Client Management Software RFP
Questions and Answers

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GENERAL CONTRACT

Application / Proposal Process

Important information regarding proposal submission process:

ARC's Office of Procurement has made updates to the ARC Procurement website which may impact your proposal submission process. **Please don't wait until the last minute to submit your proposal.**

Any potential bidders must create login credentials to apply for all ARC related solicitations.

All bidders must Register on the site, but you do not have to complete the Vendor Application in order to submit your proposal for this opportunity.

Below is the link to the newly updated procurement page, which is now live and available for all vendors to reference and instructions on how to Register.

https://procurement.atlantaregional.org/opportunities/

USER ACCOUNT REGISTRATION

A user account is required to submit proposals for open bids. Follow the steps below to create your account:

1. Visit the Procurement Portal home page and click the ***Register*** button.
2. Complete the registration form with your contact information.
    1. If your business is **not** already an approved vendor with ARC, select **"No"** under Are you associated with a previously registered vendor of this site? and enter your business name when prompted.
    2. If your business is already an approved vendor, select "Yes" and enter your Business FEIN or Tax ID so your user account can be associated with the existing vendor record.
3. Click the Register button to submit your user registration information.
4. After submitting your registration, you will receive a confirmation email. Click the link in the email to verify your account and create your account password.
5. Once your password is created, sign in to the Procurement Portal to submit your proposal and/or begin the vendor application process.

Note: To receive an award, you must also complete the vendor approval process.

RFP QUESTIONS

Proposal Submission Requirements

1. Please confirm which materials are excluded from the 15-page proposal limit (e.g., pricing exhibits, appendices, references).
    - Appendices, reference letters, and samples of reports or work outputs are excluded from the 15-page proposal limit.

2. Should responses be organized according to the Roman numeral sections in Exhibit A or another structure?
    - Proposals should be organized as follows:
        - Cover Letter (including key contact information and signed by an authorized representative)
        - Executive Summary
        - Response to Requirements
        - Implementation Plan and Timeline
        - Project Staffing and Qualifications
        - Security and Compliance Documentation
        - Pricing (including detailed line items and assumptions)
        - References (minimum of three)
        - Appendices (e.g., sample reports, API documentation, SOC 2 summary, etc.)

3. Please confirm the required submission channel (email vs. procurement portal) and accepted file formats.
    - Submissions must be submitted via ARC's procurement portal in PDF format. https://procurement.atlantaregional.org/opportunities/

Users, Volume & Scalability

4. How many users (by role—case managers, supervisors, administrators, external partners, and clients) are expected at go-live and over the contract term?
    - Initially there will be 10 users: 2 Admins, 2 supervisors, and 6 case management users
    - ARC would like the ability to add more users as program needs increase.

5. What is the expected number of concurrent users at peak times?
    - 10 users

6. What are the anticipated volumes of clients, cases, intake, and billing transactions (monthly and annually)?

- ARC currently serves approximately 300 active clients in the behavioral health coaching program and enrolls an average of 10 new clients each month. While ARC does not currently use the system for billing, it would like to have that functionality available. If new contracts are added for additional services, this system would also be used for client data management, service tracking, and billing.

Program Scope & Expansion

7. Which programs and service lines are in scope at go-live?
    - Behavioral Health Coaching/Enhanced Case Management is the program needed at go-live.
    - The selected system does need to have the flexibility to allow ARC to add and configure additional programs as needed.
8. Are these the same programs currently supported in the existing system, or are new programs being introduced?
    - Behavioral Health Coaching is the same program that is currently being supported.
9. Are additional programs expected to be onboarded during the initial contract term?
    - While ARC is working to expand current service capacity and potentially add service programs, there are no additional programs projected for onboarding at this time.

Current Systems & Environment

10. What systems are currently used for case management, billing/invoicing, reporting/analytics, and document management?
    - ARC is currently using WellSky Aging and Disability for case management, billing unit recording, reporting/analytics and document management for the Behavioral Health Coaching service Invoicing is being done manually outside the system.
11. What are the primary limitations or pain points in the current environment?
    - Primary limitations are not having the ability for more flexible and customized reporting needs and inability to integrate with other data systems.

12. Who is the incumbent vendor/integrator, and are they eligible to respond to this RFP?
    - WellSky is the incumbent vendor, and they are eligible to respond.

Data Migration

13. What is the source, format, and volume of legacy data to be migrated (e.g., number of clients, cases, documents, and total data size)?
    - The current data is in the WellSky Aging and Disability system. While there is extensive history in the system for other programs, ARC is planning to only migrate the last 7 years of data related to Behavioral Health Coaching service clients. ARC and the selected vendor will work with the current vendor, WellSky, to determine the best format and volume for migration.

14. What is the current state of data quality, and should vendors plan for data cleansing or deduplication?

- The data quality is fairly clean, and we do not anticipate the need for data cleansing or deduplication.

15. Will ARC provide a data dictionary or schema documentation?
    - Yes, ARC would work with current vendor to provide the data mapping to selected vendor.

Integrations & Technical Architecture

17. What systems (current or planned) will require integration with the proposed solution (e.g., ERP, reporting tools, state/federal systems)?
    - Currently there is no required integration with any other systems. We would like a system that is open to APIs if the need arises.
18. What integration methods are preferred (e.g., APIs, batch processing, middleware)?
    - APIs would be the preferred integration method, but we would be open to other methods.
19. Who will be responsible for integration setup, configuration changes, and ongoing management?
    - This would be a partnership between ARC IT and the selected vendor at a later date if needed. ARC is aware that this may incur an additional cost.

