Response to: Homeless Services Network of Central Florida HMIS RFP

Contact: Norm Warren
Senior Account Executive
(801) 290-5496
nwarren@eccoviasolutions.com

Contents

Cover Letter

To the Homeless Services Network of Central Florida,

Eccovia Solutions is excited to submit this proposal to your "Request for Proposal: Homeless Management Information System (HMIS)" for the Homeless Services Network of Central Florida. We have carefully reviewed the RFP and created a comprehensive and compelling response that we believe meets all of your requirements for an HMIS compliance-based solution.

Our Software-as-a-Service (SaaS) platform, ClientTrack, is an advanced HMIS case management and housing solution that serves the case management and compliance needs of HMIS continuum member agencies and their community partners. For over 16 years, our purpose-built ClientTrack HMIS has helped CoCs manage intakes, perform assessments, provide real-time referrals, and maintain ongoing, real-time compliance with HUD HMIS data standards. We work with private, nonprofit, and public entities that provide services to clients experiencing homelessness, and have a proven track record translating federal, state, and local grant guidelines, and program regulations into software requirements and solutions to meet their reporting requirements.

We are proud to work with states and CoCs across the United States, and are the HMIS platform of choice for Georgia, Utah, South Dakota, and the balance-of-state CoCs in Pennsylvania and Texas. We also provide HMIS and Coordinated Entry solutions for large metro CoCs, such as Philadelphia, Harris County, and Baltimore.

By selecting Eccovia Solutions, you'll partner with an HMIS leader who can help you:

- Create a "No Wrong Door" approach with Coordinated Entry
- Employ the consultative approach Eccovia Solutions takes to implement your Coordinated Entry
- Leverage the flexibility of ClientTrack HMIS to adapt to your region's specific challenges and needs
- Minimize administrative tasks so your COC teams can focus on solving clients' needs
- Capitalize on the strength and security of a system hosted in Microsoft Azure, with the highest levels of data protection, certified by federal and state entities
- Participate in the ClientTrack HMIS community and forums nationwide, benefitting from continuous improvements to the product on an ongoing basis

Eccovia Solutions understands that HSN of Central Florida is seeking a knowledgeable and reliable partner. If entrusted with this project, we will be a reliable partner and support your ongoing efforts to end homelessness in Central Florida. Thank you for considering our proposal. If you have any questions or require additional information, please feel free to reach out at any time. I look forward to hearing from you.

Cordially,

Norm Warren
Senior Account Executive
nwarren@eccoviasolutions.com
801-290-5496

1 Respondent Information

1.1 Business

Full legal name	**Eccovia Solutions**
Mailing address – Line 1	545 East 4500 South
Mailing address – Line 2	Suite E-260
Mailing address - City, State, ZIP	Salt Lake City, UT 84107
Main phone number	888.449.6328 (sales 801-451-2885)
Time zone	Mountain

1.2 Proposal Point of Contact

Identify the primary point of contact for questions about the proposal and/or notifications regarding the proposal process.

Name	**Norm Warren**
Title	Senior Account Executive
Email Address	nwarren@eccoviasolutions.com
Phone Number	801-290-5496

1.3 Authorized Representative

Provide name and contact information for a representative of the business who has the authority to enter into contracts and sign legal documents on behalf of the Respondent.

Name	**Daniel O'Connor**
Title	Chief Business Development Officer
Email Address	doconnor@eccoviasolutions.com
Phone Number	801-290-5481

2 Certifications and Acknowledgements

On behalf of Eccovia Solutions ("Respondent"), I/we certify that:

1. Submission of a proposal constitutes acknowledgement and acceptance of all terms and conditions defined in the RFP, except as exceptions or reservations specified by Respondent in this document.
2. All persons involved in the preparation of this proposal are aware of the requirements established by these certifications and assurances and agree to comply.
3. All information provided is accurate as of the submission date. Respondent will notify the RFP coordinator of any change or anticipated change that might impact the accuracy of any part of this proposal. Misrepresentations will disqualify Respondent from consideration.
4. Any costs incurred by Respondent associated with proposal preparation and/or participation in the evaluation process are solely the responsibility of the Respondent, regardless of the outcome. Proposals and associated materials become the property of the CoC and will not be returned.
5. Respondent will not try to convince any other HMIS vendor to submit or decline to submit a response to this RFP and has not coordinated proposed costs with any other potential Respondent.
6. Respondent will not engage in behavior, conversation, or communication that might reasonably be perceived as an attempt to influence the outcome of the evaluation process (other than by participation in the process itself). Respondent will not discuss the RFP process with members of the CoC or the evaluation team until the final selection is announced.
7. If any member of the CoC or the evaluation team suggests directly, indirectly, explicitly, or implicitly that s/he might be able to influence the evaluation process in Respondent's favor for any reason, Respondent will notify Angel Jones at angel.jones@hsncfl.org.
8. Respondent agrees that the CoC may contact references, funders, and/or other sources of information regarding compliance; customer experience; organizational, technical, and fiscal capacity; and other factors pertinent to assessing Respondent's ability to meet the CoC's HMIS needs.
9. Respondent is eligible to enter into a contract for the provision of software as a service in the State of Florida and is willing to provide relevant documentation, including articles of incorporation, business licenses, taxpayer identification number(s), etc., upon request.
10. This proposal is a firm and fixed offer of existing software functionality, licensing, and standard services for the listed costs, subject to conditions listed in the proposal, valid for at least 120 days from the submission date of this proposal for a contract term of at least two years.
11. Costs identified for programming, data mapping and migration, and any other work contingent on detailed specifications are estimates and subject to revision and/or negotiation.
12. Costs proposed in this document will be scored against other proposals and should represent Respondent's best offer.
13. The CoC reserves the right to negotiate services and costs with Respondent, to include the addition or removal of listed requirements and/or software customization to better meet CoC or HUD requirements.

14. Respondent understands that proposals may be subject to review by the public and has clearly identified all confidential and/or trade secret content. Unless required by law or court order, the CoC will not release these confidential portions of the proposal.
15. Respondent may withdraw proposals from consideration at any point in the process.
16. The CoC may issue an addendum, revise, or withdraw this RFP without prior notice.
17. The evaluation process defined in the RFP is contingent on receiving at least three proposals that meet evaluation criteria. If this does not happen, the CoC may revise the process or evaluation criteria to expand the eligible pool of Respondents, issue another RFP, proceed with fewer than three candidates, execute a sole-source contract with a vendor, or otherwise ensure that the CoC's HMIS needs are satisfied.
18. Respondent will authorize the CoC to request a credit report for consideration in the final phase of evaluation.
19. The CoC may request additional information at any point in the evaluation process to confirm or clarify proposal content.
20. Respondent will follow applicable civil rights laws and Executive Orders. There must be no outstanding findings of noncompliance with civil rights statutes, Executive Orders, or regulations, unresolved secretarial charge of discrimination issued under the Fair Housing Act, no adjudications of civil rights violations on a civil action or deferral of processing of proposals from the vendor imposed by HUD.
21. Respondent certifies that no employee, member of its executive management, key staff, or any board member has been convicted of a criminal offense related to the administration of funds, is ineligible to enter into a federally-funded contract, or is involved in any litigation or other legal matter that might compromise Respondent's organizational capacity as represented in this proposal.
22. The CoC may elect to award all or a portion of the scope of work defined by the RFP and/or may elect to split the award between two Respondents, which would require Respondent to collaborate with another organization to provide some or all services. Respondent may decline to agree to this arrangement and withdraw.
23. The Evaluation Team may waive minor technical deficiencies or any informality in a submitted proposal.
24. If the CoC and selected Respondent are unable to come to satisfactory agreement about the terms of a contract, the CoC will re-visit the evaluation process (see #17). The selected Respondent will be ineligible for further consideration.
25. This Request for Proposals for a Homeless Management Information System is issued in accordance with 2 CFR part 200; any resultant contract must comply with same.

Disclosures and Exceptions to Certifications and Acknowledgements

Click or tap here to enter text.

Signatures

Authorized Representative		
		July 26, 2019
Daniel O'Connor		Date
Proposal Point of Contact		
		July 26, 2019
Norm Warren		Date

3 Requirements Assessment

The word 'requirement' is used to refer to features, functionality, services, reports, etc. A few are desirable features/best practices that are relevant for comparison and scoring purposes, but not critical. For requirements that include a Yes/No/Other drop-down list:

- Answer 'Yes, standard' if the requirement is available, currently in use, and included in the basic cost of licensing the HMIS software. Use the *Additional information/description* section to describe how the software / service meets the requirement.
- 'Yes, add-on' should be selected when the requirement is met by existing functionality currently available at an extra cost. Use the *Additional information/description* section to describe how the software / service meets the requirement. These must also be listed in the *Summary of Costs* section.
- Answer 'Other (explain)' if the requirement is currently under development, available from a third-party, or if a currently available alternative might serve the same purpose. Use the *Additional information/description* section to explain and elaborate.
    - Include requirements that specify a user type (e.g., HMIS Lead or regular user) but can only be performed by the vendor or another user type.
    - Include an implementation date for functionality currently being developed.
    - Evaluators will assign a point value (0 or 1) based on the additional information.
    - Any of these with an associated cost must be listed in the *Summary of Costs* section.
- Answer 'No' for all other circumstances. If custom development to make the requirement available if feasible, provide a brief note to that effect and list the requirement in the *Summary of Costs* section with a (non-binding) estimate of time and cost.

For each requirement, provide a narrative response that describes how the proposed solution meets the need. Narrative should be clear, concise, and directly relevant to listed requirements. The use of screenshots or other graphics to illustrate narrative in the *Additional information/description* sections is welcome. No graphic should include Respondent or Software names.

There is no need to repeat identical content for multiple requirements. If a single feature satisfies multiple requirements, include the narrative response for the first listed requirement. For each subsequent requirement, reference the requirement number (e.g., "See requirement 3.1").

