



**STATE OF WASHINGTON**  
**DEPARTMENT OF SOCIAL AND HEALTH SERVICES**  
**PO Box 45811, Olympia WA 98504-5811**

DATE: January 26, 2024

TO: RFP # 2323-833 Bidders

FROM: Nicole Kahle, Solicitation Coordinator  
DSHS Central Contracts and Legal Services

SUBJECT: Amendment No. 01 – Change to the RFP Document and Bidder’s Q & A

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DSHS amends the RFP # 2323-833 procurement document to include:

- Updates to RFP Solicitation Document;
- Mandatory Pre-Bid Conference Slides and Attendee List; and
- Bidder’s Questions and Answers

## Update to RFP 2323-833- ORIA Solicitation Document

ORIA RFP Solicitation Doc, Section **A. Contract Requirements**, subsection **4. Bidder Minimum Qualifications** is updated to remove 4.a. "The Bidder must have had a contract with an agency or organization for the implementation of a Case Management (CM) and database solution within the last five (5) years."

RFP Solicitation Document Section **C. Explanation** subsection **1. Solicitation Schedule** is updated with the following new dates:

<b>Item</b>	<b>Action</b>	<b>Date</b>
6.	DSHS posts responses to written questions.	1/26/2024
7.	Bidders may submit written Complaints by 5:00 p.m. Pacific Time.	2/15/2024
8.	Bidders must submit a Response by 3:00 p.m. Pacific Time.	2/23/2024
9.	DSHS evaluates Written Responses.	2/27/2024 through 3/12/2024
10.	Oral presentations, if requested by DSHS.	3/19/2024 through 3/29/2024
11.	DSHS announces the Apparent Successful Bidder(s) on WEBS and begins contract negotiations.	4/2/2024
12.	DSHS notifies unsuccessful Bidder(s).	4/2/2024
13.	Bidders may request a Debriefing conference until 3:00 p.m. Pacific Time.	4/5/2024
14.	DSHS holds Debriefing conferences, if requested.	4/8/2024
15.	Deadline for submission of Protests by Bidders who participated in a debriefing conference.	4/15/2024
16.	DSHS considers Protests, if any, and issues determination.	4/29/2024
17.	Contract Execution/Start Date.	4/30/2024

**Mandatory Pre-Bid Conference  
RFP 2323-833**

**Slides and Attendee List**

(see next 5 pages)



# DSHS RFP #2323-833

## ORIA Case Management and Database Solution

Pre-Bid Conference

# Questions

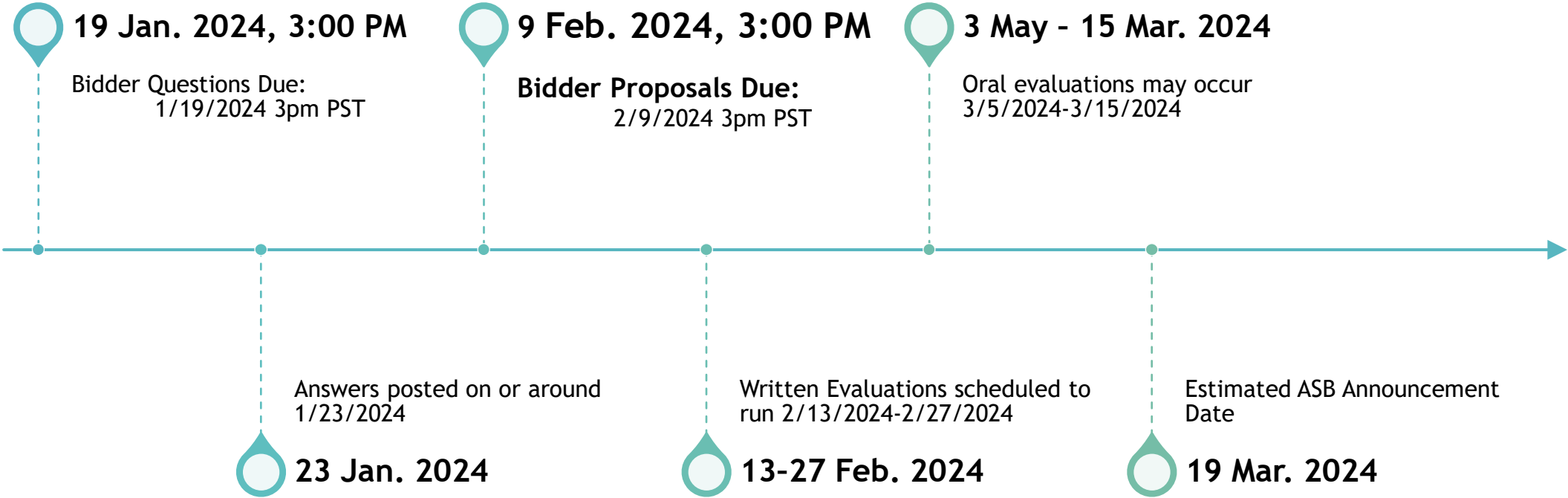
Please type your organization and name into the chat when asking questions

Ask your question verbally (please raise your hand) or in the chat

All questions regarding the content of this solicitation shall be added to the official Q&A list and posted along with the answers to questions received via email.

