

Regional Medical Center

REQUEST FOR PROPOSAL

Learning Management System
Acquisition and Implementation

Proposal Release Date: 11 November 2012

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1 INTRODUCTION

Regional Medical Center (RMC), located in Chicago, IL, is a 300 bed hospital that services the Chicagoland area and strives for quality improvement in patient care.

For the past ten years, RMC has maintained a paper file system for all employee continuing education records, however due to recent unsatisfactory Joint Commission survey; it has become essential that RMC obtain an electronic Learning Management System (LMS) to ensure employee compliance with required educational training, certification and licensing. The implementation of an electronic LMS will complement our initiatives for increasing our footprint in adopting healthcare technology and quality improvement.

We are currently in the process of implementing an EHR system to help reduce medical errors and improve patient safety. The implementation of an electronic LMS will complement and help support our dedication of improvement in the quality of care through ensuring our staff members are in compliance with the most recent and required education.

The primary driving factor in this is the ability to easily demonstrate compliance with the Joint Commission (TJC) education and training requirements.

2 STATEMENT OF PURPOSE

The purpose of this document is to solicit proposals for the acquisition and deployment of an electronic LMS in a hosted environment (SaaS). The LMS is to be supported and maintained by the selected vendor. The chosen LMS must have proven experience in helping hospitals achieve a “satisfactory” rating or higher for TJC accreditation, specifically in the area of monitoring and tracking required employee continuing education.

Our primary objectives in implementing an electronic LMS are as follows:

1. To easily monitor, organize and track education training courses for all hospital staff.
2. To ensure no gaps in clinician licensing through automated system reminders of relevant educational training courses.
3. Maintain an accurate record of continuing education credits for all hospital staff
4. Adhere to TJC accreditation requirements for education and training

This RFP is considered an invitation to negotiate for the goods and services referenced herein. We are reviewing our options in search for an electronic LMS and therefore are seeking your response to this RFP based upon a preliminary review. We are asking that you submit a formal proposal, using the forms provided, which will address the cost for the procurement and implementation methodology and timelines of your LMS. We have specifically defined certain “structural” items within this RFP such as hardware configuration and the operating system environment. This is done to provide a level cost comparison between various vendors. We understand that the operating environment may differ based on specific recommendations of the vendor; however we ask that you provide the most accurate configuration quote possible.

Regional Medical Center reserves the right to modify the Terms and Conditions of the RFP.

3 EXISTING ENVIRONMENT

3.1 Background

3.1.1 Current Regional Medical Center Locations and Employee Count

RMC has over 2000 hospital employees with a medical staff including active and consulting privileges with physicians and providers representing at least 20 different specialties. These specialties cover a variety of services including: surgery, obstetrics and gynecology, gastroenterology, otolaryngology, cardiology, oncology, pain management and rehabilitation services.

At RMC, we aspire to be the destination of choice for patients seeking quality healthcare and for those clinicians who provide support and advance that care through leading-edge treatments and breakthrough discoveries. Our goal is to transform healthcare and to be among the top mid-sized hospitals in the state of Illinois. This will be accomplished through innovation and excellence through the use and acquisition of highly qualified goods and services. Our current process for monitoring and tracking continuing education requirements using a paper-based system for our hospital staff is not in alignment with the mission and goals of our organization.

The Regional Medical Center location is as follows:

Hospital Location: 123 Michigan Avenue, Chicago, IL 60601

Current Computing Environment

Our current computing network infrastructure for RMC includes:

- IT Staff
- Desktop PC network (Dell and HP)
- Wireless internet
- In-house server
- TCP/IP
- MS Browser
- Frame Relay

RMC's future computing environment will deploy the use of mobile devices to some hospital staff members to allow for easy access to software applications including our newly implemented EHR system and the chosen LMS. With this, we are looking for an LMS that uses a GUI interface.

The LMS will be supported in a SaaS environment and hosted by the vendor with the capability to support at a minimum of 1000 concurrent users (individuals who would be simultaneously accessing the LMS application) and scalability (the ability of the hosted LMS environment to

successfully handle a growing amount of work in a capable manner or its ability to be enlarged to accommodate the growth of our organization).

