

SAN FRANCISCO HEALTH SERVICE SYSTEM

Affordable, Quality Benefits & Well-Being

Request for Proposals

DATE: January 20, 2023

TO: EAP Case Management Software Vendors

FROM: Patrick Chang
Principal Analyst
San Francisco Health Service System

RE: **EAP Case Management Software Solution Request for Proposals
(RFPQHSS2023.W1)**

I. Intent

The San Francisco Health Service System (SFHSS) is soliciting proposals from vendors capable of providing a case management software solution for our Employee Assistance Program (EAP).

Pursuant to instructions from the San Francisco Mayor's office to all City Departments (<https://sf.gov/news/mayor-london-breed-issues-budget-instructions-city-departments>) SFHSS will be prioritizing our proposed budget for the upcoming-two-year budget process to support the health and well-being of City workers and support the SFHSS 2023-2025 Strategic Plan (<https://sfhss.org/resource/sfhss-strategic-plan-2023-2025>).

II. Key Dates and Deadlines

- Deadline for RFP Questions – 1:00 PM (PT) February 21, 2023
- Deadline for Proposals – 1:00 PM (PT) March 28, 2023
- Live Demonstrations – April 17, 2023 - April 21, 2023¹
- Services Start Date – January 1, 2024²

¹ Demonstrations to be held during normal business hours (8a – 5p PT) via Microsoft Teams or Cisco WebEx.

² Conversion and Migration of Existing Data (Section VII.) must be complete prior to January 1, 2024.

III. The San Francisco Health Service System

SFHSS executes all process phases related to benefit operations and administration of non-pension benefits (including health, dental and vision) for approximately 136,000 individuals pursuant to the City and County of San Francisco Charter sections 12.200-12.203 and A8.420-A8.432, and San Francisco Administrative Code sections 16.700-16.703.³ These individuals including both active and retired employees from the City's four employer groups⁴ and their eligible dependents (collectively, "Members"). SFHSS is dedicated to providing outstanding health and other employee benefits to, preserving and improving sustainable, high-quality health benefits for, enhancing the well-being of, and adhering to the highest standards of service and support for our Members.

IV. SFHSS Employee Assistance Program

The SFHSS in-house Employee Assistance Program (SFHSS EAP), located at 1145 Market Street in downtown San Francisco, is dedicated to advancing employee well-being, addressing organizational-level City department needs in the area of employee well-being and EAP, and supporting a healthier workplace environment for all active employees from the City's four employers.

SFHSS EAP currently offers a variety of services to a pool of approximately forty-four thousand (44,000) employees from all City departments, commissions and agencies. SFHSS EAP counselors are licensed therapists with many years of experience in mental health, consultation, and workplace training, and are full-time employees of the City and County of San Francisco. These services address needs at both the individual employee level and organizational (department/division/agency) level. Individual employee services include, but are not limited to, confidential counseling, consultation, coaching, case management, referral, and direct assistance in navigating mental health and substance abuse benefits. Organizational services include but are not limited to, leadership consultation and coaching, organizational consultation, group workshops and trainings, critical incident response, mental health communications, tabling at health fairs, and responding to City-wide emergencies such as natural disasters and pandemics.⁵

³ <https://sfgov.org/services/sf-municipal-codes>

⁴ The four employer groups (employers) are (i) the City and County of San Francisco ("CCSF"), (ii) the San Francisco Unified School District ("SFUSD"), (iii) the Community College of San Francisco ("CCD"), and the San Francisco Superior Court.

⁵ Further information about the SFHSS Employee Assistance Program is available at <https://sfhss.org/eap>; a summary of the mental health benefits included in medical plans offers to employees and retirees is available at <https://sfhss.org/Using-Your-Benefits/mental-health-emp>

In recent years, due to the increase needs for employee support and the COVID-19 pandemic, SFHSS has expanded the scope of our employee assistance program services in partnership with third-party EAP providers ComPsych Corporation (<https://www.compsych.com/>)⁶ and Managed Health Network (<https://www.mhn.com/>).⁷

V. Submitting your Response

V.01. Response Deadline.

Vendors must complete the Vendor Response Form [Appendix A] and submit the form in MS Word or Adobe PDF format via email to Patrick Chang (patrick.chang@sfgov.org), cc: michael.visconti@sfgov.org, no later than **1:00 PM (PT) on March 28, 2023 (“Deadline for Proposals”)**.

