



Client Management Software Project

Request for Expression of Interest (EOI)
Monday, December 17, 2007

Table of Content:

1. Introduction to OrionHealth.....	2
2. Statement of Purpose.....	3
3. Background Information	3
4. Scope of Work.....	4
4.1. User Groups.....	4
4.2. Planning & Development Phase.....	5
4.3. Project Pilot Phase.....	5
4.4. Implementation Phase	5
4.5. Follow-up Phase	5
4.6. Deliverables	5
5. Requirements for Expression of Interest	5
5.1. Company Description.....	5
5.2. References	6
5.3. Description of Proposed Platform.....	6
6. Evaluation and Award Process.....	6
6.1. OrionHealth Key Personnel	6
6.2. Process Schedule	7

1. Introduction to OrionHealth

OrionHealth is an employee-owned injury management and rehabilitation company with three facilities in Alberta and four in BC. We provide physiotherapy, rehabilitation assessment services, pain management, and return-to-work programs, as well as community-based chiropractic, massage, occupational and physical therapy.

OrionHealth has been an employee-owned organization since 1999, and we are owned by clinicians who work daily in our programs. This has allowed us to retain our strong emphasis on clinical decision-making and clinical quality. OrionHealth's culture of integrity and clinical excellence is embodied in our mission statement:

"OrionHealth is Committed to Integrity, Innovation and Best Practices"

As well, at OrionHealth we believe our strength is in the quality and commitment of our employees. We strive to ensure a functional, developmental and supportive work environment that includes support for ongoing personal and professional development.

OrionHealth's facilities include:

Facility	Address	Year Established
OrionHealth Canmore Pain Clinic	201 - 1205 Bow Valley Tr. Canmore AB T1W 1P5	1989
OrionHealth Calgary Central – Bridgeland	300 - 1010 1st Avenue N.E. Calgary AB T2E 7W7	2002
OrionHealth Calgary NE - Temple	202 - 5401 Temple Dr. N.E. Calgary AB T1Y 3R7	2006
OrionHealth Vancouver	201 - 3150 East 54 th Ave. Vancouver BC V5S 1Z1	1996
Progressive Rehab OrionHealth	401 - 3999 Henning Drive Burnaby BC V5C 6P9	1995
OrionHealth New Westminster	210 - 555 Sixth Street New Westminister BC V3L 5H1	1997
OrionHealth Surrey	120 16555 Fraser Highway, Surrey BC V4N 0E9	Acquired 2006

OrionHealth's major referral sources are Western Canadian Workers' Compensation Boards (BC, Alberta, Yukon, NWT, and Manitoba), Individual Employers, Health Regions in Alberta and BC (e.g. Palliser Health Authority, Vancouver Coastal Health), the Insurance Corporation of British Columbia, private insurance companies, and law firms. Each of our seven clinics is unique in their staff compliment and contracts that they serve.

2. Statement of Purpose

OrionHealth would like to replace our multi-platform information and data base system with a single application which can support our network environment, providing the following service:

1. Database with advanced analysis and reporting capabilities. Reports generated would potentially be used for tracking clinical deliverables (reporting & billing) clinical research, marketing or referral tracking. It must allow flexibility with customizable user access features and user-defined fields. It should allow a scoring system for proprietary clinical tests.
2. Integration with 3rd party software such as Quickbooks, MS Office, SPSS and proprietary programs used by OrionHealth's customers. These programs are housed both within and outside of the terminal server. Integration with these programs should reduce or eliminate the redundancy of duplicate data entry. Fields should remain customizable since contractual obligations for data management with 3rd parties can be adjusted fairly frequently (every 6 months or so).
3. Client relations management (scheduling, billing, clinical reporting and referral tracking). This should include user friendly search and scheduling options and cueing for billing and clinical reporting within OrionHealth's multidisciplinary setting. It should allow user generated mail merging functions that are modifiable for preparing letters, clinical reports etc.

This system must operate within the Terminal Server which is the core of OrionHealth's data communication network. All OrionHealth users log-on to their systems which are connected to their clinic LAN. Each individual clinic's LAN connects to a centralized system through VPN to access the Terminal Server in our WAN.

Our goals and priorities for this system are as follows:

1. The software must be easy to use.
2. The software must eliminate or reduce redundancies and duplication of data entry.
3. The software must allow multi-users for reporting, tracking and capture of referral, scheduling, billing and client outcome information.

3. Background Information

We have approximately 150 staff and a network of over 120 computers within our seven clinics. Assessment and rehabilitation services are provided to over 4000 clients yearly. We hold approximately 20 contracts with various third party payers; each of which carry very specific contractual obligations. Clinical reporting and scheduling, invoicing, and data collection are a few of the variables within these contracts. OrionHealth requires

the ability to easily update templates associated with these variables to reflect revisions to our contracts. The product must support user generated mail merging capabilities.

