





**University of Massachusetts Amherst  
Department of Procurement  
Request for Bids:**

**Consulting Services for the Installation of Electronic  
Medical Records per the following specifications**

**RFB# AA12-RH-4381**

**Bid Opening Date – September 30, 2011 @ 1:00 p.m. DST**

The Department of University Health Services (UHS) at the University of Massachusetts Amherst is a comprehensive multi-specialty practice. UHS provides comprehensive primary care, walk-in care, mental health, diagnostic imaging, laboratory, pharmacy, physical therapy, eye care and optical services. Services are provided to students & dependents, faculty/staff & dependents and campus visitors. Staffing consists of physicians, nurse practitioners, registered nurses, psychologists and social workers along with respective support staff.

**Background:**

UHS is preparing to implement an Electronic Medical Record (EMR) and has contracted with GE Centricity EMR for this purpose. UHS has utilized (IDX) GE Centricity Business for its patient management system since 1992. Centricity Business is currently running as GE Web Version 4.3 and is remotely hosted by GE Healthcare at their Chicago datacenter. UHS has already implemented the following GE Centricity Business modules: MCA, BAR, Sched, PCS, and Open Referrals. UHS is also working with GE Healthcare to expand our Centricity Business application to include the following applications: Bad Debt Group, Co-Pay Reallocation, E-Commerce (EDI & Eligibility & Payer Edit Integration), as well as TES (Transaction Editing system), which is considered a critical component for EMR workflow management.

UHS is requesting to engage an experienced consulting firm to assist with project management, readiness assessment, change management, chart conversion strategy, equipment selection, application design and build, training approach and rollout strategy for the GE Centricity EMR. UHS employs approximately 28 prescribing providers and another 40-50 clinical and administrative support staff requiring chart access. Usage of the EMR will be extended to satellite clinics located at Amherst College and Hampshire College and will need to directly support or interface with all UHS clinical areas and systems, including but not limited to Optical Services, Physical Therapy, Mental/Behavioral Health, Radiology, Laboratory, Specialty and Pharmacy.

**Project Approach:**

The contracted consultants will provide both project management and technical resources to offer guidance and expertise to UHS staff involved in the project and to assist with the implementation of the EMR. UHS will provide overall project oversight and leadership, additional project management resources, additional business/application analyst resources, additional technical integration resources, provider/clinical resources and subject matter experts, as well as ancillary resources related to interfaces, other clinical systems, and business operations expertise. GE Healthcare will also be providing dedicated project management and technical resources to assist with the project. While project management from all three sources (consultant, GE and UHS) will need to work closely together, overall project management responsibilities will rest with the University of Massachusetts Amherst UHS leadership and project management resources.

### **Project Objectives and Deliverables:**

The project objectives and deliverables are as follows:

- Conduct a Readiness Assessment to help determine staff technical and organizational preparedness for an EMR implementation, identify key areas of risk and opportunity, and recommend immediately actionable plans to increase overall staff readiness, acceptance and eventual EMR utilization.
- Work with GE Healthcare and UHS Project Management to determine full project implementation plan, including but not limited to: project scope, implementation strategy, third party hardware and software requirements, interface requirements and project timeline.
- Within the guidelines of project scope, assist with the design and build of all project modules, interfaces, forms, role security and related work flows.
- Assist with the unit and system integration testing of all EMR components within project scope.
- Assist with the development of end user training materials and with the development of the training curriculum and strategy. Actual trainings will be conducted by UHS resources.
- Provide on-site go-live support during initial rollout of EMR functionality consistent with the approach defined by project management during project scoping and planning. Support must extend post go live by a minimum of two-weeks and until all issues identified during this period are resolved.
- Ensure extensive knowledge transfer occurs during all phases of the project to keep UHS staff responsible for ongoing support, configuration, expansion, and training of the EMR fully equipped to manage the EMR application post go live without outside support.

