



**2025-26.RFP03**

**Student Behavioral Health Records Data System**

**Hacienda La Puente Unified School District**

**June 10, 2026**

**TABLE OF CONTENTS**

<b>Section</b>	<b>Title</b>
	TITLE PAGE
01	NOTICE SOLICITING PROPOSALS
02	BACKGROUND & OBJECTIVES
03	INSTRUCTIONS TO RESPONDENTS
04	EVALUATION CRITERIA
05	<i>Intentionally Left Blank</i>
06	SCOPE OF WORK
07	FIRM INFORMATION & CERTIFICATION
08	PROVIDOR / FIRM REFERENCES
09	NONCOLLUSION DECLARATION
10	<i>Intentionally Left Blank</i>
11	BUDGET AND COST PROPOSAL
12	CERTIFICATIONS TO BE COMPLETED BY PROVIDER

**SECTION 01**

**NOTICE SOLICITING PROPOSALS**

The Hacienda La Puente Unified School District (“District”) is issuing this Request For Proposals (“RFP”) and invites qualified vendors to submit proposals for a secure, compliant, and efficient Student Behavioral Health Records Data System to District high school students. Interested parties shall submit two (2) hard copies and one (1) pdf copy on a USB drive in a sealed envelope to:

Hacienda La Puente Unified School District  
Attn: Joel Duarte, Director of Purchasing & Warehouse  
15959 E Gale Ave.,  
City of Industry, CA 91745

Proposals must be received no later than 3:00 P.M. (PST) on July 1, 2026. Submissions received after this date and time may not be accepted by the School District. The District reserves the right to reject any and all proposals at their discretion, the District reserves the right to request additional information and/or conduct subsequent interviews with all or none of the responding firms.

All questions or requests for clarification regarding any aspect of this RFP must be submitted via email only to Joel Duarte, Director of Purchasing & Warehouse at: [jduarte@hlpusd.org](mailto:jduarte@hlpusd.org) and a courtesy copy to Monica Reyna at [moreyna@hlpusd.org](mailto:moreyna@hlpusd.org) and Martha Calderon at [mcalderson@hlpusd.org](mailto:mcalderson@hlpusd.org). Questions received after this time may not be answered. Any firm directly or indirectly contacting District staff, including but not limited to, administrators, Board members, other than the Director of Purchasing may be disqualified.

The complete RFP document can be found:  
<https://www.hlpschools.org/district/business-services-division/purchasing-warehouse>

Thank you for your interest.

Sincerely,

Joel Duarte  
Hacienda La Puente Unified School District  
Director of Purchasing & Warehouse  
(626) 933-3932

END OF SECTION

## **SECTION 02**

### **BACKGROUND & OBJECTIVES**

#### **1. Background**

The Hacienda La Puente Unified School District (“HLPUSD” or “District”) located approximately 25 miles east of Los Angeles is one of the largest suburban school districts in Los Angeles County. The District’s pre-kindergarten through 12th grade enrollment exceeds 15,000 students who reside within the District’s boundaries which include the cities of Industry and La Puente and the unincorporated Los Angeles County areas of Hacienda Heights and Valinda.

The Hacienda La Puente Unified School District has fourteen (14) elementary schools, eight (8) K-8 and middle schools, four (4) comprehensive high schools, one alternative high school, and extensive Head Start/child development and adult education programs.

The Hacienda La Puente Unified School District is governed by a five-member Board of Education. The District employs a school Superintendent who is responsible for the day-to-day operations of the school district. The District employs approximately 3,000 certificated and classified employees, and has a total operating budget of approximately \$350 million dollars.

#### **2. Objective**

The objective of this project is to procure and implement an Electronic Health Records (EHR) system that supports healthcare billing and reimbursement processes, ensures compliance with the Family Educational Rights and Privacy Act (FERPA), the Health Insurance Portability and Accountability Act (HIPAA), and the Children's Online Privacy Protection Act (COPPA), and provides seamless integration with the Aeries Student Information System (SIS) to support student health record management and data exchange.

END OF SECTION

## SECTION 03

### INSTRUCTIONS TO RESPONDENTS

Respondents shall follow the instructions in this document, and shall submit all documents, forms, and information required for consideration of a Proposal.

