

STATE OF HAWAII  
DEPARTMENT OF HEALTH  
SCOPE OF WORK  
COUNTER/SORTER AND  
DATA ENTRY CLERICAL SERVICES - OAHU

**Description of Work**

The Department of Health (DOH) is requesting data entry clerical services for a statewide, school-located vaccination project. DOH will receive approximately 30,000 medical consent forms from schools as part of this project.

Ideally, data from Stop Flu at School (SFAS) consent forms is entered into the Hawaii Immunization Registry (HIR), a web-based, statewide immunization information system capable of capturing and sharing comprehensive lifespan immunization data. Data entered into HIR are used by DOH and immunization providers statewide to determine a patient's vaccination status. At the present time HIR data entry functionality is inoperable. In the event that HIR data entry functionality is restored at any time during the project period, the contractor will enter data from the medical consent forms directly into HIR. During the time that HIR data entry functionality is unavailable, consent form data shall be entered into a database/spreadsheet application. All information, whether entered into HIR or a database/spreadsheet application, must be accurate and timely. Consent forms shall be scanned and stored electronically as records of vaccination.

HIR data entry consists of searching the database for the patient, updating demographic information as needed, entering patients who are not in the database, and entering immunization, physician, and insurance information utilizing drop-down menus and free-text fields.

Use of a database/spreadsheet application would consist of hand-keying and/or utilizing drop-down menus to record all information on each medical consent form in an electronic format.

Data entered must be at least 95% accurate. The Service Provider shall develop a plan ensuring the 95% accuracy threshold will be met. DOH staff will periodically review the Service Provider's work and if accuracy is found to be less than 95%, the Service Provider shall be required to review and correct the data entered until DOH is satisfied that the 95% accuracy threshold has been met.

Each school's consent form must be counted/organized by grade level and organized according to a system agreed upon by DOH and the Service Provider. Counted/sorted forms shall be reviewed by DOH and/or external staff periodically to ensure accuracy. The Service Provider will be requested to re-count consent forms if found to be inaccurate.

All Service Provider staff assigned to this project will be required to review the Department of Health Disease Outbreak Control Division Information Technology Acceptable Use Policy and Access and Confidentiality Agreement prior to signing written acknowledgements, indicating that the individual has received the Policy and Agreement documents, understands the terms, including penalties for violation, and agrees to comply with the Policy and Agreement. The Service Provider shall be responsible for training all staff assigned to this project using DOH-supplied training materials. Documentation of training completion shall be submitted to DOH by

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the Service Provider before access to the database/spreadsheet will be granted. DOH shall provide one (1) train-the-trainer session for the Service Provider. Thereafter, the Service Provider shall train all staff using the DOH-supplied training materials. Any training materials developed by the Service Provider shall be reviewed and approved by DOH prior to use.

If HIR is utilized, all vendor staff assigned to this project will be required to review the HIR Confidentiality and Privacy Policy and the HIR Security Policy prior to signing a written confidentiality and security statement, indicating that the individual has received a copy of the Confidentiality and Privacy Policy and the Registry Security Policy, understands the terms, including penalties for violation of the policies, and agrees to comply with the policies. In addition, all staff must complete the HIR Security Awareness Training and HIR system training prior to being granted access to HIR.

This year the project will have two options for counter/sorter and data entry:

**Option 1:**

Data entry shall occur at the State of Hawaii Department of Health located at 1250 Punchbowl Street, Honolulu, Hawaii 96813 in the Health Information Systems Office (HISO) Training Room located in the basement of the building. Consent forms shall not be removed from the building. To maintain social distancing, the HISO Training Room is equipped with 13 computers with Internet access, though no more than 4 staff will be allowed to work in the room and will be accessible Monday to Friday, from 7:45 a.m. to 4:30 p.m. The HISO Training Room will be closed on State holidays. The Service Provider shall ensure at least one supervisor is on-site at all times while their staff are working in the building.

**Option 2:**

To maintain social distancing, data entry staff will work remotely with access to scanned documents to be used for data entry. The vendor will be responsible to provide the necessary equipment for data entry (possibly 2 laptops/computers, one to view the scanned documents and the other for data entry.)

With **both options**, the counter/sorter will work out of the State of Hawaii Department of Health at the address indicated above. If there are no forms to be counted or scanned, this staff person will be a data enterer and will have access to a computer for data entry.

The Service Provider will be responsible for ensuring all employees who report to the Department of Health building adhere to social distancing requirements and appropriately use vendor-supplied personal protective equipment and sanitizing supplies, including but not limited to, non-medical face masks, hand sanitizer, appropriate cleaning of workstations, etc. Vendor must implement a daily COVID-19 health screening for all employees who physically report to the Department of Health building.