Questions received via email must be sent to the solicitation coordinator before 3pm tomorrow January 19<sup>th</sup>.

# Essential Dates



Thank you  
for joining us  
today!



Solicitation Coordinator- Nicole  
Kahle



[Nicole.kahle@dshs.wa.gov](mailto:Nicole.kahle@dshs.wa.gov)

# Pre-Bid Conference Attendees

- ▶ Adsystem, Inc.
- ▶ AHEAD
- ▶ Aithent
- ▶ AMIV Consulting
- ▶ Aunt Bertha
- ▶ Autocene
- ▶ Avenade/Accenture
- ▶ Bitfocus
- ▶ BPM Advisors
- ▶ Catalyst Consulting Group, Inc.
- ▶ Cayzen
- ▶ cBrain
- ▶ Cerebra Consulting
- ▶ CharityLogic Corporation
- ▶ cloudPWR LLC
- ▶ CoreSphere
- ▶ Creospark Consulting Services
- ▶ Eccentex
- ▶ Eccovia
- ▶ Etech Consulting
- ▶ Everblue
- ▶ Findhelp
- ▶ FirstRule Group
- ▶ Glidefast
- ▶ HOTB Software
- ▶ Hovi Health LLC
- ▶ HSO ES
- ▶ Intellibee
- ▶ Intellitect
- ▶ Interject Data Systems
- ▶ Kinetech Cloud
- ▶ Main Street Computing
- ▶ MGM Solutions
- ▶ OQ Point
- ▶ Ovation
- ▶ Pacific Point
- ▶ Ravacons
- ▶ Ready Computing
- ▶ ScholarFund
- ▶ Slalom
- ▶ Speridien Technologies LLC
- ▶ TGMT Systems Inc (Kohezion)
- ▶ Titan Software & Design
- ▶ Tontine Group
- ▶ VisualVault



**Bidder's Questions and Answers  
RFP 2323-833**

(see next page(s))

**All other terms and conditions in this Solicitation remain the same.**

Entity	Questions	Answers
<b>Solicitation Related</b>		
HSO	Will the required reporting requirements be provided before proposal submission? Sample reports would be helpful to know how many reports are needed.	<p>DSHS ORIA is looking for a flexible system that will help us complete federal and state reports. Sample reports may be linked below to understand the types of reports needed. This may not be the complete list. We function in a changing environment and frequently need additional reports or modified reports.</p> <p>Examples of federal reports include the following:  - ORR-5 - <a href="https://www.acf.hhs.gov/sites/default/files/documents/orr/ORR-5-Instructions-07-13-2022.docx">https://www.acf.hhs.gov/sites/default/files/documents/orr/ORR-5-Instructions-07-13-2022.docx</a>  - ORR-5 Template: <a href="https://www.acf.hhs.gov/sites/default/files/documents/orr/ORR-5-Form-07-2022.xlsx">https://www.acf.hhs.gov/sites/default/files/documents/orr/ORR-5-Form-07-2022.xlsx</a>  - ORR-6 Instructions: <a href="https://www.acf.hhs.gov/sites/default/files/documents/orr/ORR-6-Instructions.docx">https://www.acf.hhs.gov/sites/default/files/documents/orr/ORR-6-Instructions.docx</a>  - ORR-6 Forms: <a href="https://www.acf.hhs.gov/orr/form/report-forms">https://www.acf.hhs.gov/orr/form/report-forms</a></p>
HSO	Will an extension to the due date be considered?	Yes, ORIA will extend the due date to Feb. 23, 2024.
CoreSphere	Can the State provide a short 1-2 week extension to the due date for proposals, to allow for more thoughtful and complete responses to the RFP?	Yes, ORIA will extend the due date to Feb. 23, 2024.
Interject	Would ORIA consider changing or removing the minimum qualification outlined in 4.a., which states a bidder must have had a contract for a Case Management system within the last five years?	ORIA will remove this minimum requirement.
GlideFast	For confirmation - the proposals are due by February 9, at 3 pm PT. Please advise as the WEBS portal is scheduled to close on Feb. 8.	ORIA will extend the due date to Feb. 23, 2024, at 3 pm PT.
Ready	<i>RFP p. 17, Section C. Explanation of Solicitation Process - 13. Acceptance of Solicitation Terms</i> . "Bidders may not alter or redline the solicitation terms or requirements in their Response. Submitting altered or redlined solicitation terms or requirements in the Bidder Response may result in bidder disqualification." This appears to be a possible conflict with Attachment D, Bidder Response Form, item 1.D, which instructs Bidders to "indicate whether you are requesting that DSHS consider any exceptions and/or revisions to the sample contract language found in Attachment A. If so, state the page of Attachment A on which the text you request to change is found, and state the specific changes you are requesting." Please confirm that Bidders may propose exceptions or revisions to Attachment A in the manner stated in Attachment D.	Attachment A is the Sample Contract demonstrating the template terms DSHS intends to use for this interaction. If bidders would like to propose a change to contract language, this is not considered an alteration of this solicitation requirements, so long as bidders utilize the provided area within Attachment D to propose any potential contract language changes or revisions they would like DSHS to consider.
Ready	<i>RFP p. 22, D.7. Submission of Responses</i> . "Bidder's completed version of each of the Attachments B, C, D, and E, to this Competitive Solicitation shall be included as a separate attachment to the Bidder's email(s)." Please confirm that this sentence should refer to Attachment F instead of Attachment E.	There is no Attachment F. Bidder's completed version of each of the Attachments B, C, and D to this Competitive Solicitation must be included as an attachment to the Bidder's email(s). Attachment E - ORIA Programs is not required to be submitted as an attachment to the bidders' proposals but should be reviewed prior to submitting a proposal.
Ready	<i>Attachment B, Bid Submission Letter</i> . Item 1 states, "This Response includes this Letter (Attachment B) as well as Attachments C (Bidder Certifications), D (Bidder Response Form), E (ORIA Programs Overview), and F (Contractor Intake Form)..." Please confirm that Bidders are not required to submit a copy of Attachment F with their Response.	Please see the answer to the question on line 9.
Ready	<i>Attachment D p. 1, Section 1. Bidder Information, item C</i> . This question asks, "Please indicate whether your Response contains any variations from the requirements of the Solicitation Document". Did ORIA intend deviations to be provided here, not variations?	No; this section should be completed if/when the bidder's response may not meet the requirements outlined in the solicitation document.
<b>General</b>		
AHEAD	Target go live seems to be end of calendar year 2024 – please confirm	As noted on page 8 of the RFP and in question 7.I. on page 11 of Attachment D, ORIA seeks a Solution that allows for baseline functionality as soon as feasible. Full implementation of the Solution must happen by the end of Year 1. If this is not possible, the existing contract may be extended through an amendment for one additional year (Year 2). Please detail your proposed approach and schedule for Solution implementation (from go-live to full implementation) in your proposal.
AHEAD	Are there any service level agreements (SLAs) that need to be tracked and / or adhered to?	In addition to all or any related contractual requirements that may be relevant or related, Service Level Agreements (SLA) expectations can be found in the Sample Contract (Attachment A) in the Special Terms and Conditions, Section 20 and in Exhibit B - Statement of Work, Section 22.

