



MISSOULA COUNTY REQUEST FOR PROPOSALS (RFP)

RFP Title:
Electronic Health Record – Missoula Public Health

RFP Due Date and Time:
Monday, December 29, 2025, by 1700

ISSUING DEPARTMENT INFORMATION

Procurement Officer:
Lester Bracey, Missoula County Assistant Auditor

Issue Date:
November 12, 2025

Procurement Officer Address:
Missoula County
200 W Broadway
Missoula, MT 59802

Procurement Officer Email and Telephone Number: lbracey@missoulacounty.us
406-258-3527

OFFEROR SUBMITTAL INSTRUCTIONS

Return Proposal to:

199 West Pine St. Missoula, MT 59802 or
email to lbracey@missoulacounty.us

Subject Line Must Be Titled:
Electronic Health Record – Missoula Public Health
RFP Response Due Date:
Monday, December 29, 2025 by 1700

OFFEROR CONTACT INFORMATION AND AUTHORIZATION

Offeror Name/Address:

Authorized Offeror Signature:

Print name and sign in ink.

Offeror Phone Number:

Offeror FAX Number:

Offeror Email Address:

OFFERORS MUST RETURN THIS COVER SHEET WITH RFP RESPONSE

INSTRUCTIONS TO OFFERORS

Follow the format presented in the RFP. Points may be deducted during scoring for deviations from the prescribed format.

Provide complete answers or descriptions. Read all questions and requirements, and provide clear, concise responses. Do not assume Missoula County or the selection committee will have any familiarity with the firm's capabilities. Proposals are evaluated solely on the information and materials provided in the response.

Adhere to the proposal due date. Late proposals will **NOT** be accepted.

The following items must be included in the submission to be considered responsive:

- Signed Cover Sheet;
- Signed Acknowledgment of Addenda (if any);
- All mandatory proposal requirements;
- Correctly executed Missoula County "Affidavit for Trade Secret Confidentiality", if the proposal contains confidential or proprietary information as defined in MCA Title 30, Chapter 14.

RFP TIMELINE

EVENT	DATE
RFP issue date	November 12, 2025
Pre-proposal conference	
Deadline for submitting written questions	November 25, 2025
Written responses posted to County website	December 2, 2025
RFP response due date	December 29, 2025
Offeror interviews/product demonstrations	January 13, 2026 between 1:00-3:00 MST or January 16, 2026 between 12:30-2:30 MST
Contract award	March 1, 2026

SECTION 1 - RFP OVERVIEW

INTRODUCTION

Missoula County, on behalf of Missoula Public Health (MPH), is seeking proposals for an Electronic Health Record and Billing/Payment Management System (EHR) system that will meet the evolving needs of the Health Services Division, including our Immunization Clinic Services, Home Visiting Services, and Nutrition Services. This EHR must be sufficiently flexible to continue to evolve as programs and system requirements change. The County seeks to implement a system developed and maintained by a company with experience in working with public health programs which are unique from typical hospital/clinical-based programs.

CONTRACT PERIOD

The contract period will be March 1, 2026 through February 28, 2031, with the option of extending the contract for up to an additional five (5) years in accordance with § 18-4-313(2)(a), MCA.

SINGLE POINT OF CONTACT

The procurement officer will be the single point of contact for inquiries regarding this RFP from the date issued until the selection is publicly announced. Offerors may not communicate with any County officials or staff regarding this procurement, except at the direction of the procurement officer; and any unauthorized contact may disqualify the offeror from further consideration. Contact information for the procurement officer is:

Procurement Officer: Lester Bracey, Missoula County Assistant Auditor
E-mail Address: lbracey@missoulacounty.us

OFFEROR QUESTIONS

Any questions or requests for clarification or interpretation of this RFP must be addressed in writing to the procurement officer on or before November 25, 2025. For purposes of this RFP, “in writing” consists of email. Questions submitted must include:

- Company name and address;
- Contact information, including name, email address, telephone number, and fax number;
- Clear reference to the section, page, and item in question.

Questions received after the deadline will not be considered.

The County will provide a formal written addendum by December 2, 2025 to questions received by the deadline. No other form of interpretation, correction, or change to this RFP will be binding upon the County. Any addendum will be posted on the County’s website, <http://missoula.co/rfp>

An Acknowledgment of Addendum must accompany the RFP response.

PREFERENCES

Please note the following three Missoula County Resolutions:

- Resolution No. 2020-061 A Resolution Giving Procurement Preference to Disadvantaged Business Enterprises
- Resolution No. 2020-076 Montana Registered Apprentice Program Resolution
- Resolution No. 2021-001 A Resolution Stating A Preference For Purchasing Goods And Services From Firms Based In Missoula County

GENERAL REQUIREMENTS

Mandatory Requirements of the RFP

To be eligible for consideration, an offeror must provide all information requested in Section 4. A proposal that fails to provide any information requested may be deemed nonresponsive or be subject to deduction of points during scoring.

Understanding of Specifications and Requirements

By submitting a response to this RFP, the offeror attests to an understanding of the specifications and requirements described herein and agrees to comply with such.

Prime Contractor and Subcontractors

If this RFP results in a contract award, the offeror selected will be the prime Contractor and shall be responsible for all work of any subcontractors. The Contractor shall be responsible to the County for the acts and omissions of all subcontractors or agents and of persons directly or indirectly employed by such subcontractors, and for the acts and omissions of persons employed directly by the Contractor. Furthermore, nothing contained within this document or any contract documents created from any contract awards derived from this RFP shall create a contractual relationship between any subcontractor and the County.

Offeror's Signature

The proposal must be signed by an individual legally authorized to bind the offeror. The offeror's signature is a guarantee that the proposal has been developed without collusion. The offeror shall provide proof of authority of the person signing the RFP upon the County's request.

Offer in Effect for 120 Calendar Days

The offeror may not modify, withdraw, or cancel a proposal for a 120-day period following the RFP due date.

PROPOSAL REQUIREMENTS

Proposal Organization

Proposals must be organized into sections that follow the format of this RFP. Pages must be consecutively numbered.

Compliance with Instructions

Scoring points may be deducted for failure to comply with these instructions. Furthermore, a proposal may be deemed nonresponsive and disqualified from consideration if it does not follow the response format, is difficult to read or understand, or is missing required information.

Extraneous or Outside Information

Selection and contract award will be based on the offeror's proposal and the evaluation of other information outlined in this RFP. Offeror responses may not include references to information located on Internet websites, in libraries, or at other external locations unless specifically requested in the RFP. Such information will not be considered, will have no bearing on any award, and may result in the offeror's disqualification from further consideration.

Copies Required and Deadline for Receipt of Proposals

The proposal must be submitted to the County procurement officer by email.