**Project Timeline**

A pre-project meeting will occur during the week of October 5, 2020. Data entry will begin

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approximately on October 14, 2020 and end no later than January 29, 2021. Based on the actual volume of vaccinations and consent forms received, project work may be completed earlier than January 29, 2021. Counting and sorting of consent forms and data entry shall be completed on an ongoing basis through approximately January 29, 2021. The Service Provider shall ensure all forms are counted/sorted and data has been entered into a database/spreadsheet application or HIR and reviewed to ensure 95% accuracy prior to January 29, 2021.

Clinic Schedule

- **October 13 – November 20, 2020**
  - Approximately 186 clinics scheduled, statewide.
  - Clinics are not scheduled on State holidays.

**Project Staffing Needs**

The Service Provider shall staff the project with persons assigned to the following roles:

- 1) Project Coordinator:
  - a. Contact person authorized to interact with the State;
  - b. Meets (in-person or via telephone) with the on-site supervisor(s) at least daily to confirm progress and address issues;
  - c. Ensures that the DOH-approved project plan is implemented and adhered to; and
  - d. Monitors work progress to ensure project milestones are met and all forms are entered meeting the 95% accuracy threshold by project end date.
- 2) On-Site Supervisor:
  - a. Supervises counter/sorter and data entry clerical staff (including attendance, time sheets, monitoring, and providing feedback/ensuring corrective actions taken);
  - b. Trains data entry clerical staff utilizing DOH-supplied training materials;
  - c. Assigns tasks to data entry clerical staff;
  - d. Alerts DOH in a timely manner to clarify illegible information on the consent form and/or discrepancies between information on the consent form and in the database/spreadsheet application or HIR; and
  - e. Performs quality assurance checks for counter/sorter and data entry clerical staff
  - f. Explains data entry errors to clerical staff;
  - g. Implements corrective actions to improve clerical staff counter/sorter and data entry accuracy; and
  - h. Ensures counter/sorter and data entry errors are corrected.
- 3) Counter/Sorter and Data Entry Clerks:
  - a. Collects and processes confidential data from the influenza vaccination consent forms;
  - b. Enters and verifies data from influenza vaccination consent forms into the database/spreadsheet application or HIR;
  - c. Flags illegible, inconsistent, or suspected inaccurate information on the consent forms for On-Site Supervisor to follow up;
  - d. Clarifies with supervisor whenever there are inconsistencies and inaccuracies on consent forms and decide on most appropriate action;
  - e. Count and sort each school's consent forms (one designated counter/sorter).

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**Project Staff Qualifications**

Staff requirements by role:

- 1) Project Coordinator
  - a. Shall have a minimum of three (3) years' experience in coordinating initiatives of similar scope and complexity; and
  - b. Shall have an undergraduate degree in a related field.
- 2) On-site Supervisor
  - a. Shall meet all of the Counter/Sorter and Data Entry Clerical requirements listed in (3.) below;
  - b. Must have at least 1 year of experience working in an office setting;
  - c. Must have a minimum of two (2) years of experience supervising a minimum of ten (10) staff.
  - d. Strong assertiveness, initiative, leadership, organizational, and communication skills preferred.
- 3) Counter/Sorter and Data Entry Clerical
  - a. Shall have at minimum a high school diploma or equivalent; two (2) years of college preferred;
  - b. Shall be proficient in Microsoft Excel, Word (minimum net typing speed of 45 words per minute), minimum 8,000 to 10,000 alphanumeric keystrokes per hour;
  - c. Shall possess Web access knowledge and Internet skills;
  - d. One (1) year of work experience involving data entry preferred;
  - e. Must have demonstrated ability to adhere to professional standards, ethical behavior, and professional business attitude;
  - f. Must exercise discretion in handling sensitive or confidential information; and
  - g. Must demonstrate strong attention to detail.
  - h. Flexible disposition, strong work ethic, and strong data entry speed, and accuracy skills preferred.

Time Off Requests: As a condition of hire, due to the short duration of the project all staff must agree to a "black out period" regarding pre-planned time-off requests during the project period. Emergency, sick, or family leave requests will be accepted/reviewed on an "as needed" basis.

Documentation of all staff requirements shall be submitted to DOH prior to the start of the project and anytime a change in staff occurs.

DOH shall have the right and the Service Provider shall comply with the request immediately, to remove personnel from all work for unsatisfactory service and replace personnel. If a change in personnel occurs, new personnel must meet all requirements detailed in this scope.