Our current multiplatform system of data management requires multiple points of entry for the same information. We would like to eliminate or significantly reduce this necessity. Currently, the system does not easily allow tracking of client schedules in concert with billing and clinic reporting information, thus we do not have a simple method of checking to see if deliverables are being maintained.

Our primary goal is to eliminate, unify or integrate the components of the current systems with one comprehensive approach with as little disruption to day to day operations as possible.

4. Scope of Work

OrionHealth is looking for a provider who will customize an existing client management program to suit our multidisciplinary clinic setting. Initially the provider would assist OrionHealth to identify needs and priorities and develop a plan for implementation. The provider would give support during the training and implementation phase and work with OrionHealth to adjust specific components to suit the variable needs of the individual clinics and their contracts. Integration with 3rd party software will be an integral part of this development process. OrionHealth understands that a plan for ongoing support will be necessary for successful maintenance of the system.

4.1. User Groups

Administration Group

- Initial client intake and customer contact
- Client scheduling with all clinical disciplines
- Communication to clients and customers regarding appointment bookings
- Invoicing
- Clinical reporting & invoicing template set up

Leadership Group

- Generating management information reports
- Assessing allocation of clinical time & productivity
- Assessing clinical outcomes & deliverables
- Future ability to link with financial systems

Clinician Group

- Access to scheduling for daily task planning
- Client scheduling
- Generation of clinical reports

IT User Group

- Revising template set up
- Providing training support

4.2. Planning & Development Phase

With representatives from OrionHealth, the successful provider will detail the requirements of the project and develop a plan for implementation. The provider will customize their software to our specific needs.

4.3. Project Pilot Phase

This is the initial phase of implementation. This trial phase may be necessary to reduce the impact on clinical services company wide. At this point, preliminary training will be necessary.

4.4. Implementation Phase

Implementation of the client management software to all seven of the OrionHealth clinics. Significant training and start-up commitments will likely be required.

4.5. Follow-up Phase

OrionHealth would require ongoing support following the initial implementation phase in order to work out any deficiencies in the system.

4.6. Deliverables

The successful provider should be able to deliver the following:

- A plan for the development & implementation of client management software to clinics within the OrionHealth network
- Customization of client management software accessible via OrionHealth's Terminal Server
- Training and support for all user levels
- A plan for future follow-up and support

5. Requirements for Expression of Interest

Please forward both a PDF and MS Word version of your EOI to Sharon Anderson (at s.anderson@orionhealth.ca) by January 31th 2008. Demo software submissions should be formatted to work on Windows XP operating systems. Please mail clearly marked supportive documents, software or other resources to:

Attn: Sharon Anderson
OrionHealth Calgary – Temple
202 – 5401 Temple Drive NE
Calgary, AB T1Y 3R7

5.1. Company Description

Please provide a brief company description outlining your companies services and philosophies. Provide links to websites as appropriate.

5.2. References

Provide three references of individuals or companies for whom your company has provided similar services. These references will be contacted during the EOI review phase.

5.3. Description of Proposed Platform

Please provide an outline of the existing platform proposed, briefly describing modifications anticipated to meet the needs of our organization. Outline the hardware requirements to support your product on our existing network. If available provide a demo version of the existing product.

6. Evaluation and Award Process

During the month of February, 2008, the selection committee will review submissions based on the following criteria:

1. Providers' demonstrated level of expertise
2. Experience with similar implementations

Up to four providers will be shortlisted to participate in further interviewing and presentation of project components. Successful applicants may be asked to submit a more detailed proposal following the initial screening process. All applicants will be notified by email by March 3, 2008 regarding the success of their submission.

6.1. OrionHealth Key Personnel

All future correspondence regarding your submission should be directed via email to Sharon Anderson. Questions will be forwarded to the appropriate party within OrionHealth. All questions and replies will be shared with those who have submitted a letter of intent with e-mail contact information.

Sharon Anderson
Clinic Leader, OrionHealth Calgary NE – Temple
s.anderson@orionhealth.ca
202 – 5401 Temple Drive NE
Calgary, AB T1Y 3R7

Lhyn Hook
Coordinator, Information Processing and Purchasing

Greg Feehan
Vice President Clinical Performance

Tonni Bloomer
Director of Finance

6.2. Process Schedule

Submission of letter of intent: as soon as possible

Deadline for questions regarding EOI: January 10, 2008

Submission of EOI: January 31, 2008

Shortlist of successful submissions provided by OrionHealth: March 3, 2008

Anticipated selection of successful provider: April, 2008

Anticipated project start date: April, 2008

 Planning & development phase TBA

 Project pilot phase TBA

 Implementation phase TBA

 Follow-up phase TBA