



COMMUNITY ACTION CORPORATION OF SOUTH TEXAS

Early Childhood Intervention
Electronic Health Record System

RFP# R25-002-01

PROPOSALS DUE:
August 29, 2025

Attn: Jason Muller
Director of Information Technology
rfp@cacost.org

Community Action Corporation of South
Texas 204 E. First St.
Alice, TX 78332

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REQUEST FOR PROPOSAL (RFP)

**Electronic Health Record
(EHR) System**

INTRODUCTION

The Community Action Corporation of South Texas (CACOST) is a private non-profit organization established in 1971 and funded through state and federal grants and fees for service. CACOST has a workforce of 629 employees and a service area consisting of seventeen South Texas counties. The mission of CACOST is to continuously improve the lives of south Texans by providing high quality healthcare, education, housing, and economic opportunities to reduce poverty through services and partnerships. More information on CACOST can be obtained by visiting the CACOST web site at www.cacost.org.

GENERAL CONDITIONS

Purpose

CACOST is seeking proposals for a reliable Electronic Health Record (EHR) System to manage all Early Childhood Intervention (ECI) Project Ninos child records. ECI currently serves on average 1,710 children in 11 counties.

Submission Information

Closing date

Proposals must be submitted no later than 5:00 pm, August 29, 2025.

Inquiries & Contact Person

All questions concerning this RFP should be directed to **Jason Muller, Director of Information Technology** at rfp@cacost.org. Communication with other individuals will not be allowed. CACOST reserves the right to disqualify any Proposer who is found in violation of this provision. No questions other than written via email will be accepted, and no response other than written will be binding upon CACOST. Submittals will remain on file in accordance with the Texas Open Records Act.

Costs of Preparation

All costs incurred in the preparation of the response to this RFP and any associated costs will be the sole responsibility of the Proposer and will not be reimbursed by CACOST.

Submission Instructions to Proposers

To be considered responsive and receive an evaluation, proposals must fully address all sections of the RFP. Your proposal should be addressed as follows:

Community Action Corporation of South Texas
RFP# R25-002-01ECI Electronic Health Record System
ATTN: Jason Muller
Director of Information Technology
204 E. First St.
Alice, Texas
78332
OR via email to rfp@cacost.org

It is the sole responsibility of the Proposer to ensure that the proposal is received by the date and time specified above. **LATE PROPOSALS WILL NOT BE CONSIDERED.** Confirmation of receipt is the sole responsibility of the Proposer. Proposal submissions may include value-added alternatives and any relevant information in addition to the information requested in the RFP. Proposals may be withdrawn in writing prior to the deadline. Unless otherwise stated, all materials submitted by the Proposer in response to this RFP shall become the property of CACOST.

Notification of Award

CACOST anticipates, but does not guarantee, a contract will be awarded on or around November 17, 2025. Award will be made to the Proposer(s) based on the listed evaluation criteria and the responses that are most compatible with CACOST's needs. CACOST will be the sole judge in making this determination.

CACOST is not bound to accept the lowest bid, or any proposal submitted. A contract for the approved proposal will be executed based upon the factors described in this RFP. The term of this Agreement is for a one-year period, beginning November 17, 2025, with mutually agreeable extensions, subject to evaluation for continuance or modifications, for up to a (4) year term.

CACOST may investigate the qualifications of any individual or firm under consideration, require confirmation of information furnished and require additional evidence of qualifications to perform the services described in this RFP. The Agency also reserves certain rights, including, but not limited to, the following:

- a. Reject any or all of the proposals
- b. Issue subsequent Requests for Proposals
- c. Cancel the entire Request for Proposal
- d. Remedy technical errors in the Request for Proposal process
- e. Appoint evaluation committees to review qualifications and proposals
- f. Seek the assistance of outside technical experts in evaluation

- g. Approve or disapprove the use of particular subcontractors
- h. Establish a short list of proposers eligible for discussions and demonstrations after review of RFP
- i. Solicit best and final offers from all, some, or one of the proposers
- j. Waive informalities and irregularities in RFP
- k. Award without discussion
- l. Cancel an awarded contract if performance is unsatisfactory, with the provision of a written notice; no penalty and/or fee may be imposed
- m. Conduct pre-contract negotiations with any and/or all potential qualified contractors

This RFP shall not, in any manner, be construed to be an obligation on CACOST to enter into a contract or result in any claim for reimbursement of cost for any efforts expended in responding to the RFP or in anticipation of any contract.