Proposals must be labeled with the proposal's name and received by the procurement officer by the due date and time. The offeror is solely responsible for assuring delivery by the deadline.

Late Proposals

Regardless of cause, late proposals will not be accepted and will be automatically disqualified from consideration.

Preparation Costs

The offeror is solely responsible for all costs incurred prior to contract execution.

SECTION 2 - RFP STANDARD INFORMATION

AUTHORITY

This RFP is issued under the authority of the Missoula County Purchasing and Contracts Policy. The RFP process is a procurement option which allows the award to be based on evaluation criteria in addition to cost. Section 6 states the relative importance of all evaluation criteria, and only the evaluation criteria outlined in the RFP will be used.

OFFEROR COMPETITION

The County encourages free and open competition to obtain quality, cost-effective services and products. The specifications contained in proposal requests are designed to accomplish this objective.

PUBLIC INSPECTION OF PROPOSALS

Public Information

All information received in response to this RFP, including copyrighted material, is deemed public information and with one exception will be available for public viewing and copying after the proposal deadline. All requests for information must be made through the County's website at: <https://missoulacountymt.nextrequest.com/>.

The public will not be able to view bona fide trade secrets meeting the requirements of the Uniform Trade Secrets Act, Title 30, Chapter 14, Part 4, MCA. The procurement officer will remove any such trade secrets from the RFP prior to public viewing.

Bona Fide Trade Secrets

Confidential information meeting the requirements of Title 30, Chapter 14, Part 4, MCA will be available for review only by the procurement officer, the evaluation committee members, and limited other designees.

Before the RFP is made available to the public, the procurement officer will remove the confidential information if the following conditions are met:

- Confidential information is clearly marked and separated from the rest of the proposal.
- No confidential material is contained in the cost section.
- An affidavit from the offeror's legal counsel attesting to and explaining the validity of the trade secret claim is attached to the proposal. To make the trade secret claim, legal counsel must use the Missoula County "Affidavit for Trade Secret Confidentiality" form. This form can be requested by contacting Lester Bracey, Missoula County Assistant Auditor, at lbracey@missoulacounty.us
- The offeror shall pay all legal costs and fees associated with defending a claim for confidentiality if a "right to know" request is received from another party.

CLASSIFICATION AND EVALUATION OF PROPOSALS

Classification of Proposals as Responsive or Non-responsive

All proposals will be classified as either “responsive” or “non-responsive.” A proposal is considered “responsive” if it conforms in all material respects to the requirements of the RFP. A proposal may be found non-responsive if:

- Required information is not provided;
- The cost proposal is excessive or inadequate as measured by criteria stated in the RFP;
- Cost information is contained in the body of the RFP rather than in a separate, sealed envelope; or
- The proposal does not conform to the specifications described and required in the RFP.

If a proposal is found to be non-responsive, it will receive no further consideration.

Determination of Offeror Responsibility

The procurement officer and/or the selection committee will make a determination whether an offeror has met the standards of responsibility based on the requirements of the RFP. Factors used to determine the responsibility may include whether the offeror has:

- The appropriate financial, material, equipment, or human resources to meet all contractual requirements;
- A satisfactory record of integrity;
- The legal ability to contract with the County;
- Provided all information requested for use in the determination of responsibility; and
- A satisfactory record of past performance.

An offeror may be deemed “nonresponsible” at any time during the procurement process if information surfaces to support such a determination.

Evaluation of Proposals and Offeror Interviews/Product Demonstration

The remaining proposals will be scored according to the evaluation criteria stated in Section 6. The selection committee may ask finalists to appear for interviews or product demonstrations or to provide written responses to items requiring clarification. Any costs associated with interviews or product demonstrations are the sole responsibility of the offeror.

County’s Right to Investigate and Reject

The County may make such investigations as are deemed necessary to determine the ability of the offeror to provide the product or services specified. The County reserves the right to reject any proposal if the evidence obtained fails to satisfy the County that the offeror is properly qualified to perform the obligations of the contract. This includes the County's ability to reject a proposal based on negative references.

Offeror Selection and Contract Execution

After an evaluation of the offeror interviews and/or product demonstrations, the selection committee will recommend a contract award, which the procurement officer will communicate to the offeror selected. If the offeror does not accept all material terms of the County contract, the County may move to next ranked offeror or cancel the RFP. The work described in the RFP may begin only after the contract is signed by all parties.

COUNTY'S RIGHTS RESERVED

The RFP in no way constitutes a commitment by the County to award and execute a contract. If such actions are deemed in its best interests, the County, in its sole discretion, reserves the right to:

- Cancel or terminate this RFP;
- Reject any or all proposals received in response to this RFP;
- Waive any undesirable, inconsequential, or inconsistent provisions of this RFP;
- If awarded, suspend contract execution; or terminate the resulting contract if the County determines adequate county funds are not available.

SECTION 3 - SCOPE OF PROJECT OF PRODUCT SPECIFICATIONS

Missoula Public Health (MPH) is a local city-county health department that provides a variety of public health services to Missoula County residents and the surrounding areas. MPH is seeking an electronic health record and billing/payment management system (EHR) that is tailored to the services provided at MPH. The EHR must be a fully integrated, user-friendly and efficient system capable of tracking, documenting, storing all actions from the first client interaction through the completion of the billing process. It must be compliant with all legal and professional standards. It must be able to adapt to future needs of MPH. All proposals shall meet the provisions, requirements, and specifications listed in this proposal document.

MPH is seeking an EHR that is adaptable to our public health program needs. MPH does not offer sexually transmitted infection testing, family planning, or other routine or urgent medical care. Please do not include these as examples in the proposal.

I. Clinic Services is comprised of a variety of staff including Registered Nurses (RN), Client Services Representatives (CSR), Billing Specialists, Clinic Coordinator, Billing and CSR Supervisor, and Nurse Supervisor. RNs operate from standing orders to deliver services outlined below. MPH is a Vaccine for Children (VFC) provider and maintains both a VFC and a private inventory of vaccines. MPH offers a sliding fee scale and bills most private insurances for services. MPH Clinic Services offers:

- A. walk-in and scheduled appointments for the following
- B. routine vaccines for all ages
- C. limited laboratory testing (i.e. blood titers, lead screening)
- D. head lice checks
- E. tuberculosis screening,
- F. pop-up immunization clinics throughout the county, throughout the year, for routine and seasonal vaccines,
- G. scheduled pre-travel consults which include personalized travel risk assessment, routine and travel immunizations, and travel-related prescriptions.

