizable reporting
  - Imaging features capture diagnostics and timepoint photos, panoramics, and cephalometrics
  - Dolphin integrates with Dentrix and Dexis for student data population of demographics and radiographs
  - Patient portal

### **The School seeks a solution that will:**

- Provide the best location and database to house all MHS student healthcare information
- Streamline our current processes creating efficiency and ease of use (current business process review and evaluation is critical)

- Provide for enhanced reporting as identified in requirement gathering sessions with users on campus (Student Health, Finance, and other stakeholders)
- Serve as the main tool used daily by all members of the Student Health Services Division (SHS) team in our various areas of work with the students. It is necessary for any one team member to have access to sign in to the system at any time without limitation of users.
- Filter applications and run reports based on selected criteria via queries or reporting/export tool;
- Provide administrative and technical controls to comply with legal and regulatory requirements, ensuring through auditing capabilities that protected personal information is properly governed at all times, in transmission and at rest.
- Provide patient portal access for appropriate stakeholders
- Ensure best practices in data security are met including the requirements of HIPAA (and any other regulatory) compliance.
- Ensure solution is available 24x7 and recoverable to degree that meets MHS requirements for business continuity.

**Current challenges** include the following:

- Multiple systems end users are required to use double and triple documentation
- No portal access for parents/sponsors or students
- Unsecured communication between medical and Homelife with student plans of care after a medical visit
- Systems do not automatically pull a visit summary and email it to student and houseparent, this is copied and pasted from Codonix or Centricity and placed in an outlook email
- No electronic protocol system for medical management
- Interfaces rarely work to download all lab, and diagnostic results
- No ability to run auto reports
- Codonix admissions to Health Center need to be printed and scanned to Centricity in the student chart with no communication or interface between systems
- Connectivity to MHS student health records with Penn State Hershey Medical Center's electronic health record system
- There is no multi-factor authentication (MFA), except for prescriptions, to access these highly sensitive systems (most places are now using prox-cards with credentials to login).
- Auditing is a manual process that can easily be overlooked so automation and/or reporting that meets HIPAA compliance would be a step to improve our posture and ensure we are meeting HIPAA requirements.
- Integration with our corporate directory structure is a critical requirement to ensure access and control is handled uniformly and in a timely manner.
- Exporting and access of the database should be tightly controlled as the power of SQL is currently used to extract data into systems that may or may not have the

proper auditing to link back to the original record access from Centricity to meet HIPAA requirements.

**Current key strategies and timelines** include the following:

- Seeking possibility of one EHR system to replace at minimum, Centricity and CodoniX
- Obtain input from frontline staff
- Review current EHR systems available for our size and connectivity to Penn State Hershey Medical Center EHR system
- Ensure EHR system has capability of generating volume of data for multitude of projects, reports, and requests about our student body's health
- See attached timeline

## RFP Submittal Requirements

To assist Milton Hershey School in selection of a partner who can help achieve the goals and overcome the challenges noted above, please provide your firm's RFP response in the following format.

**A. The proposal should describe a plan that addresses the following:**

- 1) How can your firm best provide best practice "to be" business process mapping while developing requirements for a new integrated system?
- 2) How can your firm develop the Request for Proposal so it provides the information and documentation required to implement a successful project for MHS
- 3) How can your firm identify qualified vendors who can provide MHS with the best possible scenarios to create efficiency and improve processes
- 4) Please describe the Project Team and Approach
- 5) Description of your firm's client experience
- 6) Total proposed costs including travel and expenses
- 7) Discuss realistic implementation and timeframe
- 8) Reports available for care monitoring, visit volumes and types, tracking and trending of data, and cost analysis based on ICD 10 codes
- 9) Provide a list of clients and in particular those in the K12 or secondary education business?



**B. In addition, please provide a response to the following:**

Company Name	
Address	
Contact Person/Email	
Please explain your company's ownership structure, financials, size, etc.	<i>may attach as 1-pager</i>
Please share your company's core capabilities and service offerings.	<i>may attach as 1-pager</i>
Do you offer fee discounts to nonprofit organizations? If so, please explain discount.	
Do you accept these standard payment terms and/or discounting options? Please note which is preferred.	Net 45 1% / 15 2% / 10
Can you comply with the following insurance requirements?	
<p>A. The service provider shall, at its sole expense, maintain the following insurance on its own behalf with insurance companies lawfully authorized to do business, or on an admitted basis, in the jurisdiction in which the services are performed and furnished to Milton Hershey School Certificates of Insurance evidencing the following types of coverage.</p> <p>B. Automobile Liability Coverage - \$1,000,000: The Service Provider shall maintain insurance covering losses caused by an automobile accident that arises from the operations described under the scope of services of this Agreement. Coverage shall include “non-owned” and “hired” automobiles.</p> <p>C. Commercial General Liability Coverage – Occurrence Form with the Following Limits</p> <ul style="list-style-type: none"> <li>i. Each Occurrence: \$1,000,000</li> <li>ii. General Aggregate: \$2,000,000</li> <li>iii. Personal and Advertising Injury: \$1,000,000</li> <li>iv. Products/Completed Operations: \$1,000,000</li> </ul> <p>D. Commercial Umbrella Coverage</p> <ul style="list-style-type: none"> <li>i. Occurrence Limit: \$3,000,000</li> <li>ii. Aggregate Limit: \$3,000,000</li> <li>iii. Policy to apply as a “follow form” of the Automobile Liability Coverage and the Commercial General Liability Coverage</li> </ul>	