Expected Timelines

Event	Date(s)
RFP Notification Posting	July 31, 2025
Final Date to submit Questions	August 5, 2025
Questions & Answers Posting on CACOST Website	August 7, 2025
Proposal submission due	August 29, 2025
Vendor Demonstrations	September 15 – August 19, 2025
The announcement of Intent to Award	October 31, 2025
Estimated Contract Date	November 17, 2025

ADDITIONAL TERMS & CONDITIONS

Confidentiality

The Proposer agrees to keep the information related to all contracts in strict confidence. Other than the reports submitted to CACOST, the Proposer agrees not to publish, reproduce or otherwise divulge such information, in whole or in part, in any manner or form, or authorize or permit others to do so taking such reasonable measures as are necessary to restrict access to the information while in the Proposer's possession to these employees on the Proposer's staff who must have the information on a "need-to-know" basis. The Proposer agrees to notify immediately, in writing, CACOST's authorized representative in the event the Proposer determines or has reason to suspect a breach of this requirement.

Limitations and Reservations

CACOST reserves the right to negotiate the terms and conditions of the contract with any of the evaluated Proposers. Should the successful Proposer and CACOST fail to come to an agreement, CACOST may at its sole discretion award work to any of the

remaining Proposers. The Proposer to whom the contract is awarded shall be required to enter into a written contract with CACOST. This RFP and the proposal, or any part thereof, shall be incorporated into and made a part of the final contract.

CACOST specifically reserves the right to vary the provisions set forth herein any time before the execution of a contract where such variance is deemed to be in the best interest of the needs of CACOST.

If selected for negotiations, Proposer may be required to prepare and submit additional information before final Proposer(s) selection, to reach terms for the provision of services, which are agreeable to both parties.

Stevens Amendment

This project is supported by the Early Childhood Intervention Program and Human Service Commission (HHSC) of the U.S. Department of Education as part of an award totaling \$14,131,454 with 57 percent financed with non-governmental sources. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by HHSC, U.S. Department of Education, or the U.S. Government.

COMPLIANCE WITH STATE AND FEDERAL LAWS

Historically Underutilized Businesses

It is CACOST policy to encourage participation of small and historically underutilized businesses (HUBs), as defined in Government Code, Chapter 2161.

“Historically underutilized business (HUB): means an entity with its principal place of Business in this state that is:

- a corporation formed for the purpose of making a profit in which 51 percent or more of all classes of the shares of stock or other equitable securities are owned by one or more economically disadvantaged persons who have a proportionate interest and actively participate in the corporation's control, operation, and management;
- a sole proprietorship created for the purpose of making a profit that is completely owned, operated, and controlled by an economically disadvantaged person;
- a partnership formed for the purpose of making a profit in which 51 percent or more of the assets and interest in the partnership are owned by one or more economically disadvantaged persons who have a proportionate interest and actively participate in the partnership's control, operation, and management;
- a joint venture in which each entity in the venture is a historically underutilized business, as determined under Government Code Chapter 2161; or.

- a supplier contract between a historically underutilized business as determined under Government Code, Chapter 2161, and a prime contractor under which the historically underutilized business is directly involved in the manufacture or distribution of the goods or otherwise warehouses and ships the goods.

Certification with Regard to Lobbying

No federal appropriated funds will be paid to any person for influencing or attempting to influence an officer or employee of Congress or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant or loan, the entering into of any cooperative agreement or the extension, continuation, renewal, amendment or modification of any federal contract, grant, loan, or cooperative agreement.

Prohibited Substances in the Workplace

The contractor is considered a representative of CACOST while carrying out the duties of the contract. CACOST has a policy that prohibits the possession and/or use of alcohol or illegal drugs when conducting CACOST business. If the contractor is observed engaging in this type of behavior while performing any aspect of the contract, termination of the contract will occur.

Debarment and Suspension

The contractor certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.

