HELPDESK OF THE FUTURE

Request for Proposal

March 27, 2020

Presented by:

NYU Langone Health
Table of Contents

1. Background ................................................................................................................................. 3
2. Objective ......................................................................................................................................... 3
3. RFP Overview ................................................................................................................................. 3
4. Milestone Calendar ......................................................................................................................... 4
5. RFP Submission Instructions ......................................................................................................... 4
   a) Required RFP Response Format .................................................................................................. 4
   b) Proposal Due Date, Delivery Instruction and Communication ....................................................... 4
   c) Questions ....................................................................................................................................... 5
   d) Discussions ................................................................................................................................... 5
6. Proprietary Information, Confidentiality and Non-Disclosure ....................................................... 5
7. Costs Incurred ................................................................................................................................. 5
8. Governing Law ............................................................................................................................... 5
9. Independent Contractor ................................................................................................................... 5
10. Use of Content by NYU Langone .................................................................................................. 6
11. Amendment/Addenda/Right to Cancel ............................................................................................. 6
12. Nondiscrimination ......................................................................................................................... 6
13. NYU Langone Reserves Right to Reject Any and All Bids ............................................................. 6
14. Effective Period of Prices .............................................................................................................. 6
15. Request for Proposal Scope ........................................................................................................... 7
16. Requirements and Functional Criteria .......................................................................................... 7
17. Implementation Staffing and Methodologies .................................................................................. 8
   a) Methodologies .............................................................................................................................. 8
   b) Proposed Staffing Approach ........................................................................................................ 8
18. Pricing for Software Licensing, Support and Services ................................................................. 9
19. Company Overview and References ............................................................................................. 9
   a) Company Profile ......................................................................................................................... 9
   b) Affiliation with NYU Langone ...................................................................................................... 10
   c) Past Performance and References ............................................................................................... 10
20. Evaluation Criteria ......................................................................................................................... 11
1. Background

NYU Langone Health (NYU Langone) is one of the nation’s premier academic medical centers. Our trifold mission to serve, teach, and discover is achieved daily through an integrated academic culture devoted to excellence in patient care, education, and research. NYU Langone comprises NYU School of Medicine (NYUSOM), NYU Long Island School of Medicine (LISOM), and NYU Langone Hospitals, each a New York not-for-profit corporation. NYUSOM, LISOM and NYU Langone Hospitals are Section 501(c)(3) organizations exempt from federal income taxes under Section 501(a) of the Internal Revenue Code and from New York State and City income taxes. Located in the heart of Manhattan, with additional facilities throughout the New York City area, NYU Langone consists of five inpatient locations:

- Tisch Hospital, our flagship acute-care facility and a major center for specialized procedures in cardiovascular services, neurosurgery, cancer treatment, reconstructive surgery and transplantation
- Martin S. and Helen L. Kimmel Pavilion, a 830,000 square foot state-of-the-art clinical space, with 374 single-bedded rooms on 11 patent floors, which also houses the new Hassenfeld Children’s Hospital at NYU Langone, which provides comprehensive children’s health services
- NYU Langone Orthopedic Hospital, formerly known as Hospital for Joint Diseases, a dedicated inpatient orthopedic hospital, specializing in orthopedic, neurologic, and rheumatologic services
- NYU Langone Hospital—Brooklyn, formerly known as NYU Lutheran Medical Center, a full-service teaching hospital and level 1 trauma center located in Sunset Park, Brooklyn; and
- NYU Winthrop Hospital, formerly known as Winthrop-University Hospital, a 591-bed medical center located in Mineola that provides inpatient and outpatient medical care to adults and children throughout NYU Langone's network of Long Island healthcare facilities.

Specialists at NYU Langone treat a full range of medical conditions in both inpatient and outpatient settings at locations throughout New York City’s five boroughs, Long Island, New Jersey, and Westchester, Putnam, and Dutchess counties. Our growing outpatient network brings our world-class medical services directly to the communities where our patients live and work. When more complex care is needed, we bridge the gap between our community-based practices and our hospitals to provide a seamless healthcare experience.

2. Objective

NYU Langone plans to implement a “SMART” Helpdesk. NYU Langone requests quotes in response to this Request for Proposals (RFP) for a vendor who can provide ‘Helpdesk of the Future’ services (proactive, ‘smart’) for both technical & specialized Epic desks.

3. RFP Overview

Introduction

NYU Langone invites you (Vendor) to submit a quote in accordance with the requirements, terms, and conditions in this RFP for available services that caters to both Technical and Epic call center capabilities.
This RFP process is your opportunity to demonstrate your strong commitment to partnering with NYU Langone and ensures highly competitive pricing with quality customer support services.

This RFP solicits a detailed offering that includes line item pricing as well as a detailed response regarding your corporate profile, services, capabilities, and contract/payment terms compliance. We encourage you to submit a quote that is aggressively priced which will exceed our expectations and influence the consolidation of our Vendors and market share.

