

WIC APPOINTMENT REMINDER SERVICE

This document lists how the Activities listed will be performed in addition to additional Scope of Work Activities outlined.

- 1) Provide a United States hosted cloud/web-based Appointment Reminder Service for access by State Staff, local agencies, including their associated clinic sites.
- 2) The SaaS platform shall allow for WIC State staff to configure the content of their messages to include custom scripts, including but not limited to, appointment location, date and time, local agency name, and special instructions by appointment type. In addition, State Staff shall have the ability to configure caller ID by Clinic of Agency, notification frequency, and number of days before messages are sent ahead of actual appointment dates.
- 3) The SaaS platform shall support multi-lingual communication. At a minimum, the Contractor shall provide all communication modalities in English and Spanish. Contractor to provide information as to other languages available.
- 4) The Offeror shall perform all of the necessary planning, SaaS system and server hosting, implementation, managing, application/database/server configuration maintenance and support, enhancement, training, and customer technical support of the SaaS solution in order to meet all of the requirements stated herein.
- 5) The Offeror shall use a Secure File Transfer Protocol (SFTP) so that the Contractor can receive personally identifiable WIC participant protected files via CDP Exports.
- 6) The SaaS platform shall use encryption (such as TLS 1.2, AES128 or AES256) at rest as well as in transit.
- 7) The SaaS platform shall securely store any user, patient, or participant information, including but not limited to, patient identifiable information, Health Insurance Portability and Accountability Act (HIPAA) – if applicable for local agency, personal health information (PHI), and shall adhere to Federal Communications Commission (FCC) standards for texting.
- 8) The SaaS platform shall provide for an unlimited two-way Chat SMS texting messaging solution for all WIC local agencies and their clinics to communicate with their individual participants as the WIC agencies move to this service. SMS Chat shall be integrated with reminder messaging so participants can respond directly to their appointment reminder texts. Chat should include real-time auto-translation options.
- 9) The SaaS platform shall offer role-based security with multiple levels of access control, for minimally three levels of State, Agency, and Clinic site; and that includes functionality to provide Superuser Access over all accounts, which will allow for state-level monitoring and oversight of system administration activities such as system

configuration, user administration, and network administration over all WIC agencies that opt into this service.

- 10) The SaaS platform shall offer role-based security and access control whereby WIC local agencies shall only have access to view their own user and WIC participant information and communications for their particular clinic sites.
- 11) The SaaS platform shall include a Mobile App Development Platform solution optimized for sending notifications to WIC participants' smartphones.
- 12) The SaaS platform shall allow WIC local agencies the ability to access a Web portal with a user-friendly dashboard in order to draft, record, edit/customize, and save messages, and to schedule and send those messages to WIC participants' smartphones or tablets via their preferred format(s) of voice, email, and/or SMS text.
- 13) The SaaS platform shall allow WIC local agencies ability to record their own message scripts and to broadcast automated messages using a multi-language auto-script process with an automated Text-to-Speech option.
- 14) The SaaS platform shall allow WIC participants to have the option to "Opt-In" or "Opt-Out" of receiving phone calls, emails, and/or texts. Identification of participants who opt-out of the service will be provided to the WIC local agency that submitted the appointment reminder/message.
- 15) The SaaS platform shall allow WIC local agencies to send messages to individual WIC participants or to groups of WIC participants, such as to families.
- 16) Real-time bi-directional communication—the SaaS platform shall be able to both send reminders and collect response data when a WIC participant "confirms" or "cancels" an appointment through Voice or SMS Text message.
- 17) Ability to have website URLs Automatically shortened in outgoing Text messages.
- 18) The SaaS platform shall have customizable and automated reporting capabilities for State and WIC local agency users, such as tracking and reporting number of appointment reminders, communication type (email, landline/cellular phone, text), number of successful attempts and failed attempts/rates, etc., user login history, message history tracking, message review/auditing for quality assurance, statistical data, and user demographics. Support export of data in multi-file format such as CSV, XLSX, TXT, XML, etc.
- 19) The Offeror shall provide web-based training to all agencies and their clinics as they start using the service.

- 20) The Offeror shall provide a comprehensive user guide or self-training materials for WIC local agency and clinic staff reference.
- 21) The Offeror shall provide ongoing technical support as the primary point of contact for their Appointment Reminder SaaS platform via a helpdesk call in support during regular business hours between 8:00 AM to 5:00 PM Hawaii Standard Time, Monday through Friday, excluding State of Hawaii holidays.

Requesting quote for service below but State may opt out at award:

- 22) Integrated Web Surveys with Secure Media File Uploads. Web based surveys can include single question or multiple question surveys. Participants can upload /add images/files in their responses.

Clarification/Requirements:

1. We are seeking a SaaS platform that already exists. We are not "developing" a program/platform. Secured 2-way messaging.
2. 15 Hawaii local agency sites; approximately 25,000 WIC statewide participants.
3. English and Spanish shall be included. Any additional languages that WIC requires shall be included in your total cost.
4. Some commonly spoken languages in our WIC clinics are Mandarin, Cantonese, Chuukese, Marshallese, Japanese, Korean, Vietnamese, Ilokano and Micronesian.
5. Compliance with the following Certifications: HIPAA (Type 1), ISO 27001, AICPA SOC (SOC 2, Type 2, SOC 3).
6. All data is encrypted at rest and in transit using industry standard cryptography.
7. Ability to send and receive messages via cell phone, landline, any internet connected device (ie. pc, laptop and a mobile app).
8. Provide fail over site to minimize downtime in the event of a system failure and to maximize uptime.