Any attachment(s) to the Vendor Response Form must not exceed ten (10) total pages and must be submitted with the Vendor Response Form.⁸

V.02. Questions and Requests for Clarification.

Any questions or requests for clarification must be submitted via email to Patrick Chang (patrick.chang@sfgov.org), cc: michael.visconti@sfgov.org no later than **1:00 PM (PT) on February 21, 2023 (“Deadline for RFP Questions”)**. A summary of the clarifications, questions and answers will be posted to the SFHSS Website by or before 5:00 PM (PT) March 7, 2023.

VI. Software Features

The Vendor Response Form (Appendix A, Section 3 “Vendor Response Form Questionnaire”) details EAP case management software features. Respondents must note each software feature as (A) Standard Software Feature, (B) Feature Under Development, or (C) Currently Unavailable, Requires Customization, and/or at an Additional Cost. Please note that not all features are essential or required by SFHSS. Certain features may be preferred but non-essential, or applicable to a future expansion of SFHSS and City EAP programs. Furthermore, if there are any additional features not listed, or any listed features that do not fully encapsulate a Respondent’s software solution, Respondents may attach an additional page listing and describe these

⁶ Providing EAP services and support for active employees and first responders since April 2020.

⁷ MHN has provided EAP and critical incident response services to the San Francisco Police Department since 2010, and in partnership with SFHSS, expanded those services to the San Francisco Fire Department and Sheriff’s Department as of November 2022.

⁸ Please also review section IX.02. (Relevant Information) before submitting your response to this RFP.

functionalities. That additional page may not exceed five (5) pages. Those additional five (5) pages will not be counted against the ten (10) page attachment limit described in Section VI.01. (Response Deadline) above.

VII. Conversion and Migration of Existing Data

SFHSS has existing case management data that would be required, as part of an agreement resulting from the RFP, to be converted and migrated to a new software solution, if a new vendor is selected⁹.

Vendors are asked to please describe in their response to this RFP, any technical ability, processes, and experience in migrating a new client's existing data to their solution. If conversion and migration of data incurs any extra costs, those costs should be specifically noted. The response should also include a proposed timeline and roles and responsibilities for members of both SFHSS' and Respondent's teams.

Please see Appendix B (Current Fields and Files) for information on the current case management files.

VIII. Minimum Qualifications. Qualified Respondents shall:

VIII.01. Have a fully developed case management software solution applicable to an internal EAP.

VIII.02. Have at least three (3) years of experience supporting internal EAP clients with its case management software solution.

VIII.03. Certify to become an approved City Supplier by August 1, 2023.¹⁰

IX. Respondent Selection and Online Demonstration

Each Respondent that timely submits a Vendor Response Form [Appendix A] and meets the Minimum Qualifications (Section VIII.) will be invited to demonstrate its EAP

⁹ SFHSS is currently in partnership with Athena Software (acquired by SSG Social Solutions Canada, Inc. in 2021) for our EAP case management software. As the current/incumbent solution, pursuant to the San Francisco Administrative Code and SFHSS contracting procedures, Athena Software is permitted to submit a response to this RFP.

¹⁰ Information on becoming a SF City Bidder, and subsequently a SF City Supplier, is available at <https://sfcitypartner.sfgov.org/pages/index.aspx>.

case management software via Microsoft Teams, WebEx, or a comparable online meeting and web conferencing platform, to an SFHSS RFP evaluation panel between April 17, 2023 and April 21, 2023.

Each demonstration will be limited to two (2) hours. Respondents should be prepared to demonstrate any feature listed in the Vendor Response Form or related to a feature listed in the Vendor Response Form.

X. Additional Provisions

IX.01. Limitations on the Number of Proposals and Joint Proposals.

In the instance of a planned joint Proposal from two (2) or more parties, one entity must be identified as the Respondent/Primary Proposer. The contact, address, telephone and email information are required for the Respondent as well as any Joint Respondent(s). Respondent will serve as SFHSS primary point of contact, and the Respondent will bear the sole responsibility for performance under any awarded contract. A Respondent may not submit more than (1) Proposal in response to the RFP. Respondent must have the legal authority to independently enter into a contract to perform services described in the RFP.

