

Sample RFI for Vetting Web-Based EVS Software



Vetting software of any kind can be daunting; in particular Web-Based Software or SaaS (Software as a Service). There are many variables to consider and review. For instance:

Functionality – does the software do what you need it to do?

Quality – how well does the software do what the vendor says it does?

Usability – how easy is it for you and your staff to operate?

Technical Requirements – what kind of network and hardware are needed to run the software?

Security – how secure is your data in the software?

We wrote the sample RFI below to aid you in this important process. It is the comprehensive list of questions you should be asking any Environmental Services software vendor you are considering doing business with.

Request for Information for: Web-Based Software for Environmental Services Management

Experience

- What percentage of your users work in a hospital Environmental Services (EVS) department?
- How long has your company been providing technology EVS departments?
- Please give a brief history of operating systems (OS's) your technology used before going to a SaaS platform.
- What percentage of people in the organization are qualified to go on-site to a hospital Environmental Services department and provide data-loading, staffing analysis, consulting, or training for the end users?
- How does your company determine how long it takes to clean different room types in a hospital?
- How many hospitals are paying your organization for a SaaS license?
- How many hospitals have paid your organization for on-site services in the last five years?
- What is the average number of positions in your organization dedicated to IT testing, writing code, trouble shooting, upgrading, and creating specifications for your software products for the last three years?
- How many hospital systems with at least two hospitals as current clients do you service?
- Do your clients include building service contractors providing cleaning services to a hospital?
- Please provide references for Environmental Services managers using the software such as: director, supervisor, administrative assistant.
- Please provide references for administrators the end users report to such as: a C-level position or a system manager.

Software Products and Apps

- Please give a description of the software products you currently provide.
- Are your end users required to open and manipulate spreadsheets in order to use your products?
- Please distinguish the primary data elements in your products that can be user defined and assigned versus data elements the user cannot change. These data elements include things like production rates, production methodology (units vs square feet), room types/floor types/cleaning priority, cleaning frequencies, etc.
- Do any of your products have an inventory of the areas being cleaned? If so, please provide a description of:
 - the inventory data structure
 - how the inventory is collected and created
 - the options for importing current hospital data.
- Do any of your products have the ability to create daily work assignments? If so, please provide a detailed description of how an end user would create and update daily work assignments for employees.
- Do any of your products have the ability to create and manage personnel days-on/days-off schedules by work assignment, employee name, and date? If so, please provide an overview of how this is created and managed in the product.
- Do any of your products have the ability to manage project work such as floor finishing and carpet shampooing. If so, please provide a description of how this is managed in the product.
- Do any of your products manage employee training? If so, how does this work in the product?
- Do any of your products have a census-based scheduling component? If so, please provide a description of how this is managed on a daily basis. Please include any daily data input options or if your product interfaces with another product; please provide a white paper of the interface.
- Do any of your products provide the ability to create a staffing analysis for Environmental Services? Can your product create automated what-if analyses? Is there a wizard for running staffing scenarios or does the user have to run a multitude of reports and input results to create a staffing analysis? Please provide a description of a typical staffing analysis and the methodology used.
- Quality Insurance Inspections
 - Do any of your products provide the ability to conduct quality assurance inspections for cleaning?
 - Does your product rely solely on paper and data input or does it have the option to use mobile devices to conduct inspections?
 - Can other types of rounding surveys such as two-part florescent marker (black light) surveys be performed?
 - Can other departments use your product for surveys?
 - Do your mobile apps (if applicable) have the ability to record pictures and signatures?
 - For failed items does your app have the ability to choose comments from a list? Can unique comments be recorded? Please describe.
- Do any of your products have the ability to store employee information? If an employee is inactivated, do history files for that employee remain intact? Please describe.
- Do any your products have the ability to assign hospital departments (cost centers) to rooms and report? If so, please describe.
- How many reports can your product(s) produce? Does the user have the ability to filter reports based on input such as dates, areas, employees, etc.? Please show examples.
- Do any of your products provide dashboards? If so, please explain with examples.