**Service Provider Qualifications**

The Service Provider must meet the following qualifications when providing quotes for this solicitation:

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- 1) The Service Provider must have a sufficient number of employees, , to meet the demands of the project, as determined by DOH.
- 2) Require background screening of staff assigned to this project prior to commencing work with DOH:
  - a. Education verification – highest degree earned
  - b. Third party employment verification – last two (2) employers or to the extent possible, if less than two previous employers.
  - c. Reference check – two (2) professional references or to the extent possible, if previous employment history is limited and/or previous employer’s policies do not allow for comment.
  - d. Background check – no conviction of a violation of any law
- 3) Oversee review of the Department of Health Disease Outbreak Control Division Information Technology Acceptable Use Policy and Access and Confidentiality Agreement by all data entry clerical and supervisory staff and ensure staff understands the terms, including penalties for violation of policies, and agree to comply with the policies. Ensure completion of written acknowledgements indicating that staff have received the Policy and Agreement documents, understand the terms, including penalties for violation, and agree to comply with the Policy and Agreement. Documentation of written acknowledgements shall be submitted to DOH by the Service Provider before access to the database/spreadsheet will be granted. A confidentiality Agreement between DOH and the Service Provider shall also be completed.
- 4) If HIR is utilized, oversee review of HIR Confidentiality and Privacy Policy and HIR Security Policy by all data entry clerical and supervisory staff and ensure staff understands the terms, including penalties for violation of policies, and agree to comply with the policies. Ensure completion of written HIR confidentiality and security statement by each data entry clerical and supervisory staff. Oversee completion of HIR Security Awareness Training and HIR system training using DOH-supplied training materials. Documentation of training completion shall be submitted to DOH by the vendor before access to HIR will be granted.

**Compliance, Documentation, and Hawaii Compliance Express**

Service Providers are required to be compliant with all appropriate state and federal statutes.

**Submission of Project Plan**

The Service Provider shall develop a project plan and submit it to DOH for review by October 5, 2020. No work shall begin until the plan has been approved by DOH. The plan shall include, but not be limited to the following:

- 1) Staffing
  - a. Staffing plan, including all persons assigned to the project by role;
  - b. Plan for recruiting a sufficient number of qualified staff and method(s) to ensure low staff turnover for duration of project;

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- c. Plan for addressing personnel issues, including non-performance, unsatisfactory professional behavior, and notices of termination.
- 2) Training and Staff Oversight
  - a. Plan for training staff;
  - b. Ongoing monitoring of the quality and quantity of work for each staff.
- 3) Data Quality Oversight
  - a. Method to scan all consent forms on an ongoing and timely basis;
  - b. Method and timeframe for reviewing entered data and scanned forms to assess accuracy and ensure quality;
  - c. Plan to ensure 95% accuracy threshold will be met.
- 4) Project Oversight
  - a. Plan for monitoring and adjusting workload to ensure efficient use of resources and maintaining appropriate output to meet project milestones and deadlines;
  - b. Procedures for addressing/minimizing staff absenteeism/tardiness and ensuring replacement staff if data entry staff are out or otherwise unavailable.
  - c. Procedures for submitting completed work to DOH and demonstrating that 95% accuracy level has been met;
  - d. Procedures and timeframe for reviewing and correcting work deemed unsatisfactory by DOH.
- 5) Project schedule and timeline
  - a. Anticipated number of forms to be scanned and entered on a weekly basis;
  - b. A plan for meeting targeted data entry numbers across the length of contract;
  - c. Key tasks and person(s) responsible for ensuring tasks will be accomplished across length of contract.
- 6) CVs for Project Coordinator, On-Site Supervisor, and illustrative CVs for data entry clerical staff

Discussion of the Project Plan shall occur at a pre-project meeting to be scheduled to occur on a mutually convenient date and time during the week of October 5, 2020.

**Submission of Quote**

DOH will approve invoices for payment processing for every consent form verified to have been entered into HIR or database/spreadsheet application. Consent forms must have been entered into HIR or database/spreadsheet application at an accuracy rate of at least 95%.

Service Providers shall submit a cost per form entered (applicable taxes included) to accurately and appropriately enter approximately 30,000 consent forms, into HIR or database/spreadsheet application based on the specifications of this scope, with the expectation of entering approximately 30,000 consent forms between October 14, 2020 and January 29, 2021.

Service Providers may submit for only one of the two options OR submit for the two options. Solicitation will be awarded for only one option that is most advantageous for the State.

There is no commitment by DOH as to the actual number of consent forms to be entered and the actual award amount for the term of this project.

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The State of Hawaii reserves the right to cancel this procurement/award at any time due to funding or non-performance.

**Questions**

If you have any questions regarding this solicitation, please post them in the “Questions and Answers” tab in HiePro.

If you are experiencing technical difficulties with HiePRO, please contact the State Procurement Office at (808) 586-0554.

Attachment: Illustrative SFAS consent form; highlighted fields to be entered in HIR. If alternate database/spreadsheet application is utilized, all SFAS consent form fields would require data entry.