**Technical Proposal Response Template (Attachment B)**

For

**EXCHANGE SERVICES AND DATA STRATEGY SOLUTIONS**

ISSUED BY

**TECHNOLOGY BY DESIGN, INC.**

|  |  |
| --- | --- |
| **APPLICATION INFORMATION** | |
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| **SUBMISSION DEADLINE** | **June 4, 2024** |

All correspondence and proposals should be submitted via email directly to the email address listed above and include ‘Exchange Services Data Strategy RFP’in the subject line.

# Response Template Instructions

All respondents should complete the sections listed below.

Each prompt is aligned and labeled to its corresponding section within the RFP document. Respondents are expected to utilize and respond to the information presented in the RFP document utilizing this template.   
  
We have included recommended response lengths for each section. Please attempt to be accurate, efficient, and concise with your responses in order to abide by those recommended lengths. Although not explicitly requested, diagrams are understandably an efficient way to describe systems and technical concepts. If they are included we expect that any supportive/descriptive text needed to describe the diagram is included in the aforementioned response length.

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# Applicant Overview and Qualifications

## Firm Overview

*Describe your company and its history in providing Exchange Services functionality.*

-- Insert Response Here --

## Team

*Provide background on your team, roles that will be included on the team, and the key resources that will support the project.*

-- Insert Response Here --

## References

*Provide references from three (3) current or former clients that demonstrate your ability to implement and operate your exchange services platform.*

*Each reference must include the following details:*

* *Company Name, Contact Name, Title, Email Address, & Phone Number*
* *Description of the Solutions and its relevance/similarity to the solution described in the response.*

Reference #1

-- Insert Reference 1 Info Here --

Reference #2

-- Insert Reference 2 Info Here --

Reference #3

-- Insert Reference 3 Info Here --

# Technical Approach

### **Instructions: Complete the following responses using 1 to 3 paragraphs.**

## A – Exchange Services Solution Scope of Functionality and Requirements

### A.1 - Consent Management

*Describe the solution’s approach to Consent Management.*

-- Insert Response Here --

### A.2 - Notifications, Alerts, and Results Delivery

*Describe the solution’s approach to Notifications, Alerts, and Results Delivery.*

-- Insert Response Here --

#### A.2.a - Configurable Message Delivery Methods

*Describe the solution’s ability to create configurable message delivery methods. Input all file format types that apply including any additional formats that are not listed within the chart below.*

-- Insert Response Here --

**List of Supported Format Types for Notifications, Alerts, and Results Delivery**

|  |  |  |  |
| --- | --- | --- | --- |
| Format | Supported | Customization Supported | Additional Comments Details |
|  | *(Yes, No)* | *(Yes, No)* |  |
| HL7 V.2 |  |  |  |
| HL7 V.3 |  |  |  |
| FHIR |  |  |  |
| DICOM |  |  |  |
| Additional format types should be inserted above this row. | | | |

### A.3 - Rostering / Cohorting

*Describe the solution’s approach to Rostering and Cohorting.*

-- Insert Response Here --

#### A.3.a Patient Cohorting

*Describe the solution’s approach to Patient Cohorting based on detailed patient demographic data.*

-- Insert Response Here --

#### A.3.b Member Roster Management

*Describe the solution’s approach to Member Roster Management.*

-- Insert Response Here --

### A.4 - Record Aggregation and Query Response (Patient Record Lookup)

*Describe the solution’s approach to Record Aggregation and Query Response (Patient Record Lookup)*

-- Insert Response Here --

### A.5 - Clinical Query Portal

*Describe the solution’s approach to providing Clinical Query Portal functionality.*

-- Insert Response Here –

#### A.5.a User Experience

*Describe the solution’s approach to Data Interactions and Advanced Querying, and Portal Design and Usability.*

-- Insert Response Here –

#### A.5.b Technology and Code Base

*Describe the solution’s approach to code base and technology stack.*

-- Insert Response Here –

### A.6 - Electronic Health Record (EHR) Integrations

*Describe the solution’s approach to Electronic Health Record Integrations.*

-- Insert Response Here --

### A.7 - Image Exchange

*Describe the solution’s approach to providing Image Exchange functionality.*

-- Insert Response Here --

### A.8 - Secure Direct Messaging

*Describe the solution’s approach to providing Secure Direct Messaging.*

-- Insert Response Here --

### A.9 - Extensibility and Integration

*Describe the extensibility and integration capabilities within your solution.*

-- Insert Response Here --

## B - Data Stewardship

### B.1 - Strategies for Patient Data Aggregation

#### B.1.a – Description of Approach

*Describe the solution’s approach to aggregating Patient Data.*

-- Insert Response Here --

#### B.1.b – Technology Utilization

*List and Describe what technology or tools are used during the aggregation process.*