II. Home Visiting Services is comprised of a variety of staff including RNs, Social Workers, Community Health Workers, Parent Educators, Data & Referral Assistants, Outreach & Services Coordinator, and Home Visiting Managers. Our home visiting programs focus primarily on the maternal-child-family populations. We have nationally recognized evidence-based programs such as Parents as Teachers and Nurse Family Partnership, in addition to our own home-grown programs such as our Welcome Home Baby program for brand new parents, our Foster Child Health Program that helps coordinate care and provide education/support for children in foster care, and our Missoula Healthy Families program that provides parenting support and education, resource and referral coordination, case management, and limited behavioral health counseling. Many of these programs are grant funded and require specific data tracking and reports. We bill limited Targeted Case Management Medicaid services, as well as limited fee-for-service billing with the Montana Department of Health and Human Services (DPHHS) Child and Family Services Division (CFSD). We are actively working on expanding our billing services with both Medicaid and private insurance related to limited behavioral health counseling and/or

lactation services. Our home visiting team serves clients in a variety of settings including the home, the office, off-site locations, as well as telehealth visits.

III. Nutrition Services is comprised of a variety of staff including Registered Dietitian Nutritionist (RDN), Health Educator, and Nutrition Services Manager. Our RDN primarily serves children 0 through 18 years and people who are pregnant. These nutrition consultations are offered in a variety of settings including the office, the client's home, or telehealth visits. We are currently billing for Early and Periodic Screening, Diagnosis, and Treatment (EPSDT) services and are actively working on expanding our billable services to include private insurance. Our Diabetes Prevention Program (DPP) offers both in-person and virtual group classes. Each cohort advances through evidence-based curriculum over 12-months. We bill Medicaid and Medicare and some employer benefits, we are actively working on expanding our billing to include private insurance.

MPH is seeking a qualified vendor to provide the full range of EHR functions including maintenance of all client records, client communication/portal, scheduling, reporting, billing and accounting. The vendor will work closely with Missoula County Information Systems Department and MPH. This RFP addresses the implementation period including installation, migration, training, and technical support as well as the capacity to provide ongoing maintenance and support of continuity of operations through a 5-year agreement between the vendor and MPH with the option of extending an additional 5-years if the EHR is meeting all functional requirements.

Specific requirements for the RFP include:

- Product installation
- Migration of records from current system to the new system
- On-site training of all end users
- Ongoing technical support and maintenance
- Continuity of operations and product enhancements and/or updates

SECTION 4 - OFFEROR QUALIFICATIONS

To enable the County to evaluate the capabilities of the offeror and its ability to supply the product and/or services specified in this RFP, the offeror must:

1. Demonstrate an understanding of the requirements of the RFP;
2. Demonstrate capacity to support implementation;
3. Employ staff with required expertise to complete all aspects of County's project within specified timeframe;
4. Possess evidence of organizational stability to ensure continuation of technical support into the foreseeable future;
5. Provide at least three references for projects completed within the last two years, preferably with public agencies; include customer name, contact name, email address, and telephone number; and project description;
6. Provide resumes and geographic locations of the senior executives and team members who will be involved with this project (resumes may include project implementations during employment at other firms);
7. Designate a project manager who will manage every aspect of the project and have full authority to commit resources of the firm to expedite and complete project tasks;
8. Identify all proposed subcontractors, if applicable, and their roles; the Offeror will be responsible for evaluating and pre-qualifying all subcontractors and for all aspects of the project provided/delivered by subcontractors.
9. Acknowledgement that the firm will enter into a Business Associate Agreement (BAA) with the County. The County anticipates using standard contract template and BAA language but may consider reasonable modifications or the vendor's BAA template as part of the negotiations process, provided all required HIPAA provisions are maintained.

10. Acknowledgement that the County owns all Protected Health Information (PHI) within the EHR.

RFP responses must follow the format outlined below and provide all information requested. Proposals which do not adhere to the prescribed format may be eliminated from further consideration. Each proposal must contain the following Sections:

PART 1: Company Profile and Experience of Personnel

- Introductory letter or statement of interest;
- Firm name, address, and principal contact for this RFP;
- Senior management of the firm;
- A general description of the firm including its primary source of business, organizational structure and size, number of employees, and years of experience performing services or supplying products similar to those described within this RFP;
- A resume or summary of qualifications, work experience, education, certification, and skills for all key personnel, including any subcontractors, who will perform any aspect of this contract. Include each individual's anticipated role and years of experience providing services similar to those described in this RFP.

PART 2: Firm Experience

- A detailed description of at least 3 similar past projects or products provided;
- The dates the services/products were provided;
- The client for whom the services were provided; and
- Contact information for the client.

PART 3: Financial Information

- Provide financial statements, preferably audited, for 3 consecutive years immediately preceding the issuance of this RFP and copies of any quarterly financial statements prepared since the end of the period reported by the most recent annual report.

PART 4: Product Information

- Describe the attributes of the product that will satisfy the requirements of this RFP.
- How long has it been on the market?
- What differentiates it from competitors' products?
- What is its safety/performance history?
- Have there been any HIPAA-related security incidents or breaches?
 - Describe how you distinguish between a "security incident" and a "breach" in accordance with HIPAA.
 - Describe how you have or would address a "security incident."
 - Describe how you have or would address a HIPAA "breach" including your process for breach notification.
- Describe the built-in safeguards such as encryption (in transit and at rest), audit controls, and audit trails.
- Where are service personnel located?
- Describe the availability of replacement parts.
- Provide the terms of any warranty including any disclaimers and/or exclusions on this product.
- Describe any buy-back programs the company offers, if applicable.

PART 5: Technical Proposal

Functionality requirements for Information Technology (this section will be scored as Pass/Fail by Missoula County IT personnel):

Provide a statement that the system offered satisfies all technical requirements outlined below for on premise system. If it does not, identify which elements are not available or whether there are alternative means to satisfy the requirement. Alternative technical features will be evaluated individually for suitability.

Cloud/SaaS/Hosted systems will be evaluated utilizing Attachment A “Cloud-Based Solution Checklist”.

I. Application System Requirements.

A. Database

1. Must support MS-SQL Server
2. Preferably 2014 minimum
3. Shared SQL server installation support required
4. Separate SQL instances are not desired

B. Operating System

1. Must be compatible with Windows Server 2019 or newer
2. If a web based application IIS support is preferred
3. .NET platform preferred
4. Will consider Linux platforms on an individual basis including LAMP stack

C. Authentication

1. Active Directory based authentication required for admin and user access.
2. Multifactor authentication (MFA) support required.
 - a) Preferably DUO
3. Must support Entra ID, SAML 2 or ADFS integration if cloud based

D. Logging/Auditing

1. System must provide logging and audit capabilities
2. Syslog support desired

E. Technical documentation required:

1. All system technical requirements documentation
2. Database recovery model supported
3. Network diagrams including protocols and services required
4. Completed “Cloud-Based Solution Checklist”: Attachment A

F. Artificial Intelligence (AI)

1. Describe the nature of any AI within the system i.e. is it curative or generative?
2. Describe the use of any AI within the system, including, what types of data are used as inputs; what type of outputs are produced by the AI model(s); and what type of data or processes are used to train or refine the AI model(s).
3. Describe whether the AI features can be limited or disabled and, if so, how?
4. Describe how you employ AI in a responsible/ethical manner.
5. See Attachment B – Missoula County Artificial Intelligence Policy

Subsequent Functional Requirements will be scored by the selection committee.