3.1 Hosting (2 points)

1. Respondent hosting of application and database(s) is available	Yes-standard (1)
The ClientTrack application is hosted in the Microsoft Azure Cloud. Microsoft Azure Cloud ensures a high level of security for the application. A detailed description of Azure security features is available here, https://azure.microsoft.com/en-us/overview/trusted-cloud/, in summary: Microsoft leads the industry in establishing clear security and privacy requirements and then consistently meeting these requirements. Azure meets a broad set of international and industry-specific compliance standards, such as General Data Protection Regulation (GDPR), ISO 27001, HIPAA, FedRAMP, SOC 1 and SOC 2, as well as country-specific standards. Rigorous third-party audits verify Azure's adherence to the strict security controls these standards mandate. The ClientTrack application uses HTTPS to ensure a secure connection. Users must authenticate using	

credentials controlled by an administrator who is able to disable accounts and audit login events along with other activities. Each instance of ClientTrack, with its associated data, is accessible only by Eccovia Solutions and the organization for which it was implemented.

2. CoC may host application and database	Yes (2)
ClientTrack is hosted in Microsoft Azure, but we do offer an option for clients to host if they prefer.	

3.2 Comparable Database (5 points)

Eccovia Solutions can configure ClientTrack to support victim case management, and do so for some of our HMIS clients with the same requirement. One caveat:

VAWA and HUD representatives have confirmed that legal guidelines do not allow for a funder to have access to a database in which victim information is entered, and a shared database between DV providers is not acceptable. We can support victim case management, but a single DV database for all community DV agencies cannot be done without criminal legal implications.

3.3 Training and Technical Support (6 points)

1. Respondent provides training for system administrators	Yes, standard (1)
Yes. We provide a train-the-trainer option, where we prepare a designated local, in-house expert for our clients to provide training and support to their peers. Continual Education Services (CES) is an option for users to attend an unlimited number of virtual ClientTrack Data Management and Reporting Tool training events and obtain full, ongoing access to the complete CES library of content, which includes pre-recorded training videos, short tutorials, and practice exercises. These services ensure that an organization can leverage the ClientTrack tools to add continual value to their implementation and meet their own ongoing needs. CES offers a variety of training options that empower clients to oversee the configuration and management of their own solution. Participants in our CES program will be trained to utilize the ClientTrack Data Management Tools and act as the Implementation Manager within their organization. A finalized training portfolio will be established with contract negotiations.	
2. Respondent offers train-the-trainer instruction	Yes, standard (1)
We provide a train-the-trainer option, where we prepare a designated local, in-house expert for our clients to provide training and support to their peers. We also provide an option for end-user training if that is desired.	
3. Respondent provides technical support for system administrators and has a system in place to track and respond to questions, bug reports, etc.	Yes, standard (1)
ClientTrack provides full-issue resolution through our Technical Support team, Emergency Support Services, and the integrated ticketing system. ClientTrack's integrated ticketing system enables users to report issues, ask questions, and provide feedback. Users can access this feature through the Help button in each ClientTrack screen to submit tickets that include descriptions, screenshots, contact information, and behind-the-scenes debug information. Tickets are initially submitted to the trained local system administrator, who will either resolve the issue or escalate it to the Eccovia Solutions Technical Support team. Tickets received by the Technical Support team are categorized into three tiers and are determined by issue severity, complexity, and priority. This allows the team to assign appropriate levels of support to diagnose and resolve the issue in a timely manner. Any issue notes or status changes made by support staff are updated automatically and are visible to the local system administrator.	

4. Respondent has an available library of training materials for use in training end users (e.g., comprehensive manuals, online training, etc.)	Yes, standard (1)
See 3.3.1.	
5. A training and demonstration site is available	Yes, standard (1)
Eccovia Solutions' customers have access to a production and designated training environment. We would also expect a user acceptance testing environment for data conversion where data can be verified.	
6. If Respondent offers training and/or technical support for end users, please describe.	
See 3.3.1 (end-user training) and 3.3.3 (technical support).	

3.4 System Availability and Maintenance (6 points)

1. Software is web-based, compatible with current browsers, and maintains some backward-compatibility (list browsers)	Yes (1)
As a web-based application, ClientTrack is accessible through any device that connects to the internet via a modern web browser that supports current HTML and JavaScript standards. Examples include Microsoft Edge, Microsoft Internet Explorer, Google Chrome, Safari, Mobile Safari, Chrome for Android, and Mozilla Firefox.	
2. User interface is available 24/7 with 99.9% reliability (other than planned outages)	Yes (1)
Our solution adheres to the standard SLA for access and uptime of 99.9%. Planned outages are communicated to clients well in advance.	
3. Planned outages for system maintenance or deployment of updates are coordinated with HMIS Lead at least 1 week in advance and scheduled for periods of low usage (or HMIS Lead is responsible for system maintenance and can install updates)	Yes (1)
Planned outages are infrequent and usually scheduled for 2:00 AM on Sundays with notice. System updates like major upgrades or updated data standards are deployed to a test/train system for acceptance testing before deployment to production. Routine system updates are pushed on a regular schedule and require no downtime or administrator actions.	
4. HMIS Lead is notified of any unplanned outages and the status of identifying/resolving within 30 minutes	Yes (1)
Eccovia Solutions notifies the HMIS Lead of any outages within 60 minutes.	
5. Any planned updates or modifications to any aspect of the user experience, report logic, and/or software functionality are documented; documentation is provided to the HMIS Lead in advance of development	Yes (1)
All software updates and modifications are documented and provided to the HMIS lead in advance of development. Also, we conduct focus groups to involve our clients' feedback in the development process.	
6. Any deployment of critical bug fixes is documented; notification and documentation are provided to HMIS Lead within two hours	Yes (1)

Deployment for critical bug fixes is documented and the HMIS Lead is notified within 24 hours.

3.5 Security and Privacy (16 points)

1. Software employs industry-standard or better security protocols, including support for two-factor or multi-factor authentication	Yes, standard (1)
In addition to the security protocols indicated in our response to all points of 3.1, ClientTrack can also support two-factor authentication. Our 2018 update to ClientTrack includes OAuth support for Single Sign-On (SSO) capabilities. We recommend that our clients consider applying multi-factor authentication at the identity provider level (e.g. Active Directory) and take advantage of SSO so that users do not need to manage a separate username and password for CT. SSO approaches also simplify administration.	
2. PII is encrypted for storage and cannot be browsed in database tables	Yes, standard (2)
ClientTrack is encrypted at rest (https://docs.microsoft.com/en-us/azure/security/azure-security-encryption-atrest) and in transit using no less than 128-bit encryption. Eccovia Solutions uses SSL/TLS protocols to protect authentication, authorization, and file transfers.	
3. HMIS Lead can assign user roles (e.g., system administrator, data entry, reports only) that define permissions and access to information	Yes, standard (1)
Yes. ClientTrack role-based security is managed by system administrator(s) (HMIS leads) who can manage user accounts including creation, activation/deactivation, workgroup assignments (roles), and update user profiles. This is accomplished using two distinct feature sets: • Workgroups for role-based access for access to menus, forms, functions within forms, workflows, reports and other features • Security Organizations for role-based access to data	
4. Data-sharing configuration allows HMIS Lead to create project groups and field-level control of sharing	Yes, standard (1)

The ClientTrack solution enables administrators to manage functional access as well as data access. Field-level modifications are performed within the designer toolsets.

Functional Access

A user's access to particular functionality in the application is determined by their assigned workgroup. Workgroups include a compilation of menu items and tabs that include specific functionality (forms, workflows, reports, or other functional capabilities). A user may be assigned to one or more workgroups. When a user is authenticated by the application, they will be asked which workgroup they will access. The workgroup will determine which forms, workflows, and reports the user will be able to utilize. Additionally, the forms they have access to determine which data columns are visible to them (e.g. what database columns they can view about authorized data).

Data Access

A user's access to particular pieces of data within the application is determined by their assigned organization. Organizations may represent any logical division, work unit, or department. An organizational unit is utilized to describe the group of people who share similar data access. A user may be assigned to one or more organizations. When a user is authenticated with the application, they will be asked which organization they wish to log in as. Once logged in, the user's organization determines which data (rows in

the database) they are authorized to view. Additional business rules determine whether the user can edit a particular record.	
5. Client data-sharing is restricted for clients who decline to consent	Yes, standard (1)
Client consent is central to the ClientTrack security model. Client consent is collected either using electronic signatures or uploaded files for paper-based consent. Consent data is used by ClientTrack to determine if a user requesting access is authorized to access a client's record or specific aspects of a client's record (e.g. mental health data).	
6. HMIS Lead can create/activate/deactivate users, define and edit project associations and associated user roles for each, and update contact/other information	Yes, standard (1)
ClientTrack is role-based. A typical deployment involves a group of users with common needs, thus setting up a set of common roles. However, no limits exist on the number of roles, so our partners can truly tailor the approach around their needs for each department, assigning group/project associations as desired. Eccovia Solutions has clients with up to 2,000 concurrent users, and we impose virtually no limitations on how our system could scale; deleting users is a function only our partners can execute. Users can be created, activated, or deactivated.	
7. Audit logs keep a history of changes made to records (describe user/HMIS Lead access to data)	Yes, standard (1)
User access and auditing are native features of ClientTrack.	
8. All contact with client, project, and system data in both the user interface and via database tables is logged (describe HMIS Lead access to logs)	Yes, standard (1)
User access and auditing are native features of ClientTrack.	
9. Passwords have complexity / length requirements and must be reset regularly	Yes, standard (1)
ClientTrack enforces password complexity. Passwords must have at least one number, 8 or more characters, at least one symbol, at least one capital, and not be any of the previous 6 passwords.	
10. Users can reset their own passwords	Yes, standard (1)
ClientTrack enables users to reset their own passwords.	
11. HMIS Lead can track training dates for individual users in HMIS and receives alerts and/or can generate a report of users requiring recertification	Yes, add on (1)
ClientTrack can track trainings and certifications for users in the system; this configuration can be done as an add-on service. This data is reportable and can be used to trigger alerts.	
12. Users are automatically logged out after a period of inactivity	Yes, standard (1)
This feature is standard in ClientTrack.	
13. User access to records is limited by project associations	Yes, standard (1)
See 3.5.4 above.	
14. Users are required to log in to a project and the ability to add/edit/delete records is limited to active project	Yes, standard (1)
A user is required to log in to an organization, and has access to all projects accessible to that organization. Any organizations with security or segregated access rules can have multiple organizations to separate access at the project level. Their access to add/edit records is based on the security model implemented using ClientTrack's design tools.	
15. User ability to run reports is limited by project associations	Yes, standard (1)
Users are limited to run reports for only projects associated with their organization.	