AHEAD	AHEAD typically takes a very successful train the trainer approach, as opposed to directly training all end users. Is ORIA amenable to this or should full end user training be scoped?	ORIA is amenable to this approach and expect that ORIA staff will provide user training to and perform as the first-level help desk for Service Providers' staff. (See Attachment A - Sample Contract's Exhibit B-Statement of Work, Training Services Section 11(b)(2).)
AALTA	Do you have a vendor or COTS solution in mind?	No. We do not have a vendor or solution in mind.
HSO	Of the 2500 users, how many are considered to be external vs. internal?	Not sure what 'external' vs. 'internal' users mean. We have estimated that approximately 25 Users will be from ORIA staff and approximately 2460 Users will be from our statewide Service Provider network's staff pool. The actual counts for ORIA staff and our service providers' staff may change at the the time of contract negotiations. No clients will be given access to the system.
HSO	With the federal funding of \$750k, is that for year 1 only? Is there additional funding for maintaining licensing and solution support after year 1?	Pricing listed in the RFP is an estimate, not a minimum or maximum. This contract will cover the implementation of the Solution, which requires that the vendor, such as: a. Purchase/configure/customize and set up licenses. b. Host the Solution. c. Provide project management. d. Provide training. e. Provide customer service, security, troubleshooting, etc. f. Document the Solution. g. Migrate the data. h. Gather requirements. i. Provide requirements analysis. j. Provide design services. k. Provide Solution maintenance and operations.* *An agile project schedule is not required. However, as indicated in the RFP and Attachment D, it is anticipated that this project will use agile methodologies with system users accessing the Solution before "full" implementation (expected to be complete by the end of year 1). As such, the Solution maintenance and operations will be needed from go-live with bare-bones functionality to full implementation. Please use Attachment D, question 7.I. to identify all allocated costs you are willing to accept to implement the Solution.
HSO	What level of financial information and workflow is expected within the database and case management system?	No financial information is expected to be maintained within the system, with the exception of participant amounts allowed under program as part of support service (a service type).
HSO	Is ORIA managing the distribution of funds for programs through this system?	No. Funding distribution for ORIA programs is external and outside the scope for the Solution. Funds distributed directly to participants, however, will be entered into the system by Service Provider Users for reporting purpose (i.e. A support service amount, date distributed to client, for what purpose, etc).
HSO	With multiple funding streams for certain programs, what information needs to be captured in the case management system?	Funding streams for ORIA's programs will be managed outside the Solution. The case management system will primarily capture information on the clients being served (i.e. demographics, household, intake and assessment, barriers and needs, etc.), the services being provided (i.e. type, within which ORIA program, on what dates, etc.) and by whom (i.e. service provider, referrals, etc.) The database functionality is to be able to capture and pull data needed for state and federal reporting and ORIA's programs review.
MGM Solutions	Can you please provide some examples of PHI data that will be stored in the application?	For example, ORIA has a Refugee Health Promotion program, a Refugee Health Screening program, and Refugee Mental Health program that we contract with external healthcare providers. PHI data examples include intake or enrollment date, date of service, type of service completed, exit date. ORIA tries to minimize PHI information to only those information needed for federal reporting.
FORWARD	Does ORIA expect full elimination of all siloed systems and spreadsheet maintenance?	Ideally, ORIA would like for all of our programs to live on one platform and to eliminate the need for spreadsheet maintenance.
GlideFast	Does the budgeted amount in the RFP include the acquisition of licenses?	Yes for the initial first year that includes go-live with ORIA and Service Providers' staff/Users to be able to utilize as part of Solution implementation. Ongoing licenses and budget after Solution implementation will be a separate contract.
GlideFast	Does ORIA anticipate utilizing post go-live support/services? If so, for what period of time?	Yes. Post go-live support/services is expected during and throughout the contract period.
GlideFast	Would it be acceptable to provide a 'prescriptive' approach for the engagement based upon experience and best practices learned from similar projects or would it be more appropriate to follow only the outlined requirements?	A prescriptive approach is acceptable. We are leaving it up to bidders to determine and recommend the approach that they believe best fits the RFP and their solution. We expect bidders to propose how their services and solutions can meet or exceed the ORIA's case management and database business needs listed in Section A of the RFP, as well as the contractual requirements in Attachment A. Bidders should propose the approach they believe best suits our needs and their services/solutions. If you have additional services or functionality you believe would assist ORIA in meeting their business needs, please include them in the proposal.
CoreSphere	Can you confirm the number of providers mentioned on the call (~100) and number of provider users (2450) are accurate? So each provider has roughly 24 users? Also do you anticipate this number increasing over the next few years - if so by how much?	ORIA's service providers count is not constant and may change within and between contract years. This is due to a variety of reasons, including but not limited to adding new service providers, ending contracts or procuring for all new service providers under a program (usually a rotating three-year cycle among ORIA programs). Therefore, ORIA estimates that there is between 80-100 unduplicated contracted service providers annually. The estimated 2460 for service provider staffs' licenses in the Sample Contract (Attachment A) is based on an internal ORIA exercise conducted in January 2023 that identified service provider counts at the time and applied x5 and x15 licenses per service provider to determine an estimated minimum and maximum range, which resulted in a range of 820-2460. Actual service provider staffs' licenses count will differ at time of contract negotiations, but ORIA anticipates it will be within this range.
CoreSphere	How often does each provider user use the system? Number of logins per month/per year?	There could be as many as 2460 users logging in every single business day depending on their case management needs.
CoreSphere	Will there be any external/refugee users of the system? If so how many logins per month/year?	Clients will not be users in the system.
CoreSphere	Has the State seen any demos/talked to vendors prior to releasing the RFP, if so which vendors and technologies?	ORIA has been working on developing a solution since 2019. During that time, we explored multiple options, including Salesforce, Eccovia, and Service Now. The Project was postponed in 2020, then restarted in 2021 after which ORIA made the decision to release an RFP. ORIA has not talked to a vendor nor seen demos as of Project restart in 2021.
CoreSphere	What is the desired go-live date for this system?	Please see the answer to the question on line 15.