Please provide descriptions of how each section will be met.

I. Functional requirements for all MPH programs:

- A. Ability to apply role-based access to staff, with the ability to customize access to fit within the definitions of our employees’ job descriptions.

- B. Seamless data conversion/migration from current EHR to new EHR including scanned documents, client encounters/provider notes, household information (to include individuals within the household, income), demographics, administered vaccines, and internal notes such as attempts to contact client.
- C. User-friendly, **customizable by program/provider**, appointment scheduling.
- D. User-friendly, **customizable by program/provider**, appointment confirmation and reminder notifications.
- E. User-friendly, **customizable by program/provider**, ability to message clients by text or email for registration and screening questions and other communications.
- F. Secure client portal to access records, including immunization records and to be able to complete forms, schedule appointment (for some services) and communicate with care team members.
- G. Any public-facing components of the system, such as client or client portals, online forms, or scheduling tools, must comply with WCAG 2.1 AA and Section 508 standards to ensure accessibility for all users. Internal systems should be designed to support or be compatible with commonly used assistive technologies (for example, screen readers, keyboard navigation, or high-contrast display settings) to allow effective use by County staff who may require accommodations.
- H. Online bill-pay portal.
- I. User-friendly and efficient client record creation and documentation – this should be seamless with minimal “clicks” or pop-up boxes or duplicative information on multiple screens.
- J. Pronouns and preferred name should be incorporated throughout each client record.
- K. Ability to scan and attach files to individual client charts.
- L. Ability to document consents, release of information, services rendered, narrative notes.
- M. Ability to merge duplicate records.
- N. Track Medicaid Passport Provider Authorization and re-authorizations.
- O. Ability to create note templates customized to MPH’s services offered.
- P. Ability to chart Behavioral Health notes in a confidential/secured segmented area of the EHR.
- Q. Ability to document with a client note/encounter:
 - 1. Past medical history
 - 2. Allergies
 - 3. Medications
 - 4. Height (inches and centimeters)
 - 5. Weight (pounds and kilograms)
 - 6. BMI
 - 7. Growth charts including:
 - a) World Health Organization for ages 0-24 months; and
 - b) Centers for Disease Control for >24 months
 - 8. Vital signs (blood pressure, pulse, respiration, O2 Saturation)
- R. Ability for local “administrators” or “key staff” to make changes (i.e. update drop-down lists, update note templates, de-duplicate entries, etc.).

II. **Functional requirements for Reports:**

- A. Must meet all department, city, county, grant, contract, and financial reporting requirements or needs including maintaining and updating reports based on statutory and agency requirements.
- B. Ability to run reports at an agency level.
- C. Ability to run customizable reports (Ad hoc), regardless of how it’s entered (required fields and/or customized forms).
- D. Clinic Services reports requirements:

1. Must be able to run reports with multiple searchable fields/combinations including but not limited to the following: client name/account number, age at time of vaccination, name of the vaccine, lot number, VFC eligibility, date the vaccine was administered
 - a) reports by Immunization Clinic, Travel Clinic, and off-site clinics.
 - b) reports by vaccine type (i.e. MMR) or other service.
 - c) reports by vaccine inventory type (i.e. VFC, private, VFA).
 - d) reports by payer type (Medicaid, private insurance, agency, self-pay, Medicare).
 - e) reports by age at date of service.
 - f) reports by unduplicated client.
 - g) reports by date of service.
- E. Home Visiting report requirements:
1. Run reports by Home Visiting visit types/location.
 2. Run reports by incoming or outgoing referrals.
 3. Run reports by Caseload.
 4. Run reports by provider notes/encounters that are missing information to move on to billing.
 5. Run reports by length of time between getting initial referral and closing the referral.
 6. Run reports by length of time between the visit date and actual charting date.
 7. Run reports by the Maternal Child Health Block Grant requirements (unduplicated count of clients, by age, primacy pay source, race, visit type and Standard Performance Measures chosen by MPH – this changes with the grant cycle).
 8. Run reports required by the Missoula Foster Child Health Program and funding partners (see Attachment C – Foster Child Health Reporting Requirements).
 9. Run any other grant required report.
- F. Diabetes Prevention Program report requirements:
1. Ability to run and print report of each client's class data (collated attendance data, goal attainment on above goals, graph of weight change, graph of A1C change).
 2. Ability to run report of clients who are "billable" and clients who are "scholarship".
 3. Ability to run report based on demographic information.
- G. Billing/Accounting report requirements:
1. Ability to run end-of-the-day balance reports.
 2. Accounts receivable by Program and Payor, linked to staff.
 3. Payments received by Program including tender type, linked to staff.
 4. Ability to run monthly and as needed reports:
 - a) accounts receivable,
 - b) account aging,
 - c) payment plans,
 - d) collection process,
 - e) balance billing,
 - f) agency billing,
 - g) third-party payers,
 - h) Medicaid and Medicare,
 - i) Incomplete provider notes,
 - j) Contractual write-offs and adjustments, compared to payments received by payor.

III. **Functional requirements for Billing/Accounting:**

- A. Ability to accept credit card payments and post within client's chart of account.
- B. Seamless electronic registration including real-time insurance eligibility check.
- C. Ability to print client visit statements for client at time of check-out.

- D. Ability to split a claim (i.e. pay cash up front for non-covered services, bill insurance for covered services).
- E. Electronic claims submissions through Clearinghouse including “pre-scrub” of claims forms to eliminate common errors.
- F. Migrate outstanding balances for clients and payors.
- G. Ability to review Claim Form before submitting claim.
- H. Ability to easily print claim as necessary without electronic submission.
- I. Ability to post payments automatically and manually.
- J. Ability to receive both electronic and paper payment.
- K. Ability to generate customizable and easy to understand client statements.
- L. Update all CPT and ICD 10 code sets as they routinely occur.
- M. Ability to enter multiple payor types for one client and have the payor type assigned to different programs (ex. Immunization services and Home Visiting services).
- N. Ability to adjust and/or archive payor information.

