

**SAN FRANCISCO  
HEALTH SERVICE SYSTEM**

Affordable, Quality Benefits & Well-Being

**Request for Quote**

DATE: May 20, 2019

TO: EAP Case Management Software Vendors

FROM: Michael Visconti  
Contracts Administration Manager  
San Francisco Health Service System

RE: **EAP Case Management Software Solution RFQ (RFPQ#HSS2019.05)**

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**I. RFQ Intent**

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

**II. The San Francisco Health Service System**

SFHSS is dedicated to providing outstanding health and other employee benefits to SFHSS Members, preserving and improving sustainable, quality health benefits, enhancing the well-being of employees, retirees and their families, and adhering to the highest standards of customer service. SFHSS executes all process phases related to benefit operations and administration of non-pension benefits (including health, dental and vision) for approximately 120,000 individuals, including both active and retired employees of the City and County of San Francisco, the San Francisco Unified School District, the Community College of San Francisco, and the San Francisco Superior Court, and their covered dependents (Members) pursuant to The City and County of San Francisco Charter §§ 12.200-12.203 and A8.420-A8.432, and San Francisco Administrative Code §§ 16.700-16.703.

**III. SFHSS Employee Assistance Program**

The SFHSS Employee Assistance Program (EAP) is dedicated to advancing employee well-being and a healthier workplace environment and to address a work organization's particular business needs. EAP currently offers a variety of services to a pool of approximately forty-four thousand (44,000) employees including confidential counseling, consultation, coaching, education services, critical incident response, and navigating

Members to the mental health and substance abuse benefits provided to all Members enrolled in one of our many medical plan options<sup>1</sup>. EAP counselors are licensed therapists with many years of experience in mental health, consultation and workplace training, and as employees of the City and County of San Francisco.

#### **IV. Submitting your Response**

**Response Deadline.** Vendors must complete the Vendor Quote Form [Appendix A] and submit the form in MS Word or Adobe PDF format via email to [vanessa.price-cooper@sfgov.org](mailto:vanessa.price-cooper@sfgov.org) no later than 4:00 PM (PT) on Thursday, June 20, 2019. Any attachments to the Vendor Quote Form must not exceed ten (10) total pages and must be submitted with the Vendor Quote Form.

**Questions and Clarifications.** Any questions or requests for clarification must be submitted via email to [vanessa.price-cooper@sfgov.org](mailto:vanessa.price-cooper@sfgov.org) no later than 4:00 PM (PT) on Thursday, June 6, 2019. A summary of the clarifications, questions and answers will be posted to the SFHSS Website.

#### **V. Software Features**

The Vendor Quote Form details a list of 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 describing these functionalities.

#### **VI. Conversion**

At this time, SFHSS has no intention of converting the data from its legacy EAP case management software system (EAPISoft). SFHSS will reevaluate converting data from EAPISoft in 2020.

#### **VII. Minimum Qualifications.** Qualified Respondents shall:

1. Have a fully developed case management software solution applicable to EAP.

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<sup>1</sup> Further information about the SFHSS Employee Assistance Program is available at <http://www.myhss.org/eap>; a summary of the mental health benefits included in medical plans offers to employees and retirees is available at <http://www.myhss.org/Using-Your-Benefits/using-your-benefits-employees/mental-health-emp>.

2. Have at least three (3) years of experience supporting EAP clients with its case management software solution.
3. Certify to become an approved City Supplier by September 30, 2019. Information on becoming a SF City Bidder, and subsequently a SF City Supplier, is available here: <https://sfcitypartner.sfgov.org/pages/index.aspx>

**VIII. Respondent Selection and Online Demonstration**

Each Respondent that timely submits a Vendor Quote Form [Appendix A], will be invited to demonstrate its EAP case management software via WebEx (or comparable online meeting and web conferencing platform) to SFHSS between June 21, 2019 and June 27,2019.

Each demonstration will be limited to one hour. Respondents should be prepared to demonstrate any feature listed in the Vendor Quote Form or related to a feature listed in the Vendor Quote Form.

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

**1) Does your organization meet the minimum qualifications referenced in Article VII [Minimum Qualifications] of this Informal Quote:**

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 RFQ Contact:**

- Name:
- Email:
- Telephone:

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3) Vendor Quote Form Questionnaire

EAP Case Management Vendor Attributes and Software Features	(A) Standard Software Feature	(B) Feature Under Development	(C) Currently Unavailable, Requires Customization, and/or at an Additional Cost
Pre-appointment data entry by Member/Client/Patient.  Entered data may 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"/>

<b>EAP Case Management Vendor Attributes and Software Features</b>	<b>(A) Standard Software Feature</b>	<b>(B) Feature Under Development</b>	<b>(C) Currently Unavailable, Requires Customization, and/or at an Additional Cost</b>
Push calendaring data to Microsoft Outlook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Progress and session notes, EAP and clinical service planning tools, referral network, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking organizational development services by type of service, department to which the service was provided, hours of service by EAP staff, and number of participants.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking Member/Client/Patient consultations by name, type, 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"/>
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 assessment that measures anxiety and/or depression.	<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	(C) Currently Unavailable, Requires Customization, and/or at an Additional Cost
Other integrated assessment or survey 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"/>
99.999% up-time guarantee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to convert data from legacy EAPISoft SaaS (if required in 2020)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>EAP Case Management Vendor Attributes and Software Features</b>	<b>(A) Standard Software Feature</b>	<b>(B) Feature Under Development</b>	<b>(C) Currently Unavailable, Requires Customization, and/or at an Additional Cost</b>
Tracking and reporting of number of hours per Member/Client/Patient by Department/Employer/Division	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking of Member/Client/Patient touchpoints outside of in-person or phone appointments, e.g. which are in receipt of specific marketing, outreach and promotional materials.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking of training and/or workshops provided at the division, department or group-level, including name, location, type, number of attendees, hours of service, department served, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tracking hours by EAP division at the individual and division, department or group-level for critical incident and/or disruptive event response, including, but not limited to, a Crisis Management Briefing (CMB) or Critical Incident Stress Debriefing (CISD).	<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"/>
External messaging capabilities (license holder to Member/Client/Patient)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



<b>EAP Case Management Vendor Attributes and Software Features</b>	<b>(A) Standard Software Feature</b>	<b>(B) Feature Under Development</b>	<b>(C) Currently Unavailable, Requires Customization, and/or at an Additional Cost</b>
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"/>

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#### 4) Respondent Quote

Respondents are asked to submit a quote for the first years of service, and the next four (4) years, as follows:

Year One:

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

Each additional year up to five years:

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

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