### **Project Phases:**

This project will be broken down into the following three (3) phases:

1. Phase I: Readiness Assessment – Time Line: 8-12 week for completion
2. Phase II: Project Scoping and Planning – Time Line: 8-12 weeks for completion
3. Phase III: Implementation and Rollout – Time Line: completion in full on or before June 30, 2012

Project management resources are anticipated to be available from GE Healthcare in August 2011. Environments for testing connectivity and to begin application building process are projected to be available by the end of September 2011. EMR go live date will depend upon full project scoping and is to be determined. Note that the initial implementation may not be done in “Big Bang” fashion requiring all patients/charts to be converted at go live, though that is a decision to be made during project scoping and planning.

Consultants should be prepared to begin the Readiness Assessment phase immediately after the contract is awarded.

Consultants should also be prepared to begin the project scoping and planning process as soon as GE Healthcare project management resources are available, which may overlap with the readiness assessment, though it is understood that the project scoping and planning phase cannot be completed until the results and the deliverables from the readiness assessment are factored in.

**Bid Responses:**

All bid responses must include:

- Brief description of qualifications for consultancy – this section **MUST** include:
  - a. Demonstrated expertise in GE Centricity EMR implementations including full front end and back end integration with GE Centricity Business, providing both project management and technical implementation support.
  - b. Demonstrated experience developing GE EMR interfaces, forms, work flows, reports and training documentation.
  - c. Demonstrated experience working with clinical providers and specialty departments in a manner which increases EMR satisfaction and end user application acceptance.
- References – List of names, titles, addresses, phone numbers and E-Mail addresses of three (3) references that have had direct experience with the potential consultant’s similar efforts.
- Resumes of other summary of professional experience.
- A preliminary estimate of hours deemed necessary for this project per each phase of the project.
- Total cost for the entire project including Phase I; Phase II and Phase III.

**Contract Term:**

This contract shall commence from the date of the award through go live post support, as determined by the project scoping and planning phases. Special note: this project must be completed on or before June 30, 2012.

**Evaluation Criteria:**

The following criteria will be used, as a minimum, in the selection process.

1. Cost to the University
2. Professional qualifications of the firm.
3. Demonstrated ability of the firm to provide consulting services that meets the University Health Services need.
4. EMR Projects completed by the firm that would be considered similar in nature to the UHS EMR project.
5. References from previous/current clients.

For all future arrangements please contact:

University of Massachusetts  
Attention: Ms. Maria T. Coach, Associate Director  
University Health Services  
150 Infirmary Way  
Amherst, MA 01060  
(Phone: 413-577-5262)

### **Contract for Services:**

The selected vendor(s) will be required to enter into the standard University Contract for Services. The successful vendor must sign the standard University Contract for Services and agree to all Terms and Conditions listed. A copy of the University Contract for Services can be viewed at:

[http://www.umass.edu/procurement/Fill-In\\_Forms/CFSL\\_RE\\_060208.pdf](http://www.umass.edu/procurement/Fill-In_Forms/CFSL_RE_060208.pdf).

Respondents must indicate in their response if they are not willing to sign the Contract for Services without exception. Any vendor indicating that they are not willing to sign the University Contract for Services may be eliminated from the process either during the review process or during the final contact negotiation process at the discretion of the University.

### **Insurance and Liability:**

The awarded vendor shall purchase and maintain at its sole cost and expense throughout the term of this Agreement adequate insurance coverage necessary for the performance of the work under the Contract. Such insurance should include but not be limited to the following types and amounts of coverage:

- a. The following minimum insurance coverage is required.
  - i) Workers' Compensation Insurance in compliance with applicable federal and state laws, including Employers Liability Insurance with limits of at least one million dollars (\$1,000,000) per occurrence.
  - ii) Automobile Liability Insurance covering owned, non-owned, and hired vehicles with combined limits for bodily injury and property damage of at least one million dollars (\$1,000,000) per accident. The policy must be endorsed to include the University as an additional insured.
  - iii) Commercial General Liability Insurance including products and completed operations liability, and contractual liability coverage specifically covering this Agreement, written on an occurrence form, with combined limits for bodily injury, personal injury, and property damage of at least one million dollars (\$1,000,000) per occurrence and three million dollars (\$3,000,000) per aggregate. The policy must be endorsed to include the University as an additional insured.
- b. All insurance maintained by the Contractor pursuant to this Agreement shall be written by insurance companies licensed to do business in the Commonwealth of Massachusetts. If the Contractor determines that any such insurance needs to be placed with surplus lines carriers not licensed by the Commonwealth of Massachusetts, written permission from the University is required. All insurance companies to be used by the Contractor must have a Best's Rating of not less than A- and be reasonably acceptable to the University.
- c. If requested by the University in writing, the Contractor shall furnish certified copies of the aforementioned policies to the University's designated representative.
- d. All insurance maintained by the Contractor shall provide that insurance for the benefit of the University shall be primary and the University's own insurance shall be non-contributing. The Contractor shall provide the University with certificates of insurance evidencing the above referenced insurance policies within ten (10) days of the execution of this Agreement.
- e. The certificates shall contain an unequivocal provision that the University shall be given thirty (30) days prior written notice of cancellation, material change, or non-renewal of the coverage.
- f. Contractor shall cause its subcontractors to purchase, carry, and maintain all insurance coverage and coverage limits that Section requires Contractor to have.
- g. Contractor's and/or Contractor's subcontractor's failure to provide or to continue in full force the insurance that this section requires shall be a material breach of this Agreement and may, at the sole determination of the University, result in termination of this Agreement for cause.

**Order Placement:**

University Department will place orders with a University Purchase Orders or use of the University PROCard Credit Card.

**Payment:**

The University's payment terms are net thirty (30) days from the date of receipt of contractor's invoice, with late penalty interest assessable at rates established by the Commonwealth after 45 days in accordance with Massachusetts General Laws ch. 29 §29C and with Commonwealth regulation 815 C.M.R. 4.00.

Invoices submitted to the University by the successful bidder for acquisitions under the contract will be itemized and priced out by the successful bidder in accordance with the figures contained in the bidder's response to this RFB. Therefore, bids must be inclusive. All payment shall be made in arrears, after services have been rendered to the satisfaction of the University.

**W-9:**

The successful bidder will be required to provide original signed W-9 form to the University if they are not already a recognized University vendor. A copy of this form can be accessed at: [www.umass.edu/procurement](http://www.umass.edu/procurement) - Click on "Forms" – Click on "University of Massachusetts Substitute W-9 Form".

**Massachusetts Freedom of Information Law:**

All bids and related documents submitted in response to this RFB are subject to the Massachusetts Freedom of Information Law, M.G.L. Chapter 66, and Section 10 and to M.G.L. Chapter 4, Section 7, Subsection 26, regarding public access to such documents. Statements in the bid response that are inconsistent with those statutes will be disregarded.

**Certification:**

Contractor certifies under the pains and penalties of perjury that pursuant to Mass. Gen. Laws ch.62C, §49A, that the contractor has filed all state tax returns, paid all taxes and complied with all applicable laws relating to taxes; and that pursuant to Mass. Gen. Laws ch.151A, §19A(b), has complied with all laws of the Commonwealth relating to contributions and payment in lieu of contributions to the Employment Security System; and with all laws of the Commonwealth relating to Worker's Compensation, ch.152. Pursuant to federal law, contractor shall verify the immigration status of all workers assigned to the contract without engaging in unlawful discrimination; and contractor shall not knowingly or recklessly alter, falsify, or accept altered or falsified documents from any such worker.

**Independent Contractor Status:**

The contractor is an independent contractor and not an employee or agent of the University. No act or direction of the University shall be deemed to create an employer/employee or joint employer relationship. The University shall not be obligated under any contract, subcontract, or other commitment made by the contractor.

**Compliance with Laws and Regulations:**

The contractor shall observe and obey all laws, ordinances, regulations, and rules of the Federal Government, the Commonwealth of Massachusetts, local municipalities, and the University of Massachusetts Amherst which may be applicable to its operation herein, and shall, at its own cost, obtain and maintain all permits and licenses necessary of and to its operation.

**Affirmative Action, Equal Opportunity Employer:**

The University of Massachusetts is an Affirmative Action, Equal Opportunity Employer and as such prohibits discrimination on the basis of race, color, religion, creed, sex, age, marital status, national origin, mental or physical disability, political belief or affiliation, veteran status, sexual orientation, gender identity and expression, genetic information and any other class of individuals protected from discrimination under state or federal law in any aspect of the admission or treatment of students or in employment. The successful Contractor shall adhere to the same principles.