4 SUPPLIER REQUIREMENTS & INSTRUCTIONS

Information is to be provided for all sections within this document as defined within each section. Please provide your responses according to Appendix B and Appendix C. You may include additional supplemental information as part of your proposal.

It is not necessary to provide any information other than that provided for Appendix B and Appendix C in order to fulfill the requirements for this RFP.

This RFP does not represent a commitment to purchase or lease. RMC reserves the right to reject any and all responses at its sole and absolute discretion.

4.1 RFP Questions

Our objective is to insure that we provide you with all of the information you need in order for you to provide the most complete response to this RFP as possible. As such, we welcome any and all questions which you might have. Questions or requests for clarification must be emailed to: patrick_hayes@rmc.org by **19 December 2012 by 4:00 PM CST**. A copy of all questions and their associated responses will be e-mailed to all participants as they are received and addressed by RMC.

4.2 Response Format, Deadline, and Delivery

4.2.1 Delivery

Responses to Appendix B and Appendix C should be e-mailed to the address listed below. If you are submitting any supplemental information, **please submit a total of three (3) hard copies and one electronic copy** of this material to the address listed below. All RFP responses (Appendix B and Appendix C and any other supplemental information) must be submitted **no later than 02 January 2013 at 4:00 PM CST.**

Please submit to:

**Regional Medical Center
Attn: Patrick D. Hayes, PMP
123 Michigan Avenue
Chicago, IL 60601**

E-mail address: patrick_hayes@rmc.org

4.2.2 Presentation

It is requested that any supplemental information accompanying your proposal be bound in a 3-ring binder. Number pages consecutively within a section, using section and page numbering as listed in Appendix B. In addition, the table must be filled-out and form the basis for your response.

4.2.3 Important Due Dates

Date to be Received	Items to be Returned
4:00 PM CST, 09 December 2012	Supplier Questions and Clarification Requests Due
4:00 PM CST, 02 January 2013	Completed Response to RFP Due

5 TERMS AND CONDITIONS

The general terms and conditions below will be observed in preparing the proposal to be submitted.

5.1 Information Access

All information within this proposal and all documents supplied by RMC are proprietary of RMC and considered strictly confidential. Unless written or verbal consent is obtained this information shall not be shared with individuals outside of your organization. All materials and duplicates should be returned to RMC should your company decide not to respond.

5.2 General Conditions

5.2.1 Term of Contract

The contract between RMC and vendor will begin in January 2013 for planning and will run through January 2014. Prices quoted for software and services provided by your organization are to be valid for a minimum period of one year. The final contract will have duration of five years with the option to extend the contract in three year increments. Future maintenance fees will be determined in the initial contract.

5.2.2 Expenses

RMC will not be liable for any costs incurred by respondents in the preparation or production of a proposal. In addition, all costs for an onsite demonstration will be the sole responsibility of your organization

5.2.3 Response Preparation

Respondents must organize their proposal into sections that follow the format of this RFP. A point-by-point response to all numbered sections, subsections, and appendices is required. Each response should be clear and concise as to how your organization can satisfy the requirements. In addition, respondents must provide detailed prices for all products and services listed. Your responses and price quotes will be used extensively during proposal evaluations.

5.3 Bid Evaluation and Negotiation

5.3.1 Evaluation Criteria

RMC will evaluate all bids submitted and use the "Best Value" standard in selecting the vendor to be awarded the LMS contract. Each respondent will be evaluated against the same criteria and receive a score for each category in the evaluation. The purchase and maintenance price along with these scores will be used to determine the best value. The selection process will also include the following considerations.