Budget & Pricing

20. Can ARC provide an estimated budget range or not-to-exceed amount for implementation and ongoing operations?
    - The current system expense is around $20,000, so that range should be kept in mind when developing your proposed solution.

21. Should pricing be structured separately for implementation and ongoing maintenance/support?
    - Pricing should be based upon your system implementation model.

Timeline & Go-Live

22. Is January 1, 2027, go-live date firm, or is there flexibility if delays occur in award or implementation?
    - Yes, January 1, 2027, is a firm date. Our existing contract ends on December 31, 2026.

23. Are the milestone dates in the RFP timeline firm or illustrative?
    - There is some flexibility with the milestone dates as long as the January 1 deadline is met.

24. Will ARC consider a phased or MVP-based go-live approach if full scope cannot be delivered by the target date?
    - ARC would consider a phased approach, but priority may be given to vendors who can meet the target date.

Implementation, Testing & Resources

25. What internal resources will ARC provide (e.g., project manager, SMEs, technical contacts)?

- ARC can provide SMEs, technical contacts and a project manager.

26. Will there be a defined User Acceptance Testing (UAT) period and access to test environments?
    - There will need to be user acceptance testing prior to go live. The selected vendor will need to provide a test environment for UAT.

27. Will ARC support iterative data migrations prior to final cutover?
    - ARC would be open to interactive data migration.

28. Will a parallel run or soft launch period be permitted?
    - A parallel or soft launch period would be permitted as long as the January 1 hard cutover is met.

Security, Compliance & Hosting

29. Which compliance frameworks are mandatory versus preferred (e.g., HIPAA, SOC 2 Type II, ISO 27001, CJIS, NIST)?
- ARC requires both HIPAA and NIST 800.53 compliance.

30. Are there any data residency requirements (e.g., U.S.-only hosting)?
- All data must be housed in the U.S.

31. Is Azure Active Directory / Entra ID required for SSO, and what authentication protocols (SAML/OIDC) are expected?
- The application should be configured to utilize SAML for authentication.

Functional Requirements & Workflows

32. Can ARC provide sample workflows or forms for intake, assessment, service planning, billing, and reporting?
    - These things will be provided to the selected applicant.
33. What business processes are currently experiencing inefficiencies or bottlenecks that the new system should address?
    - We do not currently have any specific inefficiencies or bottlenecks to address through this proposal.

Billing & Claims Processing

34. Does ARC require full claims processing (e.g., EDI 837/835) or only invoice generation and reconciliation?
    - ARC is not currently requiring full claims processing. We would like for this to be an available option if future contracts require this functionality.
35. Will a clearinghouse be used, and if so, which one?

- This is not applicable at this time.

36. Who is responsible for payer/clearinghouse enrollment and integration?
    - This is not applicable at this time.
37. Are payer-specific requirements or rate schedules already defined?
    - This is not applicable at this time.

Reporting & Analytics

38. What reporting and analytics capabilities are required at go-live?
    - ARC would like some flexible native data reporting to track clients and program work (e.g. Basic client demographics, assessment and care plan due dates and goals, service delivery units) We would also like the ability to build customized or detailed reports based on program and funder needs.
39. Are there specific regulatory or funder reports that must be supported?
    - There is not any additional reporting that must be supported at this time.
40. Should the system integrate with existing BI tools (e.g., Power BI, Tableau), or provide native reporting?
    - The system should provide native reporting, and we would like the ability to pull data that could be used with existing BI tools.

Financial / ERP Integration

41. What financial or ERP system is currently in use?
    - CostPoint is our current financial system.
42. What level of integration is required (e.g., one-way vs. bi-directional, real-time vs. batch)?
    - Currently there is no integration required with ARC's financial system. This would be something we may want to consider in the future.
43. What financial data objects must be exchanged (e.g., invoices, payments, GL codes)?
    - This is not needed currently.

User Experience & Accessibility

44. What are the requirements for mobile access (responsive web vs. native app)?
    - ARC is open to options; responsive web would be the minimum.

45. What level of client portal functionality is required at go-live?
    - This is not a requirement at go live.

46. Are there accessibility requirements beyond WCAG 2.1 AA?

- No, only WCAG 2.1 AA is required.

Training & Change Management

47. How many users require training, and what delivery format is preferred (onsite, virtual, hybrid)?
    - Approximately, 10 users will need to be trained. ARC is open to a train-the-trainer model which would be delivered in any format.

48. Are there external users (partners/providers) who will also require training?
    - There are currently no external users that will need training.

Contract & Commercial Terms

49. Are Service Level Agreements mandatory or negotiable?
    - ARC can negotiate SLA.

50. Will ARC require use of its standard contract, or will vendor agreements be considered?
    - ARC's Office of General Counsel will determine the appropriate contractual instrument required to establish the agreement between ARC and the vendor.

51. What pricing protections or escalation caps are required for multi-year terms?
    - Pricing cap requirements will be determined based on the services needed to be performed. Multi-year terms will be considered on a case-by-case basis, but ARC will do no more than 4 extensions for a total of 5 years.

Future-State Vision

52. How does ARC envision the system supporting future program expansion, cross-program visibility, and long-term strategic goals?
    - ARC would like this system to be the basis of something that could support future growth across a variety of programs. We would like to have a responsive system that can be configured to support evolving needs, data requirements, share data with other systems and provide billing support.