-- Insert Response Here --

#### B.1.c – Tagging and Metadata Application

*List and describe what technology or tools are used during the aggregation process.*

-- Insert Response Here --

#### B.1.d – Segmentation Capabilities

*Describe what capabilities are present and utilized to segment data based on various patient and clinical data.*

-- Insert Response Here --

### B.2 - Data Standardization and Synchronization

#### B.2.a – Standardization Protocols

*Describe the protocols enforced/recommended/available for Standardizing data across the multiple HIE organizations and health data sources.*

-- Insert Response Here --

#### B.2.b – Synchronization Mechanisms

*Describe the tools/processes the platform uses to synchronize the data across the multiple HIE organizations and health data sources.*

-- Insert Response Here --

### B.3 - Data Mapping and Normalization

#### B.3.a – Mapping Techniques

*Describe the solution’s approach to Mapping data across multiple HIE organizations and health data sources.*

-- Insert Response Here --

#### B.3.b – Maintaining Data Integrity

*Describe the solution’s approach to maintaining data integrity across multiple HIE organizations and health data sources.*

-- Insert Response Here --

### B.4 - Traceability

#### B.4.a – Change Traceability

*Describe the solution’s ability to identify and indicate every change made to underlying system data.*

-- Insert Response Here --

#### B.4.b – Data Stewardship Practices

*Describe the data stewardship practices applied to inbound and outbound data.*

-- Insert Response Here --

## C - Data Model

### C.1 - Data Model Overview

*Provide a response to the questions posed in section C. Data Model – Data Model Overview*

-- Insert Response Here --

### C.2 - Data Visibility and Access

*Outline the level of visibility and access TechBD staff and the participating HIE staff members will have to the data throughout the platform.*

-- Insert Response Here --

### C.3 - Reporting and Analytics Services

#### C.3.a - Health Data Reporting

*Outline how your solution enables Health Data Reporting.*

-- Insert Response Here --

#### C.3.b - Operational Reporting

*Outline how your solution enables Operational Reporting.*

-- Insert Response Here --

#### C.3.c - Enabling Additional Analytics

*Outline how your solution enables additional analytic reporting capabilities.*

-- Insert Response Here --

## D - Integrations

### D.1 - Within the Shared Infrastructure

#### D.1.a - Interface Engine

*Describe how your solution will integrate with TechBD’s interface engine.*

-- Insert Response Here --

#### D.1.b - Master Person Index

*Describe how your solution would integrate with a third-party Master Person Index solution.*

-- Insert Response Here --

### D.2 - Interfaces with NYeC

#### D.2.a - Statewide CCDA Retrieval

*Describe how your solution will accommodate the data sets and processes required to interoperate with NYeC’s Statewide CCDA Retrieval system.*

-- Insert Response Here --

#### D.2.b - Cross-QE Alert Notifications

*Describe how your solution will accommodate the data sets and processes required to integrate with NYeC’s Cross-QE Alert Notification system.*

-- Insert Response Here --

#### D.2.c - FHIR Data Exchange

*Describe how your solution will accommodate the data sets and processes required to integrate with NYeC’s FHIR Data Exchange system.*

-- Insert Response Here --

#### D.2.d - Statewide Consent

*Describe how your solution will accommodate the data sets and processes required to integrate with NYeC’s Statewide Consent Management system.*

-- Insert Response Here --

#### D.2.e - Statewide Master Person Index (sMPI)

*Describe how your solution will accommodate the data sets and processes required to integrate with the NYeC’s sMPI.*

-- Insert Response Here --

#### D.2.f - Data Lake

*Describe how your solution will accommodate the data sets and processes required to integrate with NYeC’s Data Lake.*

-- Insert Response Here –

## E - Implementation and Operating Strategies

*Describe your general strategy and recommended approach to bringing new HIEs into the shared infrastructure system.*

-- Insert Response Here --

## E.1 - Model for Integration

*Describe your approach/model for integrating and onboarding new participants into the platform.*

-- Insert Response Here --

### E.2 - Architectural Performance and Scalability

#### E.2.a - Efficiency and Cost Control

*Describe how your platform manages performance in response to fluctuations in system load and data volume.*

-- Insert Response Here --

#### E.2.b - Technical Scalability Strategy

*Describe how your platform scales with both the increase in volume through onboarding each new QE and also the natural increase in volume due to natural network growth.   
Note: This section can be limited to the general strategy for scalability of the system, specific component level strategies can be provided in the* [*Architecture Details and Scaling Strategies*](#_Architecture_Details_and) *section of this document.*