IV. Functional requirements for Clinic Services:

- A. Ability to maintain accurate inventory of Vaccine for Children (VFC), Vaccine for Adults or 317 (VFA), and private vaccine stocks.
- B. Must be able to document vaccines administered following the 5 rights of medication administration
- C. Must be able to track lot numbers.
- D. Must be able to update service costs when price changes occur.
- E. Must be able to utilize a custom sliding-fee-scale for VFC and VFA vaccine administration fees.
- F. Must be able to directly (real-time) upload to [Montana’s state immunization registry](#), imMTrax. Bi-directional communication would be preferred.
- G. Must be able to document vaccine refusals.
- H. Must be able to customize note templates including but not limited to routine immunization visits, lab visits, Tuberculosis screening, N-95 Fit Test screening, lice head checks, travel clinic pre-travel consults, follow up travel clinic visits, and off-site clinic encounters.
- I. Must be able to separate and track services by Immunization Clinic, off-site clinics and Travel Clinic.
- J. Must have a lab results landing page for processing results.
- K. Must interface with outside laboratories.

V. Functional requirements for Home Visiting Services:

- A. Ability for local “administrators” to make changes to language in client interventions.
- B. Ability to create individualized and easy to read client care plan template language that displays open date, program, domain, problem, intervention, status, and assigned to. Care plan must automatically populate within new notes/encounters and must be able to edit/update the care plan within the note/encounter.
- C. Ability to have embedded assessment tools (i.e.ASQ, ASQ-SE, Edinburgh, PHQ2 and PHQ3) with auto-scoring.
- D. Application must be customizable for the individual programs within Home Visiting.
- E. Ability to track source of referral into programs, staff assignment, admit and discharge dates.
- F. Ability to track referrals made by program staff and track the disposition of these referrals.
- G. Ability to print individual screens or full client records.
- H. Ability to link client age to “admit” and “discharge” dates by program.
- I. Ability to run staff caseload (admitted and open referral).
- J. Ability to track, by staff, visit types and dates.
- K. Ability to identify and track current community partners per visit, per client.
- L. Ability to track outgoing referrals and those who accepted services.
- M. Ability to track referrals that result in engagement by program
- N. Ability to track by “visit type/location” including:

1. Home visit (HV)
2. Office visit (OV)
3. Telehealth visit (THV)
4. Telephone visit (TV)
5. Case Management (CM)
6. Not Home visit (NHV)
7. Other visit (OTH)

VI. Functional requirements for Diabetes Prevention Program:

- A. Ability to personalize the templates for this program (intake versus class note templates).
- B. Ability to input and track health information in each template (weight, height, number of physical activity minutes) per participant.
- C. Ability for pt demographics to "flow" into next note (for instance, height of client prepopulates, but can be edited).
- D. Ability to build and track specific goals and goal attainment related to the program for each participant (# of sessions attended with >150 min of physical activity, # of total sessions attended, A1C reduction, weight loss reduction as examples).
- E. Ability to track program referrals made by staff and track the disposition of these referrals.
- F. Ability to track referrals to program made by inter-clinic resources or outside resources (i.e. PCP referral to program).
- G. Specific metabolic panel data page with dates of updated data saved.
- H. Ability to enroll participants to specific programs with embedded session/class schedule.
- I. Ability to select participant as "enrolled, completed course, or disenrolled."
- J. Ability to select date for each session with each progress note and edit entry for session description.
- K. Ability to print progress reports of anthropometrics collected during class enrollment.
- L. Display insurance provider with client name.

PART 6: Project Approach and Timeline

- Describe how the firm will approach this project.
- Provide a timeline for project completion.

PART 7: References

- Provide a minimum of 3 references that are using or have used the services/products of the type proposed in this RFP. At a minimum, provide the company name, location where the services/products were provided, contact person(s), contact telephone number, e-mail address, and a complete description of the services/products provided, and the dates of service.

Interviews or Product Demonstrations

The County reserves the right to conduct interviews or observe product demonstrations. If the County chooses to exercise this option, the offeror's key personnel for this project must be available for the interview or product demonstration in Missoula, Montana (at the Firm's expense). A virtual option hosted by Missoula County's Microsoft Teams platform may be considered.

INSURANCE REQUIREMENTS

Contractor will be required to maintain general liability insurance in the amount of one million dollars (\$1,000,000) per occurrence and two million dollars (\$2,000,000) in the aggregate. Contractor will be required to provide professional liability insurance. Contractor will also be required to purchase and maintain cyber liability insurance.

In accordance with §§ 39-71-401 and 39-71-405, MCA, Contractor agrees to provide workers' compensation insurance for its employees while performing work under this Agreement. Contractor shall provide proof of compliance in the form of workers' compensation insurance or documentation of corporate officer status and maintain such insurance or corporate officer status for the duration of the contract.

All insurance policies required must be from an insurance carrier licensed to do business in the State of Montana. Contractor agrees to furnish proof of required insurance to the County prior to commencing work under Agreement. Missoula County must be listed as an additional insured on the general liability insurance certificate for this Agreement unless otherwise specified by Missoula County.

SECTION 5 – COST PROPOSAL

The cost proposal must be submitted in a separate file to be considered responsive to the requirements of this RFP. The cost proposal must not be included in the body of the proposal. The cost proposal file may be sent in the same email as the rest of the proposal.

- Summary – provide an overall summary of the product and services of to be provided under this RFP including basic package and add-on options.
- Include itemized Budget with narrative justification and the total project cost.
- Include any costs/fees for enhancements, additional features, ongoing maintenance, technical assistance, and/or other items not otherwise included in the base project cost.
- Migration of existing records including scanned documents, household/family-members/demographic/income information, provider notes, including internal notes, outstanding balances, and administered vaccines.
 - Identify any exclusions and/or additional fees for migration.
- Technical Support.
- Training in person and virtual.
- Invoicing. The County's preference is an annual invoice over the 5-year agreement and over any extension(s).
- Include minimum number of active users/additional fees per user.

SECTION 6 – EVALUATION PROCESS

The selection committee will review and evaluate the proposals according to the criteria that follow, based on a total number of 100 points.

After the proposals are received, the County Procurement Officer will forward all proposals responsive to the requirements of the RFP to a selection committee appointed by the Missoula Public Health Department Director. The Selection committee members will rank the proposals based on the criteria listed below and at a subsequent meeting assure that fair, impartial, and comprehensive evaluations have been made. The selection committee may recommend contract award without further contact or discussion with Offerors, or the firms submitting the top rated proposals may be asked to make oral presentations.

If oral presentations are scheduled, the representatives of the firm who will be directly assigned to the account must be present at the interview. Afterwards, the finalists will be reevaluated, and a recommendation for contract award will be presented to the Missoula County Board of County Commissioners for approval.