- Customer references
- The vendor's overall experience, reputation, expertise, stability, and financial responsibility
- The ability to provide service in an expedient and efficient manner

- Ability to provide remote access
- Ability to provide a backup and disaster recovery plan
- Ability to have a “zero install” without requiring plug-ins or other add-ons
- Ability to meet RMC’s security policies

5.3.2 Supplier Ranking

Category	Criteria	Score
1. Software Product		
	Functionality that supports RMC’s initiatives	15
	Customization	4
	Reporting Functionality	6
	Ease of Use	5
	Tracking & Monitoring Functionality	5
	<u>Section Total</u>	<u>35</u>
2. Implementation Services		
	Transition Plan	5
	Implementation Plan	12
	Data Conversion	8
	Training	6
	Documentation	4
	Go-Live Support	5
	<u>Section Total</u>	<u>40</u>
3. Pricing		
	Purchase Price	10
	Maintenance Price	15
	<u>Section Total</u>	<u>25</u>
4. Grand Total		<u>100</u>

5.4 Formal Presentation

RMC expects to invite up to three vendors to perform a formal demonstration and presentation. There will be senior leadership, key stakeholders, compliance officers, human resource personnel, and various department representatives at the demonstration. A schedule and demonstration script will be provided to vendors once a date is agreed upon. All travel arrangements and associated costs are responsibility of the vendor.

5.5 Bid Effectiveness

The respondent’s proposal to the RFP will comprise your official bid. After submitting the proposal, the vendor agrees that the information is accurate and correct. In addition, no modifications or revisions can be made to the official bid.

5.6 Award of Contract

RMC reserves the right to reject any or all bids submitted and to accept the bid which is considered to be in the best interest of the medical center. Unless explicitly note, it is understood that the submitted bid is in accordance with the outlined specifications. The successful vendor will be notified within five business days by the purchasing officer. The vendor may not assign, sell, or subcontract any proposal without written permission from RMC.

5.7 Contract Provisions

RMC will incorporate the RFP response and any additional material provided in the response entirely into the contract with the vendor.

5.8 Responsibilities as Independent Contractor

All employees provided by the vendor shall be considered to be employees of the vendor. Under no conditions will said personnel be considered an employee of RMC. Nonetheless, RMC reserves the right to remove anyone from the project if deemed necessary. All subcontractors regarding project tasks, implementation, or project management services must be listed in the proposal. The vendor is responsible for the acts and omissions of all subcontractors or agents directly or indirectly employed by such subcontractors. RMC reserves the right to reject any and all subcontractors. RMC intends to contract exclusively with the vendor for all work related to this project. Therefore, all contractual documents created as a result of any contract awards derived from this RFP shall create contractual relationships with RMC and the vendor. There are no contractual relationships with RMC and subcontractors.

5.9 Staffing

The vendor will be responsible for assigning project personnel that have the necessary skills to complete the project. The vendor will have sole responsibility to assign tasks to the appropriate personnel. However, RMC reserves the right to remove an employee if deemed necessary. Reasons for removal include but are not limited to underperforming, negative attitude, tardiness, absenteeism, violations of HIPAA, or any acts that are detrimental to the project or RMC.

5.10 Insurance

RMC requires your organization to have the following insurance:

- ✓ Commercial General Liability Insurance covering all aspects of the work effort with limits of not less than two million dollars per occurrence.
- ✓ Worker's Compensation and Employer's Liability Insurance in accordance with Illinois state law and the state in which the vendor resides. The policy limit shall not be less than one million dollars.
- ✓ Automobile Liability and Property Damage Insurance covering all automobiles and other vehicles used in the connection with the performance of the work with limits of not less than two million dollars per occurrence.
- ✓ Contractual liability assumed by the contractor for all subcontractors that are utilized.

5.11 Equipment

The vendor should include a detailed price quote for defined software and operating system. In addition, specific configuration prices should be included. This will allow RMC to directly compare configuration options along with their associated prices. RMC reserves the right to buy required hardware, infrastructure, and operating services from a vendor of our choice. Being awarded the project does not guarantee that RMC will purchase the required services or infrastructure from the same vendor.

5.11 Intent to bid

All materials that have been disclosed concerning RMC are confidential and proprietary information of RMC. The vendor agrees to maintain the confidentiality of this information. All materials must be immediately returned if the vendor does not wish to submit a bid. All materials submitted in response to the RFP concerning the vendor become property of RMC.

5.12 Contract Item Costs

5.13.1 General

RMC will look for vendors that have an aggressive purchase, implementation, maintenance, and support pricing to minimize the cost to RMC for the initial go live and long term use.