**Hacienda La Puente Unified School District** will evaluate the information submitted by Respondents as outlined herein. If any information is found to be false, incomplete, or otherwise unsatisfactory, the District may, at its sole discretion, reject the Respondent's submission.

1. **RFP Documents**

Complete RFP documents, including addenda issued, can be found on the Purchasing webpage of the Hacienda La Puente Unified School District website at:

<https://www.hlpschools.org/district/business-services-division/purchasing-warehouse>

2. **Due Date**

The due date for this RFP July 1, 2026, at 3:00 p.m. (PST). Proposals received after the date and time will be deemed nonresponsive and returned to the Respondent unopened. For the purposes of this RFP the official time shall be that in the District's Purchasing office. Proposals will be publicly opened at the District Office, immediately following this submission time.

3. **Submittal Location**

Proposals can be mailed or hand delivered to the District Office at:

Hacienda La Puente Unified School District  
Attn: Joel Duarte, Director of Purchasing & Warehouse  
15959 E. Gale Ave.  
City of Industry, CA 91745

The District shall not be responsible, nor shall it give consideration, to any delays in mailing or shipping services. The District will not be responsible for submissions misdelivered due them being unreadable or mislabeled.

4. **Format**

Proposals shall be submitted in a sealed envelope/package clearly marked on the outside with the Respondent's name, the RFP number and RFP title. Included in the package should be one (1) original hard copy clearly marked "Original", one (1) hard copy clearly marked "Copy" and one (1) electronic copy on a USB Storage Device. Proposals sent by e-mail or facsimile will not be accepted.

Proposals shall be typed and securely bound or stapled in a manner that ensures all pages remain intact, the proposals should clearly exhibit the Respondent's ability to provide a product and the related services as called out in the Scope of Work and Evaluation Criteria. The complete proposal, including all narrative content, required forms, marketing materials, and any supplemental documentation, shall not exceed 75 pages in total. Proposals that exceed the page limit or are not properly assembled may be deemed non-responsive. The proposal must include copies of this RFP's Sections 07, 08, 09 and 12.

5. **Product Demonstration**

Following the District's initial evaluation of written proposals, the District may invite one or more Respondents to participate in a live product demonstration. The demonstration may be conducted virtually or in person at the District's discretion.

The purpose of the demonstration is to validate the functionality, usability, performance, and capabilities described in the Respondent's proposal. Respondents may be required to demonstrate specific use cases identified by the District, including but not limited to:

- Student health record creation and management
- Clinical documentation and charting
- Immunization and medication tracking (optional)
- Billing and reimbursement workflows
- Reporting and analytics
- User security and role-based access controls
- Integration with the Aeries Student Information System
- Administrative and system management functions

The District may provide demonstration scenarios, scripts, and evaluation criteria in advance. Demonstrations will be evaluated as part of the proposal scoring process. Failure to demonstrate functionality represented in the proposal may result in a reduction of evaluation points, a determination that the proposal is non-responsive, or removal from further consideration.

**6. Preproposal Conference**

There will be no preproposal conference.

**7. Respondent Questions & Clarifications**

All questions or requests for clarification regarding any aspect of this RFP must be submitted via email only to Joel Duarte, Director of Purchasing & Warehouse at: [jduarte@hlpusd.org](mailto:jduarte@hlpusd.org) and a courtesy copy to Monica Reyna at [moreyna@hlpusd.org](mailto:moreyna@hlpusd.org) and Martha Calderon at [mcalderon@hlpusd.org](mailto:mcalderon@hlpusd.org).

Questions must be received no later than June 23, 2026, at 2:00 p.m. (PST). The District is under no obligation to respond to any questions received after this deadline or to any questions submitted in a manner not consistent with these instructions.

To ensure fair and equal dissemination of information, Respondents are strictly prohibited from contacting any other District personnel regarding this solicitation. Failure to adhere to this requirement may result in disqualification from further consideration.

**8. Addenda and RFP Modifications**

Any corrections, modifications, additions, revisions, or other changes to this RFP will be valid only if issued in writing by the District as a formal RFP Addendum. All Addenda will be posted on the District's website at: <https://www.hlpusd.org/district/business-services-division/purchasing-warehouse> and will become part of the official RFP documents.

It is the sole responsibility of each Respondent to check for any Addenda have been issued. Acknowledgment of all issued Addenda will be a mandatory requirement for submitting a complete and responsive proposal.