IX.02. Relevant Information.

Each proposal shall contain only relevant information that is specific to this RFP and the specific questions and requests contained herein. While there is no intent to limit the content of any proposal, a Respondent must emphasize simple, straightforward and concise statements that satisfy the requirements of the RFP, and clearly identify applicable subsections or scope. Respondents accept that superfluous information such as but not limited to, generic marketing information, may be disregarded.

IX.03. Disposition of Proposals, Public Disclosure and Confidentiality.

Upon opening, all Proposals in response to the RFP shall become the exclusive property of SFHSS and may be subject to public disclosure pursuant to the San Francisco Sunshine Ordinance (San Francisco Administrative Code Sec. 67.24(e)) and the California Public Records Act (California Government Code, Sec. 6250). In accordance with San Francisco Sunshine Ordinance, contracts, bids, responses to requests for proposals, Proposals, and all other records of communications between the Health Service Board, the officers and employees of SFHSS, members of the Evaluation Panel, and persons or firms seeking

contracts, including but not limited to respondents, prospective bidders, and incumbent providers of in-scope services, shall be open to inspection immediately after a contract has been awarded. Nothing in this request for proposals requires the disclosure of the net worth of a private person or organization or other proprietary financial data submitted for qualification for a contract or other benefit until, and unless, that person or organization is awarded the contract or benefit. Information provided which is covered by this paragraph will be made available to the public upon request.

IX.04. Confidentiality.

If a Respondent believes that any portion of its Proposal is exempt from public disclosure under the San Francisco Sunshine Ordinance or applicable California Public Records law, such portion may be marked "CONFIDENTIAL". SFHSS may deny public disclosure of any portions so designated and will work with Respondent to preserve confidentiality of documents. The submittal of a Proposal with portions marked CONFIDENTIAL shall constitute the Respondent's agreement, in consideration for SFHSS' willingness to receive such response, to reimburse SFHSS for, and to indemnify, defend, and hold harmless SFHSS, the Health Service Board, the City and County of San Francisco, its officers, fiduciaries, employees, and agents from and against: (a) any and all claims, damages, losses, liabilities, suits, judgments, fines, penalties, costs and expenses including, without limitation, attorneys' fees, expenses and court costs of any nature whatsoever (collectively, "Claims") arising from or relating to SFHSS' nondisclosure of any such designated portions of a Proposal; and (b) any and all Claims arising from or relating to SFHSS' public disclosure of any such designated portions of a Proposal if disclosure is deemed required by law or by court order.

IX.05. Conflict of Interest.

SFHSS cautions Respondents that the California Government Code Section 1090 conflict of interest prohibition pertaining to public officials and government employees has been interpreted to prohibit contractors, vendors and/or suppliers (Contractors) from being financially interested in any contract that they help create. It is the sole responsibility of each Respondent, and their employees/contractors, to determine whether such a conflict of interest exists or may exist. Respondent, and staff, will be required to agree to comply fully with and be bound by the applicable provisions of state and local laws related to conflicts of interest, including Section 15.103 of the City's Charter, Article III

(Conduct of Government Officials and Employees), Chapter 2 (Conflict of Interest and Other Prohibited Activities) of City's Campaign and Governmental Conduct Code, and Section 87100 et seq. and Section 1090 et seq. of the Government Code of the State of California. Respondent, Account Executive, and key staff will be required to acknowledge that it is familiar with these laws; certify that it does not know of any facts that constitute a violation of said provisions; and agree to immediately notify the City if it becomes aware of any such potential conflicts during the term of the Agreement. Individuals who will perform work for SFHSS on behalf of Respondent might be deemed Contractors under state and local conflict of interest laws. If so, such individuals will be required to submit a Statement of Economic Interests, California Fair Political Practices Commission Form 700, to the City within ten calendar days of the City notifying the successful Respondent that the City has selected Respondent.

IX.06. Request for Clarification from Respondent(s).

At any time during the Proposal evaluation process, SFHSS may require a Respondent to provide written clarification regarding its Proposal. However, SFHSS reserves the right to make an award without further clarifications of Proposals received.

IX.07. Contract Delay Contingency.