ADMINISTRATIVE INFORMATION

Background Information

Early Childhood Intervention (ECI) is a program for families with children, birth to age three, with disabilities and developmental delays. The program is designed to support families as they help their children grow and learn. ECI's family centered model provides specialized support by an interdisciplinary team in the child's natural environment with a focus on coaching and instructing parents and caregivers through a child's daily routines. Our ECI program provides services in 11 counties in South Texas which include Aransas, Brooks, Duval, Jim Hogg, Jim Wells, Kenedy, Kleberg, Nueces, San Patricio, Webb, and Zapata.

SCOPE OF SERVICES

ECI Project Ninos seeks to procure a web-based Electronic Health Record (EHR) System to manage all ECI documents including all child records and bill claims for approximately 3,100 children. It must include a robust billing component for processing claims with public and private insurers and provide detailed management reports for program compliance and oversight.

The system will be used by 166 employees and subcontractors across four offices. Monthly service volumes include 5,500 direct service encounters, 390 evaluations, and 1,300 Targeted Case Management (TCM) encounters.

General Requirements – The following items are required with all proposals submitted:

The proposed system must:

- A. Be cloud-based, accessed via the web, accessible from mobile phones.
- B. Include monthly terms for a 12-month term contract with the option to renew services annually for a total period not to exceed four (4) years.
- C. Include all costs associated with the deployment and implementation of the proposed solution.
- D. Indicate optional services and modules as (optional) in their pricing structure as CACOST reserves the right to implement services based on immediate need.
- E. Include an explanation of any penalty or liability charges for reducing services prior to or after installation of the proposed system.
- F. Be able to produce interface and or document requirements for our Texas Kids Intervention System (TKIDS).
- G. Be easy and intuitive to use so that the average person can enter and review data without difficulty.
- H. Be able to provide a detailed training plan and resources for staff.
- I. By submitting a response to this request for proposal, vendors automatically agree to include an option to terminate for convenience in their contract with CACOST.
- J. Provide licensing for 30 billable providers and 49 assistant-based resources.

Vendor Qualifications

Vendor/Company Information – All Proposers must include company background information that provides, at a minimum, the following details:

- A. Company ownership
- B. Length of time in the Electronic Medical Records industry

- C. Number of office locations and/or service centers
- D. Number of employees
- E. Primary contact information – Name, Address, Phone, and email
- F. Disclosure of potential conflicts of interest.

References – All proposers must include a list of at least three (3) business references, preferably customers that are currently using a system similar to the system being proposed with multiple location sites.

- A. Customer name
- B. Primary contact information – Name, position, address, phone, and email
- C. Number of Providers
- D. Number of sites

System Functionality & Features

Practice management

The proposed system must have:

- A. Ability to create and facilitate provider and resource schedules
- B. Ability to confirm, cancel, and reschedule appointments via app-based portal, SMS, or web.
- C. Ability to streamline incoming referrals directly into EHR
- D. E-Faxing Capable for incoming and outgoing

Child Records

The proposed system must:

- A. Be able to use digital English and Spanish Texas ECI Health & Human Services Commission (HHSC) required forms.
- B. Provide the ability to add additional forms for compliance as needed.
- C. Provide the ability to document child Intake, Evaluations, Assessment, Individualized Family Service Plans (IFSP), Transition, Specialized Skills Training (SST), Speech Therapy, Occupational Therapy, Physical Therapy, Nutrition Services, Assistive Technology, Targeted Case Management, and other required services in the child's record.
- D. Be able to ensure that all documentation and forms are present in the child's record, and an assurance that data will not be lost or missing.
- E. Provide the ability to coordinate services using a user-friendly calendar.
- F. Provide a portal for clients to access assigned records, and signatures for important consents or agreements.
- G. Provide the ability to generate individual reports by child, service coordinator, service provider and location.
- H. Provide the ability to generate management and other customizable reports for

program oversight such as provider's planned and delivered report, Targeted Case Management report, and federal indicator due dates.