3.6 Data Collection (7 points)

1. Vendor-configured collection of all standard HMIS data elements as defined in the HMIS Data Dictionary	Yes, standard (1)
ClientTrack for HMIS combines a continually-updated HMIS solution, a powerful set of configuration tools, and a data-sharing platform. The solution meets the data collection requirements as defined by the HMIS data dictionary and the reporting requirements as defined by programming specifications and the HMIS reporting glossary.	
2. HMIS Lead can create custom forms and fields on standard and custom forms system wide or for individual projects	Yes, standard (2)
This functionality is offered through the ClientTrack Forms Designer, a visual design tool that allows administrators to create their own customized form designs so information is placed exactly where they want it. The graphical Form Designer is a powerful data tool that offers complete control over field placement, field type, labels, default values, require status, list options, etc. In addition, it creates database fields simultaneously as the front-end form is designed. These forms can be utilized wherever and however is needed, whether for individual projects or programs or systemwide.	
3. Software includes scan card or similar functionality for bed nights, services, etc.	Yes, standard (2)
ClientTrack includes an ID card report used to create ID cards. ClientTrack is able to use ID cards for a number of use cases including bed/facility check-in, services, and finding client records. Our biometric partner Fulcrum integrates with ClientTrack for thumb scanning and other biometric devices at an additional cost.	
4. Software has data entry wizards/workflows that guide users through all required data collection for project entry/annual assessment/exit	Yes, standard (2)
ClientTrack not only provides data entry workflows that capture all required data for project entry, assessment, exit, etc., but using ClientTrack Workflow Designer, these workflows can be created, modified, and adjusted by authorized users. This allows you to capture any new required data or address any new project needs that may arise, all without any coding required. The ClientTrack Workflow Designer allows administrators with CES training to create workflows which integrate forms (static data collection), assessments (point-in-time data collection), and process-driven logic into a user-friendly interface allowing the capture of information, documentation, tasks, and activities. The Workflow Designer can set workflow variables through queries, direct user questions, or data entry to change the flow of workflow steps. The Designer supports different workflow paths, looping processes, and any number of business rules applied to the collection of quality data in a way that is simple for all users.	

3.7 Usability / Other Features (6 points)

1. Software includes a client messaging feature, i.e., users can enter messages/notes that can be passed on to the client by the next user to see the client	Yes, standard (1)
ClientTrack's notification/alerts are commonly used to fulfill this requirement.	
2. Software includes a user messaging feature, i.e., HMIS Lead can enter messages/notifications to users that will be displayed at the next login	Yes, standard (1)
System-wide and agency-specific news and bulletin boards are frequently used to meet this requirement.	
3. Users can upload photos, scans, and other documents to a client record	Yes, standard (1)
ClientTrack provides Client Files to upload documents directly associated with a client record. In addition, the Document Checklist allows for a list of items to be identified with the ability to upload applicable documents	

used for verification. Client Photos can be uploaded or stored directly to ClientTrack with a webcam or phone camera and an advanced browser.	
4. Bed and unit availability is tracked in real time using a combination of project inventory and enrollment data; information is available to relevant users	Yes, standard (1)
This functionality is offered as part of our baseline HMIS product; real-time data of bed and unit availability is accessible to authorized users.	
5. Client records include a summary report (separate from shared enrollment data) of clients' history of outreach contacts, shelter stays, and other residential project enrollments relevant to past and current homeless status	Yes, add-on (2)
This report would be an add-on; a Microsoft SSRS formatted report would be created and available through the client dashboard.	

3.8 Data Quality Tools (14 points)

1. HMIS Lead can set data collection for standard and custom fields to mandatory or optional	Yes, standard (1)
See 3.6.2.	
2. HMIS Lead can create validation/regular expressions for standard and custom fields and configure error messages for display	Yes, standard (1)
See 3.6.2.	
3. Software requires database search prior to creation of a client record and has other prevention measures for duplicate client records	Yes, standard (1)
As part of client intake, the database is automatically searched for exact or potential duplicate records. Users can then review any results prior to a new intake to prevent the creation of duplicate client records.	
4. Software prevents creation of overlapping enrollments in the same project for the same client	Yes, standard (1)
ClientTrack's validation for "same" residential programs automatically checks as users attempt to enroll the client. Users receive a message explaining that there is an existing enrollment in the same project.	
5. Software enforces the requirement for one and only one head of household per enrollment	Yes, standard (2)
ClientTrack requires one and only one head of household on the enrollment form. As household composition changes the validation process will re-check to make sure there is only one head of household.	
6. Users see reminders of missing/don't know/refused responses for active clients at login	Yes, standard (1)
ClientTrack has multiple features to meet this need. Displaying at login would require additional system configuration to present it to users on their dashboards or other areas of the system.	
7. HMIS Lead has access to reports and/or receives alerts about potential duplicate client records	Yes, standard (2)
ClientTrack's duplicate client report is accessible to designated users like HMIS leads.	
8. HMIS Lead can merge duplicate client records	Yes, standard (1)
ClientTrack's merge client feature makes it possible to merge clients.	
9. Users and HMIS Lead have access to data quality reports that identify missing/don't know/refused responses on HMIS fields for all records in a given date range	Yes, standard (1)
ClientTrack's reporting tools offer this functionality.	
10 Software prevents and/or has tools to identify logically inconsistent data (pregnant males, income sources identified for clients with no income, entry date	Yes, standard (1)

after current date, etc.)	
ClientTrack does provide the tools to find inconsistent data issues, however common issues like these are prevented using form rules that identify inconsistencies like pregnant males and invalid entry dates.	
11. Software alerts users to upcoming annual assessment deadlines for active clients	Yes, standard (1)
ClientTrack's active enrollments forms display annual assessment deadlines. Variations of these forms can be placed in areas of the solution chosen by user.	
12. Auto-exit functionality for night-by-night shelters and street outreach projects after x time with no bed night or contact	Yes, standard (1)
ClientTrack's program setup form allows administrators to set auto-exit and auto notifications driven by inactivity in a program. For example, inactivity over a 90-day period would automatically result in an exit. Our exit forms can also default an end date.	

3.9 Coordinated Entry (8 points)

1. Support for all current versions of VI-SPDAT	Yes, standard (1)
All current versions of VI-SPDAT are supported by ClientTrack HMIS.	
2. Support for a transactional history of VI-SPDAT assessments	Yes, standard (1)
VI-SPDAT Score history is visible on the client screens and the score can be displayed on all applicable search screens.	
3. VI-SPDAT assessments and scores are an integral part of a client record accessible in any login context to all users with permission to view a given client record	Yes, standard (2)
VI-SPDAT Score history is visible on the client screens and the score can be displayed on all applicable search screens.	
4. Integrated real-time housing inventory and referral system	Yes, standard (1)
ClientTrack's housing and referral system is part of the ClientTrack solution. Data sharing among different user types for coordination is a common use of the ClientTrack solution, especially in our many coordinated entry implementations.	
5. Tracking and user alerts for status changes, no-shows, etc.	Yes, standard (1)
ClientTrack is able to trigger alerts from nearly any data in the system including status changes and no-shows.	
6. Includes a prioritization tool that allows prioritization of individual clients in each eligible category (youth, individual, family) and incorporates data from other enrollments (status changes) and custom fields	Yes, standard (1)
ClientTrack has a range of features that allow for prioritization of clients. This includes out-of-the-box wait list features, configurable housing queues for coordinated entry, and query/dashboard features for more advanced presentation of prioritization data.	
7. Other Coordinated Entry features / functionality	
ClientTrack's housing module helps facilitate reservations and placements for coordinated entry systems. The ClientTrack eligibility engine is commonly used to implement data driven referrals for housing and other services in a coordinated entry system.	

3.10 Reporting (19 points)

1. CoC Annual Performance Report	Yes, standard (1)
2. ESG CAPER	Yes, standard (1)

3. HUD Longitudinal System Analysis (LSA)	Yes, standard (1)
4. HUD System Performance Measures	Yes, standard (1)
5. PATH Annual Report	Yes, standard (1)
6. HMIS CSV Export / VA Repository generated by regular user	Yes, standard (1)
7. HMIS CSV Export / RHY Repository generated by regular user	Yes, standard (1)
8. All federal reports pull data from HMIS data elements consistent with published specifications and are updated on schedule	Yes, standard (1)
Yes. Eccovia Solutions maintains and utilizes all current specifications and updates accordingly as part of the ClientTrack HMIS platform.	
9. HUD Housing Inventory Count (or similar) report	Yes, standard (1)
This report is among the standard reports that comes with the baseline ClientTrack HMIS platform.	
10. HUD Point-In-Time Count (or similar) report	Yes, standard (1)
This report is among the standard reports that comes with the baseline ClientTrack HMIS platform.	
11. HMIS Lead can develop custom reports based on standard and custom fields and assign them to projects	Yes, standard (1)
HMIS leads (and other authorized users) can use ClientTrack's Data Explorer to query the system and visualize data. The solution also has a report designer and integrates with Microsoft's Report builder for SSRS.	
12. Reporting includes drill-down/detailed view of included clients and links to client records	Yes, standard (2)
ClientTrack reports, including HUD reports like the system performance measures, include detail data through drill down or expand/collapse features.	
13. Report results are exportable to Word/Excel/CSV/other	Yes, standard (1)
ClientTrack's reports can export to each of these formats. Users with export rights are also able to export to Excel from ClientTrack forms that are used to search and display historical data in the system.	
14. Users can schedule automated report generation with emailed results	Yes, standard (1)
The email is a notification that prompts the user to login to access their report to protect access to sensitive data.	
15. HMIS Lead can assign canned reports to any project that collects the data required to produce them, regardless of funding source or project type	Yes, standard (1)
This feature is standard in ClientTrack.	
16. Reporting includes configurable parameters so that results may be filtered by standard (e.g., Veteran Status) or custom fields	Other (explain)
ClientTrack can be configured so that results may be filtered. HUD reports are complex; either SSRS reports or CSV Exports use sophisticated stored procedures that are not edited within ClientTrack's design tools. The report or export logic must be updated to reflect custom fields. This is configurable.	
17. For projects with multiple funding sources, enrollments / services / bed nights can be associated with one or more specific grants; report output can be filtered by grant and aggregated across multiple projects with the same grant ID	Yes, standard (1)
ClientTrack supports multiple funding sources for projects as well as services in our base application. The reporting functionality is supported through our reporting tools.	
18. Advanced analytics tools that allow for the inclusion of external data are available	Yes, add on (1)
Eccovia Solutions supports this need in multiple ways. The system has native APIs and is integrated with an interface engine for data exchange. We also offer Azure-enabled Advanced Analytics, wherein we create a replica of the production database and make it available for advanced analytic tools like PowerBI and Tableau.	