-- Insert Response Here --

### E.3 - Timeline

*Describe your approach to imeplementation based on the information provided, including:*

* *Timeline for activities represented in a Gantt format.*
* *Non-standard implementation activities required for integrating multiple solutions and data from associated entities, including activities for upfront design and process alignment.*
* *Indication of key milestones and all proposed deliverables.*
* *TechBD level of effort expected.*

## F - Metrics

*Describe how your platform scales with the with both the ingestion of four QEs data but also.*

-- Insert Response Here --

## G - User Management, and Traceability/Auditability

### G.1 - User Management

*Describe how the platform manages user access along with traceability and auditability of user access.*

-- Insert Response Here --

### G.2 - Traceability and Auditability

*Describe how the platform provides traceability and auditability of user access. (1-3 paragraphs)*

-- Insert Response Here --

#### G.2.a - Compliance Standards

*Describe the solution’s adherence to New York State industry compliance standards and regulations. (1-3 paragraphs)*

-- Insert Response Here --

#### G.2.b - Audit Abilities

*Describe the solution’s approach to audit capabilities and enablement of administrative review.*

-- Insert Response Here --

#### G.2.c - Break the Glass Security Standards

*Describe the solution’s approach to “Break the Glass” emergency protocols and safeguarding capabilities.*

-- Insert Response Here --

## H – Hosting Model(s)

*Describe the solution’s hosting models and list the advantages and disadvantages of each.*

-- Insert Response Here --

## I - Data Migration

### I.1 - Strategy

*Describe the solution’s outline of the data migration strategy including vendor frameworks and capabilities.*

-- Insert Response Here --

### I.2 - Enabling Technologies

*Describe and list the solution's approach to data quality, compliance, security technologies and standards.*

-- Insert Response Here --

## J - Maintenance and Operations Strategies

#### J.1 - Maintenance and Operations Strategies: Maintenance and Operations Model

*Describe the solution’s approach to maintenance and operations models and list the advantages and disadvantages of each including the following.*

* *Managed Services*
* *In-House Maintenance by Client Personnel*
* *Hybrid Models*

-- Insert Response Here --

#### J.2. - Maintenance and Operations Strategies: Application and Architecture Performance Monitoring

*Describe the solution’s outline to strategy on best practices to maintain system health and monitoring.*

-- Insert Response Here --

#### J.2.a - Maintenance and Operations Strategies: Roles and Responsibilities

*Describe the solution’s approach to team composition, roles, and responsibilities.*

-- Insert Response Here --

#### J.2.b - Maintenance and Operations Strategies: Flexibility for Client Ownership

*Describe the solution’s approach to flexibility for client ownership, ongoing education and involvement.*

-- Insert Response Here --

#### J.2.c - Enhancement and Product Roadmap

*Describe the solution’s approach to roadmap enhancements, communication standards, and prioritizing client requests.*

-- Insert Response Here --

# **Architecture Details and Scaling Strategies**

*For the RFP Sections listed below, provide the following details regarding how your proposed solution will scale to meet the demands of the system, and the specific technologies used to do so.*

*At minimum you must provide, details on the RFP sections listed below. If different strategies are used for different components of the platform, add rows and reference the RFP section related to the component of your platform.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Example Vendor Name | | | | | |
| **RFP Reference** | **Component Name** | **Supporting Infrastructure** | **Scaling Strategy** | **Scaling Strategy Description** | **Scalability Limitations** |
| *Reference Section* | *The name used by the vendor.* | *List the tools, technology, or process that supports the scalability of this component of your Exchange Services Solution.* | *Describe the scaling strategy (Vertical, Horizontal, Elastic, etc.)* | *Describe how the strategy and infrastructure achieves scalability for this component.* | *Describe any known limitations* |
| A.5 | Patient Record Lookup Portal | S3 Buckets, RDS Instances | Horizontal |  |  |
| A.1 |  |  |  |  |  |
| A.2 |  |  |  |  |  |
| A.4 |  |  |  |  |  |
| A.5 |  |  |  |  |  |
| A.6 |  |  |  |  |  |
| A.7 |  |  |  |  |  |
| A.8 |  |  |  |  |  |
| A.9 |  |  |  |  |  |
| C.3 |  |  |  |  |  |
| D |  |  |  |  |  |
| G.1 |  |  |  |  |  |
| … |  |  |  |  |  |

# **Management Approach**

## Project Planning and Execution Approach

*Describe how your teams typically manage project tasks, project deadlines, risk management and issue escalation.*

-- Insert Response Here --

## Client Vendor Relationships

*Describe your team’s approach to maintaining relationships with clients and other vendors on the project.*

-- Insert Response Here --