### **Rehabilitation Compliance:**

In accordance with Section 504 of the Rehabilitation Act of 1973 and the implementing regulations of that Federal Act (45 CFR 84), the University of Massachusetts / Amherst does not discriminate on the basis of handicap in admission or access to, or treatment of employment in the programs and activities which the University operates. Inquiries concerning compliance with the regulations stated in the Federal Act should be directed to the Chancellor's Office; Whitmore Building; Amherst, MA 01003 Phone: 413-545-2004.

### **Recordkeeping, Audit and Inspection of Records:**

The contractor shall maintain books, records and other compilations of data pertaining to the requirements of the Contract to the extent and in such detail as shall properly substantiate claims for payment under the Contract. All such records shall be kept for a period of six (6) years or for such longer period as is specified herein. All retention periods start on the first day after final payment under this Contract. If any litigation, claim, negotiation, audit or other action involving the records is commenced prior to the expiration of the applicable retention period, all records shall be retained until completion of the action and resolution of all issues resulting therefrom, or until the end of the applicable retention period, whichever is later. The Governor, the Secretary of Administration and Finance, the State Comptroller, the State Auditor, the Attorney General, the Federal grantor agency (if any), the University, or any of their duly authorized representatives or designees shall have the right at reasonable times and upon reasonable notice, to examine and copy, at reasonable expense, the books, records, and other compilations of data of the contractor which pertain to the provisions and requirements of this Contract. Such access shall include on-site audits, review, and copying of records.

### **Political Activity Prohibited – Anti Boycott Warranty:**

The contractor may not use any Contract funds and none of the services to be provided by the contractor may be used for any partisan political activity or to further the election or defeat of any candidate for public office. During the term of this Contract, neither the contractor nor any controlled group, within the meaning of §993 (a) (3) of the Internal Revenue Code, as amended, shall participate in or cooperate with any international boycott, as defined in §999(b) (3) and (4) of the Internal Revenue Code of 1986, as amended; nor shall either engage in conduct declared to be unlawful by Mass Gen. Laws Ch.151E §2.

### **Choice of Law:**

The laws of the Commonwealth of Massachusetts, without giving effect to its conflicts of law principles, govern all matters arising out of or relating to this Contract and all of the transactions it contemplates, including, without limitation, its validity, interpretation, construction, performance and enforcement. The contractor agrees to bring any federal or state legal proceedings arising under this Contract in which the Commonwealth or the University is a party, in a court of competent jurisdiction within the Commonwealth of Massachusetts. This paragraph shall not be construed to limit any other legal rights of the Parties.

### **Indemnification of the University:**

The contractor shall defend, indemnify, and hold harmless the Commonwealth, the University, its Trustees, Officers, servants, and employees from and against any and all claims, liability, losses, third party claims, damages, costs, or expenses (including attorneys' and experts' fees) arising out of or resulting from the performance of the services performed by the contractor, its agents, servants, employees, or subcontractors under this Contract, provided that any such claims, liability, losses, third party claims, damages, costs, or expenses are attributable to bodily injury, personal injury, pecuniary injury, damage to real or tangible personal property, resulting there- from and caused in whole or in part by any intentional or negligent acts or omissions of the contractor, its employees, servants, agents, or subcontractors. The foregoing express obligation of indemnification shall not be construed to negate or abridge any other obligation of indemnification running to the Commonwealth and/or the University that would otherwise exist. The University shall give the contractor prompt and timely notice of any claims, threatened or made, or any law suit instituted against it which could result in a claim for indemnification hereunder. The extent of this Contract of indemnification shall not be limited by any obligation or any term or condition of any insurance policy. The obligations set forth above shall survive the expiration or termination of this Contract.

### **Tax Exempt Status:**

The University is exempt from federal excise, state, and local taxes; therefore, sales to the University are exempt from Massachusetts sales and use taxes. If the University should become subject to any such taxes during the term of this Contract, the University shall reimburse the contractor for any cost or expense incurred. Any other taxes imposed on the contractor on account of this Contract shall be borne solely by the contractor.