3.11 Data Integration, Exchange, and Access (11 points)

1. All HMIS data elements exportable to current HMIS CSV in a single dataset including multiple projects/project types/funders	Yes, standard (1)
ClientTrack's reports can export to each of these formats. Users with export rights are also able to export to Excel from ClientTrack forms that are used to search and display historical data in the system.	
2. All HMIS data elements exportable to current HMIS XML in a single dataset including multiple projects/project types/funders	Yes, standard (1)
ClientTrack's data elements are exportable to current HMIS CSV format in a single dataset.	
3. HMIS Lead can import all HMIS data elements from a standard HMIS (CSV and/or XML) dataset including multiple projects/project types/funders	Yes, standard (1)
Your HMIS Lead can import all HMIS data elements in the standard HMIS CSV dataset, including multiple projects/project types/funders.	
4. HMIS Lead can configure a custom export of HMIS and other data	Yes, standard (2)
ClientTrack's Data Explorer, integrated forms export, and query designer make it possible for HMIS leads and other designated users to select data for export from ClientTrack.	
5. HMIS Lead can map and import HMIS and other data not in standard HMIS CSV/XML format	Yes, standard (2)
ClientTrack allows the HMIS lead to map and import HMIS data in the current HUD HMIS CSV/XML format. Other data not in standard HMIS formats require a custom import and are out of scope unless a defined scope of work is provided as an add-on service.	
6. HMIS Lead has direct database access to real-time or near real-time HMIS data for reporting and data analysis purposes (live or reporting copy)	Yes, standard (2)
Yes; they have access to all data via Query Designer and Data Explorer. An additional option would be Advanced Analytics at an additional cost. Our Azure-Enabled Advanced Analytics replication of the production database is updated in real-time and gives access to data analysis programs like Microsoft PowerBI, making additional information available for reporting.	
7. The system can integrate legacy photos and other documents and file types	Yes, add on (1)
This is accomplished during legacy data conversion. Our experience in the intersection of human services and technology has led to high-standard practices in legacy data conversion (XML/CSV), secure data hosting, HUD compliance, reporting, training, and technical support.	
8. Database relationships and dependencies are fully documented for extraction and reporting purposes	Other (explain)
Schema-based relationships in the SQL database are extractable. Relationships based on forms/views in the system are available to authorized users, and can be queried and exported for reporting reference. It is relevant to note that an embedded data dictionary with HMIS data standard content is scheduled for release in 2019. The Data Dictionary allows for custom data elements, metadata, and versioning.	

4 Organizational Capacity

4.1 Overview

Describe the organization's experience in providing software, service, and support, particularly as it applies to HMIS. Information of particular interest includes:

- Customer base in general (number of customers/number of years) and the relative portion of business related to HMIS;
- Business model (i.e., non-profit, for profit, governmental entity, etc.);
- Organizational structure and staffing;
- Fiscal capacity to complete work; and
- Any designation as a small business and/or minority-, veteran-, or women-owned business.

Background and Customer Base

Eccovia Solutions is uniquely qualified to provide the HUD compliance reporting application for HSN of Central Florida’s homeless response system. For over 16 years, we have partnered with CoCs across North America, facilitating compliance-focused data collection, reporting, and collaboration between both dedicated and non-dedicated homeless service providers to develop a comprehensive strategy for ending homelessness.

Eccovia Solutions was one of the first providers to incorporate HUD compliance requirements into its solution and comes pre-configured with all the latest HUD compliance reporting requirements. We currently support over 1,500 agencies and nearly 100 CoCs, including rural, metro, balance of state, and statewide implementations. We are considered one of the leading HMIS vendors in the country, with CoC clients ranging from the states of Utah, Georgia, and South Dakota to Harris County/Houston, Philadelphia, Baltimore, and communities across the United States.

Business Model

Eccovia Solutions is a Utah-based C Corp. We have grown organically year over year for the last decade. With nearly 100 employees, we pride ourselves on our total independence. This translates to direct flexibility and additional care for our clients, as we are beholden neither to private equity owners nor creditors. Our revenues are derived primarily from (1) recurring software license, maintenance, and hosting fees; (2) recurring support fees; (3) one-time implementation fees, and (4) miscellaneous services.

Organizational Structure

Our company is organized by the following groups: (1) Engineering and Product Development, (2) Solutions Delivery, (3) Client Success, (4) Commercial (Sales, Marketing, and Proposals), (5) Product Strategy, and (6) Operations.

We dedicate a high-performance team to our HMIS implementations. Your dedicated team will represent a cross-functional group reporting to Solutions Delivery. This team will include the following organizational scheme:

- Project Manager
- Business Analyst
- HMIS Subject Matter Expert
- Data Management and Reporting Expert
- Implementation Engineer
- Report Writer
- Quality Assurance

All of our deployments include methodical project planning and requirements finalization upfront. We thereafter document granular Business Requirements Specifications (BRD) that the client ultimately signs off on. Once the BRD is executed by both parties, we move swiftly into the actual system build, involving the resources above.

Included in this build stage is data migration and training. We have performed nearly 100 data migrations, and we bring a standardized methodology to accelerate that process. After a series of targeted phases, we progress the solution to QA, inclusive of targeted user acceptance scripts for final testing and verification.

Once in production, we assign our Client Success team, inclusive of ISO 9001:2105-inspired professional help desk for world-class support and a dedicated account manager. An HMIS data management and compliance administrator will be available if needed.

Additional information regarding our HMIS team: We have ramped up one of the deepest HMIS data management benches in the United States. We offer compelling post-production expertise to ensure your success. Our Client Success team includes deep subject matter expertise to help ensure continued compliance with federal partner standards, advise on effective HMIS policy, and administer day-to-day system operations so you can spend your time focusing on your community.

Our HMIS team includes former HUD TAs, case managers, and a combined experience of over 20 years as ClientTrack HMIS administrators. Our HMIS team has intimate knowledge of the unique needs faced by communities large and small in supporting a truly functional and integrated HMIS.

Fiscal Capacity to Complete

Eccovia Solutions is highly profitable, maintains considerable cash reserves, and runs and manages a disciplined business. The company has been profitable each and every year since its inception. As we have no outside investors or creditors, we manage our projects carefully and make sure HMIS implementations have the full company attention.

Veteran Owned

Eccovia Solutions is a veteran-owned organization. Moreover, we are dedicated to workplace diversity.

4.2 Respondent Leadership Team

Please list members of Respondent executive/senior management teams. Include brief descriptions of each member's role in the organization and relevant experience. Particularly for large organizations, it is not necessary to list every executive/senior manager, but the information should be sufficient to assess the organization's capacity and institutional experience/knowledge and capacity to provide HMIS software and services. Experience with software/database development, customer service, and HMIS is of particular interest.

Use the space below to add additional records.

Carl Champagne	
Chairman and CEO	1998
Over the last 30 years, Carl has guided several high technology and manufacturing companies through critical phases of turn-around and fast-track growth. With each of these endeavors, he has not only provided market vision and technological and business expertise, but vital leadership necessary for the company's long-term growth and profitability. Carl also has significant experience with large corporations, such as Digital Equipment, GTE (now Verizon), and Compaq (now Hewlett-Packard). Carl has a Bachelor of Science and Master's Degree in Computer Science, and completed the Management of High Technology Business program from the Sloan School of Management at MIT. He is also a past Chair of the Board of Directors for Special People Loving Outdoor Recreation Experiences SPLORE), a nonprofit organization.	
Daniel O'Connor	
Chief Business Development Officer	2015
Daniel O'Connor leads the Eccovia Solutions Business Development Office overseeing all commercial activities for the company. With a focus on business development, sales, and product marketing, Daniel has applied his unique combination of business and legal background to develop compelling new collaboration and compliance software applications. Daniel has over 20 years' experience building software ventures in the life sciences and regulated industry. Prior to joining Eccovia Solutions, Daniel was instrumental in building UK-based collaboration software Workshare and co-founded Zorch Software to build FDA compliance software, which was acquired and now part of DXC Technologies. Daniel also co-founded InnovocCommerce and commercialized one of the life science's leading clinical trial portal products. Daniel earned his Juris Doctor from University of California Hastings College of Law and Masters from University of California, Los Angeles. Daniel is also member of the Association for Clinical Research Excellence and Safety.	
Sandra Hoffmann	
Director of Solutions Delivery and Professional Services	2017
In her 14 years of experience as a project manager and business analyst, she has served as a consultant and guided technology and client relationships project teams for Infosys Public Services and Boehringer Ingelheim. As the Director of Solutions Delivery and Professional Services, Sandra manages solution delivery teams comprised of project managers, business analysts, and implementation engineers in the fulfillment of	

solution contracts.

Sandra brings with her a strong background in international project and program management, business analysis, business process management, and vendor management. She is a Certified Scrum Master, holds a certificate in business analysis of the University of California, Irvine, and underwent Six Sigma Green Belt Training at the University of Utah. She is an alumna of the University of Applied Sciences Munich, Germany, where she graduated in 2004 with a Bachelor of Computer Science.