In the event the implementation date/service start date under an agreement resulting from this RFP is delayed up to one (1) year for any reason, all parties shall make a good faith effort to maintain the contractual relationship and to amend the applicable agreement as necessary to address the delay. In the event of a delay, SFHSS also reserves the right to terminate the applicable agreement at its sole discretion.

IX.08. Cancellation.

Should Respondent wish to cancel, revise, or rescind its Proposal, a written letter so stating must be received by SFHSS via email (patrick.chang@sfgov.org, cc: michael.visconti@sfgov.org) before the Deadline for Proposals. Should Respondent wish to revise a Proposal, the revised Proposal must be received before the Deadline for Proposals, at which point any previously received proposals shall be set aside. In no case will a statement of intent to submit a revised Proposal, or commencement of a revision process, extend the Deadline for Proposals for any Respondent.

IX.09. Validity of Response.

Any proposal and/or quote must remain valid for at least ninety (90) days. This includes services, pricing, as well as the proposed staffing assignments.

IX.10. Expenses.

There is no expressed or implied obligation for SFHSS to reimburse any Respondent for expenses incurred in responding to the RFP. SFHSS reserves the right to retain all submitted questions and responses to the RFP and use any information or ideas contained therein.

IX.11. Authorized Communications.

Respondent will direct all communications, in writing, via email, to Patrick Chang (patrick.chang@sfgov.org) cc: michael.visconti@sfgov.org.

IX.12. Unauthorized Communications.

Respondents are precluded from contacting other SFHSS staff, the Health Service Board, members of the RFP evaluation panel, or any partners or consultants of SFHSS including but not limited to, other City employees, representatives, or officials, regarding this RFP. Respondents are precluded from issuing news releases, social media postings, media releases, or other similar public releases of information regarding the RFP or the contents herein without prior written approval from SFHSS. Failure to adhere to the prohibition on unapproved communications may result in disqualification from the RFP and/or rejection of a Proposal.

IX.13. Rejection of Proposal.

SFHSS reserved the right to consider as acceptable only those Proposals submitted in compliance with all the requirements set forth in this RFP, all appendices hereto, and which demonstrate an understanding of the scope of services requested. At its sole discretion, SFHSS reserves the right to reject any response and/or proposal for reasons including, but not limited to:

- Collusion among two or more respondents or prospective respondents (including, but not limited to, Respondent's employees, consultants, officers, partners or subcontractors)

- Conflicts of interest;
- Submission of a conditional or incomplete Proposal;
- Failure to respond in the format required, both in content and sequence, as applicable;
- Failure to submit the response by the specified deadline;
- Failure to answer any question in this RFP;
- Failure to meet a qualification or requirement;
- False or misleading statements;
- The submission of a non-responsive Proposal;
- Proposals submitted by a non-responsible Proposer, and/or
- Any other reason which, in SFHSS' opinion, the response or Proposal fails to meet the conditions and requirements of this RFP.

IX.14. No Offer to Contract.

Issuance of this RFP in no way constitutes a commitment by SFHSS, the Board, or the City, to award a contract. Acceptance of a Proposal neither commits SFHSS to award a contract to any Respondent, even if all requirements stated in this RFP are met, nor limits our right to negotiate in our best interest. SFHSS reserves the right to contract with a respondent for reasons other than lowest price.

IX.15. Reserved (Commissions).

IX.16. Consent to Reassign Personnel.

If selected by SFHSS and contracted for services as a result of this RFP, Respondent shall not reassign personnel assigned to the contract during the term of the agreement without prior notification to SFHSS and the Board, including the account executive, account manager, or key staff. If personnel are unable to perform duties due to illness, resignation, or other factors beyond Respondent's control, Respondent shall make every reasonable effort to provide suitable Substitute Personnel for review and approval by SFHSS. Respondent shall coordinate with SFHSS regarding the selection of Substitute Personnel including from the personnel identified within the Respondent's RFP response, but not limited to, in-person interviews with proposed Substitute Personnel. Substitute Personnel shall not automatically receive the salary and/or hourly rate

of the individual or position being replaced, if applicable to the proposal and resulting agreement, and SFHSS and Respondent shall negotiate the salary/hourly rate of any substitute personnel into the agreement. If applicable, the hourly rate negotiated shall depend, in part, upon the experience and individual skills of the proposed substitute personnel, and the final negotiated rate may not exceed the hourly rate stated in the agreement.

IX.17. Removal of Personnel.

