INSTRUCTIONS
The offeror is expected complete the spreadsheet entitled basic business functions and document whether the functionality is:

Standard in the product - This would indicate that the functionality or requirement is in the offering and does not require configurability or the purchase of a separate module. Indicate YES or NO.

Config - This would indicate the the functionality is in the offering and is configurable. Indicate YES or NO.

App Interface - This would indicate that the functionality can be accomplished via an existing application interface to external systems or programming. Indicate YES or NO.

Not in product - The functionality is not in the product (indicated by an X in the Column). If the functionality is in a release schedule of the product or the vendor is willing to accommodate in the product prior to implementation - please indicate with a detailed explanation of how it would be accomplished and an implementation date.

PA DHS RESOURCE AND REFERRAL TOOL RFP - HIGH-LEVEL FUNCTIONALITY REQUIREMENTS
APPENDIX F

Software Features	Standard Function	Config	App Interface	Not in Product
- Web portal that supports no wrong door				
- Client portal - anyone can search for services				
- Mobile capabilities (tablet and cell phone)-Responsive design				
- SDOH Assessment(s)				
- Eligibility screenings (For example: Public benefits, state programs, social services)				
- Resources information / searchable services database				
- Geo-mapping				
- Referrals: generating/tracking/feedback (closed loop)				
- Client self-referral				
- Care team information				
- Care team shared notes				
- Case management capabilities: Goal planning/tracking				
- Navigation available in multiple				
- User-oriented / Easy navigation				
- Appointment Scheduling				
- Appointment reminders				
- Text messaging clients				
- Adding family members/supports				
- Document storage for eligibility (birth cert/Driver's License/Social Security Card)				
- Roles based security (access to information based on the role of the user)				
- Various forms of consent (digital/voice/written)				
- Accessibility: Navigation accomodates all literacy levels and disabled individuals				
- ROI analysis				
- Heat Maps				
- Tracking denial of services				
Client Data Repository (Individual & Family Level)				
- Individual level data				
- Household level data - (ability to link individuals)				
Customization				
- Data Fields				

- Dashboards				
- Layout: easy to navigate / well organized and nicely presented				
- Reporting				
- Analytics / Outcomes				
- Ability to incorporate customized SDOH assessments				
Systems / Interoperability				
- Send/receive data from stakeholder systems (EHR or Case/Care Management) via common API or industry standard, Ex: HL7 FHIR				
- Built-in workflows				
- Single sign-on - capability for user to stay within their own systems while accessing referral tool				
- Real-time data/reports/communication				
- Capacity/Bandwidth (can handle state-wide demands)				
- Audit trails that record user, date and time that changes were made				
- Data Encrypted for security - In-Transit and at rest				
- Vulnerability testing and vulnerability remediation prior to each release of software				
Directory				
- PA service agencies included in the directory				
- Wide range of service areas represented in directory				
- Searching Capabilities: Simple/Advanced/Filters				
- Staff interfaces and client interfaces				
- Program and Services Information Updates: Contact Information and services offered				
Data Accessibility and Security				
- Aggregates data				
- Access to data (including ability to export) based on a variety of filters (i.e., referred by organization, referred to organization)				
- Reporting capabilities within tool (user defined and standardized)				
- Visualization of data within the tool (heat maps, graphs, dashboards)				
- Data security and HIPAA compliance				