EVALUATION CRITERIA

PROPOSAL EVALUATION CRITERIA	POINTS
PART 1: Company Profile and Experience of Personnel	10
PART 2: Firm Experience	10
PART 3: Financial Information	Pass/Fail
PART 4: Product Information	10
PART 5: Technical Proposal – Functionality for Information Technology	Pass/Fail
PART 5: Technical Proposal – Subsequent Functionality Components I-VI	30
PART 6: Project Approach and Timeline	10
PART 7: References (3)	10
Cost proposal	20
TOTAL POINTS	100

Missoula County Standard Terms and Conditions

By submitting a response to this invitation for bid, request for proposal, or limited solicitation, the vendor agrees to acceptance of the following Standard Terms and Conditions and any other provisions that are specific to this solicitation or contract.

ACCEPTANCE/REJECTION OF BIDS, PROPOSALS, OR LIMITED SOLICITATION RESPONSES:

The County reserves the right to accept or reject any or all bids, proposals, or limited solicitation responses, wholly or in part, and to make awards in any manner deemed in the best interest of the County. Bids, proposals, and limited solicitation responses will be firm for 30 days, unless stated otherwise in the text of the invitation for bid, request for proposal, or limited solicitation.

ACCESS AND RETENTION OF RECORDS: The contractor agrees to provide the County, the County Auditor, or authorized agents, access to any records necessary to determine contract compliance. The contractor agrees to create and retain records supporting the services rendered or supplies delivered for a period of three years after either the completion date of the contract or the conclusion of any claim, litigation, or exception relating to the contract taken by Missoula County or third party.

ALTERATION OF SOLICITATION DOCUMENT: In the event of inconsistencies or contradictions between language contained in the County's solicitation document and a vendor's response, the language contained in the County's original solicitation document will prevail. Intentional manipulation and/or alteration of solicitation document language will result in the vendor's disqualification.

ASSIGNMENT, TRANSFER AND SUBCONTRACTING: The contractor shall not assign, transfer or subcontract any portion of the contract without the express written consent of the County.

AUTHORITY: The attached bid, request for proposal, limited solicitation, or contract is issued under the authority of the Missoula County Purchasing and Contracts Policy.

COMPLIANCE WITH LAWS: The contractor must, in performance of work under the contract, fully comply with all applicable federal, state, or local laws, rules and regulations, including the Montana Human Rights Act, the Civil Rights Act of 1964, the Age Discrimination Act of 1975, the Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973. Any subletting or subcontracting by the contractor subjects subcontractor to the same provisions. In accordance with § 49-3-207, MCA, the contractor agrees that the hiring of persons to perform the contract will be made on the basis of merit and qualifications and there will be no discrimination based upon race, color, religion, creed, political ideas, sex, age, marital status, physical or mental disability, or nation origin by the persons performing the contract.

PREPARATION OF CONTRACT: Unless otherwise agreed by the parties in writing, the County, not the contractor, shall prepare any contracts, agreements, exhibits, attachments, appendices or similar documents, primary or supplemental, that memorialize the parties' agreement(s) based on this procurement, using the County's standard, internally-approved processes and forms as the preliminary draft, to be modified by the parties accordingly throughout the contracting process.

CONFORMANCE WITH CONTRACT: No alteration of the terms, conditions, delivery, price, quality, quantities, or specifications of the contract shall be granted without prior written consent of Missoula County. Supplies delivered which do not conform to the contract terms, conditions, and specifications may be rejected and returned at the contractor's expense.

DEBARMENT: The contractor certifies, by submitting this bid or proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction (contract) by any governmental department or agency. If the contractor cannot certify this statement, attach a written explanation for review by the County.

DISABILITY ACCOMMODATIONS: The County does not discriminate on the basis of disability in admission to, access to, or operations of its programs, services, or activities. Individuals who need aids, alternative document formats, or services for effective communications or other disability related accommodations are invited to make their needs and preferences known to the County department issuing the solicitation. Interested parties should provide as much advance notice as possible.

FAILURE TO HONOR BID/PROPOSAL: If a bidder or offeror to whom a contract is awarded refuses to accept the award or fails to deliver in accordance with the contract terms and conditions, the County may, in its discretion, suspend the bidder or offeror for a period of time from entering into any contracts with Missoula County.

FORCE MAJEURE: Neither party shall be responsible for failure to fulfill its obligations due to causes beyond its reasonable control, including without limitation, acts or omissions of government or military authority, acts of God, materials shortages, transportation delays, fires, floods, labor disturbances, riots, wars, terrorist acts, or any other causes, directly or indirectly beyond the reasonable control of the nonperforming party, so long as such party is using its best efforts to remedy such failure or delays.

HOLD HARMLESS/INDEMNIFICATION: The contractor agrees to protect, defend, and save the County, its elected and appointed officials, agents, and employees, while acting within the scope of their duties as such, harmless from and against all claims, demands, causes of action of any kind or character, including the cost of defense thereof, arising in favor of the contractor's employees or third parties on account of bodily or personal injuries, death, or damage to property arising out of services performed or omissions of services or in any way resulting from the acts or omissions of the contractor and/or its agents, employees, representatives, assigns, subcontractors, except the sole negligence of the County, under this agreement.

LATE BIDS AND PROPOSALS: Regardless of cause, late bids and proposals will not be accepted and will automatically be disqualified from further consideration. It shall be solely the vendor's risk to ensure delivery at the designated office by the designated time. Late bids and proposals will not be opened and may be returned to the vendor at the expense of the vendor or destroyed if requested.

PAYMENT TERMS: All payment terms will be computed from the date of delivery of supplies or services OR receipt of a properly executed invoice, whichever is later. Unless otherwise noted in the solicitation document, the County is allowed 30 days to pay such invoices. All contractors will be required to provide banking information at the time of contract execution in order to facilitate County electronic funds transfer payments.

RECIPROCAL PREFERENCE: The County applies a reciprocal preference against a vendor submitting a bid from a state or country that grants a residency preference to its resident businesses. Such reciprocal preference is applied only to competitively bid projects for construction, repair, or maintenance of a building, road, or bridge in excess of \$50,000.

REGISTRATION WITH THE SECRETARY OF STATE: Any business intending to transact business in Montana must register with the Secretary of State. Businesses that are incorporated in another state or country, but which are conducting activity in Montana, must determine whether they are transacting business in Montana in accordance with §§ 35-1-1026 and 35-8-1001, MCA. Such businesses may want to obtain the guidance of their attorney or accountant to determine whether their activity is considered transacting business.