5.13.2 Price Protection

The rates for services and software provided in the RFP must be valid for a period of one year. Moreover, all rates in an accepted bid must be guaranteed at the proposed rate for two years. Future price negotiation may begin within two years of contract expiration of existing rates and may be agreed upon for up to 5 years.

6 SCOPE OF THE RFP

This RFP is a solicitation for information regarding the purchase, implementation, and maintenance of an LMS software system. As such, our objectives are as follows:

- Strong implementation project management, reflected in 10 key project milestones (**see section 7.4**)
- A clearly defined set of deliverables and scope of work that include the software system, project management planning documents, training, system content and documentation
- System functionality that jointly supports RMC's quality initiatives for continuous improvement in patient care, patient safety, and compliance as well as security and ease of deployment and maintenance, minimizing the total cost of ownership.

The purpose of this section is to provide some additional insight into the information content which should be included in your response to the RFP. This information should be in addition to the response to the specific items detailed in Section 7 of this document.

As you prepare your proposal, it is also important for you to understand that it is our objective to have the option of operating independently of the software supplier at some point in the future, should we desire to do so. This would include the ability to add new sub-systems onto the existing application as well as (potentially) customizing the application itself.

6.1 Product Software Pricing

This section of the response should define the price structure for your product. It should include the price to purchase the software as well as any costs associated with installation of the software and training of both users and technical personnel in the use, operation, and maintenance of the proposed product(s). Costing should also be provided for an unlimited user license of the software with no restrictions on number of installations of the application within our organization.

Also included should be any costs associated with other products (integration tools, development tools, operating system software, etc.) that you believe are required in order to implement and efficiently operate the new business information system.

The warranty period associated with the software should also be defined within this section. Make sure to specify not only the duration of the warranty period, but also the relationship between the warranty period and the onset of a maintenance and support agreement.

If the software is sold with source code, please indicate any incremental cost associated with this feature. In addition, if source code is not available, you should define whether an escrow process for the software and supporting documentation is available as an integral part of the licensing agreement, and the costs associated with this service.

6.2 Project Management

The activities to be provided by the supplier project manager shall include the following:

- The project manager will serve as the primary point of contact throughout the project
- The project manager will develop an overall implementation strategy to be agreed upon by the RMC project manager
- The project manager will interface with RMC's project manager to ensure the project's success.
- The project manager will allocate contractor's resources to complete all tasks.
- The project manager will be responsible for task management and tracking
- The project manager will hold regular project status meeting to update stakeholders on the state of the project, any issues and next steps.
- The project manager will set the projected timeline, staging and scheduling to be agreed upon by the RMC project manager

6.3 Mentoring technical staff

As part of the implementation process, we would like our technical personnel to become familiar with the application in the following areas:

- Authoring, managing and displaying content in LMS
- Understand and apply “best practices” for system maintenance as provided by contractor/vendor
- Application programming, including but not limited to development tools, utilities, queries, interfaces etc.
- Running system reports
- System administration especially in the initial stages of testing and implementation
- Workflow and GUI customization support
- Release management support

6.4 Functional expertise

During the course of the implementation, we will need to be able to understand how the various aspects of your system can best be utilized by our organization. In order to continue with process improvement exercises after the completion of the implementation, our personnel must develop knowledge in these areas:

- Administer and support scalability (setting quota limits and bandwidth restrictions if necessary)
- Assistance and guidance with development of the business rules and applying them to the software
- Fit and gap analysis and systems analysis
- Assistance in the development of data interfaces to/from external entities
- Assistance in the conversion of existing data

6.5 Optional Services

In addition to the standard items listed above, we expect to need assistance in a variety of other areas. These may include, but will not necessarily be limited to, the following:

- Where needed and justified, customized design and programming for supported modifications
- Any other implementation support required for the on time, on budget, and successful completion of the project

7 SUPPLIER QUESTIONNAIRE

Complete the attached questionnaire (Appendix B and C) in full detail. RMC will use these documents to directly compare the vendors. This will be the sole place where information specific to your organization will be reviewed from for evaluating prospective vendors. Hence, it

is imperative that the questionnaire is thoroughly completed and ample time is committed to this undertaking.

