OntarioMD
Empowered Practices. Enhanced Care.

Request for Services

Business and Technical Consulting Services

EMR Integration Consultant

RFS Number: 2020-02
Issued: May 22, 2020
Closing Date: June 8, 2020 1:00PM EDT

Table of Contents

1. Introduction

1.1. Invitation to Submit

This Request for Services ("RFS") is an invitation to Vendors to put forward a Submission for the provision of consulting services in the role of **EMR Integration Consultant**, as described in Section 4.

In responding to this RFS, you will be deemed to have taken into account all the terms and conditions in the RFS and willing to enter a Statement of Work using the OntarioMD standard form for consulting contracts (Appendix A).

1.2. About OntarioMD

OntarioMD supports physician practices in the selection, implementation and adoption of electronic medical records (EMRs) and other digital health tools. Over 17,000 physicians and more than 1,000 nurse practitioners are enrolled in our programs. OntarioMD is also playing a key role to support clinicians who are joining Ontario Health Teams (OHTs) to enhance the provision of integrated care across the Ontario health care system.

We have a successful track record in developing and implementing provincial digital health tools that are integrated with EMRs based on physicians' needs. Our award-winning Health Report Manager (HRM), eNotifications and Insights4Care Dashboard tools, and our extensive collaborative work with clinician, EMR vendors and provincial partners to integrate certified EMRs with provincial EHR products and services, demonstrate the value of our digital health services to enhance patient care.

While OntarioMD is a wholly owned subsidiary of the Ontario Medical Association, it is funded largely by the Ontario Ministry of Health through Ontario Health,

For more information see www.ontariomd.ca.

1.3. Evolving to Meet Emerging Directions and Priorities

OntarioMD's trusted EMR Certification Program is committed to continuously improving the quality of OntarioMD certified EMRs. OntarioMD's EMR Certification Program is recognized nationally and provides a crucial under-pinning for Ontario's Digital First for Health Strategy.

Through OntarioMD's agreement with Ontario Health (OH), its strategic partnerships and relationships with the Ministry of Health, EMR vendors, clinicians and other provincial delivery partners, OntarioMD will continue to drive EMR maturity and provide products and services that increase the value of EMRs. Through its close collaboration with EMR vendors, OntarioMD enables EMR enhancements to clinicians that are fully integrated into their OntarioMD-certified EMR products, including Health Report Manager (HRM), eNotifications, the Ontario Laboratories Information System (OLIS), eConsult, the Digital Health Drug Repository (DHDR), the Digital Health Immunization Repository (DHIR) and Insights4Care (i4C) Dashboard. OntarioMD's EMR Roadmap will continue to prioritize EHR interoperability, access to and/or exchange of EMR data in alignment with the MoH Digital First for Health strategy.

OntarioMD continues to work on behalf of physicians and relies heavily on practicing clinicians to ensure the user experience is optimized for use in clinical practice. Our Peer Leader Program, along with trained Practice Advisors, also assist physician practices to access patient information in assets such as HRM, OLIS, and eNotifications. We will support physicians to maintain an OntarioMD-certified EMR product to ensure continued access to these products.

OntarioMD EMR Certification provides assurance to physicians and the digital health community that EMR vendors and their certified EMR products have met, and continue to meet, the minimum set of requirements and obligations to drive EMR maturity for the province. EMR Offerings must be certified in order to subscribe to Provincial EHR products and services, including OLIS, HRM, eConsult, DHIR, DHDR and future priority EHR solutions and services as they become available.

This RFS focuses on solution architecture-oriented consulting services necessary to advance current and emerging EMR integration initiatives such as virtual visits, the access to, and/or exchange of, data with primary care under the province's Digital Health for Information Exchange (DHIEX) strategy and integration with Hospital Information Systems.