4. Milestone Calendar

The following calendar of events is based on planned NYU Langone activities and anticipated vendor delivery capabilities. It is presented for illustrative purposes only. These milestones will be reviewed as necessary at the time a contract is awarded to a vendor.

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<thead>
<tr>
<th>Milestones</th>
<th>Date</th>
<th>Time</th>
</tr>
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<tbody>
<tr>
<td>RFP Release Date</td>
<td>3/27/2020</td>
<td></td>
</tr>
<tr>
<td>Additional Questions due</td>
<td>4/2/2020</td>
<td>3:00PM EST</td>
</tr>
<tr>
<td>NYULH Answers to Questions due</td>
<td>4/6/2020</td>
<td>3:00PM EST</td>
</tr>
<tr>
<td>Proposal due</td>
<td>4/13/2020</td>
<td>4:00PM EST</td>
</tr>
</tbody>
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5. RFP Submission Instructions
   a) Required RFP Response Format

Vendors are required to submit one complete and exact copy of their responses to the RFP (Proposal) in a single electronic file electronically via e-mail to NYU Langone. with Vendor’s information and responses provided in the appropriate places therein. The required electronic applications formats are Microsoft Word and Microsoft Excel. Any supporting graphic or presentation-based slides may be submitted in a separate PowerPoint file. PDF format is only acceptable for providing supplemental documentation such as architecture diagrams, workflow visuals, screen shots, etc. The file should clearly identify the Vendor and include the name. Each response page should be numbered for ease of reference. If possible, the submission should include web links to relevant supporting materials, such as company marketing materials and examples of relevant software solutions, instead of embedding them into the document.

   b) Proposal Due Date, Delivery Instruction and Communication

All Proposals are due by April 13, 2020 no later than 5:00 P.M. EST. Send your complete electronic response via email to: ITsourcing@nyulangone.org with the subject line “Helpdesk of the Future”

Bidders Note: All questions regarding interpretation or specifications must be submitted in writing to ITsourcing@nyulangone.org only. Under no circumstances shall Vendor contact any employee of NYU Langone. Any dialogue initiated by Vendor and not addressed to contact above will result in an immediate disqualification. Discussions on other business matters and not related to this RFP are permitted.
c) Questions
Interested parties who need additional information or have questions about this RFP must be submitted via email to ITSourcing@nyulangone.org on or before 4 PM (EST) on April 13, 2020 with the subject line “NYU LANGONE CLM RFP QUESTIONS.” All questions and responses will be shared with all vendors on April 6, 2020.

d) Discussions
NYU Langone, at its discretion, may or may not choose to contact vendors. NYU Langone reserves the right to request additional information which, in NYU Langone’s opinion, is necessary to understand the information provided by the vendor during the RFP process. In the event we choose to contact vendors, such contact and discussions are only intended to gain additional clarification of the vendor’s potential capability to meet the service requirements.

Any verbal communications shall be considered unofficial and non-binding with regard to this RFP. NYU Langone reserves the right to determine, at its sole discretion, the appropriate and adequate responses to written comments, questions, and requests for clarification. NYU Langone’s official responses and other official communications pursuant to this RFP shall constitute an amendment of this RFP. Only NYU Langone’s official, written responses and communications shall be considered binding with regard to this RFP:

6. Proprietary Information, Confidentiality and Non-Disclosure

NYU Langone is not requesting, and does not require, confidential proprietary information or trade secrets to be included as part of Vendors’ Proposal. Any information contained in the RFP responses that is proprietary or confidential must be clearly designated. NYU Langone will maintain the confidentiality of Vendor’s information marked “Confidential” of “Proprietary” in accordance with applicable laws; provided, however, that (i) submitted responses may be reviewed and evaluated by any person except for other vendors, at the discretion of NYU Langone, regardless of any statement contained within your information, and (ii) unless we otherwise specifically agree in writing, we shall be entitled to retain and use information submitted by each vendor with regard to the RFP.

Vendor shall have no rights in this document, or the information contained therein and shall not duplicate or disseminate said document or information outside the Vendor's organization without the prior written consent of NYU Langone.

7. Costs Incurred

All costs incurred in the preparation and presentation of the Proposal shall be borne by Vendor. By submitting a Proposal, Vendor agrees that the rejection of any Proposal in whole or in part will not render NYU Langone liable for associated expenses.

8. Governing Law

This RFP shall be governed by and construed and enforced in accordance with the laws of the State of New York (without regard to the principles of conflicts of law embodied therein) applicable to agreements executed and performed in such state. Each party submits to the jurisdiction of the State and Federal Courts located in New York County in the State of New York for any action or proceeding relating to this RFP, and expressly waives any objection it may have to such jurisdiction or the
convenience of such forum.