### **Sustainability:**

The University of Massachusetts signed the President Obama's Climate commitment in 2007. See link for more information: [www.presidentsclimatecommitment.org](http://www.presidentsclimatecommitment.org) The University is committed to reducing the adverse environmental impact of our purchasing decisions; we are committed to buy goods and services from manufacturers and suppliers who share our environmental concern and commitment. We encourage proposals to include economical and environmentally friendly products and service options which serve to minimize waste, reduce excess packaging, recycle, reduce, reuse, prevent pollution and/or offer resource efficiency. It is our goal to maximize environmental responsibility on the UMass Campuses. Please propose details on how your company can support our initiative to provide sustainable products and services to our end-users.

- ◆ Describe the tools and resources that are available to our campuses.
- ◆ Describe what initiatives your company has implemented and is working on.
- ◆ Are green and recycled products clearly identified on your web ordering system so users can easily recognize them when ordering?

The University recommends that vendors use recycled paper and double-sided copying for production of all printed and photocopied documents.

### **Data Security and Breach Notification:**

The vendor shall protect data and information provided by the University to Vendor ("University Data") to commercially acceptable standards and no less rigorously than it protects its own confidential information.

The vendor shall develop, implement, maintain and use appropriate administrative, technical, and physical security measures to preserve the confidentiality, integrity, and availability of University data.

The Vendor will not provide any University data to and sub-contractor or agent without the prior express written permission of the University or as otherwise provided under the agreement.

The Vendor shall retain any University data only as long as needed for the specified purpose and to securely dispose of any University data when there is no longer a business need to retain that data.

The Vendor agrees to notify the University immediately if any breach of the security, confidentiality or integrity of University data occurs; assist the University in any subsequent investigation and notification processes; and to otherwise comply with all applicable Massachusetts and federal laws and regulations regarding data security and breach notifications, such as M.G.L. c. 93H and Health Information Technology for Economic and Clinical Health Act (HITECH Act).

### **PCI-DSS (Payment Card Industry-Data Security Standard):**

Treasurers Office required language:

Service Providers and third-party providers and the "UMASS merchant" represent and warrant to the other party that it is Payment Card Industry Data Security Standard (PCI-DSS) compliant and shall remain compliant during the term of the Agreement. In the case of a third-party application, the applications will be listed as PA DSS compliant at the time of implementation by the University. In either situation, should either party become non-compliant during the term, the non-compliant party shall promptly notify the other party of its non-compliance status. Both parties are responsible for the security of the cardholder data that is in such party's control or possession, as mandated by PCI DSS in the performance of their individual and mutual responsibilities under this Agreement.

Service Providers must be listed on the Visa Global List of PCI DSS Validated Service Providers. Third-party applications must be listed on the PCI Security Standards Council List of Validated Payment Applications (PA-DSS). Should the Service Provider or Third Party Application not be listed, a letter from a Qualified Security Assessor stating compliance must be submitted.

**Cancellation for Cause:**

Any purchase agreement or contract arising from this solicitation will be subject to cancellation by the University of Massachusetts upon written notice and without penalty to the University of Massachusetts if, in the opinion of the University of Massachusetts, the quality, delivery schedule, specifications, terms, conditions, and other service requirements are not maintained as originally stated and accepted by the vendor.

**Receipt of RFB from a Source Other than Issuing Office – WARNING:**

Prospective bidders who have received this document from a source other than the Issuing Office should be aware that all official documents, including amendments, are posted on the University of Massachusetts Amherst Procurement web-site at: <http://www.umass.edu/procurement/bidsopen>

Bidders assume complete responsibility for obtaining all amendments, and will be bound by the terms of all amendments, even in the event that they do not receive direct communications from the Issuing Office prior to the closing date.

It is the vendor's responsibility to check the University of Massachusetts Amherst Procurement web-site.