Sam Taylor

Director of Solutions, HHs and Public Sector	2007

Sam Taylor serves as the Director of Solutions for Health and Human Services and Public Sector. His focus is on the development of programs and services that enable health and social service organizations to work together to address the social determinants of health. Sam is an accomplished project management professional and is the leading force at Eccovia Solutions for implementing technology and processes for public sector, nonprofit, and private health and human service organizations.

Prior to his current role, Sam was the Director of Product Management at Eccovia Solutions where he was responsible for the planning, organizing, and managing of the successful completion of all technology solutions.

Sam has a BA from Utah Valley University, a Master's in Philosophy and Social Policy from American University, and an Advanced Project Management Certificate from the Stanford University Center for Professional Development. He also holds education certificates in HL7 Fundamentals, Data Analysis, Case-Based Introduction to Biostatistics, and Computing for Data Analysis.

Scott Wood

Director of Engineering	2018

Scott has 11 years' experience managing Software Engineering and Information Technology teams, both local and translocated. Known for building and keeping strong teams, coaching employees, energizing cultures, creating trust, and driving to success with robust and scalable systems, Scott's specialization includes architecture, design, engineering, B2B and internal integrations, business intelligence, SaaS, and internal third party applications. Scott has broad experience planning, executing, and delivering large scale projects in a diverse range of industries. He possesses unique skill in bridging and collaborating all business departments with Engineering and IT.

As Director of Engineering, Scott leads the engineering department, which is responsible for the development and maintenance of the ClientTrack software platform, as well as associated and related IT infrastructure.

Laurel Rodriguez

Director Marketing	2014

As Director of Marketing for Eccovia Solutions, Laurel Rodriguez leads a marketing organization focused on building the Eccovia Solutions brand and driving awareness, thought-leadership, and demand generation.

Laurel is responsible for the planning, development, and implementation of all marketing strategies, marketing communications, and public relations activities. She recently led a successful company re-brand for Eccovia Solutions, including all new corporate branding, messaging, and demand generation

strategies. Laurel brings with her 12 years of building marketing demand generation strategies for cloud software companies. She has a BA in Marketing from Utah State University.	

4.3 Respondent Staff

Please list roles of Respondent customer service, support, technical, and any other staff who would be involved in any tasks related to implementation and/or ongoing operations for HMIS.

For any role that would be filled by persons already on staff or under contract, create a separate record for each person, provide their names, and briefly describe their relevant experience/skillset.

For any role that would require Respondent to hire or contract with additional staff, explain the staffing source (e.g., new hire, contractor, etc.) and describe the experience/skillset required to fill the role.

Specify whether staff would be involved in implementation, ongoing operations, or both.

Use the space below to add additional records.

<table>
<tr><td colspan="2">Project Manager</td></tr>
<tr><td>Jason Sims: Project Manager</td><td>Implementation</td></tr>
<tr><td colspan="2">Jason is an accomplished, results-oriented professional with a comprehensive management background encompassing the areas of information technology, product management, quality assurance, and client management. He displays strong leadership abilities in managing complex projects and supervising and training personnel. Jason’s expertise in transforming business requirements into strategic solutions, resolving escalated production issues, and providing guidance on system integrity has made him a valuable asset to all of the teams he was a member of. Jason has excellent communication skills, with proficiency in communicating with multi-level audiences and engaging in negotiations.</td></tr>
<tr><td colspan="2">Business Analyst</td></tr>
<tr><td>Kristine Umble: Business Analyst</td><td>Implementation</td></tr>
<tr><td colspan="2">Kristine is a client and sales professional with substantial experience in application software across diverse industries. In her six years at Eccovia Solutions, Kristine has performed the roles of a Business Analyst and Account Manager, and was instrumental in developing reports and performance metrics for ClientTrack implementations in various client locations and applications. Kristine’s expertise in the ClientTrack solution and the data collection and reporting needs of our clients makes her an indispensable part of this team.</td></tr>
<tr><td colspan="2">Data Management and Reporting Expert</td></tr>
<tr><td>Oanh Do: Data Migration and Reporting</td><td>Implementation</td></tr>
<tr><td colspan="2">With 15 years of experience in IT project development, Oanh has a deep understanding of the process of data management. Oanh has worked on many different projects with various roles from database developer to business analyst. She has deep knowledge about SQL server and healthcare systems, as well as expertise in database management software, data warehouses, and further, business suites Informatica and Pentaho. She is also experienced in Agile and RUP methodologies.</td></tr>
<tr><td colspan="2">Implementation Engineer</td></tr>
<tr><td>Andrew Graham: Implementation Team Lead</td><td>Implementation</td></tr>
<tr><td colspan="2">Andrew is the Lead Implementation Engineer. Andrew has, in his five years with Eccovia Solutions, guided large ClientTrack implementation and configuration projects, wielding his extensive skill and experience using SQL and reporting services, and his knowledge of data modeling, to realize their successful executions.</td></tr>
<tr><td colspan="2">Quality Assurance</td></tr>
<tr><td>Ryan Christiansen: QA Engineer</td><td>Implementation</td></tr>
<tr><td colspan="2">Ryan performs quality assurance for SaaS solutions prior to their release to production. The QA Engineer identifies and documents issues and works with implementation engineers, business analysts, and others to clarify solution requirements and close out issues.</td></tr>
<tr><td colspan="2">Integration Lead</td></tr>
<tr><td>Frank Parth, Integration Lead</td><td>Implementation</td></tr>
<tr><td colspan="2">As the Senior Interface Software Engineer, Frank is experienced at leading the implementation of the NextGen/Mirth Connect interface engine for Eccovia Solutions and interfacing ClientTrack with outside systems. Already fluent in the HL7 and IHE standards for HIMS, he has been learning best practices for</td></tr>
</table>

HMIS and standards regarding the exchange of data for supporting the homeless population.

In addition to the individuals described above, ClientTrack provides full-issue resolution through our Technical Support team, Emergency Support Services, and the integrated ticketing system. ClientTrack's integrated ticketing system enables users to report issues, ask questions, and provide feedback. Users can access this feature through the Help button in each ClientTrack screen to submit tickets that include descriptions, screenshots, contact information, and behind-the-scenes debug information.

Tickets are initially submitted to the trained local system administrator, who will either resolve the issue or escalate it to the Eccovia Solutions Technical Support team. Tickets received by the Technical Support team are categorized into three tiers and are determined by issue severity, complexity, and priority. This allows the team to assign appropriate levels of support to diagnose and resolve the issue in a timely manner. Any issue notes or status changes made by support staff are updated automatically and are visible to the local system administrator.

Eccovia Solutions Technical Support includes full issue resolution through ClientTrack's integrated ticketing system and Emergency Support services. The Technical Support team operates from Monday to Friday, 9:00 AM – 9:00 PM EST, while Emergency Support services are available 24 hours a day, 7 days a week.

5 Planning and Implementation

5.1 Projected Timeline

I. Narrative Response

Eccovia Solutions is highly experienced in implementing HMIS solutions. As such, we have developed a baseline HMIS Project Work Plan that we use as a foundation for creating your custom implementation plan. The sample plan included is to help visualize the elements and general timeframe of an implementation. Elements and processes of implementation deliverables include:

Project Initiation

During project initiation, an Eccovia Solutions Project Manager will be identified and assigned to your project and will be your primary point of contact throughout the implementation. The Project Manager will schedule and conduct a project kickoff call to review project resources, review contract deliverables, review the schedule and establish dates/times for ongoing project meetings and analysis efforts.

Project Requirements Elicitation — Onsite

Initial requirement discovery and specification will create the initial setup data requirements.

Requirements Discovery

Utilizing this Scope of Work as a guideline, an Eccovia Solutions Business Analyst will meet with critical stakeholders, subject matter experts, and other persons deemed relevant to gain a detailed understanding of your organization's HMIS setup data requirements and Coordinated Entry Process based on this scope of work.

Project Requirements Specification

Requirement Specification

Utilizing the information derived in the Analysis Sessions, an Eccovia Solutions Business Analyst will draft the HMIS Solution Design document.

Finalized Project Control Documents

Once the Solution Design document has been finalized, your Project Manager will provide updated project control documents, including a finalized Initial Project Plan, based on the outcomes of the Requirements Specification phase of the project.

Project Business Analysis

Utilizing the solution design document, we will negotiate a specific number of hours/days of business analysis services to design and implement all modules noted within this scope of work.

Setup Data Management

Setup Data Management includes project support for all activities necessary to ensure setup data is implemented correctly.

ClientTrack HMIS Essentials

The following existing basic features will be deployed (no configuration of features is provided within this deliverable). Baseline data collection tools are maintained for future releases of HUD HMIS compliance requirements, and all HMIS reporting and exports leverage baseline elements, ensuring effective reporting. The following tools are available within ClientTrack HMIS Essentials:

- **HUD Intake, Update/Annual and Exit Workflows:** We streamline common processes into a step-by-step workflow for ease of use.
- **Case Management:** Developed and engineered for more than 12 years by experts in both human services and technology, the ClientTrack solution helps organizations improve efficiency in day-to-day tasks, such as determining eligibility, developing case notes, tracking client progress, measuring outcomes, and providing referrals.

- **Housing:** Facility and resident shelter tracking, transitional housing, and permanent supportive housing programs for flexibility in tracking bed nights; also provides key tools for housing programs. The platform provides current resident lists, facility logs, and incidents, as well as utilization, turn-away, and other housing reports.
- **Reporting:** ClientTrack provides real-time reporting tools to all users within the system. HMIS reports plus standard reports provide agencies with critical data to meet their programmatic needs as well as HUD compliance requirements.
- **Workgroups:** ClientTrack HMIS provides role-based access to features through Workgroups for Emergency Shelters, Outreach, Lead Agencies, and HMIS programs.

Data Migration Analysis

Eccovia Solutions will conduct a Data Migration Analysis of the legacy data. Central Florida HMIS is responsible for providing the complete sample data sets early in the elicitation phase. Once the analysis is complete, a Data Migration Plan and Proposal will be provided based on analysis. ClientTrack's HUD CSV Import tool provides effective data import for HUD standard data. Any additional elements needed or of any other file type provided will be analyzed by an experienced SQL analyst, who will review legacy data and outline recommendations for conversion. Recommendations will be documented within a proposal with the analyst to include firm, fixed-price or time/material-basis pricing for the design of the migration mapping (based on final configuration of the solution), preparation of scripts, test run, and final run of migration of data sets outside of the HUD standard data set.