If businesses determine that they are transacting business in Montana, they must register with the Secretary of State and obtain a certificate of authority to demonstrate that they are in good standing in Montana. To obtain registration materials, call the Office of the Secretary of State at (406) 444-3665, or visit their website at <http://sos.mt.gov>.

SEPARABILITY CLAUSE: A declaration by any court, or any other binding legal source, that any provision of the contract is illegal and void shall not affect the legality and enforceability of any other provision of the contract, unless the provisions are mutually dependent.

SHIPPING: Supplies shall be shipped prepaid, F.O.B. Destination, unless the contract specifies otherwise.

SOLICITATION DOCUMENT EXAMINATION: Vendors shall promptly notify the County of any ambiguity, inconsistency, or error which they may discover upon examination of a solicitation document.

TAX EXEMPTION: Missoula County is exempt from Federal Excise Taxes (#81-6001397).

TERMINATION OF CONTRACT: Unless otherwise stated, the County may, by written notice to the contractor, terminate the contract in whole or in part at any time the contractor fails to perform the contract.

UNAVAILABILITY OF FUNDING: The contracting department, at its sole discretion, may terminate or reduce the scope of the contract if available funding is reduced for any reason.

U.S. FUNDS: All prices and payments must be in U.S. dollars.

VENUE: This solicitation is governed by the laws of Montana. The parties agree that any litigation concerning this bid, request for proposal, limited solicitation, or subsequent contract, must be brought in the Fourth Judicial District in and for the County of Missoula, State of Montana, and each party shall pay its own costs and attorney fees.

WARRANTIES: The contractor warrants that items offered will conform to the specifications requested, to be fit and sufficient for the purpose manufactured, of good material and workmanship, and free from defect. Items offered must be new and unused and of the latest model or manufacture, unless otherwise specified by the County. They shall be equal in quality and performance to those indicated herein. Descriptions used herein are specified solely for the purpose of indicating standards of quality, performance, and/or use desired. Exceptions will be rejected.

APPENDIX A- Cloud-Based Solution Checklist

Vendor/Provider

Physical Security

- Are all secure areas protected by demising walls?
- Are all secure areas using two factor access control (i.e., card swipe and pin)?
- Does provider require a sign in procedure for visitors, service providers, etc.?
- Are all visitors in secure areas escorted?

Employee and Contractor Verification

- Does provider perform criminal background check on employees, contractors, and service providers?

Access and Change Control Audit

- Is provider SSAE 16 SOC2 Type 2 Compliant?
- Name of CPA audit firm performing the SSAE audit?
- Date of last audit?

Vulnerability Assessment

- Date of most recent security vulnerability assessment?

Data Protection

- Where will Missoula County's data be resident?
- Is data encrypted at rest? If so, provide encryption standard in use.
- Please list any security standards provider is certified in, HIPAA, SOX, GLBA, CJIS, PCI, etc.?
- Are all network communications encrypted? If so, provide encryption standard in use.
- Provide an outline of backup procedures.
- Are data backups stored offsite? If so where, and by whom?
- Are data backups encrypted?
- Is the service multi-tenant?
- Is the service segmented on virtual machines?

Business Continuity and Disaster recovery

- Describe plan for power and critical service failure.
- Describe plan for physical disasters such as fire, water, or natural disaster.
- Describe plan for security breaches resulting in failure of core systems, such as DDOS attack.
- Does provider have a DR failover site? If so, does the failover site adhere to the same standards as the primary site?
- Is the failover considered active-active or active-passive?

Network Traffic and Access Logging

- Is provider logging access to the system, switches, databases, routers, firewalls, etc.? If so, would the provider be willing to share the logs upon request?
- Is logging enabled and what is the retention period?

Client Connections and Authentication

- How are client connections secured?
- Is there support for SSO with Azure and/or ADFS?
- Are strong user passwords required? Please provide password policy.

- Is multifactor authentication required or available?

Service Level Agreement

- Provide SLA information.
- Describe penalties associated with SLA breach.
- Will you accept our BAA, or do you have a standard BAA (Business Associate Agreement) for HIPAA purposes?

Insurance

- Provide a copy of provider's liability insurance coverage.
- Provide a copy of provider's cyber liability insurance coverage.

Solution Security & Features

Application Requirements

- What are the hardware and OS requirements?
- Are there any dependent applications (specific browsers, SSMS, etc.)?
- Are there any connectivity requirements (multiple servers, etc.)?
- Are there any required services and permissions (SQL Server service, Server Admin role, etc.)?
- Do you support Microsoft SQL Server, and can the DB be deployed to a shared SQL instance?

Security Requirements

- How is authentication secured? Is it compatible with Active Directory, ADFS, LDAP, or Azure AD?
- Is the application able to utilize multifactor authentication?



ARTIFICIAL INTELLIGENCE POLICY

LAST UPDATED: 2025.07.08

Purpose

This policy establishes guidelines for the ethical and effective use of Artificial Intelligence (AI) technologies by Missoula County (the County), including generative AI systems. It aims to ensure transparency, accountability, equity, and the responsible use of AI to enhance public services, and operations.

Scope

This policy applies to all departments, personnel and entities under the jurisdiction of the County. Departments may not develop their own policies related to AI. It also includes contractors or third-party vendors implementing AI systems, on behalf of the County.

Administration

Department Heads and Chief Officers are responsible for the enforcement of this policy within their departments.

The Chief Technology Officer is responsible for the development and maintenance of this policy.

Definitions

- **Artificial Intelligence (AI)** – A field of computer science focused on creating systems capable of performing tasks that typically require human intelligence, such as decision-making, pattern recognition, natural language understanding, and learning from data.
- **Generative AI** – A subset of AI that creates new content—including text, images, audio, or video—based on training data and user prompts. Examples include large language models (LLMs) and image generation systems.
- **AI System** – Any software, tool, platform, or service that uses algorithms, machine learning, or statistical models to automate or assist in tasks typically requiring human cognition.
- **Human-in-the-Loop (HITL)** – A requirement that a human reviews and approves AI-generated outputs prior to their use, ensuring accountability and quality control.
- **Prompt** – An input provided to a generative AI system to produce a specific response or output. Prompts may include instructions, questions, or text examples.
- **Output** – The result or product generated by an AI system in response to a given prompt or input.

- **Chief Technology Officer (CTO)** – The County’s designated authority responsible for managing technology strategy, acquisition, compliance, and oversight of AI policy implementation.
- **Vendor (Third Party)** – An external party or contractor that provides software, platforms, or services, including AI systems, for use by the County.
- **Attribution** – The clear identification of AI-generated content, specifying the AI system used and the department or entity responsible for approving its use.
- **Bias** – Systematic error introduced into data processing or decision-making that results in unfair outcomes, particularly with respect to race, gender, socioeconomic status, or other protected characteristics.