7.1 Supplier Background

RMC will use the information in this section to make investigations as deemed necessary to determine the vendor's ability to provide the services specified. RMC reserves the right to reject any proposal if evidence is found that the vendor fails to meet expectations of RMC or obligations of the contract. This includes the ability to reject a proposal based on negative references.

7.1.1 General Information

Vendor shall provide the following information concerning your organization:

- a. Company name, address, phone number, fax number and organizational structure of your company. List the headquarters location and all separate legal entities and their relationship to each other.
- b. Respondents must include the biographies of the project team who will be assigned to the project. Including the names and phone numbers of persons authorized to conduct negotiations with RMC.
- c. All relationships with subcontractors or third parties must be disclosed.
- d. Any past or on-going investigations by the government or any other agency must be disclosed. In addition, any past or current lawsuits regarding performance, copyright, HIPAA, or patient infringement must be reported.
- e. Vendor must officially state that there is no conflict of interests that would prevent your organization from acting in the best interest of RMC.
- f. Vendor must include a copy of your most recent financial statements including your annual sales.

7.1.2 Experience

- a. Vendor shall stipulate how long they have been in business of providing the services detailed in the RFP and under what company name.
- b. Vendor shall provide a complete description of the company's main products and how they fit into the vision of RMC.
- c. Vendor shall provide a thorough description of the last two implementations. Including the length of time for implementation, training the staff, and time to stabilization.
- d. Vendor shall provide a summary of the numbers and roles of the technical and support staff devoted to the ongoing development, support, and maintenance of their LMS.
- e. Vendor shall provide documentation that their tracking, monitoring, and reporting system will meet all of RMC's expectations.

7.2 Customer Base and References

Vendor shall provide a minimum of three references that are effectively using the software and application at the time of the RFP response. The references should be comprised of organizations similar to the size and employee count as RMC. Include the name of the institution, address, contact person name along with their telephone number and email address. These references may be contacted by RMC to validate the vendor's ability to perform the contract. RMC reserves the right to use any information obtained to disqualify a vendor.

Information about references should include the following:

- Company Name
- Address
- City
- State
- Zip
- Web Site URL
- Contact Name
- Contact Title
- Contact Phone
- Contact e-mail
- Line of Business
- Date of Go Live
- Go Live Type
- Current Software Version
- Subscribe to Annual Maintenance
- Duration of Implementation (Months)
- Total Number of Users
- Number of Concurrent Users
- Utilize Warehouse Management
- Number of RF Users
- Number of Locations
- DB Server Environment
- Client Environment
- Database Utilized
- Implementation / Software Ratio

7.3 Pricing Structure

Pricing information should reveal a five year cost. The price should be broken down per task or function, along with, the total five year cost of ownership.

7.3.1 License Costs

- a. Illustrate costs, requirements, and user or administrator number limitations for single LMS license. Including a cost for the stated number of concurrent users as well as a cost for unlimited users.

- b. Indicate a guaranteed cost per incremental user licenses and any discount if purchased in increments.
- c. One year minimum warranty mandatory. Indicate length of warranty period and cost of one year warranty if not included.
- d. Indicate whether the license is perpetual or not.
- e. Indicate any discounts for prepayment of license.
- f. Indicate costs for future upgrades.

7.3.2 Conversion and Installation Costs

- a. Detail the cost to convert existing learning modules and associated data. Cost should be broken down by average cost per module.
- b. Detail the cost to input existing data into the LMS. Cost should be broken down by average cost per employee record.
- c. Detail the cost to install the LMS if this price is not included in the license price.

7.3.3 Training

- a. Detail types of training units included in license costs, training options available for additional costs, cost for blocks of training units, and cost for training classes.