CoreSphere	Can offshore resources be used for development of the solution, if production and non-production environments that contain PII/PHI and other confidential information remain in the US and are not accessed by offshore resources, and all data remains in the US?	Yes, so long as no access to any ORIA data is given to those working outside of the continental US.
CoreSphere	On the pre-bid conference call you mentioned that the \$750,000 budget number is for year 1 design, development, and implementation, with operations&maintenance in future years to be an additional cost. Has the budget for those O&M years been approved/allocated? If so can you provide a rough estimate of the O&M number you have requested/received?	Pricing is an estimate and not a minimum or maximum. It is only for Year 1 (or Year 1 and 2, if the bidder needs an extra year to reach full implementation). Maintenance and operations, support, licensing, etc. for additional years will be handled in a separate contract.
CharityLogic	The RFP notes the desire to create Dashboards. Please provide examples of the types of Dashboards you would like to create and the types of data from your Case Management System that would appear in these dashboards.	ORIA is looking for dashboards that aggregate and display metrics and key indicators that can be examined at a glance by a range of audiences. For ORIA purposes, it would be ideal to be able to look at aggregate data at a provider, program, and office level. This could include numbers served within a program or geographic areas, outcomes for specific services, or overall populations served across programs at a statewide level. A dashboard on total clients served could also include length of service, utilization of programs/services, and whether outcomes were achieved, etc. The ability to drill down or filter down to data source would be a helpful feature. For the Service Provider User, a dashboard example may be a list of its participants with associated information (i.e. service type, under what ORIA program, by which staff, etc.), which the User can select and access a specific client's case and information and drill down, or filter (i.e. by staff or ORIA program type or service type, etc).
CharityLogic	Is it mandatory for the case management system to display these dashboards within the software, or would it be acceptable for the data to be shared via API or data replication to appear in a dashboard located elsewhere, outside of the case management software?	Although preferred, it is not mandatory for the case management system to display these dashboards within the Solution.
CharityLogic	Please expand on the needs related to tracking of service levels and funding. Can you provide examples of a workflow? For instance, does the ORIA obtain funds for direct distribution to clients, with a need to track the funding pool and funds given directly to clients and remaining funds available within the Case Management System? Please describe your desired workflow/capabilities in regard to tracking service levels and funding.	The Solution will need to track the services that clients receive. Some programs may provide certain support services that provide funds to cover the costs for clients specific needs, including travel or to purchase of work-related equipment. ORIA's programs, however, do not disburse cash assistance directly to clients as in other types of cash disbursement programs. Therefore, we will not be tracking funding levels in the system.
Bitfocus	How many unique contracted service providers will be participating in the new solution?	ORIA currently contracts with an estimated 80 to 100 unduplicated organizations annually. All organizations will be participating in the new solution. The Solution should be nimble since additional organizations may need to be added.
Ready	In the Pre-Bid conference, it was mentioned that ORIA currently serves about 22,000 individuals, with expected growth in the coming years. Approximately how many open cases does ORIA have open on a given month in the first service year (2024-2025)?	ORIA does not track cases open across all programs per month. We are seeking a Solution that can support our case management and database needs to be able to track cases open (unduplicated or duplicated) across all programs for any given timeframe.
Ready	Does ORIA currently utilize any analysis and visualization tools such as PowerBI or Tableau for reporting and dashboards?	No. ORIA does not currently use these tools for reporting and dashboards. We would be open to explore using these tools as an option.
Ready	RFP p. 7, Section A. Contract Requirements - Security Business Needs . The RFP requires that "ORIA is able to limit the number of users per provider in the Solution. The Solution has user administration, role-based security and auditing (entry, update, view, print, delete) capabilities." Our solution is typically licensed based on service volume, not user volume. Is the need to limit user counts by provider needed to control anticipated license costs?	No. The limitations on users directly relate to ensuring personal identifying data is accessible only to those who need it. All contracted service providers and staff who need access to the case management system will be assigned as users. Those who do not need access or only need limited access will have either no or restricted access. This is to protect data, not to reduce costs. All system users will need to have unique user names and be assigned role-based security with permission levels tailored to their program, caseload, and responsibilities. ORIA staff will be assigned as user administrators. They need the ability to approve and rescind user access, and limit or grant permissions.
Aithent	We understand that this is a multi-year contract. How is the price proposal expected to reflect the future year costs?	M&O costs have not been determined and will likely depend on the system implemented through this RFP. Please see the answer to question 35 for more information on the contract for future years.
Aithent	Is the onboarding process common across service providers?	ORIA does not currently have an IT onboarding process for service providers. With a new solution, we anticipate that the same onboarding process (to be developed) will be used for our service providers.
<b>IT-Related</b>		
AHEAD	Will ORIA be able to provide exports of MyRIA and eJAS data for importation?	Yes, it is possible for ORIA to export data from MyRIA and eJAS to import into a new system.
AHEAD	How many Excel sheets contain data that will need to be imported?	ORIA is still determining how many Excel sheets will need to be imported into the new system. Currently programs receive monthly caseload reports with client data. If a program has an average of 15 providers, there would be 180 spreadsheets/year/program with a goal of importing five years of data. ORIA is currently looking to see if any of our federal reports would reduce the number of imports into the new system. At the upper level, we could have as many as 8000 Excel sheets for importing, but the goal for ORIA is to reduce that number through combining reports.