SFHSS reserves the right to request that personnel be removed from performing any services upon written notice including, but not limited to, for actual or perceived conflict(s) of interest, misrepresentation of skill or experience, or failure to meet the requirements of the agreement resulting from this RFP. If any personnel are removed, Substitute Personnel shall be assigned.

IX.18. Objections to the RFP Terms.

Should any Respondent object on any ground(s) to any provision(s) or legal requirement(s) set forth in this RFP, Respondent must, not less than ten (10) calendar days before the Deadline for Proposals, provide written notice to SFHSS at patrick.chang@sfgov.org, cc: michael.visconti@sfgov.org setting forth with specificity the grounds for the objection(s). The failure of a Respondent to object within the time allowed, and in the manner set forth in this paragraph, shall constitute a complete and irrevocable waiver of any such objection(s).

The deadline for objections to this RFP is Saturday, March 18, 2023 (11:59 PM PT).

IX.19. Campaign Reform Ordinance.

Respondents must comply with Section 1.126 of the San Francisco Campaign and Governmental Conduct Code, which states as follows:

No person who contracts with the City and County of San Francisco for the rendition of personal services, for the furnishing of any material, supplies or equipment to the City, or for selling any land or building to the City, whenever such transaction would require approval by a City elective officer, or the board on which that City elective officer serves, shall make any contribution to such an officer, or candidates for such an office, or committee controlled by such officer or candidate at any time between commencement of negotiations

and the later of either (1) the termination of negotiations for such contract, or (2) three months have elapsed from the date the contract is approved by the City elective officer or the board on which that City elective officer serves.

If a Respondent is negotiating for a contract that must be approved by an elected local officer or the board on which that officer serves, during the negotiation period Respondent is prohibited from making contributions to:

- The officer's re-election campaign;
- A candidate for that officer's office; and/or
- A committee controlled by the officer or candidate.

The negotiation period begins with the first point of contact, either by telephone, in person, or in writing, when a Contractor approaches any City officer or employee about a particular contract, or a City officer or employee initiates communication with a potential Contractor about a contract. The negotiation period ends when a contract is awarded or not awarded to the Contractor. Examples of initial contacts include: (1) a vendor contacts a City officer or employee to promote himself or herself as a candidate for a contract; and (2) a City officer or employee contacts a Contractor to propose that the Contractor apply for a contract. Inquiries for information about a particular contract, requests for documents relating to this RFP, and requests to be placed on a mailing list do not constitute negotiations.

Violation of Section 1.126 may result in the following criminal, civil, or administrative penalties:

- Criminal. Any person who knowingly or willfully violates Section 1.126 is subject to a fine of up to \$5,000 and a jail term of not more than six months, or both.
- Civil. Any person who intentionally or negligently violates Section 1.126 may be held liable in a civil action brought by the civil prosecutor for an amount up to \$5,000.
- Administrative. Any person who intentionally or negligently violates Section 1.126 may be held liable in an administrative proceeding before the Ethics Commission held pursuant to the Charter for an amount up to \$5,000 for each violation.

For further information, Respondents should contact the San Francisco Ethics Commission at (415) 581-2300 (<https://sfethics.org/>).

IX.20. Reservations of Rights by the City.

The issuance of this RFP does not constitute an agreement by SFHSS, the Health Service Board, or the City that any contract will be entered into by SFHSS, the Board, or the City. SFHSS expressly reserves the right at any time to:

- Waive or correct any defect or informality in any response, proposal, or proposal procedure;
- Reject any or all Proposals;
- Reissue a Request for Proposals, Request for Qualifications or a similar procurement;
- Prior to Deadline for Proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals;
- Procure any services specified in this RFP by any other means; and/or
- Determine that no contract(s) will be pursued.

IX.21. Contract Negotiation.

Following the announcement of the final ranking of Respondents, SFHSS will commence contract negotiations with the highest ranked Respondent. If SFHSS is unable to negotiate a satisfactory contract with the highest-ranked Respondent within a reasonable time, including approval of the proposed solution/software by the City's Department of Technology, as applicable, or if the highest ranked Respondent deviates materially from the terms of the RFP including all addendum, amendments and attachments thereto, SFHSS, in its sole discretion, may terminate negotiations with the highest ranked Respondent and begin contract negotiations with the next highest ranked Respondent.