2. Procurement Process

2.1. RFS Coordination

Contact
Val Lesko
Manager, Corporate Planning and Administration
Procurement@OntarioMD.com

Mailing Address
OntarioMD
150 Bloor Street West, Suite 900
Toronto, ON M5S 3C1

2.2. Procurement Timetable

The target completion dates for the procurement activities are listed below:

Activity	Date
Issue RFS	May 22, 2020
Submit Applicant's Questions	May 28, 2020 at 13:00 EDT
Respond to Applicant's Questions	May 29, 2020
Closing Date for Receipt of Submissions	June 8, 2020 at 13:00 EDT
Evaluate Submissions	June 9-10, 2020
Candidate Interviews [1]	June 12 & 15, 2020
Select Vendor	June 15, 2020
Begin Contract [2]	June 22, 2020
Complete Contract	November 30, 2020

This RFS timetable is tentative only and may be changed by OntarioMD at its sole discretion.

The Client may, in its sole discretion, extend the Contract End Date for up to four (4) month by giving written notice to the Vendor not less than 10 days before the initial assignment end date.

Notes:
1. Interviews may be waived at the discretion of OntarioMD
2. Subject to contract execution

2.3. Submission Requirements

Submissions are requested from Respondents corresponding to the OntarioMD submission requirements described below. Respondents **must** order their Submission in the same order as the order of information requested below.

Respondents must submit their Submissions electronically in two separate parts. One part will contain the price portion of the Submission using Appendix E. The other part will contain the rest of the Submission. Each part must be submitted in separate electronic files in Microsoft Word format or Portable Document Format (PDF).

1. Cover Letter
The cover letter will include an introduction of the Respondent and **must**:
- include a statement in their response that they have read, understood and accept the terms and conditions contained in the Letter of Engagement (**Appendix A – Standard Consulting Form**) and that the Respondent will, if requested by OntarioMD, sign and enter into this agreement with OntarioMD and be bound by the provisions of the Letter of Engagement.
- include a statement confirming that the information provided in the Submission is accurate.
- be signed by an authorized signing officer of the organization.

2. Respondent Profile
The Respondent profile includes a brief description of the Respondent's type of business and a Respondent's contact for all questions and clarifications arising from the Submission. The contact information includes the person's title, address, email, and telephone number.

This section **must** include a short summary describing a previous example(s) of where the Respondent has provided similar services to OntarioMD or other entities in the health care sector.

3. Conflict of Interest Declaration
The Respondent **must** sign and complete the Conflict of Interest Declaration attached in **"Appendix B – Conflict of Interest Declaration"**.

4. Project Team & Staffing
Identify proposed candidate for the role. Respondents should note that **only one** candidate may be proposed for the role.

The Respondent **must** use **Appendix D – Candidate Experience** to provide **a detailed description** of how the proposed candidate meets the rated experience criteria. A soft copy of the template can be provided upon request.

The Respondent **must** also include a resumé for the candidate as part of their response to Appendix D.

Once a Submission has been accepted, project staff may not be substituted without written agreement from OntarioMD.

Please identify if any component of this project will be outsourced or subcontracted. Please state the name and location of the outsource company or subcontractor, and the length and nature of the relationship with the Respondent.

5. Candidate References
Complete and attach **Appendix C – References** providing references as requested therein.

6. Price
Complete the pricing information using **Appendix E - Pricing**. All dollar amounts are to be stated in Canadian funds.

As noted above, Appendix E is to be submitted as a separate file.

2.4. Evaluation Process

The evaluation of the Submission will be conducted by a panel of OntarioMD representatives. A Submission must meet the requirements of each applicable stage to proceed to the next stage.

Stage 1 consists of validating that all Submission Requirements are included and complete according to **section 2.3 – Submission Requirements**

Stage 2 will ensure that all experience requirements identified as mandatory in **Section 4.3 – Experience** have been met by the proposed candidate

Stage 3 will score the proposed candidates experience against **Section 4.3 - Experience** and its relevance to the Scope of Work described in **Section 4.2 - Scope of Work**. Scoring will be evaluated by OntarioMD for each Submission which passes stage 1 and stage 2.

Stage 4 Upon successful completion of Stage 3, the pricing attachment provided by each Respondent will be opened

Stage 5 consists of verifying reference information. References will only be contacted if a Respondent's candidate is considered at the completion of Stage 4

The points allocated to each stage of the evaluation process are as follows:

Stage	Evaluation Process	Points
1	Submission Requirements (section 2.3 of this RFS)	Pass / Fail
2	Mandatory experience requirements (Section 4.3 of this RFS)	Pass / Fail
3	Candidate Experience (Section 4.3 of this RFS)	80
4	Price	20
5	Reference Verification	Pass / Fail

Per the procurement timetable, the top candidates may be invited for a detailed interview to verify the experiences in the proposed candidate's resume.

