## **Appendix D – Software Capability Checklist**

| **SOFTWARE HIGH LEVEL CAPABILITY CHECKLIST** |
| --- |
| Functionality | Standard Function | Configuration | App Interface | Not In product | Comments |
| **Baseline Expectations** |  |  |  |  |  |
| Capacity/Bandwidth (can handle state-wide demands) |  |  |  |  |  |
| Web portal that supports no wrong door |  |  |  |  |  |
| Responsive design which allows viewing and accessibility on Mobile (tablet and cell phone) |  |  |  |  |  |
| Navigation available in multiple languages (What languages available out of the box?) |  |  |  |  |  |
| User-oriented / Easy navigation / Nicely presented |  |  |  |  |  |
| Accessibility: Navigation accommodates all literacy levels and disabled individuals |  |  |  |  |  |
| Vulnerability testing and vulnerability remediation prior to each release of software |  |  |  |  |  |
| Single entry of data is shareable across forms and services without reentry |  |  |  |  |  |
| Workflow capabilities that will allow for multiple organizational level access and assignment |  |  |  |  |  |
| Configure, build, and support the South Dakota Community Information Exchange (CIE) software and its platform. |  |  |  |  |  |
| The CIE will facilitate the creation of a statewide closed-loop referral system.  |  |  |  |  |  |
| The CIE will provide social need information, service and referral requests, service and referral outcomes, and potential pre-determined health information to providers and community partners.  |  |  |  |  |  |
| The CIE must be implemented, and statewide rollout completed by contract term end date of 5/31/2024.  |  |  |  |  |  |
| A MS Project Schedule that will support the contract term end date of 05/31/2024 and the proposed implementation approach:Phase I: Contract Negotiations beginPhase II: Vendor Contract ExecutedPhase III: Implementation ProjectCIE Global WorkflowsHIE IntegrationiCarol/Connect 211/Service Provider Registry IntegrationHelpline Center Network of CareOnboard Pilot Community-Based ProvidersPhase IV: Iteration-Based Design SprintsCyclical Feedback Loop with Pilot Community-Based ProvidersSystem Integrations and Workflow ImprovementsPhase V: System Growth - Complete Onboarding and statewide rollout  |  |  |  |  |  |
| Payment for product subscription and licenses is due upon successful completion of UAT. Project Team will require access prior to UAT. Team member subscriptions and licenses can be invoiced at that time. |  |  |  |  |  |
| This is a deliverable based contract. Payment schedule includes:• Approved Requirements• Approved UAT• Approved Go-Live• Approved Statewide Rollout |  |  |  |  |  |
| At a minimum, the following environments must be dedicated and made available for the implementation when requirements are approved: Development, UAT, and Production. |  |  |  |  |  |
| **Client and End User Features** |  |  |  |  |  |
| Integration with Helpline Center community resource directory to provide client resource search  |  |  |  |  |  |
| Client portal to request service and communicate with care team |  |  |  |  |  |
| Various forms of consent and end user agreement (digital/written) |  |  |  |  |  |
| Integrated workflow to capture digital signature for consent and end user agreement.  |  |  |  |  |  |
| Data management for cycles of opt-in, opt-out or consent |  |  |  |  |  |
| **Care Coordination Features** |  |  |  |  |  |
| View dashboard including summary of user activity, case referrals, case load, latest activity, dates/times for client appointments, alerts andstatus |  |  |  |  |  |
| Create new clients and client user accounts, if applicable |  |  |  |  |  |
| Contribute to and view comprehensive client record and service history |  |  |  |  |  |
| SDOH Assessments (evidence-based: PRAPARE, CMS, etc.) |  |  |  |  |  |
| Social need risk factor identification and tracker |  |  |  |  |  |
| Referrals: generating/tracking/feedback (closed loop) |  |  |  |  |  |
| Tracking denial of services, unmet needs, and detailed need outcomes |  |  |  |  |  |
| Email referral capabilities |  |  |  |  |  |
| Eligibility screenings (For example: Public benefits, state programs, social services) |  |  |  |  |  |