IX.22. Protests.

Within five (5) working days of the date of SFHSS' issuance of a notice of non-responsiveness, any Respondent that has submitted a Proposal and believes that SFHSS has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by SFHSS on or before the end of the fifth (5th) working day following SFHSS' issuance of the notice of non-responsiveness. The day of the issuance of the notice of non-responsiveness shall not count towards these five working days (day zero). The notice of protest must include a written statement specifying in

detail each and every ground asserted for the protest. The protest must be signed by an individual legally authorized to represent Respondent, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify all facts and evidence that would support and/or justify the protest.

Within five (5) working days of the date of the announcement and/or notice of the results of the RFP by SFHSS, any Respondent that has submitted a responsive Proposal and believes that SFHSS has incorrectly ranked the Respondents, may submit a written notice of protest. Such notice of protest must be received by SFHSS on or before 5:00 PM (PT) on the fifth (5th) working day after the day of the notice of final ranking (day zero).

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent Respondent, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify all facts and evidence that would support and/or justify the protest.

Respondent is responsible for delivery to, and confirmation of receipt by, SFHSS of any protest by the deadlines specified in this Section.

Protests must be delivered via email to:

Michael Visconti
Contracts Administration Manager
San Francisco Health Service System
michael.visconti@sfgov.org

With copies sent to: abbie.yant@sfgov.org; jennifer.donnellan@sfcityatty.org

Protests or notice of protests made orally or by any other means, including, but not limited to, by telephone, by U.S. Postal Service or common carrier, in-person, or by messenger, will not be considered or accepted by SFHSS.

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**Appendix A – Vendor Response Form
EAP Case Management Software Solution RFQ**

1) Does your organization meet the minimum qualifications referenced in Article VIII [Minimum Qualifications] of this Request for Proposals:

Put an "X" next to one:

Yes: _____ No: _____

2) Contact, Tax & Vendor Information Page

a) Company or Organization:

- Name:
- Address:
 - Physical:
 - Website:
- Federal Tax ID:
- City Supplier ID (if applicable):

b) Primary Contact for purposes of this RFP:

- Name:
- Email:
- Telephone:

c) Primary Contact for City Department of Technology and SFHSS Cybersecurity Assessment:

- Name of Account Lead:
- Email:
- Telephone:
- Name of Technical Lead (if different):
- Email:
- Telephone:

3) Vendor Response Form Questionnaire

Please note: The EAP Case Management Vendor Attributes and Software Features below are listed in no particular order of importance or relevance.