- I. Ability to track goals and metrics
- J. Auto save progress note documentation
- K. Include a previous visit progress notes data import to streamline progress note documentation
- L. Include customizable and reusable template repository for progress note documentation

Billing

The proposed system must:

- A. Be able to electronically bill each service and evaluation through the clearing house.
- B. Be compliant with regulations, including state and federal.
- C. Be able to process claims in compliance with the State of Texas HCFA 1500 forms.
- D. Have the ability to (re)generate and prepare patient statements upon the insurer's adjudication and determination of patient responsibility.
- E. Demonstrate how its technology automatically alerts coding and billing staff for documentation completion. The proposer must also demonstrate the use of artificial intelligence and automation tools to ensure the accuracy of coding and billing.
- F. Include the ability to schedule jobs for billing including but not limited to electronic claim batch reports (i.e. 835, 837, 999, 277) and insurance eligibility.
- G. Include the ability to generate monthly patient statements, via email, SMS, and to the patient portal.
- H. Include daily auto payment posting.
- I. Include a family size income calculator.
- J. Include the ability to conduct and or facilitate insurance verifications.
- K. Include an online payment portal.

Billing Reporting

- A. Must include "standard reports". The "standard reports" shall include but are not limited to:
 - Claims cost reports/ Aging reports
 - Performance metrics
 - Predictive and Trending denial analysis reports
 - Drill down analysis (e.g., payor line-item denial codes, claims issues, rejections, status messages).
- B. Access to reports and report creation should be assigned to user roles and exportable in various electronic formats.

Security

The Proposer must include significant details about the security of information. Include at a minimum:

- A. The system must offer robust security features to limit access of users to information relevant to their specific job duties and authority.
- B. Demonstrate how the system meets all HIPAA and FERPA security requirements.
- C. Security features must ensure that all child records are handled in accordance with all state and federal privacy and confidentiality laws.
- D. A description of how the patient's data is always secured and in all product modules (e.g. strong password protection or other user authentication, data encrypted at rest, data encrypted in motion).
- E. A description of the audit and review processes within the system.
- F. Two-Factor Authentication either app based or SMS capable.

Support

Implementation/Training - All proposers must include a tentative implementation plan with estimated dates related to the delivery and installation of all components required to place the complete solution into service. The implementation plan must clearly identify the tasks and resources required of CACOST and Proposer during the entire process. The implementation plan must also include the following elements in addition to the other processes necessary:

- A. The proposer must describe the approach and ability to satisfy training requirements, including initial product training, train-the-trainer sessions, configuration training, application and system training, and an in-depth training plan for billing. A detailed migration plan and price must be outlined.
- B. Training should involve in-depth training for staff and should be enough to allow them to understand and operate all functions of the system as well as allowing them to troubleshoot minor issues without technical intervention or assistance. Up to three (3) open forum meetings for end users (to include a question-and-answer period) should also be performed to demonstrate to end-users the functionality and operations of the system so that they can take full advantage of system features. All training shall be included as part of the initial fee for setup.
- C. Proposer will provide ongoing training on new features and functionality.

Support

- A. The Proposer must provide technical phone support for the proposed system at least during normal business hours of 8:00 am to 5:00 pm CST Monday through Friday.
- B. Describe how after-hours support is handled.
- C. Methods of support offered (e.g., phone, online, or in person if applicable).

EVALUATION CRITERIA

The following table illustrates the general evaluation criteria that will be used to determine which proposal provides the most value to CACOST:

Factors	Points
Vendor Qualifications	10
Functionality	40
Cost	30
Support	20
Maximum Points	100

The evaluation categories can be broken down as follows:

1. Vendor Qualifications – all information provided in the Vendor/Company information and References section of this RFP.
2. Functionality – all information provided to meet or exceed the Practice management, Child Records, Billing, Billing Reporting, & Security.
3. Support – all information provided in the Implementation/Training, and Support section of this RFP
4. Pricing – all costs associated with the deployment and use of the proposed system through the respective terms offered. These costs must all be included to ensure proper evaluation.
5. All other voluntarily submitted material will be categorized into the evaluation category most closely associated with it.

In accordance with applicable laws, rules and regulations for public purchasing, award(s) will be made to the responsible contractor(s) whose proposal(s) is/are determined, after evaluation, to be the best value to CACOST. The proposal must be submitted on time and must materially satisfy all mandatory requirements identified above to qualify for evaluation. A written acceptance mailed or otherwise furnished to the qualified contractor(s) and a fully executed contract is required prior to commencement of any work under this RFP. Protest procedures are available upon request and must be submitted within (10) days of award determination for consideration.