**9. Withdrawal or Revision of Proposal**

Prior to the due date, a Respondent may withdraw their submission by written request to Joel Duarte at [jduarte@hlpusd.org](mailto:jduarte@hlpusd.org) and a courtesy copy to Monica Reyna at [moreyna@hlpusd.org](mailto:moreyna@hlpusd.org).

A Respondent may revise a proposal on the Respondent's own initiative at any time before the deadline for submission of proposals. The Respondent must submit the revised proposal in the same manner as the original. A revised proposal must be received on or before the proposal due date.

In no case will a statement of intent to submit a revised proposal, or commencement of a revision process, extend the proposal due date for any Respondent.

**10. Offer Period**

Proposals shall be firm offers subject to acceptance by the District and may not be withdrawn for a period of 90 calendar days following the last day to submit Proposals. The withdrawal period can be extended beyond the

90 calendar days with the approval of the Respondent. Proposals may not be amended once submitted to District, except as permitted by the District.

**11. Award of an Agreement**

Following the evaluation of proposals, the District may, at its sole discretion, award a contract to the Respondent whose proposal is determined to be in the best interests of the District based upon the evaluation criteria set forth in this RFP.

The District reserves the right to consider all information obtained during the evaluation process, including proposal responses, interviews, demonstrations, reference checks, clarifications, and any additional information requested by the District.

Selection shall not be based solely on cost, nor shall the District be obligated to award a contract to the Respondent receiving the highest numerical score. The District reserves the right to determine which proposal best meets the District's needs and provides the greatest overall value.

The District may negotiate terms, conditions, pricing, scope of services, and contract provisions with one or more Respondents prior to making a final award. If negotiations with a selected Respondent are unsuccessful, the District may discontinue negotiations and enter into negotiations with another Respondent or take any other action deemed to be in the District's best interests.

The District reserves the right to reject any or all proposals, waive informalities or irregularities in any proposal, reissue the RFP, cancel the procurement process, or elect not to award a contract.

Any award resulting from this RFP shall be subject to approval by the District's Board of Education, if required, and execution of a mutually acceptable written agreement.

**12. Protest**

Any Respondent who submitted a Proposal to the District may file a protest provided that each and all of the following are complied with:

- a. The protest is in writing, the protest can be hand delivered or mailed to the same address as called out in the Submittal Location or emailed to Joel Duarte at: [jduarte@hlpusd.org](mailto:jduarte@hlpusd.org) and a courtesy copy to Monica Reyna at [moreyna@hlpusd.org](mailto:moreyna@hlpusd.org).
- b. The protest is received by the close of the District's business day not more than seven (7) calendar days following the date of the District's Notice of Intent to Award a contract(s) or Notice that the Respondent has not advanced to a subsequent step in the evaluation process.

The written protest sets forth, in detail, all grounds for the protest, including without limitation all facts, supporting documentation, legal authorities and argument in support of the ground for the protest; any matters not set forth in the written protest shall be deemed waived. All factual contentions must be supported by competent, admissible and credible evidence.

Any protest not conforming to the foregoing shall be rejected by the District as invalid. Provided that a protest is filed in strict conformity with the foregoing, the District's Director of Purchasing or such individual(s) as may be designated in his/her discretion, shall review and evaluate the basis of the protest, and shall provide a written decision to the Respondent submitting the protest concurring with or denying the protest. The District's written decision shall be final and not subject to reconsideration or appeal. No Respondent shall seek judicial relief, in any form, relative to the District's intent to award the Contract, or the protest thereof, unless the foregoing protest procedure has been strictly and timely complied with by the Respondent. The issuance of a written decision by the District shall be an express condition precedent to the institution of any legal proceeding relative to the Proposals process, the District's intent to award the Contract, or the District's determination to reject all Proposals. By submitting a Proposal, the Respondent accepts the District's RFP and evaluation process as fair, open and competitive and compliant with all applicable regulations.