EAP Case Management Vendor Attributes and Software Features	(A) Standard Software Feature	(B) Feature Under Development (as of the date of Proposal / RFP Response)	(C) Currently Unavailable, Requires Customization, and/or at an Additional Cost
Pre-appointment data entry by Member/Client/Patient which shall include workplace information, demographic data, contact information, PHI and PII	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secure Access for SFHSS EAP Counselors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multi-factor authentication for license holders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secure domestic (U.S.A) data hosting and backup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Audit and compliance measures and/or certifications (SOC 1/2, ISO/IEC)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HIPAA compliance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to surrender and/or destroy SFHSS Data upon request and/or termination of business relationship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EAP Case Management Vendor Attributes and Software Features	(A) Standard Software Feature	(B) Feature Under Development (as of the date of Proposal / RFP Response)	(C) Currently Unavailable, Requires Customization, and/or at an Additional Cost
Push calendaring data to Microsoft Outlook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unlimited space for session notes and number of sessions/contacts with EAP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pre-loaded and expandable lists of clinical and organizational problem areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In-program expandable list of providers/programs for referrals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking of organizational services by type of service, department receiving service, hours of service, and number of participants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking of Member/Client/Patient services by name, unique identifier, type of service, department, division, and/or organization, number of hours, and outcome	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking of Member/Client/Patient cancellations, no-shows and rescheduled appointments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EAP Case Management Vendor Attributes and Software Features	(A) Standard Software Feature	(B) Feature Under Development (as of the date of Proposal / RFP Response)	(C) Currently Unavailable, Requires Customization, and/or at an Additional Cost
Tracking of any/all services, clinical and/or organizational, provided to Member/Client/Patient under one unique identifier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to attach an MS Word or Adobe PDF file directly to a Member/Client/Patient file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Integrated validated pre/post assessments that measures anxiety and/or depression	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other integrated assessment(s) or survey(s) common to EAP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability for non-clinical staff to view EAP non-confidential data and reports on a need-to-know basis (e.g., limiting permissions for some licenses)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to produce deidentified and HIPAA compliant reports (no PHI, PII, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User Training and post-implementation/go-live support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24/7 Emergency Technical Assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EAP Case Management Vendor Attributes and Software Features	(A) Standard Software Feature	(B) Feature Under Development (as of the date of Proposal / RFP Response)	(C) Currently Unavailable, Requires Customization, and/or at an Additional Cost
99.999% up-time guarantee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to convert data from Penelope SaaS (if required)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking and reporting, with graphs, of monthly, quarterly, annual and year over year data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking and reporting, with graphs, of individual services including # and type of calls into EAP, new clients and # of total clients per month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking and reporting, with graphs, of individual demographic data including department, age, gender identification, race, sexual orientation, occupation, health plan, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking and reporting, with graphs, of referral types both into the EAP (supervisor, HR, union, self, etc.) and from EAP (health plan, legal, financial, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking and reporting, with graphs, of Individual Services for presenting issues by type and frequency and appointment type (telephone, face to face, virtual, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EAP Case Management Vendor Attributes and Software Features	(A) Standard Software Feature	(B) Feature Under Development (as of the date of Proposal / RFP Response)	(C) Currently Unavailable, Requires Customization, and/or at an Additional Cost
Tracking and reporting, with graphs, of Individual Services for total # of sessions used per client, average # of sessions/client across demographics and number and ratio of attended to no-shows for counseling services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking and reporting, with graphs, of Organizational Services which include, Consultations, Orientations, Critical Incidents, Training/Workshops, Mediations, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking and reporting, with graphs of Organizational Services by name, type (in-person, virtual, etc.), department, # of people served, unique and/or recurring employees served and % of registered to show for trainings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking of training and/or workshops provided at the department, division(s), or group-level, including title of training, location, type, number of attendees, hours of service, department served, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking of Critical Incident /Disruptive Event Response at the individual and department/division/ group-level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internal messaging capabilities (license holder to license holder)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EAP Case Management Vendor Attributes and Software Features	(A) Standard Software Feature	(B) Feature Under Development (as of the date of Proposal / RFP Response)	(C) Currently Unavailable, Requires Customization, and/or at an Additional Cost
External messaging capabilities (license holder to Member/Client/Patient)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DocuSign Compatible	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compatible with Workplace Outcome Suite (WOS) Survey	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to extract data in .pdf , Microsoft Excel (.xls/.xlsx) and .cvs file.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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4) Respondent Cost Quote

Respondents are asked to submit a cost quote for the first year of service as well as the next four (4) years. If any services are included within the underlying licensing or annual fee, please note as "Included".

Year One:

Implementation and Testing including, but not limited to, server set-up, hosting prior to go-live date, training for SFHSS	
Data Migration and Conversion	
WebEx training for SFHSS EAP (up to 3 hours)	
Four (4) licenses for twelve (12) months, including any week(s) prior to go-live for training purposes and 24/7/365 technical support	
Hourly fee for customization	
<i>Description of any additional services requiring additional fees or one-time costs:</i>	

Each additional year up to four additional years:

Four (4) licenses for twelve (12) months, including any week(s) prior to go-live for training purposes and 24/7/365 technical support	
Cost per additional license (above the first four licenses)	

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Appendix B – Current Fields and Files

It is the expectation of the SFHSS the selected Respondent will be able to convert and migrate, at a minimum, 3,650 files from the current EAP (Section VII, FN 9).