E. Workers' Compensation & Employer's Liability Coverage

- i. Commonwealth of Pennsylvania statutorily required coverage with an endorsement indicating that any "SUBCONTRACTORS" used by service provider will be provided workers' compensation coverage through service provider's policy.
- ii. Employers' Liability Coverage: \$1,000,000

F. Additional Insured: Milton Hershey School shall be added as an ADDITIONAL INSURED on all liability policies, except the Workers' Compensation Coverage. The coverage offered to the ADDITIONAL INSURED on Service Provider's liability policies shall be primary coverage to any other coverage maintained by the ADDITIONAL INSURED and shall not permit or require such other coverage to contribute to the payment of any loss.

G. Notice: It is agreed Service Provider's insurance will not be canceled, materially changed or non-renewed without at least thirty (30) days advance written notice to the Milton Hershey School by "Certified Mail – Return Receipt Requested".

H. Other Coverage: Any type of insurance or any increase in limits of liability not described above which Service Provider requires for its own protection or on account of a statute shall be its own responsibility and at its own expense.

Can you comply with the requirement for Act 34 clearance (background check) for each individual who will come onto the Milton Hershey School campus?

Please acknowledge if your company is classified as a diverse business enterprise, for example small business, minority or woman owned or applicable diverse business classification.

Please acknowledge if you are a Milton Hershey School alumna/alumnus or employ an alumna/alumnus.

Please acknowledge agreement to represent and warrant the following:

- a. No Current or Prior Conflict of Interest. That Supplier/Contractor has no business, professional, personal, or other interest, including, but not limited to, the representation of other clients, that would conflict in any manner or degree upon working with Milton Hershey School. **Please disclose below if any family member or relative of the owner or principal of the business is employed by MHS.**

- b. Notice of Potential Conflict. If any such actual or potential conflict of interest arises,

Supplier/Contractor shall immediately inform MHS in writing of such conflict within this RFP response.	
Please acknowledge if your company is willing to participate in offering MHS student work opportunities such as summer internships, specific job shadowing or networking events.	
MHS's service agreement template is attached on Page 10. MHS plans to utilize this agreement with the selected firm. Please provide initial feedback if there are terms in this agreement that are not acceptable to your firm.	
Please provide 3 client references (educational/non-profit clients if possible).	

***Please review the RFP timeline below to ensure you respond appropriately and on time.***

## Milton Hershey School Contact Information for this RFP

Listed below is your Milton Hershey School contact(s) for this RFP process. Any attempt by a firm or its affiliates to discuss this RFP with anyone at Milton Hershey School other than the designated contact(s) may result in the disqualification of the firm from further consideration for this business.

Stephen Valentine  
[valentines@mhs-pa.org](mailto:valentines@mhs-pa.org)

## RFP Key Due Dates

***Updated***

<b>Date</b>	<b>Milestone</b>
<b>March 20, 2020</b>	RFP issued via email from Milton Hershey School RFP contact(s).
<b>April 3, 2020</b>	Firm to email response to Milton Hershey School contact(s) listed above with Intent to Respond.
<b>April 17, 2020</b>	Deadline for submission of questions via email to Milton Hershey School contact(s) regarding project scope and expectations.
<b>April 30, 2020</b>	Milton Hershey School contact(s) will email back answers to all questions submitted on time to all RFP participants.
<b>May 11, 2020 5:00 PM EDT</b>	Emailed copy of RFP response DUE. Email your proposal to contact(s) listed in the Milton Hershey School Contacts section of RFP.
<b>May 18-22, 2020</b>	Milton Hershey School Evaluation Period. The Milton Hershey School team may contact you via email or phone with questions about your RFP proposal.
<b>June 1 – 10, 2020</b>	<b><i>Short-listed firm invited for presentations.</i></b>
<b>June 17, 2020</b>	Award Update to participants of RFP.

**The above schedule is subject to change by Milton Hershey School.** Changes will be communicated to each RFP participant.

## Project Timeline

*Updated*

Date	Milestone
July 1 - 15	Project Timeline planning with MHS
July 15 – September 15	Interviews and RFP Creation.
<i>September 15, 2020</i>	RFP issued via email from Milton Hershey School RFP contact(s).
<i>October 2020</i>	Milton Hershey School Evaluation Period. The Milton Hershey School team may contact you via email or phone with questions about your RFP proposal.