AALTA	Is the Office of Refugee and Immigrant Assistance (ORIA) looking for a Commercial -Off-the-Shelf (COTS) or a custom built solution?	ORIA is looking for a COTS system, which can be configured and customized to meet our business needs. We would be open to a custom built solution, so long as it meets the scope, schedule, and budget.
AALTA	If ORIA is looking for a COTS product, the license cost will be separate from the proposed budget. Is the government expecting the license cost to be included in the total cost and fit into the proposed budget?	Yes. The expectation is the licensing costs related to the term of this contract are included. After implementation there will be additional funds available for licensing, etc. See Attachment D 8.A.
AALTA	If the government is expecting a COTS product, does ORIA want the vendor to include the license cost in the proposal? If that is the case, we can provide a license cost; however, the government would need to establish the license agreement directly with the software vendor. Is this acceptable?	Yes. We think this is an acceptable approach.
FORWARD	Would a SaaS solution need to integrate with eJAS or any other existing systems in use?	No, it would not be required. See answer to question on line 73.
GlideFast	Will domain separation be required to satisfy any state or federal security requirements?	Domain separation is not currently required to satisfy any state or federal security requirements.
GlideFast	What ServiceNow products/modules (if any) are currently being utilized and how many licenses does ORIA possess?	ORIA does not use ServiceNow products/modules for programmatic work. ORIA does not have any ServiceNow licenses. However, DSHS currently has licensing for ServiceNow Public Sector Digital Services (PSDS) Pro. This includes capabilities for Knowledge Base and Self Service portal which includes a chatbot, etc. We are currently only using it for IT service management.
GlideFast	Will each individual service partner have access to all of the information in a centralized database, or will each one be granted access to specific data fields?	Each contracted service provider will need to be assigned an appropriate level of permissions allowing them to access ONLY the data appropriate for their role and the clients they are serving.
GlideFast	What systems are currently being utilized and will integrations with those system(s) be required?	ORIA's programs currently use three systems. One program has a SQL-based system, where Excel sheets are uploaded into SQL. Some programs use the internal Electronic Jobs Automated Systems. Most use monthly reports produced on Excel spreadsheets. At this time, integration with these systems is out of scope of this RFP. Data pulled from these systems by ORIA in Excel format to be converted into the Solution as part of data migration is in scope.
CoreSphere	Is the State open to consuming this solution as a managed service?	ORIA is open to understanding all potential options that fully meet all of the required elements.
CoreSphere	Are there any data encryption or other requirements for this system? Is FedRAMP a requirement?	Please see Exhibit A Data Security Requirements of the Sample Contract for information relating to data encryption and FedRAMP requirements.
CharityLogic	Regarding duplication prevention: are search tools to find potential duplication prior to data entry sufficient, or do you desire detection of duplication as the worker types/enters data that warns them they may be duplicating a record? If so, please provide examples of the types of data fields that should trigger automatic detection of duplication. Besides entry of new clients/cases, are there other types of records where you are looking to have data duplication prevention in the software?	ORIA would like the option for both a search tool and the detection of duplication as a worker enters data. Different possible combinations of data fields can be used to trigger a match, including: Name, Date of Birth, Alien Number. Preventing client/case duplication in the Solution is critical in order to prevent errors for reporting.
CharityLogic	The RFP mentions wanting to have an ongoing upload option to update data – please provide clarification/confirm our assumption that you desire the ability to regularly upload a “template” in Excel form that would create and/or update existing data. Please confirm that the data you wish to regularly update through this method is contact/interaction/case data, resource/referral records, other? (if other, please describe) How frequently do you envision wanting to import data as described? Daily, weekly, monthly, adhoc? Would you be willing to explore real-time data creation or transfer from external sources using API connections?	ORIA requires the ability to regularly upload an Excel template in order to create and/or update existing data. The frequency of importation of the Excel templates varies by program and may change based upon federal or state requirements. Data includes limited client demographics, intake or enrollment date, date of service, type of service completed (drop-down list options), exit date. ORIA tries to minimize PHI information to only that information needed for federal reporting.  ORIA is open to different options available to meet our business needs, provided its covered in our existing data sharing requirements under our service providers contracts. New data sharing agreements are out of scope.