9. **Independent Contractor**
Vendor is an independent contractor and no employee or agent of vendor shall be deemed to be an employee or agent of NYU Langone.

10. **Use of Content by NYU Langone**
All material submitted in response to this RFP will become the property of NYU Langone and may be returned only at NYU Langone’s option. NYU Langone has the right to use any or all ideas not protected by intellectual property rights that are presented in any response regardless of whether the response becomes part of a contract. Notwithstanding any vendor copyright designations contained on responses, NYU Langone shall have the right to make copies and distribute responses internally.

NYU Langone will not return responses to this RFP. Vendors will not be notified of the result of NYU Langone’s review, nor will they be provided copies of it. If NYU Langone issues a procurement document, no vendor will be selected, pre-qualified, or exempted based on its participation in this RFP process.

11. **Amendment/Addenda/Right to Cancel**
NYU Langone reserves the right to alter and/or cancel the RFP timeline or other portions of this RFP at any time.

12. **Nondiscrimination**
No person shall be excluded from participation in, be denied benefits of, be discriminated against in the admission or access to, or be discriminated against in treatment or activities on the grounds of disability, age, race, color, religion, sex, national origin, or any other classification protected by federal or State Constitutional or statutory law; nor shall they be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of contracts with NYU Langone.

13. **NYU Langone Reserves Right to Reject Any and All Bids**
Nothing in this RFP shall create any binding obligation upon NYU Langone. Moreover, NYU Langone, at its sole discretion, reserves the right to reject any and all bids as well as the right not to award any contract under this bid process. NYU Langone reserves the right to award portion of this bid. All bids should be governed by NYU Langone standard Policy and Procedure and Terms and Conditions.

14. **Effective Period of Prices**
All pricing Proposals by Vendor will remain fixed and firm until August 31st, 2021.
15. Request for Proposal Scope

NYU Langone requests that you submit a proposal for based on the following guiding principles:

- Only vendors that offer both Clinical and Technical Helpdesk services will be considered
- Level of expertise (e.g. number of staff with Epic certifications & in what module)
- Vendors will be asked to include automation / efficiency solutions
- Vendors must exhibit technology such as AI, Chat, Persona
- Vendors must have infrastructure redundancy to minimize downtime
- Vendor must use our existing HEAT tool
- Vendor will follow NYU defined outage process with call outs, front end message postings and ticket prioritization
- Patient calls are not included in scope
- Support to cover all Medical Center missions – Clinical, Education and Research and associated applications & workflow
- Customer Satisfaction Survey tool is hosted by NYU;
  - Vendor will take appropriate action on all not satisfied ratings for their agents
- Vendor will have remote control capability to the desktop, but not admin rights
- Vendor will be provided with password reset tool
- Vendor with use NYU knowledgebase
- Vendor will house their operations in their own space/location
- Vendor will manage all personnel (e.g. hiring, terminations)

Responses to this RFP should address providing both Technical and Epic helpdesk services as well as what your organization has implemented with other institutions to innovate. The scope of this RFP is for support services, as well as for implementation services. If you do not offer implementation services please identify and complete this RFP with a preferred implementation partner.

16. Requirements and Functional Criteria

An RFP questionnaire matrix has been provided for your use in answering of all questions. ALL responses to the questions in the questionnaire must be provided on this matrix.

Please answer all questions in Appendix A – Helpdesk of the Future Questionnaire.xlsx, scoring your platform as such:

0 – No (Capability not supported)
1 – Yes, but requires customization
2 – Yes, but requires configuration
3 – Yes, out of the box
NA – Question not applicable for yes/no response (e.g. description question)

Please also provide notes as needed to explicate the details of your response. Where relevant, attachments to demonstrate solution architecture, user experience, workflows, and timelines are welcome, and can be provided as supplemental attachments to your response.
17. Implementation Staffing and Methodologies

A key element of our selection criteria is ease and speed of implementation, as such, please provide an outline of your recommended approach to implementation, including your recommendations on the optimal utilization of professional services through each phase of the initial implementation.

If you offer implementation services, please answer the following questions listed below. If you do not offer implementation services please identify and work with a 3rd party implementation partner to complete the RFP.

a) Methodologies

- Describe recommended implementation strategy to achieve results in optimal time throughout the whole project.
- Provide a detailed overview of the company’s project management methodologies including documentation deliverables.
- Describe your proposed implementation process.
- Provide project documentation/templates used to support the full implementation process.
- Provide a proposed communication plan based on service delivery and NYU Langone culture.
- Define go-live as well as post-go-live support and infrastructure.
- Briefly describe your experience in implementing similar programs. Indicate how you provided support to the company to facilitate change in its corporate environment(s). Emphasize value-added activities that created a win-win environment for the customer and the vendor. And, outline any roadblocks you encountered and how they were resolved.
- Please share with us any internal policies and procedures you have helped to develop for other organizations regarding similar corporate initiatives.