3. Terms and Conditions

1. Confidentiality

   OntarioMD reserves all rights in respect of this RFS. Respondents to this RFS may not reproduce, modify, disclose, distribute or publish any portion of this RFS or any information about without the prior written approval of OntarioMD, save and except for the strict purpose of preparing a response, and provided always that any such reproduction, modification, disclosure, distribution or publication of this RFS shall only be made to or for recipient's employees or advisors on a strict need-to-know basis, each of whom the recipient agrees to bind to these same confidentiality obligations.

   Respondents or other RFS recipients may not use the name of OntarioMD or refer to this RFS in any advertisement or other promotional messages without the prior written consent of OntarioMD.

   Information pertaining to OntarioMD obtained by the Respondent as a result of participation in this RFS is confidential and must not be disclosed without written authorization from OntarioMD.

   Collection and Use of Personal Information

   Respondents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any subcontractors. If this RFS requires Respondents to provide OntarioMD with personal information of employees who have been included as resources in response to this RFS, Respondents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to OntarioMD. Such written consents are to specify that the personal information may be forwarded to OntarioMD for the purposes of responding to this RFS and use by OntarioMD for the purposes set out in the RFS. OntarioMD may, at any time, request the original consents or copies of the original consents from Respondents.

2. Please provide an electronic copy (via email) **as indicated in Section 2.2** to:

   > Val Lesko
   > Manager, Corporate Planning and Administration
   > Procurement@OntarioMD.com

   All communications regarding this RFS must be directed by email to this address.

3. We regret extensions cannot be granted. Submissions received after the deadline will be sent a notification email that their Submission will not be considered.

4. Facsimile Submissions in whole or in part will not be accepted.

5. Respondents that are selected for a short list will be required to make their candidates available for interviews (tentatively scheduled as indicated in Section 2.2) and respond to questions from OntarioMD.

6. Other than the contact named in 2. above, a Respondent may not contact or attempt to contact, during the RFS process, anyone else at OntarioMD for the purposes of obtaining information that relates to this RFS. Any Respondent who fails to comply with this requirement will be disqualified.

7. OntarioMD, without liability, cost or penalty, may at any time prior to or after closing time:
   - Alter any dates in this RFS;
   - Cancel this RFS;
   - Amend or supplement this RFS;

- Issue a new RFS for the same or similar services.

8. The Submission with the lowest cost may not necessarily be the winning bid. While the cost is an important element in the selection process, it is to be clearly understood that there are other evaluation criteria in the RFS that OntarioMD will consider in evaluating Submissions.

9. OntarioMD, without liability, cost or penalty, may, in its sole discretion, waive irregularities in any Respondent's Submission.

10. OntarioMD, without liability, cost or penalty, may, in its sole discretion and at any time after submission, seek clarification from any Respondent with respect to its Submission. Any written information received by OntarioMD from a Respondent in response to a request for clarification from OntarioMD shall be considered an integral part of the Respondent's Submission.

11. OntarioMD may verify any Respondent claim or statement by whatever means OntarioMD deems appropriate, including contacting references other than those offered by the Respondent, and may reject any Respondent statement or claim, if in the judgment of OntarioMD the statement or claim is unwarranted or not credible.

12. OntarioMD assumes no responsibility for any costs associated with your response to this RFS.

13. OntarioMD's standard Letter of Engagement referenced in Appendix "A" is available through the following portal link:

    https://www.ontariomd.ca/documents/letter%20of%20agreement%20-%20corporation%20-%20january%2030%202020.pdf

14. The Respondent must provide a statement in their response that they have read, understood and accept the terms and conditions contained in the Letter of Engagement and that the Respondent will, if requested by OntarioMD, sign and enter into this Agreement with OntarioMD and be bound by the provisions of the Letter of Engagement. The RFS will become part of the Letter of Engagement.