| Resource information / searchable services database / resource mapping based on 211 LA taxonomy codesResource information / searchable services database/ resource mapping |  |  |  |  |  |
| Case management capabilities: Goal planning/tracking |  |  |  |  |  |
| Built-in workflows |  |  |  |  |  |
| Care team information |  |  |  |  |  |
| Care team shared notes |  |  |  |  |  |
| Text messaging clients |  |  |  |  |  |
| Adding family members/supports |  |  |  |  |  |
| Document storage for eligibility (birth cert/Driver's License/Social Security Card) |  |  |  |  |  |
| **Client Data Repository** |  |  |  |  |  |
| Ability to match/remove duplicate client records coming from separate sources |  |  |  |  |  |
| Individual level data |  |  |  |  |  |
| Household/ Family level data - (ability to link client records) |  |  |  |  |  |
| **Data Capabilities** |  |  |  |  |  |
| Real-time data/reports/communication |  |  |  |  |  |
| Access to data (including ability to export) based on a variety of filters (i.e., referred by organization, referred to organization, risk factors, outcomes) |  |  |  |  |  |
| Reporting capabilities within tool (user defined and standardized) |  |  |  |  |  |
| Visualization of data within the tool |  |  |  |  |  |
| Aggregates data |  |  |  |  |  |
| Geo-mapping capabilities based on coverage area of services |  |  |  |  |  |
| HUD/ HMIS Standardized Data Fields |  |  |  |  |  |
| Outcomes and cost analysis |  |  |  |  |  |
| Connect indicators/ outcomes to national benchmarks (i.e., Healthy People 2030) |  |  |  |  |  |
| **Security** |  |  |  |  |  |
| Role-based security (access to information based on the role of the user) |  |  |  |  |  |
| Audit trails that record user, date and time that changes were made |  |  |  |  |  |
| Data Encrypted for security - In-Transit and at rest |  |  |  |  |  |
| HIPAA compliance |  |  |  |  |  |
| **Integrations** |  |  |  |  |  |
| Send/receive data from stakeholder systems (EHR or Case/Care Management) via common API or industry standard, Ex: HL7 FHIR |  |  |  |  |  |
| Single sign-on - user can stay within their own systems while accessing referral tool |  |  |  |  |  |
| Interface to and resolve identities through SD’s HIE Community Master Person Index (MPI) |  |  |  |  |  |
| Ability to interface with productivity applications (Calendars, Office 365, etc.) |  |  |  |  |  |
| Software: Please designate existing integrations with the following and whether it is a direct connection or through another service provider, etc.: |  |  |  |  |  |
| Health Catalyst (Health Information Exchange) |  |  |  |  |  |
| Meditech |  |  |  |  |  |
| CPSI |  |  |  |  |  |
| Epic |  |  |  |  |  |
| AthenaHealth |  |  |  |  |  |
| eClinical Works |  |  |  |  |  |
| CorrecTek |  |  |  |  |  |
| Procentive |  |  |  |  |  |
| Qualifacts |  |  |  |  |  |
| McKesson/ Allscripts |  |  |  |  |  |
| Eccovia |  |  |  |  |  |
| **Resource Directory** |  |  |  |  |  |
| Integration of Helpline Center resource database (database structure follows Human Services Data Specifications HSDS Logical Model) Integration of the Helpline Center resource database |  |  |  |  |  |
| 211 LA County Taxonomy of Human Services is core of search capabilitiesAIRS Certified Taxonomy of Human Services |  |  |  |  |  |
| Gravity Project -based ICD10 Z codes and designated terminology for SDOH |  |  |  |  |  |
| Searching Capabilities: advanced / filtering options |  |  |  |  |  |
| Staff interfaces and client interfaces for search |  |  |  |  |  |
| Program and Services Information Updates: Contact Information and services offered |  |  |  |  |  |
| Customization of data display to both providers and clients |  |  |  |  |  |
| **System Administrators can configure the following:** |  |  |  |  |  |
| Data Fields |  |  |  |  |  |
| User Account Creation and Management |  |  |  |  |  |
| Forms |  |  |  |  |  |
| Dashboards |  |  |  |  |  |
| Search settings / Saved search |  |  |  |  |  |
| Incorporate customized SDOH assessments |  |  |  |  |  |
| Reporting |  |  |  |  |  |
| Analytics / Outcomes |  |  |  |  |  |
| API Building |  |  |  |  |  |
| Public-facing forms |  |  |  |  |  |
| Role-based filters |  |  |  |  |  |