CharityLogic	In past Washington State RFPs we have been bid on, the entity released a list of questions/parameters/expectations that would be covered in the Security Design Review in order for a contract to be approved. Could such a document be provided to potential bidders of this RFP to get a better idea of the expectations and requirements for a vendor to pass the security design review?	Specific Security Design Review information will be provided to the apparent successful bidder during contract negotiations. The following link has additional information on the Security Design Review process: <a href="https://watech.wa.gov/policies?combine=&amp;field_categories_target_id=80&amp;field_type_target_id=All">https://watech.wa.gov/policies?combine=&amp;field_categories_target_id=80&amp;field_type_target_id=All</a>
Bitfocus	How many users will need to build custom reports and do ad hoc data analysis?	The ability to build custom reports and ad hoc data analysis is limited to designated ORIA staff. Currently, ORIA has 24 full-time employees. However, the ability may be limited to approximately 16 staff (Program Managers, Supervisors, Leads). Types of customized reports may include standard reports for service providers' access to assist with their case management and for ORIA access to assist with program management, evaluation, and strategic planning.
Bitfocus	How many users will need to build custom dashboards?	The ability to build custom dashboards will be limited to designated ORIA staff. Currently, ORIA has 24 full-time employees. However, this ability will be limited to specific staff members.
Bitfocus	Once the initial data migration is completed, will there be any ongoing data import required from other systems/organizations (i.e. eJAS, Excel spreadsheet files)?	ORIA expects ongoing data import functionality for a few contractors, such as Department of Health (DOH). Currently, ORIA provides the Excel format and the DOH pulls data from its system in the required Excel format and submits to the ORIA Program Manager (PM). Excel report is not being replaced, but import functions will allow either DOH staff or the ORIA PM to import the Excel's data into the Solution.
Ready	<i>RFP p. 7, Section A. Contract Requirements - Security Business Needs</i> . The RFP requires that "The Bidder is responsible for supporting ORIA during disaster recovery and disaster recovery exercises including recovering the Solution according to DSHS Recovery Time Objective and Recovery Point Objective requirements." Can ORIA provide the Recovery Time and Recovery Point Objectives requirements? Or otherwise, is the expectation that recovery occurs within 24 hours with no data loss, as stated in Attachment A – Exhibit B, Statement of Work, Section 2.12?	We typically have an RPO of one hour (or one hour of lost work max) and our RTO is 3 days in a disaster recovery situation.
Ready	<i>RFP p. 8, Section A. Contract Requirements - 3. Project Scope - Desired Scope Enhancements</i> . The RFP requests that the solution be able to "Provide business intelligence functionality within the Solution." Can ORIA provide more information regarding the envisioned business intelligence functionality of the case management solution?	ORIA is interested in exploring business intelligence functions that will assist ORIA in making informed data-driven decisions but has not defined specific functionality at this point. We hope to gain a better understanding of the potential business intelligence functionalities available in Case Management Solutions through this exercise.
Ready	<i>RFP p. 8, Section A. Contract Requirements - 3. Project Scope - Desired Scope Enhancements</i> . The RFP requests that the solution would "Use e-signatures for online forms, with the ability to sign manually when needed." Does ORIA have a preferred eSignature provider that they would want to utilize with the solution? Also, are manual signatures referring to paper-based forms, or is manual signature referring to a touchscreen or mouse-drawn signature capability?	ORIA does not have a required e-signature provider at this time. The reference to manual signatures refers to paper-based forms.
Ready	<i>Attachment A p. 57, Exhibit D - Incident &amp; Problem Tickets: Impact/Urgency/Priority Definitions</i> . The RFP requests that the respondents propose a Service Level Agreement (SLA). Do the SLAs need to align exactly with the priority and severity matrixes shown in Exhibit D to Attachment A?	The SLA's should closely align with the priority and severity matrices provided.
Aithent	What is the DSHS standard RTO & RPO for this implementation?	We typically have an RPO of one hour (or one hour of lost work max) and our RTO is 3 days in a disaster recovery situation.
Aithent	What is a separate Government data Storage section? Does it refer to Government Private Cloud storage? Is this a storage requirement for this initiative?	The reference to a separate Government data storage section refers to the potential future need to segregate data based on federal or state requirements. This was not intended to refer to Government Private Cloud storage. Please see Exhibit A Data Security Requirements of the Sample Contract for information relating to cloud storage requirements.
Aithent	<i>Contracted service providers have the ongoing option to upload an Excel file with required data, populating existing database fields</i> . The data must have a unique identifier for the import to be meaningful and prevent data duplication. Does the current excel data sources has such an identifier?	No. ORIA provides the Excel formats to our contractors to complete and submit into ORIA. There's not a unique identifier but there's a field for the Agency's name and in some cases also for their contract number. Excel files are maintained in individual Agency/Service Provider folders under each ORIA program.  Import functionality under the new Solution will be limited to ORIA's contracts with other state/government agencies (i.e. Department of Health) which have their systems from which required data for ORIA can be pulled and submitted in Excel format. For these entities, the import function will be convenient to prevent duplication of efforts. For non-state/government agencies, direct data entry into the Solution will replace the need to complete and submit data in Excel.  ORIA will need to work with the vendor to develop a unique identifier for the Agency and/or Agency staff if required.