4. Requirements

4.1. Role

OntarioMD is seeking a candidate to fill the role of EMR Integration Consultant. Reporting to the Executive Director for Technology and Integration, this role is expected to span the period from **June 22, 2020 to November 30, 2020, with the possibility for extension by up to 4 months (will not extend beyond March 31, 2021).**

4.2. Introduction

This role focuses on solution architecture-oriented consulting services necessary to advance current and emerging EMR integration initiatives such as virtual visits, the access to, and/or exchange of, data with primary care under the province's Digital Health for Information Exchange (DHIEX) strategy and integration with Hospital Information Systems.

Ensuring virtual care solutions used by clinicians are validated against a minimum set of expectations is a priority objective for the province's virtual care program. Business requirements which define minimum expectations for virtual care solutions are being finalized by provincial partners in collaboration with OntarioMD. These requirements will be progressive as expectations mature within the landscape. OntarioMD will perform a critical role in developing validation criteria against these maturing provincial and federal requirements and in ensuring alignment of qualified solutions.

As the EMR landscape continues to mature, so too must the ability for EMRs to integrate with other health IT systems including access to, and/or the exchange of, information in the provision of care, e.g.: to support virtual care or electronic referral. OntarioMD is also working with provincial partners to advance EMR integration in alignment with the province's Digital Health Information EXchange (DHIEX) strategy. This work will rely heavily on data and messaging standards, privacy and security, and requirements for system-to-system interoperability unique to health care and in alignment with EMRs, HISs and Ontario Health architecture and standards. As an extension of this objective, deeper integration of primary care with Hospital Information Systems is also anticipated.

This role may also encompass other architecture and standards activities which advance EMR maturity in alignment with OntarioMD, the Ministry of Health and Ontario Health priorities.

4.3. **Scope of Work**

OntarioMD is looking to procure a Technical Specialist – EMR Integration Consultant to:

- Work with Ontario Health and other provincial stakeholders to refine requirements and minimum assessment criteria used to validate virtual care solutions

- Work with the OntarioMD EMR Certification Program and Ontario Health to:

    o Refine Validation processes

    o Conduct and support validation of EMR-based/virtual care solutions against the minimum assessment criteria

- Work with provincial stakeholders to define requirements which advance information exchange for primary care and integration of EMRs

    o Work with provincial stakeholders to inform the progression of EMR integration requirements for virtual visits and other health information exchange solutions in alignment with DHIEX program objectives

    o Ensure use of applicable health-specific data and messaging standards, where applicable, for the collection and exchange of health information

    o Assess and determine primary care alignment and integration requirements for, or with, foundational HIS-oriented solutions

- Advance other architecture- and standards-related activities which advance EMR maturity in alignment with OntarioMD, the Ministry of Health and Ontario Health priorities

- Leverage recognized ISO security guidelines and other related standards to advance minimum privacy and security policies and controls

- Lead, facilitate, and/or participate, in cross-stakeholder EMR technology workshops with subject matter experts from multiple stakeholder organizations including OntarioMD, EMR vendors, Ontario Health, other delivery partners and clinicians, to develop and validate solution requirements

- Develop and provide presentations and documentation to various internal and external audiences as required and report regularly on progress and status.

- Develop and revise applicable documentation and ensure knowledge transfer necessary to support deliverables at the conclusion of the contract

- Participate in project meetings to report on progress and issues management

4.3. Experience

The following desired skills and experience will be used to evaluate the proposed candidate. Please use **Appendix D – Candidate Experience** to describe in detail the proposed candidate's related experience.

- **[Mandatory]** Minimum ten (10) years of experience in Information Technology service design and development

- **[Mandatory]** Minimum five (5) years experience in design and/or delivery of provincial health care technology solutions and services based on, or in alignment with, provincial strategy

- Experience with OntarioMD's EMR Certification Program including development of, or alignment with, Ontario EMR Specifications

- Experience developing and/or implementing with Fast Healthcare Interoperability Resources (FHIR) and other applicable health-related messaging and content standards including nomenclature and terminology (e.g.: XML, JSON, ICD, SNOMED, etc.)