7.3.4 Service, Support, Maintenance, Annual, and Miscellaneous costs

- a. Detail hourly rate for resources of necessary in-house consulting. Suggested but not limited to: technical, functional, conversion, and help desk support.
- b. Detail any required one-time initial service, setup, implementation, training, orientation, and go-live support costs.
- c. Detail any additional optional one-time services and associated fees.
- d. Describe the benefits of the optional services.
- e. Detail annual maintenance costs.
- f. Detail any software upgrade costs if not covered in the annual maintenance cost.
- g. Detail any backup or disaster recovery costs that are not included in the license price.
- h. Detail any scheduled costs increase, annual or otherwise.
- i. Detail any discount options available.
- j. Detail any additional costs not included above along with an explanation for the cost.

7.4 Implementation Services

Provide an implementation methodology which your organization plans on using. Describe the required or recommended steps that are taken to ensure a smooth and successful implementation. The implementation plan should be broken down into stages along with tools that are utilized to track the progress of each stage. Provide an implementation timeline and schedule. Detail the roles and responsibilities of your organization and of RMC. Detail how issues will be identified and resolved in a timely fashion during the implementation process. Provide a plan and method for tracking the progress to the milestones below.

- a. System installation of LMS
- b. System configuration
- c. Content module development
- d. System administration training
- e. Continuing education learning modules content
- f. Continuing education learning modules evaluation process
- g. Conversion to web-based platforms
- h. Concurrent user sessions
- i. End-user training sessions
- j. Monitoring and support of on-going project

7.4.1 Data Conversion

Describe your organization's approach to converting the existing learning education modules and employee records into the LMS. This should include the data integrity checking, auditing function and any post conversion cleanup. Detail how any discrepancies regarding legacy records will be resolved.

7.4.2 Training

Describe how RMC's super users will become experts with the LMS. Include any recommendations regarding training processes or how best to train end users. Include training methodologies that have worked and failed in the past implementations.

7.4.3 Project Management

RMC will assign an internal project manager to oversee the progress of the project and the successful implementation of the LMS. In addition, the internal project manager will assign and schedule all RMC personnel that are required.

7.4.4 RMC Resources

Vendor shall identify the suggested users that RMC should supply for the successful completion of this project. Included should be: job title and number of dedicated full time employees need for the project, minimum and optimum recommended resources, and any additional resources that may be needed.

7.5 Technology

Detail the technology platforms used or needed to effectively utilize the LMS. This should include: operating systems, necessary plug-ins, application development environment, network environment supported, or additional features that are needed.

7.6 Invoicing

Detail the proposed fee schedule and terms. Include any discount percentages for early payments. Identify any differences between payment terms and conditions associated with software compared to implementation or support services. Clearly state how the user acceptance

period is defined. Include the parameters for which RMC can decline the software and receive a full refund if the LMS does not function as specified in the RFP response.

7.7 Detail System Requirements

The vendor must clearly state what system requirements are necessary to run the LMS. The minimum requirements along with the optimal requirements shall be included.

8 NOTE TO SUPPLIER

It is expected that all proposals submitted would be in accordance with what has been clearly outlined in the RFP. Once a bid proposal has been submitted it is final. The time for questions will be from the date you receive the RFP to the date stipulated at the beginning of this request.

Once you have completed your proposal, your signature or that of a duly authorized individual of your company must be affixed, in order for us to acknowledge the fact that you have read the RFP thoroughly and have completed the proposal within the stipulated guidelines.

See APPENDIX B for proposal format instructions.

9 APPENDICES

9.1 APPENDIX A – Hospital Details

Organization Name: Regional Medical Center

Address: 123 Michigan Avenue

City: Chicago

State: IL

Zip: 60601

Phone: (312) 555 - 8000

Cell: (312) 555 - 0829

Fax: (312) 555 - 8001

Joint Commission Organization ID: 9999

Beds: 300

Total Employees: 2,000

Staff Physicians: 500

Total estimated system users: 2,500

9.2 APPENDIX B - Required Proposal Outline

Proposals should be submitted in Microsoft Word (doc/docx) format, double-spaced, using Arial 11 font style. Submissions should include the following numbered sections.