**Submission of a Bid:**

Submission of a bid indicates that the bidder has read, completely understands and agrees with this Request for Bid document. If the bidder takes exception to any of the contract terms and conditions contained herein, the bidder shall so note it as an exception in this Bid Response, referencing the section and item number and giving a complete explanation for the exception. The University reserves the right to use any such exception as grounds for rejection of the bid.

**Bid Opening Time and Date:** Bidders shall deliver **two (2) copies** of their bid response in its entirety including all requested samples and/or supporting documentation as required in the bid specifications to the following address by **Friday, September 30, 2011 at 1:00 pm, DST at which time the bids will be opened and publicly read.** Bids shall be clearly marked and addressed to:

**University of Massachusetts  
Procurement Department  
407 Goodell Building ~ 140 Hicks Way  
Amherst, MA 01003  
Fax 413-545-1643  
*Attention: RFB AA11-RH-4381***

The University is not responsible for any expenses that may be incurred by any bidder to prepare or submit bids.

Each bidder is solely responsible for the accuracy and completeness of its bid. Errors or omissions may be grounds for rejection, or may be interpreted in favor of the University. The University will not increase the purchase order to the successful vendor for omissions or oversights not due to the fault of the University or its agents. All changes must be approved in writing.

It is the sole responsibility of the bidder to insure that its bid is delivered to the Procurement Department in its entirety by the due date and time. Late bids will not be considered, and will be placed, unopened, in the bid file. Faxed bids will be accepted, provided the original is received within 5 working days after bid deadline submission date.

All questions from prospective vendors regarding this Request for Bid shall be referred to the Purchasing Manager in the Procurement Department by email or fax only, by Tuesday, September 20, 2011 at 2:00 PM. No telephone calls will be entertained. Inquiries received after the specified date and time will not be accepted. The University will E-Mail its response to

all questions to all bidders of record by formal addendum on Wednesday, September 21, 2011. The contact information for this individual is:

**University of Massachusetts Amherst**  
**Rosemary A. Hassay, Purchasing Manager**  
**FAX: (413) 545-1643**  
**E-Mail: [procurement@admin.umass.edu](mailto:procurement@admin.umass.edu)**

The University will extend the due date by written addendum if such information significantly amends this request for bid or makes compliance with the original proposed due date impractical.

Minority-Owned Business Enterprises (MBE) or Woman-Owned Business Enterprises (WBE) is strongly encouraged to submit proposals in response to this request for bid. For the purposes of this RFB the term MBE or WBE shall mean a consultant who is certified as a minority business enterprise by the State Office of Minority and Women-Owned Business Assistance (SOMWBA), and who is still certified at the time the Respondent's Qualifications are submitted. All minority owned businesses are encouraged to apply for SOMWBA certification. For further information on SOMWBA qualifications, or access to vendor lists, contact the State Office of Minority and Woman-Owned Business Assistance at (617) 727-8692 or go to <http://www.somwba.state.ma.us> for more information.

The University of Massachusetts is an Affirmative Action, Equal Opportunity Employer.

List three (3) customers with similar requirements as those of the University of Massachusetts Amherst whom the University may contact for reference purposes, including the company name, contact person, telephone number, address and brief description of business done with the company within the past year. By submitting this information the vendor authorizes the University of Massachusetts Amherst to contact these clients for the purposes consistent with the review of this bid.

**Reference #1**

**Company Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Description of Services:** \_\_\_\_\_

**Contact:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **E-Mail:** \_\_\_\_\_

**Contract Term:** \_\_\_\_\_ **Through:** \_\_\_\_\_

**Reference # 2**

**Company Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Description of Services:** \_\_\_\_\_

**Contact:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **E-Mail:** \_\_\_\_\_

**Contract Term:** \_\_\_\_\_ **Through:** \_\_\_\_\_

**Reference #3**

**Company Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Description of Services:** \_\_\_\_\_

**Contact:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **E-Mail:** \_\_\_\_\_

**Contract Term:** \_\_\_\_\_ **Through:** \_\_\_\_\_

**Vendor Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_ **City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **ZIP:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_ **FAX:** \_\_\_\_\_ **E-Mail Address:** \_\_\_\_\_

**Name of Person Submitting Bid:** \_\_\_\_\_

**Authorized Signature:** \_\_\_\_\_