- Experience with integration across Health IT Systems and Services, including HISs, using industry standard approaches (e.g.: APIs)

- Experience writing and ensuring compliance with functional and non-functional health system IT requirements

- Experience with community-based EMR solutions and office technologies

- Experience with health sector related privacy and security principles and policies (e.g.: ISO 27001/27002)

- Experience building and maintaining productive working relationships with health system stakeholders including the MoH, Ontario Health, EMR vendors, health system delivery partners and clinicians in complex, multi-stakeholder health care environments

- Excellent written and oral presentation skills; able to present to internal and external executives.

Appendix A – Standard Consulting Form

OntarioMD's standard Letter of Engagement is available through the following portal link:

https://www.ontariomd.ca/documents/letter%20of%20agreement%20-%20corporation%20-%20january%2030%202020.pdf

Appendix B – Conflict of Interest Declaration

Conflict of Interest includes any situation or circumstance where, in relation to this RFS process, the Respondent has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including (i) possessing or having access to information in the preparation of its Submission that is confidential to OntarioMD and is not available to other Respondents; (ii) communicating with any official or representative of OntarioMD or members of the Evaluation Team or other person connected with the RFS other than the contact specified in the RFS, with a view to influencing them and obtaining preferred treatment in this RFS process; or (iii) engaging in conduct that compromises or could be seen to compromise the integrity of the open and competitive RFS process.

☐ The Respondent hereby confirms that there is not now, nor was there in the past, any actual or potential Conflict of Interest relating to the preparation of our Submission nor do I/we foresee any actual or potential Conflict of Interest in completing the Scope of Work outlined in the RFS.

 or if applicable,

☐ The following is a list of actual or potential Conflicts of Interest relating to the preparation of our Submission or in completing the Scope of Work outlined in the RFS.
_____
_____
_____

Respondent acknowledges that where the Respondent fails to provide confirmation as required herein or makes any misrepresentation or omission regarding any Conflict of Interest, OntarioMD shall be entitled, within its entire discretion, and in addition to any other remedy that may be available to the OntarioMD in law or in equity, to disqualify this Response.

Name of Respondent: _____

_____
Signature of Respondent Representative
I have authority to bind the Respondent

_____
Date

Appendix C – References

Respondent(s) shall list a minimum of three (3) customer references for each proposed candidate. Respondents must provide full contact information.

For each customer, please provide the following:

- Customer – Name, Address

- Contact Person – name, title, number, email

- A brief description of the project, its deliverables, outcomes and timeline to deliver. Include any details that would highlight the candidate's experience in areas similar to the ones being requested at part of this RFS

Appendix D – Candidate Experience

Please use the following table(s) to describe in detail the proposed candidate's related experience, and attach the candidate's resumé in accordance with Section 2.3 of this Request for Services:

Vendor Name:	
Candidate Name:	

Criterion	Candidate Experience
• **[Mandatory]** Minimum ten (10) years of experience in Information Technology service design and development	
• **[Mandatory]** Minimum five (5) years experience in design and/or delivery of provincial health care technology solutions and services based on, or in alignment with provincial strategy	
• Experience with OntarioMD's EMR Certification Program including development of, or alignment with Ontario EMR Specifications	
• Experience developing and/or implementing with FHIR and other applicable health-related messaging and content standards including nomenclature and terminology (e.g.: XML, JSON, ICD, SNOMED etc.)	
• Experience with integration across Health IT Systems and Services, including HISs, using industry standard approaches (e.g.: APIs)	
• Experience writing and ensuring compliance with functional and non-functional health system IT requirements.	
• Experience with community-based EMR solutions and office technologies	
• Experience with health sector related privacy and security principles and policies (e.g.: ISO 27001/27002)	
• Experience building and maintaining productive working relationships with health system stakeholders including the MoH, Ontario Health, EMR vendors, health system delivery partners and clinicians in complex, multi-stakeholder health care environments	
• Excellent written and oral presentation skills; able to present to internal and external executives	

Appendix E – Pricing

Please provide the following information in accordance with Section 2.3 of this Request for Services:

Vendor's Legal Name	
Name of Consultant	
Role	
Hourly Rate	$
Per Diem (maximum daily rate @ 7.5 hours/day)	$