Policy

1. Acquisition

- The acquisition of AI technology shall be managed by the Technology Department and any new acquisition shall follow all established procurement policies and the following procedures:
 - For existing software with generative AI extensions, tools or add-ons: Technology Department shall review requests from entities to enable or turn on AI functions, only if use is deemed consistent with this policy.
 - For new software: Department or entity shall submit a request for new software. The Technology department head or designee shall review requests in accordance with the Technology Acquisition and Artificial Intelligence policies.
 - The use of free generative AI tools is not allowed. (Disallowed AI tools include, but are not limited to: ChatGPT, Gemini and Meta AI.)
 - The use of limited trial generative AI tools is not allowed without the approval of the CTO and may only be used for the purposes of evaluation prior to acquisition.
 - The use of personal generative AI accounts for County business is not allowed.

2. Accountability and Oversight

- Human oversight is required for all AI systems.
 - All AI content or outputs shall undergo human review (“Human-in-the-Loop” or HITL) prior to use.
 - Each Department Head, or designee shall review, and approve all AI generated content.
 - Content deemed unacceptable shall not be used for any internal or external purpose.
- Contracts with AI vendors must include provisions for transparency in updates, and the ability to audit the AI system’s performance and compliance.
- Contracts must allow for termination if the AI system fails to meet statutory, ethical or operational standards.
- Contractors or other third parties shall disclose the use of AI in any product or service provided to the County and shall follow all applicable policies and procedures described herein.
- All AI systems are subject to periodic review to assess ongoing compliance, performance and relevance.

3. Privacy and Data Security

- AI technology used by the County must comply with state and federal privacy, disclosure and retention laws.
- Inputs and outputs from AI systems must be securely stored and anonymized where feasible.

4. Transparency and Communication

- County departments and entities may use Microsoft Teams built-in AI transcription service to transcribe meetings.

- i. All other AI technologies used to record meetings or perform transcription of meetings, are prohibited.
 - ii. Meetings transcribed by AI, and subject to public inspection must be recorded. Recordings must include audio, and where possible, video.
- b. Use of AI systems to generate video or image content shall be attributed to the system used to create it. Where possible, attribution shall be embedded in the video or image.
 - i. Attributions should include the AI system used, along with the department or entity that has approved the content (in accordance with Section 2a of this policy).
- c. The use of AI systems, including prompts, outputs and other work products are subject to the County's standards, policies and procedures. This includes but is not limited to the Acceptable Use of Technology policy.
 - i. AI systems shall support retrieval and export of all prompts and outputs, through provided features, or by utilizing vendor contract assurances.

5. Fairness and Equity

- a. All AI systems are subject to audits to ensure they do not perpetuate or amplify biases, particularly in decision-making such as emergency response or resource allocation.
 - i. Audits may be performed by the CTO or their designee. Audits may not be performed without authorization of the CTO.
 - ii. AI systems found to violate fairness and equity standards may be found to not meet operational standards.
- b. Decisions or recommendations generated by AI must be reviewed and validated to avoid undue reliance on potentially flawed algorithms.

Enforcement and Compliance

Failure to comply with this policy may result in the suspension or termination of AI use and disciplinary actions for personnel or contractors involved.

Reviews and Updates

This policy will be reviewed annually to account for advancements in AI technology, changes in the law and feedback from the community.

ATTACHMENT C: FOSTER-CHILD HEALTH REPORTING REQUIREMENTS 3 REPORTS

REPORT #1: Quarterly Community Assistant Fund Report

The Quarterly CAF asks for specific client data that was entered within a month from their admit date. This report would include all clients enrolled within a quarter. The following client specific data is collected:

- Admit date
- Name of Child
- Age
- Date of Birth
- Gender
- Primary Care Provider
- Dental Provider
- Immunizations up to date
- Placement type
- Development OK
- Weight >95%
- Weight <5%
- BMI >95%
- BMI <5%
- # of Medical Diagnosis
- # of Unstable Medical Diagnosis
- # of Dental Diagnosis
- # of Unstable Dental Diagnosis
- # of Mental Health Diagnosis
- # of Unstable Mental Health Diagnosis
- Out-of-County and Returned Home status

The report also requests the following cumulative data: Number of new referrals received per date range (quarter) and the number of referrals due to parental Opioid Use Disorder (OUD)/ Substance Use Disorder (SUD), Number of Home visits per date range for program, Number of Case management Activities per date range for program, Number of Telephone visits, Number of Telehealth visits, Number of Other visits, Number of office visits, PHN Caseload Total for that quarter.

REPORT #2: Client Entry Report

The Entry Report asks for specific client data that was entered within a month from their admit date.

This report is similar to the CAF Report but is an ongoing report as new clients are enrolled in the program. It includes more data than the CAF. The following client specific data is collected at entry to the program:

- Admit date
- Name of Child
- Age
- Date of Birth
- Gender
- Primary Care Provider at entry?
- Dental Provider at entry?
- Immunizations up to date at entry?
- Placement type
- Development OK
- Weight >95%
- Weight <5%
- BMI >95%
- BMI<5%
- Current Medical Diagnosis listed
- # of Unstable Medical Diagnosis
- # of Current Dental Diagnosis
- # of Unstable Dental Diagnosis
- Current Mental Health Diagnosis listed
- # of Unstable Mental Health Diagnosis
- Known Allergies
- WIC Enrolled
- School History
- Special Services
- Medications listed

REPORT #3: Client 6 Month Report

The Six-Month report asks for specific client data that has been obtained after 6 months from the admit date. Data is viable if it has been entered 1 month after the admit date. The following client specific data is collected at entry to the program:

- Admit date
- Name of Child
- Age
- Date of Birth
- Gender
- Primary Care Provider at 6 months?
- Dental Provider at 6 months?
- Immunizations up to date at 6 months?
- Placement type
- # of Placements
- Development OK
- Weight >95%
- Weight <5%
- BMI >95%
- BMI<5%
- Current Medical Diagnosis listed
- # of Unstable Medical Diagnosis
- # of Dental Diagnosis
- # of Unstable Dental Diagnosis
- Current Mental Health Diagnosis listed
- # of Unstable Mental Health Diagnosis
- Known Allergies
- WIC Enrolled
- School History
- Special Services
- Medications
- Total # of times PHN had contact with child/foster family? = From Provider Notes, all (visit types) by program MFCHP, minus CPT Codes T1016, Case Management and TVL
- Total # of Medical Summaries for individual child
- PHN Care Coordination - # of care coordination = From Provider Notes, CPT code Case Manager by program MFCHP
- Total # of coordination notes for child = All visit types + All Case coordination