HUD HMIS CSV Standard Format Data Migration

Eccovia Solutions will complete setup, mapping, and one initial migration run, one additional test run, and a final migration run, as well as quality assurance testing. Your HMIS staff is responsible for source data cleansing efforts and providing three (3) full migration files: one for initial run, one for additional test run, and one final to align with deployment for daily use.

Integration Analysis

Eccovia Solutions will provide a negotiated number of hours providing initial analysis of integration requirements with existing systems to define the requirements for API or flat file integrations. Central Florida HMIS is responsible for providing a list of systems, data sets, direction and integration method anticipated prior to analysis.

User Acceptance Testing

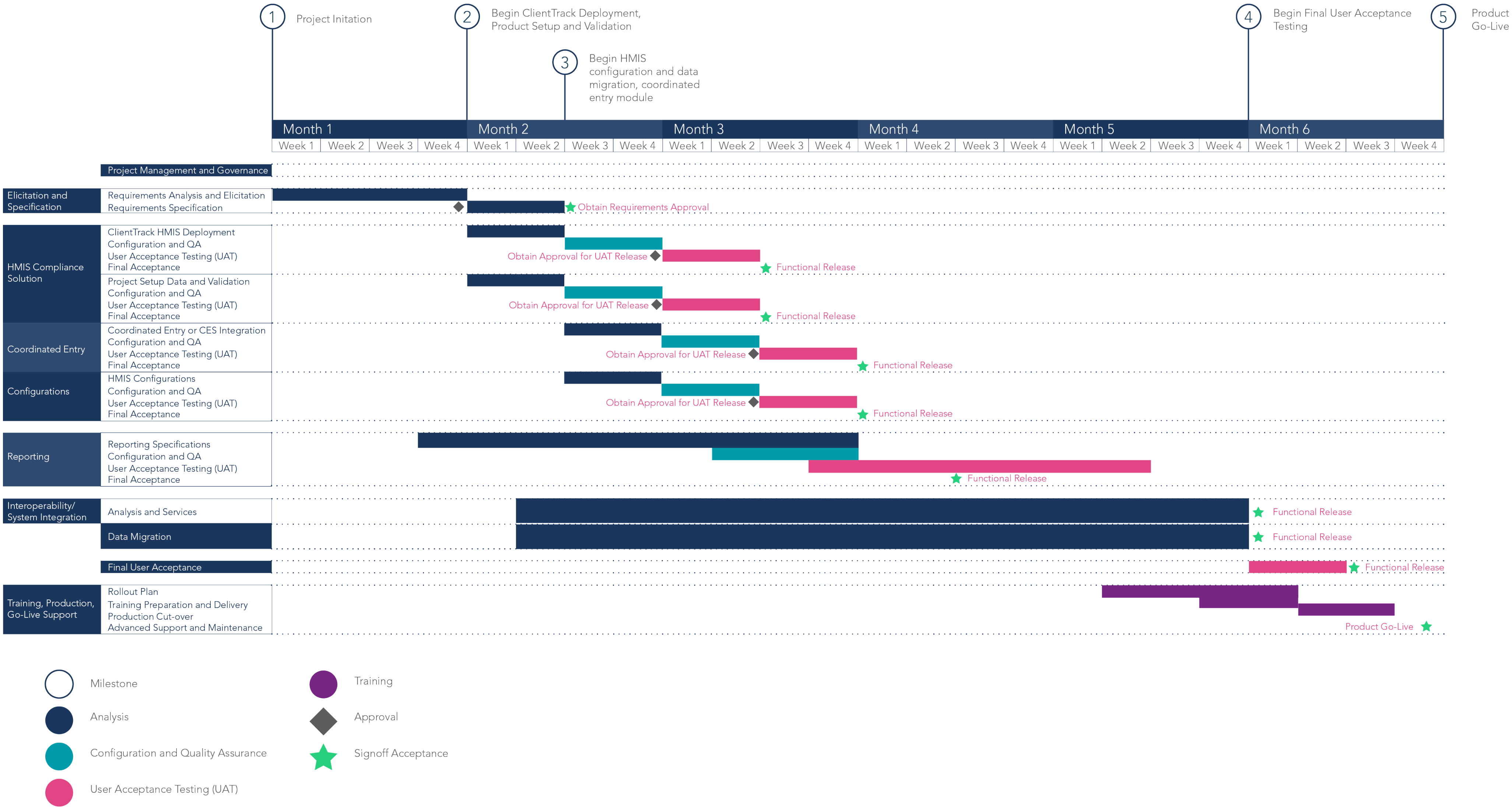
This phase provides Central Florida HMIS with a negotiated number of days to review the final solution. Your HMIS will submit any material issues regarding the functionality through the integrated ClientTrack Ticketing System. We will allocate resources to review the submitted issues and implement changes to the solution for issues deemed in scope. Also included:

- Train-the-Trainer Training
- Data Explorer Training
- ClientTrack Fundamentals Training

Deployment Support

Eccovia Solutions will assist Central Florida HMIS administrators in deploying the system for day to day operational use. Deployment support will include a negotiated number of hours of support during the week of deployment. Additional support will be proposed via a change request.

II. Sample Project Plan



5.2 CoC/HMIS Lead Roles and Staffing

Based on Respondent experience with other CoCs, please describe the CoC/HMIS Lead roles involved in a successful collaboration with Respondent during implementation and ongoing operation of the HMIS. Assuming appropriate experience and skills, please estimate the level of effort (or FTE equivalent) for each role.

Use the space below to add additional records.

CoC Admin/System Admin	
No less than 1 FTE per 80 active users	Implementation
Job/Task Description: Creating Setup Data, including organizations, projects, service codes, goals, referral codes, etc. Creating user accounts. Helping direct what security model should be used. Providing initial training for all users/CoC Admins. Checking that any custom reporting requirements can be satisfied with data collection. If data is being migrated, checking that data is migrated as expected.	
Experience/Skillset Required: Previous Database experience (HMIS preferred), Homeless non-profit experience (Familiar with HUD funding), ability to provide training/breaking down technical software to non-tech audience, can comprehend spec documents, provide reporting and analysis support.	
CoC Admin/System Admin	
No less than 1 FTE per 80 active users	Ongoing operations
Job/Task Description: Adding/monitoring setup data, adding/monitoring user accounts, providing ongoing training for end users, handling issue tickets, ongoing data quality/cleaning, assisting with reporting and analysis, making custom modifications (that don't fall under compliance) to system.	
Experience/Skillset Required: Previous Database experience (HMIS preferred), Homeless non-profit experience (Familiar with HUD funding), ability to provide training/breaking down technical software to non-tech audience, can comprehend spec documents, provide reporting and analysis support.	

6 Summary of Costs

6.1 Standard License

Provide an estimate of the annual cost to license Software with standard HMIS data collection and reporting.

Requirement/Deliverable	One Time Cost	Annual Cost
License – Standard	0.00.	0.00.

List factors or conditions that may potentially impact the estimated annual cost provided above (e.g., payment schedule, length of initial contract, licensing of additional functionality, purchase of other services) or cause it to fluctuate (e.g., additional users, additional projects, number of client records). Quantify the impact, if possible.

Cost Basis / Factors Affecting Cost of Standard License:

Click or tap here to enter text.

6.2 Implementation and Hosting

For each requirement/deliverable below, enter the associated one time and/or annual costs.

- If included in the standard license cost or the cost of another deliverable/requirement, enter $0.
- If any portion of the cost of a requirement is included in the standard license cost, enter only the portion of the cost that is not included.
- If not available from Respondent at all, enter n/a in both cost fields.
- For any task/service that could optionally be provided by Respondent or provided by the CoC, check the box in the CoC column and enter the cost *if provided by Respondent*.

Requirement/Deliverable	CoC	One Time	Annual
Completed Project Plan		0.00.	
Comparable Database (350 users/260 projects)		110000	117000
Configuration – 200 custom fields	☒	104550	TBD
Data Mapping and Migration			
HMIS standard data (7 years)	☐	12000	TBD
500 active/2,000 inactive user records and project associations	☐	0.00.	0.00.
200 custom fields	☐	1250	TBD
5,000 uploaded client documents/files *est.*	☐	1250	TBD
Hosting/Server Management	☐	0.00.	0.00.

Notes/Factors Affecting Cost of Hosting and Implementation

- Pricing Includes the following environments: HMIS Production, HMIS Training/Testing, Comparable DB Production and Comparable DB Training/Testing
- Migration: Custom fields beyond HMIS data standards and uploaded client documents will require additional analysis before pricing can be provided. We have included a cost for Migration Analysis as part of our response and a firm-fixed cost will be provided once we’ve had the opportunity to review a sample data set.
- Hosting/Server Management in Microsoft Azure is included in the license fee

- The Configuration line item includes the following: Estimated cost of initial implementation, End User Training (Train-the-Trainer) and Administrator Training

6.3 Cost for Features/Functionality/Services Not Included in Standard License

List any requirement from the Requirements Assessment section that is associated with additional cost.

- Do not list any requirement that does not incur additional cost.
- Do not list any cost more than once unless it could be incurred more than once. If a single feature (e.g., an add-on module) will satisfy multiple requirements, include a general description and reference the requirement numbers. For example: *Coordinated Entry Module (requirements 9.1-9.7)*.
- If the listed cost is an estimate subject to significant change, include a brief note to that effect after the description. Example: "Req. 7.3. Upload photos, scans, and other documents to a client record (Estimate – depends on file size / number of uploads)"

Requirement/Deliverable	CoC	One Time	Annual
Azure Advanced Analytics Environment (Annual Fee)	☐	15000	15000
HMIS System Administrator Service (Pricing is based on actual engagement and number of hours desired per month)		TBD	TBD

7 Additional Information

7.1 References

List at least three current customers and at least one former customer. References must include at least one HMIS implementation currently using Software as the designated HMIS.