Section	Section Title	Section Content
0	Executive Summary Supplier Background & Company Financials	Executive Summary
	<ul style="list-style-type: none"> General Information - Company name, address, phone and fax - Organization structure - Locations and legal entities - Company and Project team bios - Subcontractors and Third-Parties - Lawsuits and investigations - Conflict of interest statement 	
1	<ul style="list-style-type: none"> - Financial statements 	Response to Section 7.1
	<ul style="list-style-type: none"> Experience - Date of incorporation / duration of business - Product overview / description - Recent implementation summaries - Technical organization breakdown (support and development) - Overview of support and tracking system tools 	
2	<ul style="list-style-type: none"> Customer Base & References - Total install base - References contract information 	Response to Section 7.2
3	<ul style="list-style-type: none"> Five Year Pricing Structure - License costs - Conversion and Installation costs - Training - Service, Support, Maintenance, Annual, and Miscellaneous costs 	Response to Section 7.3
4	<ul style="list-style-type: none"> Implementation Services - Detailed implementation methodology and project plan milestones - Data Conversion 	Response to Section 7.4

	- Training	
	- Project Management	
	- Required RMC Resources	
	- Sample Gantt chart	
	Technology Requirements	
	- System development and deployment technologies in-use by vendor (programming languages, databases, web servers, application servers, etc.)	
5	- Hardware and infrastructure requirements for RMC	Response to Section 7.5
	- Estimated hardware costs for RMC	
	- Bandwidth requirements	
	- Operating system requirements	
	- Third-party software license and version requirements	
	Invoicing	
6	- Fee and invoicing schedule and payment installments	Response to Section 7.6
	- System acceptance period	
7	Detailed System Requirements	Response to Section 7.7 / Appendix C

9.3 APPENDIX C - Detailed System Requirements

Using the table that follows, complete the detailed system requirements by indicating a value for each question based on the following:

- 3 – Functionality is currently available
- 2 – Functionality is available through a partner or 3rd party interface
- 1 – Functionality is planned for the next release (within 1 year)
- 0 – No planned availability

Number	Requirement	Scoring Weight	Vendor System Availability (0 – 4)	Vendor Comments
8.1	General Requirements			
8.1.1	System is currently in use at other healthcare providers.	20		
8.1.2	System has been used successfully in Joint Commission audits, achieving “satisfactory” rating at all sites.	20		
8.1.3	The system must include accessibility features or function with standard Microsoft Windows accessibility tools.	10		
8.2	Deployment / Hosting			
8.2.1	System can be hosted and deployed in a software-as-a-service model.	15		
8.2.2	System can be hosted locally, if desired.	10		
8.2.3	The system shall provide a testing sandbox where changes can be tested before deployment.	10		
8.2.4	The system can be deployed using a custom URL (e.g., training.rmc.org). (EthosCE Features)			
8.3	Access			
8.3.1	The system shall provide web-based access (no client installation, no custom browser plugins).	10		
8.3.2	Please specify any third-party requirements and dependencies (Flash, Java, etc.).	10		
8.3.3	The system shall provide compatibility with Internet Explorer versions 6, 7, 8, 9. Please specify any specific browser limitations.	10		
8.3.4	The system shall provide compatibility for use on Apple iPad.	5		
8.3.5	The system shall provide compatibility for use on Android tablets.	5		
8.3.6	Please specify any specific platform limitations (such as	5		

	use of Flash in any content modules).			
8.3.7	The system shall provide secure remote login (available for use outside of hospital network).	10		
8.4	Reporting Requirements			
8.4.1	The system shall be capable of delivering a certificate of training compliance for an individual user.	20		
8.4.2	The system shall be capable of delivering a certificate of compliance for all users of an individual training module.	20		
8.4.3	The system shall be capable of reporting the training history by date range, by module (including all), and by user (including all).	15		
8.4.4	The system shall be capable of reporting the training non-compliance report for date range.	20		
8.4.5	The system shall include a default set of reports built specifically to demonstrate compliance to Joint Commission training documentation requirements.	20		
8.4.6	The system shall be capable of developing and delivering a set of custom reports.	15		
8.4.7	The system shall support export of reports in Microsoft Excel format.	15		
8.4.8	The system shall support export of reports in PDF (portable document format).	10		
8.4.9	The system shall provide email notifications of training that is due.	15		
8.4.10	The system shall provide email notifications of training that is past due to users and their managers.	15		
8.5	Content Management			
8.5.1	The system shall supply a set of built-in standard content modules for use in a hospital setting.	15		
8.5.2	The system shall include a content module for training users on use of the learning management system.	10		
8.5.3	The system shall support custom content provided by	20		

