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**TRANSMITTAL FORM**

Today's Date:	<u>09/23/2021</u>	Department:	<u>240 - Health &amp; Human Service - Human Services Division</u>
Contract No.:	<u>C-21-227-06-30</u>	Effective Date:	<u>10/23/2021</u>
Description of Project:	<u>Statement of Work</u>		
Awarded Vendor:	<u>Netsmart</u>		
CC Approval on	<u>09/21/2021</u>	AI-	<u>82466</u>

**Routing of documents:**

- ✓ 1. Executive Office – Attn: Monica Salinas
- \_\_\_\_\_ 2. District Attorney's Office – Attn: Select ADA
- \_\_\_\_\_ 3. County Judge's Office – Attn: Richard F. Cortez
- \_\_\_\_\_ 4. County Clerk's Office – Attn: Arturo Guajardo, Jr.
- \_\_\_\_\_ 5. Purchasing Department – Attn: Yolanda Velasquez ext. 4881

**ATTENTION COUNTY CLERK'S OFFICE:**

Please do not attach the following to the minutes of this agenda due to the confidential nature of the information contained herein:

- Contract/Agreement
- Exhibit A – RFB Procurement Packet
- Exhibit B – Fee Schedule/Bid Page ( Pgs. \_\_\_\_\_ to \_\_\_\_\_ )
- Exhibit C – Certificate of Liability Insurance
- Other: \_\_\_\_\_

**QUOTE**  
Hidalgo County- \$0 OC NX

By and Between <b>Netsmart Technologies, Inc.</b>  11100 Nall Avenue Overland Park, KS 66211 ("Netsmart")	And <b>Hidalgo County Health Departm</b> <b>Client Account Number: 1002812</b> 1304 S. 25th Street Edinburg, TX 78539 ("Client")
<b>Attention:</b> Sarah Neal, Client Alignment Executive, Public Sector  Telephone No: 1 (913) 272-2133 sneal@ntst.com Legal notices to be sent to: Contracts Notice@ntst.com	<b>Attention:</b> Rigo Hinojosa, Director of IT  Telephone No: (956)318-2426 rigo.hinojosa@hchd.org  Legal notices to be sent to (if different):

**Client**

Richard F. Cortez  
(PRINTED NAME)

County Judge  
TITLE

9/23/21  
DATE

FILED  
AT 3:00 O'CLOCK P M  
  
**SEP 23 2021**  
  
ARTURO CHA JARDO, JR. COUNTY CLERK  
HIDALGO COUNTY, TEXAS  
BY [Signature] DEPUTY

APPROVED BY  
COMMISSIONERS COURT  
ON: 9/21/21 [Signature]

**Schedule 1 – Scope of Use, Fees and Payment Terms**

**PROFESSIONAL SERVICE CHARGES:**

<u>Services</u>			
<u>Product</u>	<u>QTY</u>	<u>Unit</u>	<u>Fees</u>
Professional Services - OrderConnect <sup>1</sup>	1	Fixed Fee	\$0.00
<b>Sub-Total</b>			<b>\$0.00</b>

**Notes:**

The recurring fee amount represents the full annual recurring fee at the contracted rates herein. The recurring fees paid during year one may vary based on proration described in the payment terms and product-specific term start dates identified within this quote or purchase agreement.

All annual recurring fees are subject to the annual increase set forth in the Agreement.

**(1) - Those products notated with a (1) are subject to third party pass through terms available at: <https://www.ntst.com/lp/pass-through-terms>.**

**Payment Terms:** All payment for the products and/or services included on this quote will be due according to the following payment schedule and terms:

- a. Services  
100% of Services fees due upon execution of this quote.



**Moving from OrderConnect to OrderConnect-NX**  
**SCOPE OF WORK (“SOW”)**  
 (As of 6/01/2021)

**Netsmart Technologies, Inc. and Client**

**1. Purpose**

The purpose for this statement of work is to outline the requirements and deliverables for the implementation and project management of the Client’s Implementation. The scope is based on the latest generally available software release, project timeline, and use of Plexus Foundations implementation methodology, Plexus Home content and recommendations. The details of the scope of services are included below.

**2. Project Duration**

Project Duration

The following project Start and End dates are estimates and are subject to adjustment based upon the Effective Date of the Agreement and both parties overall cooperation of such implementation. Netsmart requires a minimum of forty-five (45) days following the Effective Date of this Agreement to accommodate pre-project activities such as planning, staffing and technology activities. The detailed project plan will define the scope and estimated timing of Netsmart’s work. Once the project plan is finalized, extended delays and changes in scope may result in changes to scheduling and services. Charges for additional services will be billed at Netsmart’s then-current rates for such services.