Aithent	Align with existing DSHS systems to achieve compatibility and shared functionality, promoting linkage and preventing data duplication when feasible. It would have the ability to interface capturing with DSHS systems and applications, if needed. What are the existing DSHS systems that need interoperate with the proposed system? Can we get more information about the shared functions?	The case management solution must meet business needs and contract requirements detailed in the RFP and sample contract. It should also meet some or all of the desired enhancements listed on page 8 and 9 of the RFP. Integration with existing DSHS systems is a desired enhancements (want-to-have). If your Solution is currently capable or could be capable of including any of these desired enhancements, such as integration/interfacing with other DSHS systems, please detail which ones can be included in this project in your proposal.
Aithent	Provide the ability to integrate with contracted service providers systems and with other data systems. Could you explain what other data systems should be considered in scope for this project and their significance in sharing the data?	Third-party system integration is outside the scope of this project. This section of the RFP provides desired enhancements (like-to-have) and is not a must-have required as part of the Solution implementation. If possible, we would like to hear from the vendor whether their proposed Solution has this capability should the need arise in the future that requires integration with contracted service providers systems or other data systems, such as existing DSHS systems that will require data sharing agreements, etc.
<b>ORIA Specific</b>		
VisualVault	Is ORIA responsible for licensing the service provider community?	ORIA will work with our service providers to determine who among their staff will need to access and use the Solution and will determine the overall User licensing count and access level(s) if separately priced. ORIA will work with the vendor on initial licensing needs and determine the process for changes in licensing needs.
VisualVault	Is ORIA responsible for inspecting the quality of service provided to refugee and immigrant families?	ORIA is responsible for conducting desk audits (low-risk contracts) and monitoring visits (medium to high-risk contracts) and can review services provided to participants during these activities. Programs meet regularly with their service providers to collaborate on emerging issues and the overall quality of services provided to refugees and immigrants.
VisualVault	Is it correct to assume ORIA receives complaints and cases can be initiated from a validated complaint?	There is currently no formal process in place for complaints to be submitted to ORIA. In general, our service provider is the 'front line staff' working with directly with participants. Participant complaints and/or service provider complaint can be received via service provider staff.
VisualVault	How many ORIA staff are considered internal/office staff and how many are considered field staff?	ORIA does not work directly with clients and participants. Currently, ORIA has 24 full time positions.
VisualVault	Does ORIA have an existing records retention policy that determines how long doc types need to be preserved?	Yes. ORIA's retention policy requires a seven year retention period--year one includes the current active contract year, plus six years after the end of the contract. If there's a legal case open, then retention must be indefinite until legal matter is settled. ORIA needs a Solution that can meet retention policies, as well as, a Solution with the ability to retain high-level data, such as demographic and service data that does not have identifiable information attached but may include aggregate counts information to provides ORIA with relevant historical information (i.e. how many people served in ORIA for last 10 years, broken out by gender, country of origin, county, program utilizations, service types, etc.)
AHEAD	Based on the 21 ORIA programs, are there documented workflows to address each of the services provided by these program (i.e. cash assistance, job training, etc.)?	There are no formal or well-documented workflows developed for each ORIA program currently, although some programs may have basic workflows established. In general, the service provider will determine a client's eligibility for ORIA programs and may conduct a formal intake or assessment to determine the scope for service needs. Outside the Solution, the service provider will engage with clients directly and provide the services or make referral to a third party. Inside the Solution, the service provider will enter clients and services data (demographics, service type, start/end dates, referral info, etc.) Because ORIA programs share clients, one new development would be a universal client intake and assessment form to be completed and shared among providers serving the same client, to better coordinate services. ORIA may be able to formally develop ORIA workflows prior to contracting or as part of the contract and overall WorkPlan/approach as proposed.