	the hospital.			
8.5.4	The system shall provide a content authoring tool.	15		
8.5.5	The system shall support import content from PDF, MS Word, and MS PPT files.	20		
8.5.6	The system shall support multimedia content. (EthosCE Features)	15		
8.5.7	The system shall support content from Articulate, Captivate, and Adobe Presenter. (EthosCE Features)	10		
8.5.8	The system shall include support for tests and quizzes as part of a content module.	20		
8.5.9	The system shall include compliance to the following standards: See http://www.adlnet.gov/	0		
8.5.10	SCORM - Sharable Content Object Reference Model	15		
8.5.11	AICC - Aviation Industry CBT (Computer Based Training) Committee	10		
8.5.12	IMS - Instructional Management Systems	10		
8.5.13	The system shall support live events using WebEx.	10		
8.5.14	The system shall award and manage continuing education unit credits (CEUs). (EthosCE Features)	15		
8.5.15	The system shall allow import of users and training requirements. (EthosCE Features)	10		
8.5.16	The system shall allow both free and paid courses to be made available. (EthosCE Features)	5		
8.6	Customizability			
8.6.1	The system shall allow the hospital to modify the web site to include branding with the hospital's name and logo.	10		
8.6.2	The system shall allow a customized disclaimer and legal notice for access.	10		
8.6.3	The system shall allow the hospital to apply a customized format to the web site for color and other general "look and feel" elements by providing a	5		

	customized web site CSS (cascading style sheet) or similar.			
8.7	Maintenance and Support			
8.7.1	The system shall be deploy as a hosted, software-as-a-service (SaaS) model (not hosted by the hospital).	15		
8.7.2	The vendor shall support an up-time Service Level Agreement (SLA), including remuneration for any loss of productivity caused by unplanned downtime.	15		
8.7.3	The vendor shall provide data backup and document their backup policies and procedures.	10		
8.7.4	The vendor shall document and provide a copy of their disaster recovery policies and procedures.	10		
8.7.5	The vendor shall document and provide a copy of their internal user security procedures.	10		
8.7.6	The vendor shall provide an option for source code escrow.	5		
8.7.7	The vendor shall provide technical support by phone.	15		
8.7.8	The vendor shall provide end-user technical support 24/7.	15		
8.7.9	The vendor shall provide system administration and content management support during normal business hours (8am – 5pm eastern time).	5		
8.7.10	The vendor shall allow access to historical data, and migration, following termination of use.	10		
8.8	Security			
8.8.1	The system shall support integration with hospital’s Single-Sign-On (SSO) system and Active Directory (AD) identity management system via support for LDAP (Lightweight Directory Access Protocol).	5		
8.8.2	The system shall allow user access using their standard hospital network ID and password.	5		
8.8.3	The system shall support for two-factor authentication.	5		
8.8.4	The vendor shall perform SAS70 (Statement on	10		

	Auditing Standards #70) or SSAE16 (Statement on Standards for Attestation Engagements #16) security audits of their systems and procedures and provide those results to the hospital. See http://sas70.com/sas70_overview.html See http://ssae16.com/			
8.8.5	The vendor shall comply with HIPAA security and privacy rules, wherever applicable.	15		
8.8.6	The system shall provide an audit log of all security access (successful and failed login attempts).	15		
8.9	Employee Compliance Data (Halamka)			
8.9.1	The system shall provide the ability to record and maintain training history.	20		
8.9.2	The system shall provide the ability to record competencies achieved.	20		
8.9.3	The system shall provide the ability to record licenses and certificates.	15		
8.9.4	The system shall provide the ability to record education history.	15		
8.9.5	The system shall provide the ability to record visa status and related information.	5		
8.9.6	The system shall provide the ability to record malpractice information.	5		
8.9.7	The system shall provide the ability to record immunization records.	5		
8.9.8	The system shall provide the ability to record work duty hours.	5		

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