**3. Scope of Services**

The solution(s) as outlined below will be implemented under the direction of Netsmart utilizing Netsmart’s standard Plexus Implementation methodology (Initiation, Configuration, Validation and Adoption).

Description: OrderConnect-NX is a secure, Web-based prescribing and medication management system. The system can be utilized anywhere using a Window-based system via there is access to the following browsers: Chrome, Firefox, Edge, and Internet Explorer.

<b>OrderConnect-NX Screens and Features</b>	<b>Scope of Services</b>
<b>Client Search Pane / Most Recent Client List</b>	Search for clients directly in OrderConnect-NX. If launching OrderConnect from a care record, the client search will occur in the care record.
	Use basic search or advanced search features
	A list of the most recent client records accessed readily available
<b>Client Facesheet</b>	Client demographics viewing and editing
	Client diagnoses viewing and editing
	Client allergies viewing and editing
	General comments viewing and editing
	Current client medication orders and details

	Start Order button to launch Orders screen
<b>Orders Screen – Medication Orders</b>	View current medication orders
	View history of medication orders
	Start a medication order, reorder a medication, change a medication order, discontinue a medication
	View details of a medication order
<b>Order Entry Screens - Medication</b>	Search for medications
	Enter details of medication orders.
	<b>Titration and tapers not yet available</b>
	View medication alerts and Care Suggestions
	Choose medication order output: eRx, eFax, Print
	Pharmacy selection
	Supervisor selection
	Print education leaflets, consent forms, rx collaterals
Complete two-factor authentication for EPCS orders	
<b>Prescribers Queue</b>	Approve or deny Verbal Orders
	Approve or deny Renewal Requests and Change Requests
<b>Transmissions Screen</b>	View electronic transmissions that have failed or are pending
<b>Resources Screen - Reports</b>	Transmissions Log Report - Available
	Order Audit by Prescriber Report - Available
	<b>Other reports that are in the original OC are not yet available</b>
<b>Orders Screen – Lab/Rad Orders</b>	<b>Not yet available</b> When available, will be added to Full-Suite implementations. (Not in scope for eRx-Only clients)
<b>Order Entry Screens – Lab/Rad</b>	<b>Not yet available</b> When available, will be added to Full-Suite implementations. (Not in scope for eRx-Only clients)
<b>Results Screen – Lab/Rad Results</b>	<b>Not yet available</b> When available, will be added to Full-Suite implementations. (Not in scope for eRx-Only clients)
<b>Eligibility and Formulary Checking</b>	<b>Not yet available</b>
<b>External Medication History</b>	<b>Not yet available</b>
<b>Medication Reconciliation</b>	<b>Not yet available</b>
<b>Patient Reported Medications (aka, Non-ISC Rx)</b>	<b>Not yet available</b>
<b>PDMP Checking</b>	<b>Not yet available</b>
<b>OC-eMAR</b>	<b>Not yet available</b>
<b>Prescription Resend</b>	<b>Not yet available</b>
<b>Mini Rx Profile</b>	<b>Not yet available</b>
<b>Sample Inventory Management (Add on Module)</b>	<b>Not yet available</b>
<b>Custom Formulary Management (Add on Module)</b>	<b>Not yet available</b>

OrderConnect-NX Environments	
<b>OrderConnect-NX UAT Configuration</b>	If an OrderConnect UAT environment already exists, it will be configured to be OC-NX and connect to the client's care record UAT environment to allow Single Sign On. Single Sign On testing will be completed for up to five users. The client is responsible for testing in UAT. If an OrderConnect UAT environment does not already exist and if the client wants a UAT environment, additional hours will be quoted and charged.
	All active users in the UAT OrderConnect environment will be switched to the OC-NX view. If any additional users are added to UAT after moving to OC-NX, the facility will need to open a Support case with Netsmart requesting the new UAT users have the OC-NX view.
<b>OrderConnect-NX LIVE Configuration</b>	The client's live OrderConnect environment will be configured to be OC-NX and connect to the client's care record LIVE environment to allow Single Sign On. Single Sign On testing will be completed for up to five users.
	All active users in the live OrderConnect environment will be switched to the OC-NX view. If any additional users are added to the facility after moving to OC-NX, the facility will need to open a Support case with Netsmart requesting the new users have the OC-NX view. In other words, even though the facility has the OC-NX, additional users that are added will not automatically have that view.

Training and Support	
<b>Train-the-Trainer Training</b>	Netsmart will conduct one one-hour Train-the-Trainer training of OrderConnect-NX. The training will be recorded and made available to the client.
<b>Go Live Support</b>	Netsmart will provide up to one week of post-Go Live support.