AHEAD	Does ORIA have any plans (outside of training that will be provided) for organizational change management in relation to the release of the new tool and processes?	ORIA strongly believes in collaboration and coordination with our contracted service providers. Change management will be a critical piece of rolling out this new tool. Included in that change management may be stakeholder demos and listening sessions as well as other potential tools to prepare for a smooth launch for the Case Management and Database Solution.
CharityLogic	Please provide examples of the types of approval workflows you desire. What types of activities need approval, and what is an example workflow/steps you envision for the approval process	ORIA client service contracts allows a service provider to request an exemption to policy (i.e. goes against the contract) that requires the ORIA Program Manager (PM) to review and approve. The types of activities that need a "Request for Approval" (RFA) is generally limited to whether a client service is allowable/unallowable to be invoiced and paid for.  Currently, service provider may contact a PM directly via email to approve for a RFA service prior to or after service provision. If prior and the PM denies then the service is not allowed to be provided. If post and the PM denies then the service provided cannot be invoiced to ORIA.  Because the Solution will be for service provider to enter their clients and services provided, a possible RFA workflow in the Solution could be to develop business rules for service limitations, which triggers an RFA to notify both the service provider and ORIA PM/Users when an RFA exists that need PM approval. Within the Solution, have a way for the PM to review and take action (approve or deny) that is tracked and results in client/service to be included or excluded from a Client Service Report that the service provider can general from the system with the information they need to invoice ORIA outside the system.
Ready	RFP p. 5, Section A. Contract Requirements - General Business Needs. The RFP requires that "The Solution links individuals within a family or household. Individuals within the household have unique identifiers and are linked to a household identifier." Can ORIA describe further how households are linked to families and individuals? Is a household linked to a specific location or address, or is it just a link between related persons?	For ORIA, a household linked by relationships (such as Head of Household, Spouse, Child, Parent, etc.) of those living together. We do not define by location or address because households may share the same location/address.
Ready	RFP p. 6, Section A. Contract Requirements - Data Management Business Needs. The RFP requires that "Through the Solution, users have the ability to document, modify and track the unique contractual requirements within each ORIA program." Can ORIA provide examples of unique contractual requirements that would need to be tracked?	ORIA will not use the Solution to document or track contractual requirements with our service providers. ORIA is seeking a flexible Solution that we can easily modify ourselves, when needed to align with new or changing federal policies and/or reporting requirements. For example, when a new data element or item needs to be added to an existing drop-down list, when a new service type or outcome type is required to be provided under an existing program, and/or when a new program with new data sets need to be added under ORIA's programs profile within the Solution.

Hovi Health	<p>Have you identified any provider agencies willing to partner with the developers and ORIA for feedback and possible pilot site? We believe a development partnership between the program experts, end users, and development team is key for making a product that works well for everyone.</p>	<p>ORIA will be engaging in a change management process to incorporate provider involvement and feedback into the development of the solution. We agree that this partnership is key for developing a successful product.</p>
Aithent	<p>Can the participant enroll in more than one ORIA Program at a time?</p>	<p>Yes, a participant can be enrolled in more than one ORIA program and with more than one service provider at the same time. For example, a participant may be receiving cultural orientation and support services through the PRIME program at the same time they are receiving English as a Second Language (ESL) from the LEP Pathway Education program and Job Search help from the LEP Pathway Employment program. Limitations do exist where a client cannot receive the same type of service from multiple ORIA programs at the same time. For example, ORIA's LEP Pathway Employment program, CLEVER program and ORIA BFET program all provide job search therefore a client cannot be enrolled in these at the same time. Similarly, a participant cannot receive the same service from more than one provider.</p>