TX-503 (Austin/Travis County) HMIS Vendor Request for Proposal Reponse

Appendix A: Proposal and Demonstration Evaluation Criteria

Category	#	Performance Criteria	Select: 0 - Not Included 1 - Add-on 2 - Included	Explanation of Response (Example: Description of Alternative Feature or Customization)	Estimated Additional Annual Cost (If Applicable)
Data Elements	1	Software designed to collect and report the Universal Data Elements (UDE's), as specified in the current HUD Data Standards Manual and Dictionary.			
Data Elements	2	Software designed to collect and report the Project Descriptor Data Elements (PDDE's), as specified in the current HUD Data Standards Manual and Dictionary.			
Data Elements	3	Software designed to collect and report the Program Specific Data Elements (PSDE's), as specified in the current HUD Data Standards Manual and Dictionary.			
Data Elements	4	Software designed to collect and report the Metadata elements (ME's), as specified in the current HUD Data Standards Manual and Dictionary.			
Data Elements	5	Software designed to collect and report Housing Inventory Count (HIC) data in a way that is easily uploaded to HDX with no vendor-side errors.			
Data Elements	6	Ability to import data using current XML and CSV schema specified on the HUD Exchange and HDX website as well as customized data transfer protocols as needed.			
Data Elements	7	Data defaults to system-wide sharing, but the default can be modified by a system administrator, and a user can modify sharing on an individual client's record.			
Data Elements	8	HMIS Solution adheres to HUD Data Standards with regard to data collection at various stages. Universal Data Element collection occurs once at the Client Record Creation stage, Program Specific Data Element collection occurs on a per-enrollment basis, household creation and assignment of Household ID occurs once per enrollment and is unique to each enrollment. HMIS Solution allows for data collection at all remaining stages including the Update/Occurrence Point stage, Annual Assessment stage, Exit stage, and Post Exit stage to track changes to appropriate elements also specified in the HUD Data Standards.			
Data Elements	9	Move-In Date can only be recorded at the enrollment level.			
Data Elements	10	Integrated coordinated assessment and referral module that is easy to navigate and understand.			
Data Elements	11	Software must provide enough data collection capabilities within Project Admin to help us report on target populations within a geography, hours of operation, etc. Software has the ability to specify a project's target population in one geography and a different target population in another geography.			
Data Elements	12	Software must provide the ability to indicate what counties a project provides services to.			
Data Elements	13	The HMIS software should include ability to make eligibility-informed referrals and track referral outcomes.			

Data Elements	14	Where the HMIS Data Standards allow it, data elements should utilize conditional logic to be sure users cannot save conflicting data. For example, if the user selects "Yes" for Income, the user must be required to record an Income Source with an Amount saved (or change the response to "No"). The HMIS software should limit availability of certain data elements based on appropriate need, such as questions that should be only available for certain age groups, for Heads of Household only, and other program specific elements. In lieu of conditional logic, where not available, the HMIS software should take advantage of recommended HUD Standards' assumed logic models for data elements such as Income, Non-Cash Benefits, and Insurance by only requiring Yes responses and assuming the remaining No's, and calculating Total Monthly Incomes at the Client level.			
Data Elements	15	Customizable user alerts or reminders when required HUD Annual Assessments are due/past due. Reminders should be able assignable to a variety of individuals who may or may not be HMIS users (e.g. case managers, housing director, Executive Director) and may be set to persist until the household has been assessed. Alternatively, the ability to set reminders to automatically propagate external calendars, such as Outlook, Google, or Apple, or other industry leading calendar or planning tools while maintaining PPI standards.			
Data Elements	16	One Release of Information per organizational 'tree' in HMIS, not per project.			
Data Elements	17	The Respondent implements data mapping changes as specified by HUD prior to the date of release.			
Data Elements	18	The HMIS Software meets HUD and federal partner deadlines for implementing data element, response category, and report specification updates; including HUD requirements for giving HMIS admins enough time to prep for implementation of new elements.			
Data Elements	19	The HMIS Software has a data dictionary, clear naming conventions, and transparency in table structure to support reporting and data import and export.			
Data Elements	20	Software offers a customizable prioritization function that can be accessed by HMIS users for coordinated entry process purposes, including at the County level, Region level, and Organization level.			
Data Elements	21	The HMIS Software can track geolocation			
Data Elements	22	The HMIS Software must have a mobile-friendly interface to facilitate real-time collection of PIT data to be used in PIT reporting, or the ability to seamlessly import externally collected PIT data.			
Data Elements	23	The HMIS Software has barcode or scan card for data entry that can be customized to fit a project's particular workflow, whether that's NBN or Entry Exit. The software should include a bed and unit management feature to allow for expedient entry and exit into specific beds and units that feeds to real-time vacancy. Bed reservations can be made by outside providers.			
User Interface	24	Consistency in the user interface and functionality - buttons, terms, functionality, placement, movement, transitions all look and work the same from any point of entry.			
User Interface	25	Ability to efficiently export data using current XML and CSV schema specified on the HUD Exchange, HDX website.			