- Do any of your products have the ability for a non-environmental service employee (visitor, patient, customer or co-worker) have the ability to scan QR (Quick Response) codes or text message for service requests? Please explain.
- Do any of your products have the ability for employees to use mobile devices for:
 - Receiving and completing tasks such as “restroom needs attention”, “linen needed for a patient room”, “meeting room set up”, etc.?
 - Receiving digital work assignments with the options for recording discharge, isolation, between case, or full cleans performed?
 - Text messaging with mobile-to-mobile, web-to-mobile, mobile-to-web capabilities
 - Storing history of text messaging?
 - Receiving verbal cues such as “you have an incoming task” or “you have an incoming message”?
 - Receiving and completing project work tasks such as floor finishing, carpet shampooing, etc.
- Do the mobile devices require a continuous, real-time internet connection in order to conduct a cleaning inspection or perform a survey? Or can the mobile device apps be used if the user is in a “dead spot” with no internet connection?
- Are there separate apps for managers and employees? Can both apps be loaded on the same device? Can the mobile devices be used by any manager or employee with distinctions automatically discerned by username log in?
- What is the platform used for the mobile device apps? iOS, Windows Tablet, or Android?
- How are the apps installed on the mobile devices?

Database Structure and Users

- For a hospital system, what are the options for database structure? Can the hospitals be multi-tiered so that a user can have access to multiple hospitals? Please explain.
- Can users be limited to certain portions of a database? Who can create new users? Can users be given access to different products based on their hospital? Please explain.
- What is the process for adding or inactivating a user? If a user is inactivated, do history files for that user remain intact?
- Does your company have a product that allows an administrator to see metrics across a system or region in the system as well as allowing the administrator to log in to any of the products and databases? Please explain.
- How do the mobile apps interact with the databases? How does the app “know” the user’s data requirements such as: inspections to be done, surveys available, or work assignments to be performed?
- Can the data being input into the mobile app be viewed in the web application almost immediately? Please explain this process.
- Does your registration site keep records of users’ login’s and log off’s? Can these logs be sent to an administrator?

Security and Requirements

- How involved will our IT departments be in making your users successful?
- Are the servers housing the databases dedicated or shared?
- Does your company use virtual servers?
- What are the domains (website addresses) that are required to access your products?
- What e-mail addresses will your company be using to send messages to users from your servers?
- What are your browser and hardware requirements?
- Is the data housed in the software used for patient care or does it contain any patient-related information (HIPPA data)?
- Does your company have plans to ever store patient or sensitive financial data in the future?
- Is there any financial information of a highly secure nature included your applications?
- Does your company have errors and omissions as well as liability insurance policies? What are the amounts of coverage and deductibles? Can your insurance company name our hospital system as a beneficiary?
- How is the application hosted? Is it used on the Internet as part of an ASP model? What type of database is used? What type of data encryption is used?
- Who owns the application?
- Who owns the data in the application?
- Are there any specific installation requirements regarding our operating system environment?
- How is login security established for the user?
- How often are users prompted to change their password? What are the password requirements in terms of length and allowed characters?
- How many times can a user attempt to login with an incorrect password before they are locked out of the system?
- Please explain as much as you can about your malware and virus protection.
- What are the data security practices?
- Is the data center properly equipped regarding facilities compliance?
- Is physical access to the data center secure?
- How are the backups managed?
- What service do you use for security rating? What is your security rating?
- Please provide a network diagram of your web server environment.
- Is your data center SSAE 16 / ISO 27001 compliant? Please provide a diagram of your security and infrastructure?
- Please comment on your data center's policies for power, UPS, generator, HVAC, and fire protection.
- How do your mobile apps handle notification and messaging? What ports are needed?

Non-Software Services, Technical Support, Agreements, and Pricing

- Please explain your software pricing model with potential volume discounts for a hospital system.
- Please provide your pricing model and deliverables for:
 - On-Site Data Collection
 - Data Entry
 - Staffing Analysis
 - On-Site Software and App Training
 - Consulting Work: such as set-up and implementation of daily work assignments
 - Off-Site Data Migration or Database Creation from Blueprints
 - Data Verification of Older Databases
- Please explain in detail your company's policy for travel and on-site expenses including airport parking, meal per diems, hotel accommodations, hotel mini-bars, hotel laundry services, rental car, airfare class/ticketing, POV's/mileage, Uber/taxis, and any other modes of transport.
- Please explain in detail your company's normal technical support policy with holiday schedules, normal hours of operation, off-hour policy, services such as gotomeeting.com or log me in rescue, e-mail access, user manuals, and training videos. What application is used to log support calls and user requests? How are user requests for enhancements handled?
- Does your company have a SaaS (software-as-a-service) agreement? If so, can we modify it?
- Does your company operate with Scope of Work documents for on-site work? If so, please provide an example.

SFS has over 950 Hospital ES Departments logging in and using our web-based applications every day.

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