#### 4. Assumptions

- Client is updated to CareFabric Events 2.0 (CFE 2.0) or higher prior to start of project. (CareFabric Events is the data transfer mechanism between the client's Netsmart care record and OrderConnect.) If client is not on CFE 2.0 and needs to be updated to it, additional Consulting hours and costs will apply.
- Netsmart will devote enough resources and timely communication to the project in order to assure its reasonable success.
- Professional services quotes do not include travel, living and travel time expenses, as all services will be delivered remotely, unless otherwise approved.

- Cancellation of events must be given two weeks prior to scheduled activities onsite, otherwise the Client will still be charged for travel that has been booked.
- Client will provide enough resources and timely communication to the project in order to assure its reasonable success. A training room will be available for the training sessions with working equipment and appropriate software loaded prior to the arrival of the Netsmart team if it is part of the planning and expectations for the project.
- Training will cover those items that are available in OrderConnect-NX at the time of training. As additional items are added to OrderConnect-NX and if training is requested on those items, the additional training will be quoted and charged.
- Individuals scheduled to attend training will attend and participate in the entire session as defined by the agenda.
- Netsmart will share available recommended practices during the implementation.
- The project will be executed according to the phase based Netsmart Plexus Foundation Methodology as outlined below.
- Client will assign an individual who has authority and accountability for signing-off on project completion. This shall be a named individual.

## **5. Location of Work and Client Responsibilities**

All work by Netsmart will be conducted remotely unless identified as onsite in the detailed project plan. For onsite sessions, Netsmart reserves the right to complete those sessions remotely. A high-level outline for work location and Client responsibilities is provided below.

## **6. Netsmart Plexus Foundation Methodology, Expectations & Deliverables**

The following section of this document details the main deliverables of the Client Implementation. The implementation Phases outlined below act as gates with quality milestones for each Phase that must be completed prior to moving on to the next Phase.

### **6.1 Initiation Phase**

During the Initiation Phase, the client project team will be introduced, and the team's responsibilities and project timeline will be discussed. The different phases within the Plexus Foundation Methodology are presented, outlining the objectives of each phase and the roles and responsibilities of each member of the team.

The Project Launch meeting is the initial call with project teams to discuss project timeline and expectations, and the project scope will be reviewed with the Netsmart and client project team.

#### **Objectives:**

- Project Teams Confirmed
- Event Dates Agreed Upon
- Project Plan Agreed Upon
- Project Launch Completed

## 6.2 Configuration Phase

During the Configuration Phase, the Netsmart consultant will work with OC Engineering to update the client's UAT OC environment (if one already exists) to OC-NX. The Netsmart consultant will also work with the client's care record UAT instance to re-configure the Single Sign On so that it points to the new OC-NX instance. The Netsmart consultant will work with OC Engineering to update all UAT users' profiles to be OC-NX enabled.

System testing will be performed.

Once testing has been completed in the UAT environment the Netsmart Consultant will work with OrderConnect Engineering to update the client's OrderConnect live environment to the OC-NX version as well The consultant will also re-configure the client's live care record environment's Single Sign On so that it connects to the OrderConnect-NX environment. The Netsmart consultant will work with OC Engineering to update all active OC users' profiles to be OC-NX enabled.

The Netsmart consultant will ensure clients develop a solid plan to confirm end-users will be effectively trained prior to go-live. This will be critical to the success of the project as well as adoption of the solution. Netsmart suggestions for the client's training plan will include training strategies, resource requirements, any required technologies and/or logistics, timelines, goals and objectives.

### Objectives:

- System Configuration Completed in Test Environment
- System Review Completed
- System Review High Risk Items Addressed
- Testing and Training Finalized

## 6.3 Validation Phase

Train-the-Trainer sessions are provided to the client's super-user/training team.

Check-in calls are scheduled to discuss completed testing and any issues that may arise.

### Objectives:

- One Week of System Testing Completed
- Train-the-Trainer Training Completed
- Integration Testing Issues Resolved
- System Configuration Completed in LIVE environment
- Integration Testing Completed

## 6.4 Adoption Phase

During the Adoption Phase, the Go Live event will occur when the solution is moved into productive use by the end-user population. This will consist of "preparation" and performing



functions out of the Live environment. The Netsmart consultant will support this event remotely and will provide two days of remote post-Go Live support.

Once all deliverables in scope have been completed, the Netsmart consultant will request client acceptance. At that time, the client will be transitioned to Support for any future cases.

**Objectives:**

- Go Live Issues Resolved
- Go Live Event Completed
- Two Days of Remote Post-Go Live Support Provided
- Go Live Event Acceptance
- Transition to Support Completed