**12. Respondent Assurances**

Prior to submitting a response, the Respondent shall ensure that they fully understand the proposed work, have become fully acquainted with the conditions of the contract and proposal documents including any addenda issued and any other documents included or referenced in this solicitation. In the event that additional information is required, including clarification on discrepancies and/or omissions in the RFP document, the Respondent shall notify the District per the Respondent Questions & Clarifications section of this proposal. The submission of a proposal shall be taken as prima facie evidence of compliance with this section. Respondents shall not, at any time after submission of the proposal, dispute, complain, or assert that there were any misunderstandings with regard to the nature or amount of work to be done. Any interpretation of the Contract Documents will be made only by written addenda duly issued per the terms of this RFP. The District will not be responsible for any explanations or interpretations provided in any other manner. No person is authorized to make any oral interpretation of any provision in the Documents to any Respondent, and no Respondent should rely on any such oral interpretation. Proposals shall include complete compensation for all items that are noted in the Contract Documents as the responsibility of the Contractor.

**13. RFP Costs**

The District will not be liable for any cost incurred by the respondents in preparing responses to this RFP or for negotiations associated with award of contract.

**14. Term of Agreement**

Any resulting Contract is expected to be valid through June 30, 2029 for and may be extended for up to two (2) additional one-year optional renewal terms. Do to the nature of the services a contract may be written for a shorter period of time.

**15. Agreement**

Respondents shall include with their proposal a complete copy of the standard agreement, contract, license agreement, terms and conditions, subscription agreement, or other governing contractual document that the Respondent proposes the District execute in connection with the services described in this Request for Proposals (RFP).

The District will review the proposed contract as part of its evaluation process. Contract terms, conditions, risk allocation provisions, indemnification requirements, limitation of liability clauses, data privacy and security provisions, insurance requirements, and other legal and business terms may be considered in the District's scoring, evaluation, and selection of the successful Respondent.

The District reserves the right to request modifications to any proposed contractual provisions. Respondents shall identify any contractual provisions that are non-negotiable and provide justification for such provisions in their proposal.

A Respondent's willingness to negotiate contract terms in good faith and to accommodate the District's requested revisions may be considered during the evaluation process. The District reserves the right to reject any proposal, determine a proposal to be non-responsive, discontinue negotiations, or decline to make an award if the parties are unable to reach agreement on contract terms acceptable to the District.

**16. Rate Escalation**

In the event that this contract is extended beyond the initial term, the costs specified herein may be subject to an annual escalation. Any such rate increase shall not exceed [3.5%] per year as calculated from the initial term.

The Respondent must submit a written request for any proposed rate adjustment at least sixty (60) days prior to the start of the extension term. The District reserves the right to approve, negotiate, or reject any proposed increase. No rate adjustment shall take effect without the prior written approval of the District.

END OF SECTION

**SECTION 04**

**EVALUATION CRITERIA**

EVALUATION CRITERIA: The proposals received will be evaluated according to the following criteria:

<b>Category</b>	<b>Point</b>
<b>System Functionality and Technical Requirements</b>	30 points
<b>Cost of Ownership / Value</b>	25 points
<b>Compliance, Security, and Integration</b>	25points
<b>Implementation, Training, and Support</b>	10 points
<b>Vendor References, Experience &amp; Past Performance</b>	10 points
<b>TOTAL</b>	<b>100 points</b>

The District will evaluate the submissions based on the criteria above. After the initial evaluation, the District may, at the sole discretion, elect to conduct a product demonstration with select respondents. The District may adjust the evaluation scoring after the product demonstration.

The District, as part of its comprehensive evaluation process, reserves the right to seek clarification from the Respondents, request additional supporting documentation, conduct post-submission interviews, and obtain information from external sources.

The District reserves the right to automatically disqualify any Respondent from further consideration if, during the evaluation process, it is determined that the Respondent, or any of its principals, has engaged in egregious conduct in the course of its past or current business operations. Such conduct may include, but is not limited to:

- Fraud, misrepresentation, or material non-disclosure in prior public or private contracts;
- Acts of gross negligence or willful misconduct;
- Documented violations of state or federal laws or regulations related to labor practices, workplace safety, or licensing requirements;
- Termination for cause or default on prior contracts, particularly those involving public agencies or educational institutions.

This determination may be based on information obtained through reference checks, public records, litigation history, regulatory agency reports, or any other credible sources available to the District during the evaluation period.

The District, in its sole discretion, will determine what constitutes egregious conduct and whether such conduct warrants disqualification. The District’s decision in this regard shall be final and is not subject to appeal.