User Interface	26	Thorough resources on the proper set up and use of the HMIS Software to optimize common HMIS workflows for accuracy, completeness, and timeliness.			
User Interface	27	Thorough and continually updated user interface documentation; including system administration, front-end use, and data integration. Every screen is documented in a clear and cohesive manner and is easily accessible to system admins and end users.			
User Interface	28	Ability for users to add service transactions through a concise service transaction list compatible with HSDS (with service transaction definitions).			
User Interface	29	Ability to embed clickable external links in the HMIS Software to our own web content, such as html ahref or mailto codes that could be used as a supplement to Help functionality in the HMIS Software to direct users to outside training resources such as How-To videos, guides and manuals, or to communicate by email directly from a problem spot in the HMIS Software			
User Interface	30	Ability to see history of responses and to edit or correct those responses on-the-fly.			
User Interface	31	Ability to upload and download client-level documents to/from the client profile (. pdf, .jpg, .doc, .csv, etc.)			
User Interface	32	The HMIS Software can be securely accessed from multiple devices including computers, smartphones, and tablets; mobile capability functions.			
User Interface	33	HMIS solution should be printer friendly.			
User Interface	34	Simple interface to assign case managers, enter client notes, goal plans, and housing plans for case management purposes. Easy to manage for case managers, oversee for supervisors, and simple and reportable in terms of reporting case outcomes per project.			
User Interface	35	Warning when entering a project stay that will pull through as an error in HUD reports (<>1 head of household, overlapping project stays).			
User Interface	36	Easy to switch projects/providers to ensure client is entered under the appropriate project.			
User Interface	37	Simple and easy to read/navigate reporting platform.			
User Interface	38	Ability to dynamically manage household members who join and depart from program stays and adheres to the HUD Data Standard that "a Household ID has no meaning beyond a single Enrollment."			
User Interface	39	Ability to easily view the clients' entire project stay/services history on one screen.			
User Interface	40	User-friendly referral system in which an HMIS user can refer, accept, or deny referrals in a simple process (just a few clicks).			
User Interface	41	Ability for users to sign an HMIS ROI digitally on HMIS for better real-time data collection.			
User Interface	42	Protocols in-place to prevent duplicate client record creation.			
Reporting	43	The HMIS Software provides up-to-date HUD-required Annual Progress Report (APR), Longitudinal Statistical Analysis (LSA), System Performance Measures (HUD SPM), Consolidated Annual Performance Evaluation Report (CAPER), Data Quality Framework, PATH, RYH, SSVF and any other VA required reporting, and HOPWA			

Reporting	44	Audit reporting available to system admins for all events (viewing, adding, deleting, modifying) for all aspects of data elements, provider settings, and system settings in the HMIS software by any user. Audit reporting includes the old value and the new value, the date and timestamp of the event, and the user connected to the event.			
Reporting	45	The HMIS Software includes a customizable reporting tool that inherits data visibility settings made at the user and provider level on client level data.			
Reporting	46	The HMIS Software includes a custom reporting tool based on reporting software with a broad community and good documentation. The software is up-to-date and fully supported.			
Reporting	47	The HMIS Software includes a custom reporting tool that allows real-time data queries.			
Reporting	48	The HMIS Software includes a custom reporting tool that is well documented, fully supported, and training is available to all users.			
Reporting	49	Access is granted to read query all tables and fields in the HMIS Software.			
Reporting	50	Ability to schedule any report.			
Reporting	51	Ability to schedule any export.			
Reporting	52	Ability to create custom exports of any data, including custom data elements.			
Reporting	53	Ability to run any report on any mix of providers			
Reporting	54	Ability to drill down or otherwise access client-level data behind any vendor-maintained reports (whether required by HUD or not) so users can ascertain how all aggregations are being calculated.			
Reporting	55	Thorough and continually updated report documentation including data models and data dictionaries that communicate what a report contains, where the data comes from, and why the report was created. Documentation includes change log.			
Reporting	56	Real-time Coordinated Entry reporting at the project, County, and System levels including program eligibility, prioritization criteria, and vacancies.			
Reporting	57	Software must provide a resource directory that details agency and program information.			
Reporting	58	Mechanism for end users to approve or request specific changes to the PDDEs about their project without having the permissions to actually modify that data.			
Reporting	59	Required data quality reporting for numerous funders (VA, ESG, CoC, etc.) maintained by the vendor.			
Reporting	60	Ability to search through all custom reports to find the one needed.			
Reporting	61	The HMIS can geocode addresses and ability to perform geospatial analysis that is integrated throughout the BI system			
Customer Service	62	User Acceptance Testing (UAT) procedures around every software upgrade, patch release, feature enhancement delivery (including customized reporting), and other system change. Acceptable procedures include, at a minimum, a two-week UAT period.			
Customer Service	63	Vendor-managed ticket system for tracking software issues with the ability to track statuses of open issues and resolution times.			