Exception: The CoC's current vendor is exempt from the requirement to provide a reference from an HMIS implementation and asked to provide references from customers who are not CoC member agencies and who do not operate HMIS-participating projects in the CoC.

References will be asked to answer a standard set of questions about factors pertinent to Respondent's ability to meet the CoC's HMIS needs, including reliability, user experience, communication, and customer service. Please be aware that the CoC may request additional reference if a listed reference is unable or unwilling to answer these questions.

<table>
<tr><td colspan="2">Treasure Coast Homeless Services Council</td></tr>
<tr><td>Louise Hubbard, Executive Director</td><td>Current customer</td></tr>
<tr><td>irhsclh@aol.com</td><td>772-567-7790 x 1012</td></tr>
<tr><td colspan="2">A ClientTrack HMIS customer for over 10 years, the Treasure Coast Homeless Services Council, Inc. (TCHSC) provides homeless prevention, supportive services, and permanent housing to individuals on the Treasure Coast. The Council is made up of Member Agencies that collaborate to meet the needs of the homeless and near-homeless in area communities. This is the Lead Agency for Fort Pierce/St.Lucie/Indian River/Martin Counties CoC.</td></tr>
<tr><td colspan="2">Changing Homelessness (Formerly Emergency Services and Homeless Coalition of Jacksonville)</td></tr>
<tr><td>David Ojeda, Chief Operating Officer</td><td>Current customer</td></tr>
<tr><td>DSOjeda@changinghomelessness.org</td><td></td></tr>
<tr><td colspan="2">The Jacksonville CoC represents a valuable reference as they are a large community and currently have 50 participating agencies leveraging ClientTrack. ClientTrack was responsible for:
Data transfer and implementation, converting data and migrating them from another provider
Helping move them to a coordinated assessment model
Providing a project management team to help build a strong security model across the CoC
ClientTrack also:
Provided Continuous Education Services (CES) to help train the HMIS team to manage ongoing configurability
Assisted in end-user training, enabling the change management process
Helped Jacksonville remain in compliance with HUD
Supported system conversion, single CoC, technical staff and broad vision</td></tr>
<tr><td colspan="2">Georgia Department of Community Affairs</td></tr>
<tr><td>Jeanette Pollock</td><td>Current customer</td></tr>
<tr><td>jeanette.pollock@dca.ga.gov</td><td>(404) 679-3177</td></tr>
<tr><td colspan="2">Eccovia Solutions worked with the Georgia Department of Community Affairs to implement a statewide case management system for individuals who are homeless or at risk of becoming homeless. As the Source Data hadn't been updated to the most recent standards, DCA struggled to migrate all Source Data, and the</td></tr>
</table>

Source Data contained significant data issues. Nevertheless, in less than four months we went live. Whereas with their previous system, they were less able to take care of each CoC, with ClientTrack, we updated their data to the most recent standards and set up their system and data access to be more person centric and allowed DCA to take much more control of their system as a whole.	
Deferred	
Name.	Former customer
Email	Phone #
Describe the scope of services provided and number of years as a customer. For HMIS implementations, include approximate number of projects and users.	

Respondent Notes – Deferred References

Information on our former clients is considered proprietary and will be made available in the event that Eccovia Solutions is selected as the vendor for this RFP, [Contingent upon confidentiality agreement, client approval.]

7.2 Conflict of Interest Disclosure (1-2 pp.)

If Respondent has other relationships or obligations that would represent any actual or perceived conflict of interest with respect to Respondent's objectivity, impartiality, ability, and/or willingness to perform work for the CoC under the Terms and Conditions included in the RFP, disclose them here. Include the provisions of any formal Conflict of Interest policy.

Eccovia Solutions is not aware of any relationships or obligations that would represent actual or perceived conflicts of interest as described. Our client-generic Conflict of Interest policy contains the following provisions, which can be adjusted and negotiated should Eccovia Solutions be selected as the vendor for this RFP.

7.3 Confidentiality Policies and Procedures (1-2 pp.)

If Respondent staff have any access to client-level data, describe policies and procedures related to confidentiality, including vetting and/or background checks, training, oversight, and responses to and customer notification of breach. Include the user roles/titles of persons granted access and include the text of agreements signed by staff, if any. If this is not applicable, explain why.

With over 20 years in the software market, Eccovia Solutions has broad experience in building software solutions that are subject compliance frameworks, such as HIPAA and 42 CFR Part 2. We have a Privacy and Security Officer who oversees all ongoing activities related to the development, implementation, and maintenance of our privacy policies in accordance with applicable federal and state laws. In addition, we have implemented an ongoing security awareness and training program for all employees, wherein all employees are required to undergo annual HIPAA training.

Eccovia Solutions performs background checks through Bluemountain. Bluemountain contacts the potential employee for consent to perform the background check, the results of which are sent to our HR manager upon completion. Upon employee termination, all assets are collected, all means of accessing the premises are returned, and all information access credentials are revoked.

In the event of a breach, Eccovia Solutions adheres to the requirements set forth in the HITECH Act, which imposes data breach notification requirements for unauthorized uses and disclosures of “unsecured PHI.” These notification requirements are similar to many state data breach laws related to personally identifiable financial information (e.g. banking and credit card data). Breach response activities are coordinated with internal and external stakeholders, as appropriate, to include external support from law enforcement agencies. All Eccovia Solutions employees are aware that noncompliance will in disciplinary action up to and including termination of employment, and may expose employees to the consequences of applicable federal or state laws leading to prosecution, as well as criminal and civil penalties.

Individuals accessing or utilizing covered information will use reasonable care to ensure that the data remains confidential and is not damaged, lost, or stolen. This reasonable care will include such actions as:

- Paper or electronic records (including records stored on hard drives or other electronic media) containing covered information shall be disposed of only in a proper manner
- Employees are prohibited from leaving their workstations “logged-in” or keeping open paper materials and files containing covered information on their desks when they are not at their desks
- At the end of the work day, all files and other records containing covered information must be secured in a manner that is consistent with protecting the security of personal information
- Files containing covered information shall never reside on removable media or laptops; the only approved storage method includes secure storage on the network drive and Sharefile; all protected data shall be encrypted

The roles of Eccovia Solutions staff who are authorized to access client data are as follows:

Solution Delivery: Project Manager, Business Analyst, Implementation Engineer
Product: Product Manager, Solutions Engineer
Advanced Professional Services: Advanced Professional Services, Support Help Desk

Engineering: Platform Engineer, Baseline Engineer, Interoperability & Data Analytics, Quality Assurance

Regardless of role, all employees are required to sign the following agreement:
"I hereby acknowledge that I am in receipt of and understand the information provided to me by Eccovia Solutions in the Comprehensive Data Security, Privacy and Confidentiality Policy and Plan (for HIPAA). This includes the EMPLOYEE HANDBOOK and the training of [most recent training date].

I further acknowledge that I am forbidden from any action that can be perceived as a breach as defined in this policy. This prohibits disclosure, willful or unintentional, of protected health information received from, or created or received by Eccovia Solutions on behalf of any covered entity (client). I understand and accept my responsibility and the implications including potential civil, criminal, and financial penalties as described therein."

7.4 Third Parties

If any task, feature, or functionality requires the involvement of a third party, provide contact information, briefly describe the services provided, and identify the associated requirement(s). Provide a sample service agreement or contract (screenshot/scan/other) below. If costs are not defined in the agreement, include them in the description.

Click the '+' sign at the lower right-hand corner of the box below to add additional third parties.

Not applicable.	

7.5 Disclosure of Contract Disputes (1-2 pp.)

Provide a brief description and current status of any contract terminations, litigation, censure by professional certifying authority, or other formal action initiated against vendor organization related to contract disputes or non-compliance. If none, so state

Eccovia Solutions has no contract terminations (other than expiration), litigation, censure by professional certifying authority, or any other formal action initiated against us related to contract disputes or non-compliance.

7.6 Additional Features and Services (Optional; up to 5 pp.)

This section may be used for any information that Respondent would like to provide about Software features and/or Respondent services that are available but not described elsewhere in this proposal because they are not directly relevant to listed requirements.

This section will not be scored and is entirely optional. Screenshots in this section may include Vendor and/or Software name – if included; it will not be reviewed until after de-identified proposal sections are scored.

Eccovia Solutions offers optional services that many other HMIS customer have found valuable in provision of their services. Two that may be of interest to Central Florida include:

- **HMIS Administrator Services:** *Eccovia Solutions' HMIS Administration Services provides powerful efficiencies and value-added services to Central Florida HMIS should the CoC seek additional support. ClientTrack HMIS Administrator Services offer CoC and HIMS Lead staff a knowledgeable partner who can help ensure continued compliance with federal partner standards, advise on effective HMIS policy, and administer day-to-day system operations. Our HMIS team has accumulated multiple years of experience as ClientTrack HMIS administrators, with intimate knowledge of the unique needs faced by communities large and small in supporting a truly functional and integrated HMIS.*
- **Azure-enable Advanced Analytics:** *Azure-enabled Advanced Analytics is an Azure SQL copy of your production database that can be connected to analytics tools such as Microsoft Power BI. Azure-enabled Advanced Analytics makes it possible for your organization to access ClientTrack production data without worrying about causing performance issues for your users.*

Please see the attachments included in the final pages of our proposal for more detail.

545 East 4500 South, Suite E-260
Salt Lake City, UT 84107
Sales: 888.449.6328
eccoviasolutions.com

Azure-enabled Advanced Analytics

Every day, health and human service organizations assess risk for high-needs individuals and appropriately measure and manage care and services for them. This data helps identify areas for improvement in client outcomes and process improvement. In addition, organizations need a way to share this data with key stakeholders, funders, and partners in the community.