b) Proposed Staffing Approach

- Provide an outline of a proposed staffing for the implementation engagement and include the below information.
  - Reporting relationships
  - Resource skill set
  - Project role and responsibility
  - Suggested work location
  - Number of years of experience providing this service for both the Technical desk and Epic Clinical desk
  - Indicate the engagements in which the team member participated and their role
  - Number of staff with Epic certifications and the specific module certifications
  - Share any other relevant knowledge and/or certifications (e.g. ITIL, Microsoft desktop certification)
• Are you willing to provide project resources for the entire duration of the project? Dedicated resources cannot be replaced without NYU Langone's expressed written permission.
• NYU Langone reserves the right to refuse proposed staff.

18. **Pricing for Software Licensing, Support and Services**

• Utilizing the attached pricing worksheet (Appendix B – Pricing Worksheet.xlsx), provide a detailed price estimate, including a summary of all costs and a detailed list of each item proposed and its associated cost. Please list all software, firmware and licenses necessary to achieve full functionality.
• All software, firmware and licenses necessary to achieve full functionality need to be accounted for, including 3rd party software used.
• All software update services need to be included in the service contract, including firmware updates and any other software related to the solution.
• Please list all professional services and rates for both implementation and ongoing maintenance or support.
• Please distinguish each proposed cost into categories, for example: licenses, professional services, training, travel, etc.

19. **Company Overview and References**

Please provide information on all items listed below. If you are bidding with a 3rd party implementation partner, please provide the information for both companies.

  
a) **Company Profile**

Please provide information that will enable us to evaluate your company’s financial stability. We require that you include the following:
• Company description: including ownership, number of years in business, strategic direction, overview of product offerings, mission, history, acknowledgements or awards
• Recent financial results and 5-year growth history
• Existing Epic Access Agreements
• Established Clinical and Technical Call Centers (provide locations)
• Dunn and Bradstreet Number
• Recent acquisitions
• Partner relationships
• Description of selection criteria for contractor or co-implementation partners
• Work force distribution by country, city, state, etc.
• Total number of employees: include number of project managers, implementation specialists, development engineers, % full time versus contracted, etc.
- Average number of years of application and implementation experience and business process definition for consultants and managers.

- Describe your differentiating qualities and indicate why you are the best vendor for NYU Langone, and why you will be the best 2 years from now.

b) Affiliation with NYU Langone

Any relationships or financial interests disclosed by the vendor shall be communicated to the Compliance Office, who shall evaluate whether such disclosure precludes the vendor from further consideration.

As part of the evaluation process, each vendor must disclose in writing all relationships or financial interests that they may have with any NYU Langone board member, employee or physician (employed or voluntary). The term “financial interest” shall include, but not be limited to, the following transactions or relationships between an employee, director or officer of NYU Langone or any member hospital of NYU Langone and the vendor (a) consulting fees, honoraria, gifts or other emoluments, or “in kind” compensation; (b) equity interests, including stock options, of any amount in a publicly or non-publicly-traded company (or entitlement to the same); (c) royalty income (or other income) or the right to receive future royalties (or other income); (d) any non-royalty payments or entitlements to payments; or (e) service as an officer, director or in any other role, whether or not remuneration is received for such service.

Please provide information regarding affiliations you may have with NYU Langone or other business partnership which may have relevance, including:

- Any relevant financial interests as defined above.

- Any previous relationship with NYU Langone, and the types of services previously provided to NYU Langone, including a NYU Langone facility and include respective facility contacts. Include annual business transactions and any corresponding or related earnings and sales activity.

- Any business partnerships you have that could interfere with your potential obligations to NYU Langone.

- Your preferred supplier relationships with respect to the manufacturers or any suppliers you may use. Include any additional industry-related partners that may not be listed but that would be meaningful to NYU Langone.

c) Past Performance and References

Describe your experience in providing Helpdesk Services Including:

- Your company and product strengths as it relates to us.

- How many companies use your Helpdesk services?

- How many companies have stopped using your Helpdesk services and why?

Please provide a list of three academic (or other) hospitals who have received services on similar engagements as the one outlined by this RFP and include the information below.

- Client name and headquarter address

- Contact name

- Telephone number
• Email address
• Length of time using your services
• Brief description of the service provided

Failure to provide suitable references to NYU Langone will result in the vendor’s bid being rejected without further consideration.

20. Evaluation Criteria

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<th>Evaluation Criteria</th>
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<tr>
<td>Requirements &amp; Functional Criteria</td>
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<tr>
<td>Implementation Considerations</td>
</tr>
<tr>
<td>Pricing</td>
</tr>
<tr>
<td>Company Overview and References</td>
</tr>
</tbody>
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