Customer Service	64	Technical support responses are within 24 hours and resolution is within a timeframe agreed upon by both vendor and customer. Weekly updates on progress of resolution.			
Customer Service	65	Respondent's customer service model builds a customer-to-single-representative relationship so that the representative knows our implementation and advocates for our issues to be resolved in a complete way.			
Customer Service	66	Patch release timing, content, communication, customer testing, and customer acceptance are well-coordinated.			
Customer Service	67	Training/testing site available to all end-users that mirrors the live/production environment.			
Customer Service	68	Licensed in a way that allows us to publish publicly our own user trainings with screenshots and/or screen casting of the software.			
Customer Service	69	Respondent maintains a welcoming and safe online customer community that can speak freely about the software and its implementation in order to help each other.			
Customer Service	70	Change logs and up-to-date list of Known Issues for each feature and each vendor-maintained report in the software is freely available to system administrators.			
Customer Service	71	Respondent creates and maintains suggested project workflows that are HUD-compliant, as simple as possible for the end-user, and easily set up and maintained by system admins.			
System Administration	72	Integrated Online Help functionality exists and is accessible to users.			
System Administration	73	Mechanism for system administrators to manage client deduplication via a client record merger or similar functionality.			
System Administration	74	Fund-source management, for when multiple funding sources are tied to a single project; local, state and federal dollars must be tracked to services provided to clients to ensure accurate reporting to all interested parties.			
System Administration	75	Ability to re-organize provider relationships (for example, which project is the "Organization" of a project) at the administrator's level at no cost.			
System Administration	76	Step-by-step, documented Project/Unit Inventory setup for System Administrators.			
System Administration	77	User roles can be customized and maintained by system administrators.			
System Administration	78	The system administrator should be able to set flexible sharing defaults for client data by data element, project, and project type in accordance with CoC privacy protocols.			
System Administration	79	HMIS software should allow administrators to create and save tailored lists (or groups) of providers within the system.			
System Administration	80	Ability for system administrators to customize each user's interface (i.e. assessments or reports that appear) when they log into HMIS.			
System Administration	81	Ability for system administrators to control and/or manipulate the required assessment fields as needed.			
System Administration	82	Ability to mass-change project-level settings on groups of providers, including visibility, Services & Referrals settings, and all HUD-required PDDE's.			
System Administration	83	Ability to indicate the County/Parish in which a project is located in a way that is easily used in custom reporting system and in Coordinated Entry reporting.			

System Administration	84	Ability to upload project grants and contracts in the Provider-Admin / set-up section in HMIS.			
System Administration	85	Ability for end-users to reset their own password securely.			
System Administration	86	API that can be used to support a custom reporting solution in an external reporting solution such as R.			
System Administration	87	Clear and easy to understand user licensing management and reporting for system admins. We need to be able to easily see how many licenses we have purchased and how many are in use.			
System Administration	88	Ability to move a user's account and history should they change agencies.			
System Administration	89	Administrative functions to manage user accounts that include the ability to restore users, track licensing, create customized data elements on user records, and review prior user histories.			
System Administration	90	Ability to search Provider Admin by Provider ID.			
System Administration	91	Ability to record custom data at the User Admin level like number of security breaches, last training completed, and why they were inactivated or deleted.			
System Administration	92	Ability to create assessments with question/answer functionality that includes customizable conditional logic.			
System Administration	93	Provide sufficient security protocols: at least 128-bit+ end-to-end data encryption, time out after a period of inactivity, concurrent login prevention, updated user password standards as published by the National Institute of Standards and Technology, SSL Certificate, user access logs, and an automated audit trail.			
System Administration	94	Provide disaster recovery plan for no additional charge.			
System Administration	95	Software has little-to-no unplanned downtime for maintenance and customers are given at least 2 business days of notification prior to any system maintenance down time.			
System Administration	96	Robust search capabilities across the BI system: includes support for Boolean search support in any place that allows text searching.			