## Conditions for Reply

### General RFP

- This Request for Proposal (RFP) is not an offer. Milton Hershey School reserves the right to reject any and all proposals and make an award to a party other than the lowest bidder.
- Your firm agrees that all information communicated by Milton Hershey School shall be received for the sole and exclusive purpose of enabling you to submit a response to this RFP. The information contained in this RFP and the RFP itself, is proprietary in nature and shall not, under any circumstances, be disclosed, in whole or in part, to any third parties without the prior written approval of Milton Hershey School.
- In submitting a proposal, your firm understands that Milton Hershey School will determine at its sole discretion which proposal, if any, is accepted. Your firm waives any right to claim damages of any nature whatsoever based on the selection process, final selection, and any communications associated with this RFP process.
- All proposals shall become the property of Milton Hershey School and will not be returned. Milton Hershey School reserves the right to procure only part of the services proposed and/or reject any or all proposals. Milton Hershey School shall have no obligation to award a contract for work, goods, and/or services as a result of this solicitation.
- Milton Hershey School reserves the right to change the schedule of events, as deemed necessary.
- Following the due date for submission of this RFP, and prior to establishing a contract, the RFP response shall be binding upon your firm in all respects for a period of 120 days.
- The issuance of this RFP and the receipt of the information in response to this document shall not in any way cause Milton Hershey School to incur any liability or obligation to your firm, financial

or otherwise. Milton Hershey School assumes no obligation to reimburse or in any way compensate your firm for expenses incurred in connection with your response to this document.

- Milton Hershey School is a member of the Hershey Purchasing Consortium consisting of The Hershey Company, Hershey Entertainment and Resorts, Hershey Trust Co., Hershey Medical Center, M.S. Hershey Foundation and Milton Hershey School. MHS is eligible for discounts offered to any member. Bidders should consider MHS' RFP in addition to other Consortium members when submitting proposals.
- Milton Hershey School participates in cooperative purchasing programs such as PEPPM and COSTARS.
- Milton Hershey School is committed to diversity and inclusion of our workforce, customers, consumers and suppliers. To that end, we encourage diverse suppliers, contractors, and sub-suppliers to bid on opportunities to provide our company with high-quality goods and services at a reasonable price.
- Any potential partner or sub-contractor with whom your firm may work to respond to this RFP and/or provide services to Milton Hershey School must agree to the above conditions.
- If your firm does not agree to the above conditions, do not respond to this RFP.

## Indemnity

- Milton Hershey School will not accept a proposal or contract, which contains any provision causing the School to indemnify the supplier for any reason.

## Qualification Statements

- Firms are limited to those firms qualified and engaged in a full-time business and can assume liabilities for any performance or warranty service required.

## Pre-Award Conference

- Prior to award of the contract, the firm(s) may be requested to attend a pre-award conference at Milton Hershey School to review the Proposal and Scope of Work. All costs associated with Pre-Award conference shall be borne by the firm.

## Disposition of Documents

- All unsuccessful firms will be advised when the contract(s) has been awarded.
- If a firm declines to submit a proposal, or if a firm submits an unsuccessful proposal, such firm may destroy all RFP documents rather than return them.

## Subcontracting

- Firms shall not subcontract any of the work without prior written approval of Milton Hershey School. A list of proposed subcontractors and the scope of work to be subcontracted shall be included with the proposal for Milton Hershey School approval.

## Required Documentation for Firms working with Milton Hershey School

- Milton Hershey School prefers to utilize the School's contract templates. Selected firm will be presented Milton Hershey School's contractual terms and conditions if awarded business. See attached .pdf file to review Milton Hershey School's contract for services.



MHS Service  
Agreement 2017

- Successful supplier/firm must submit necessary bank information for all payments. Milton Hershey School makes all contract payments via electronic funds transfer. Failure to accept payments in this manner will result in non-conformance.
- Successful supplier/firm must comply with Pennsylvania ACT 34, and provide the PA State ACT 151 and FBI Criminal Background Checks for each individual who will come onto the Milton Hershey School campus. Failure to submit this clearance will result in non-conformance.
- Successful firm must maintain commercial general liability insurance with limits not less than \$1,000,000 per person and \$1,000,000 in the aggregate for bodily injury and property damage. Such policies shall name the school as an ADDITIONAL INSURED. The firm shall have the insurer furnish and shall deliver to the school's Risk Management Department a certificate stating "CERTIFICATE HOLDER IS INCLUDED AS AN ADDITIONAL INSURED EXCEPT FOR WORKERS COMPENSATION." Failure to comply will result in non-conformance.
- All firms must disclose any conflicts of interest by working with Milton Hershey School.
- All firms must provide a minimum of three (3) client references, especially those in the educational and/or corporate sectors.
- All firms must provide three credit references (include contact name and information), as applicable.

## Payment Terms

- Milton Hershey School's standard payment terms are listed below.
  - Net 45
  - 1% / 15
  - 2% / 10
- Milton Hershey School is exempt from State of Pennsylvania sales tax. A tax exemption certificate is available to the successful bidder.