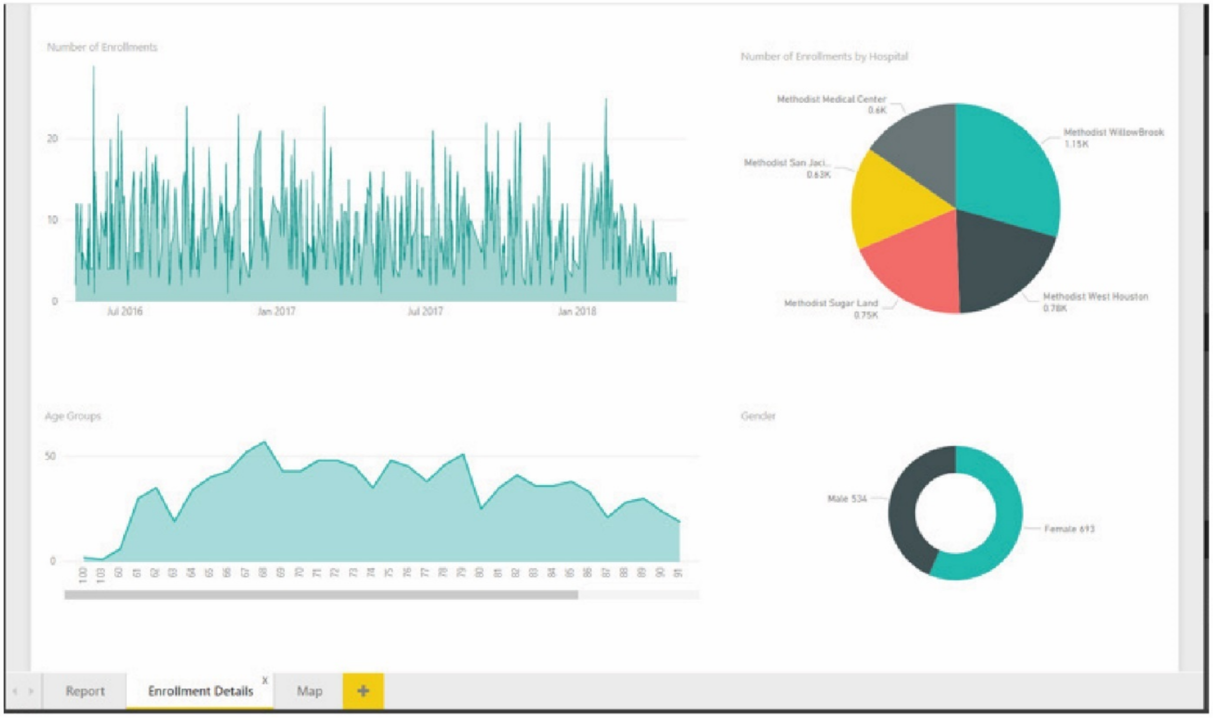
Eccovia Solutions is pleased to offer our clients a new way to bring your data to life. Introducing Azure-enabled Advanced Analytics.

WHAT IS AZURE-ENABLED ADVANCED ANALYTICS?

Azure-enabled Advanced Analytics is an Azure SQL copy of your production database that can be connected to analytics tools such as Microsoft Power BI. Azure-enabled Advanced Analytics makes it possible for your organization to access ClientTrack production data without worrying about causing performance issues for your users.

HOW DOES AZURE-ENABLED ADVANCED ANALYTICS WORK?

- ✓ Azure-enabled Advanced Analytics automatically adds newly created custom columns and tables once they are deployed to your production database
- ✓ Organizations can use any analytics tool that supports connections to Azure SQL
- ✓ The Azure SQL copy database is updated approximately every 2 hours in order to ensure the most updated data for your queries
- ✓ A copy of the production system is necessary to preserve performance of the live database
- ✓ The table names are not changed by the copying process
- ✓ The copy includes all ClientTrack tables



Note: *Analytics tools like Power BI do not have ClientTrack security rules. Your security model will not be enforced in the analytics tool. This solution is designed for evaluators, administrators, and other users expected to have full access.

GETTING STARTED

Eccovia Solutions will create an Azure SQL instance and load the initial copy of your production data. Once complete, we provide your organization with authentication and connection details to use to connect to your Azure SQL instance. Simply visit powerbi.microsoft.com to download the free desktop version of Power BI. You can also view additional license options needed for sharing outside of your organization.

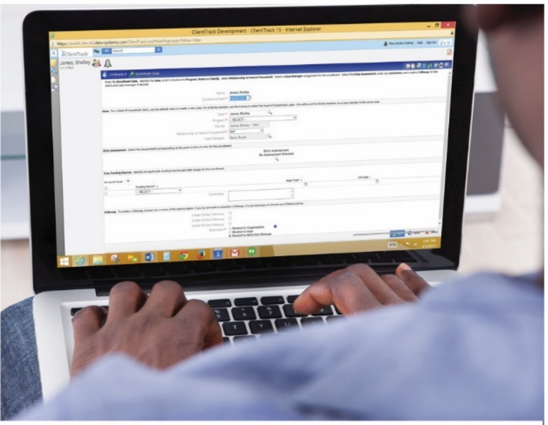
Eccovia Solutions hosts your analysis copy in Azure SQL and maintains an automated, incremental update in order to ensure you always have the latest data for your queries.

Reach out to your Account Manager or contact us at sales@eccoviasolutions.com to learn more about Azure-enabled Advanced Analytics.

Eccovia Solutions provides an industry-leading care coordination platform for state and county health and human service agencies, ACO/MCO's, Medicaid Waiver programs, and community-based providers. Our unique and proven solutions help connect communities with a whole person care tracking, monitoring, and reporting system.

Eccovia Solutions

545 East 4500 South, Suite E-260
Salt Lake City, UT 84107
Sales: **888.449.6328**
eccoviasolutions.com



HMIS Administrator Services

We do the heavy lifting so you can focus on your clients

RECORDING & ACCOUNTING FOR SERVICES

Continuums of Care across the country rely on ClientTrack HMIS to help end homelessness in their communities. ClientTrack enables CoCs to manage intakes, perform assessments, and report on outcomes while collecting all Federal Partner data. ClientTrack also provides the Data Management Toolset and training that enable HMIS administrators to customize their system to meet their unique requirements. However, what about the HMIS agencies that don't have enough time, resources, or technical knowledge to support their HMIS platform and ensure compliance with HUD?

ClientTrack HMIS Administrator Services bring efficiency and turn-key ease to managing your HMIS so you can take care of your community. ClientTrack HMIS Administrator Services give CoC and HIMS Lead staff a knowledgeable partner who can help ensure continued compliance with federal partner standards, advise on effective HMIS policy, and administer day-to-day system operations.

Our HMIS team has over 10 years as ClientTrack HMIS administrators and has intimate knowledge of the unique needs faced by communities large and small in supporting a truly functional and integrated HMIS. Jeanette Pollock, Special Projects Manager for the Georgia Department of Community Affairs said "The ClientTrack Administrator Services team has made a huge difference. They are an integral part of my team and we would not be in such good shape without them."

"I have complete confidence in the ClientTrack Administrator Services team. I can't know everything and so I rely on the knowledge they bring and look to them to respond to questions or address issues."

JEANETTE POLLOCK
Special Projects Manager
Georgia Department of Community Affairs

HMIS Administrator Services include:

REPORTS

- ✓ Generating, reviewing, and inputing PIT, HIC, AHAR, and System Performance Measures
- ✓ Working collaboratively with HMIS agencies to resolve any data quality issues with AHAR and System Performance Measures
- ✓ Coordinating with CoC's PIT/HIC efforts to generate Point-in-Time data for annual CoC NOFA submission
- ✓ Providing end-user training on federally required reports

TRAINING

- ✓ Training end users on HMIS compliant data entry in accordance with CoC Guidelines and Policies.
- ✓ Training a dedicated, core group of end users as "super users" to assist with local support needs, facilitate training, and increase HMIS knowledge in the CoC

COMMUNICATION

- ✓ Communicating new requirements and federal HMIS guidance to CoC and end users
- ✓ Facilitating communication between CoC Lead, HMIS Lead, HMIS End Users, and Eccovia Solutions staff
- ✓ Providing end user support and basic configuration
- ✓ Providing first or second line of support for end users
- ✓ Collaborating with "super users" to research and coordinate solutions
- ✓ Providing adjustments for configured forms, workflows, and workgroups

SETUP DATA

- ✓ Creating new organizations, projects, funding sources, facilities, and service codes in HMIS for new organization or project entry
- ✓ Managing existing organization and project setup data for compliance, adjust as needed (i.e. new service offered)
- ✓ Policy maintenance, implementation, and enforcement
- ✓ Making recommendations for data quality, privacy, and security policy updates based on current HMIS standards and ClientTrack software
- ✓ Assisting with CoC policy enforcement of Data Quality, Privacy, and Security plans, such as regular data quality review

HMIS Administration Consultation Services

In addition to providing day-to-day system administration, we also provide HMIS consultation services. An HMIS expert will work with you to ensure your setup conforms to HMIS standards, improving efficiency and compliance now and preventing data quality issues down the road. Our consultation services include the following:

HMIS SETUP REVIEW

- ✓ Identifying conflicting or absent funding sources for federal projects
- ✓ Identifying compliance mapping issues
- ✓ Helping leverage baseline functionality for local needs and use to ensure you're getting the most out of your existing solution

HMIS DATA ANALYSIS

- ✓ Data Quality—Working with the service desk to ensure as few DQ errors as possible
- ✓ Advanced Analysis—Working with your CoC on advanced queries for analysis. Developing research plans to apply just in time intelligence to your CoC
- ✓ Interoperability with non-HMIS agencies and data—Working with community partners to integrate local configuration and data needs into the larger HMIS CoC

Eccovia Solutions is proud to play a key role in the success of our clients in ending homelessness in their communities. Our ClientTrack HMIS solution and administrator services give you a knowledgeable technology partner who can do the heavy lifting so you can spend your time focusing on your clients.

To learn more about how your organization can benefit from partnering with Eccovia Solutions and our industry-leading ClientTrack HMIS software, visit EccoviaSolutions. com or call 888.449.6328 to speak with one of our experienced Solution Experts.

Eccovia Solutions is a trusted provider of industry-leading software and services for health and human service organizations of all sizes. Our leading ClientTrack platform is an advanced case management and housing solution that focuses on meeting the needs of HMIS continuum member agencies and their community partners to address all aspects of a homeless individual's needs. ClientTrack is configured to meet the latest HUD HMIS Data Standards, and comes with all the latest HUD compliance reporting requirements pre-configured.