B.1. Fields. The following are the types of fields the selected solution/software should ideally have or be able to create, or have a comparable field or customizable field or option:

B.1.1. Client demographic information. Including, but not limited to:

- *Name*
- *Address*
- *Phone*
- *Email*
- *DOB*
- *Last 4 of SSN*
- *Language (spoken/preferred)*
- *Age*
- *Gender* (Male, Female, Non-Binary, Not Stated, Other Not Listed, Trans Female, Trans Male)
- *Relationship Status* (Divorced, Living Together/Domestic Partner, Married/Registered Domestic Partner, Separated, Single, Never Married, Widowed, Unknown)
- *Occupation* (Elected Official, Exec/Admin/Mngr, Laborer, Machine/Transport Operator, Office/Clerical Worker, Paraprofessional, Professional/Technician, Service Worker, Skilled Craft Worker, Supervisor)
- *City Department*
- *Years with City*
- *Job Title*
- *Union*
- *Employment status* (Full-time, Part-time, Per Diem, Temp/As Needed, Unknown)
- *City County Status* (Activated DSW, Active, Admin Leave, Disability, FMLA, Furloughed, Personal Leave, Probation, Sick Leave, Suspension, Worker's Comp, Working Remote)

- *Health Plan* (as of the date of this RFP, health plan entry options include: Blue Shield Access+, Blue Shield PPO/Accolade, Blue Shield Trio, Health Net Canopy Care, Kaiser, UHC, Veteran's Benefits, Other, and None)
- *Sexual Orientation* (Bi-Sexual, Gay/Lesbian, Straight/Heterosexual, Prefer not to say, Other not listed)
- *Race/Ethnicity* (American Indian or Alaska Native, Asian, Black or African American, Filipino, Hispanic or Latino, Multi racial, Native Hawaiian or Pacific Islander, White, Unknown)
- *Highest Level of Education* (Bachelor's degree, Master's degree, Doctorate degree, High School, Some College)
- *Referral Source* (BSU, Chaplain, CIRT, Coworker, Department Medical, Family/Sign Other, HR, Peer Support, Supervisor/Manager, Union, Worker's Comp).

B.1.2. Emergency contact information. The list of presenting issues should including, but not be limited to, the following:

- *Mental Health* (Anger Management, Anxiety, Grief/Loss, Life Transition, Depression, Stress, Personality Disorder, Psychosis, Delusional, Bipolar Disorder)
- *Physical Health* (Catastrophic Illness, Chronic Health Issues, Diabetes, High Blood Pressure, Weight)
- *Substance Abuse* (Alcohol, Cocaine, Crack, Marijuana, Methamphetamine, Nicotine, Opiate, Prescription Drugs)
- *Family/Marital/Relationship* (Caregiver, Child Abuse, Child Behavior, Childcare, Communication, Conflict, Divorce, Domestic Violence, Eldercare, Extended/Blended Family, Parenting, Separation)
- *Financial, Work-Related* (Work Dissatisfaction, Career, Co-worker Relations, Roles and Duties, Safety/Accidents, Discipline, Workplace Violence, Subordinate Relations, Work Performance, Worker's Comp related, Manager Relations, Tardiness, Work Quality/Quantity, Retirement Transition, COVID Work Related).

B.1.3. List of types of services. Including, but not limited to:

- Case Management
- Counseling
- Critical Incident Response

- Individual Consultation
- Management Consultation/Coaching

B.1.4. List of types of contact. Including, but not limited to:

- Face to Face
- Telehealth
- Phone Contact
- Email Received
- Email Sent
- Group Session
- On-site Consultation
- On-site Training
- Incident Response at/on Location
- Third party Consultation
- Video Event

B.2. Reports. Reports should list monthly, quarterly, annually and year over year data. Reports should be delivered in document and graph form.

The following are the types of reports the chosen solution should ideally be able to provide or create, or have a comparable report or customizable report or option:

B.2.1. Reports for Individual Services should include, but not be limited to, the following:

- Number of calls/month
- Number of new clients/month
- Total number of clients
- Type, frequency and severity of Presenting Issues
- Departments
- Age
- Type and frequency of Gender
- Sexual Orientation
- Race

- Relationship Status
- Occupation
- Health Conditions and Health Plan
- Number and type of Referrals and Appointments
- Average # of sessions used
- Number and ratio of attended to no-show for counseling sessions.

B.2.2. Reports for Organizational Services should include, but not be limited to, the following:

- Total, type and frequency of Organizational Services
- Total # and types of Consultations and Participants
- Number of unique participants
- Total # of and people served for Orientations
- Total # of Critical Incidents, department and # of people served
- Total # of and participants in types of Training/Workshops
- Average # of participants in Training/Workshops
- Total # and type of mediations provided
- Total # of and participants in Group Support Sessions
- Total # of unique and returning employees attending Group Support Sessions