END OF SECTION

**SECTION 05**

Section Intentionally Left Blank

END OF SECTION

## SECTION 06

### SCOPE OF WORK

#### Student Behavioral Health Records Data System

##### I. Background & Purpose

The District is in the process of building infrastructure for both Local Education Agency Medi-Cal Billing Option (LEA-BOP) and a Multi-Payer Fee Schedule Billing Functionality under the California Youth Behavioral Health Initiative (CYBHI) that assist with billing and Electronic Health Record Platform functionality.

The District seeks to procure a secure, compliant, and efficient Electronic Health Records System for the management, storage, and exchange of student behavioral health records data. The purpose of this procurement is to ensure continuity of care, compliance with all applicable privacy regulations, and the ability to integrate with existing student information systems to equip the Hacienda La Puente Unified School District operational readiness for LEA-BOP and the Children and Youth Behavioral Health (CYBHI) School-Linked Multi-Payer fee schedule.

The selected vendor must provide a consolidated billing system that supports end-to-end functionality across all relevant billing pathways and documentation types used by school-based providers. The system must remain current with all applicable program requirements and allow for timely updates. Each subsection below outlines examples of core functionality expected within this comprehensive solution; however, vendors are encouraged to describe additional features that enhance usability, efficiency, or compliance beyond what is listed.

This section is organized around the three primary service areas: LEA-BOP and Multi-Payer Fee Schedule Billing, and EHR Platform Functionality.

##### II. Objectives

###### A. LEA-BOP and Multi-Payer Fee Schedule Billing Functionality

The selected vendor must offer a system that fully supports and maintains up-to-date functionality for billing under California's Local Education Agency Medi-Cal Billing Option and the Statewide Multi-Payer Fee Schedule that is aligned with DHCS requirements. The features listed below are not exhaustive but represent examples of required functionality. The solution is expected to include all necessary components to ensure compliance and performance throughout the life of the contract, including core capabilities necessary for compliant participation and efficient claim management.

###### 1. Implementation:

- Work with HLPUSD to assess reimbursement opportunities and assess program potential.
- Establish provider and site databases for effective tracking of services that are aligned with DHCS standards.
- Provide implementation training to HLPUSD and coordinators and billing leads.
- Identify necessary data collection elements for claims submission and reporting.

###### 2. Training and Materials:

- Provide comprehensive training and support to HLPUSD staff, including billing staff, technical staff, providers, and administrators.
- Deliver user-friendly manuals, recorded modules, and ongoing office hours.
- Provide a Coordinator Handbook with comprehensive guidance, including around audit compliance.
- Make available proprietary provider forms in both paper and electronic format.

###### 3. Billing and Claims Operations:

- Submit claims to DHCS for LEA-BOP and Carelon for Multi-Payer Fee Schedule, including claim generation and scrubbing. This includes submitting claims within 30 days of complete data receipt and supporting retroactive billing within Medi-Cal's 180 days from date of service limit.
- Monitor and provide tools to track denials and resubmissions, providing resolution support.

- Automate bulk eligibility verification with and without Member ID.
  - Facilitate ERA payment posting and reconciliation reports.
  - Support EDI claim interchange and FTP connectivity between platforms.
4. Program Reporting and Analysis:
- Provide quarterly management reports (by provider, service, or site).
  - Prepare and submit reports.
5. Support and Coordination:
- Issue regular bulletins with policy, system, and program updates.
  - Provide a dedicated Client Care Center and Help Desk with phone and email support.
  - Support audit preparation, including documentation and system queries.

**B. Electronic Health Record (HER) Requirements**

The selected vendor must provide a robust and adaptable EHR platform that meets the evolving needs of school-based service providers. The system must support clinical, administrative, and compliance-related documentation. The following examples highlight the type of functionality HLPUSD expects, though vendors should ensure their platform supports all necessary operations.

Comply with FERPA, HIPAA, and California state laws regarding student records and health data. Provide a secure platform for storing, accessing, and sharing behavioral health records. Full-service third-party billing solution that streamlines the reimbursement process and maintains compliance with state and federal regulations and optimizes financial outcomes for HLPUSD. The system must support role-based access controls for school staff, counselors, psychologists, school social workers, administrators, and authorized community-based partners.

**1. Clinical Features:**

- Streamlined clinical documentation for daily use.
- Support for individual and group services.
- Selection of diagnoses and treatment plan templates (e.g., Wiley Library).
- Web-based referral creation and tracking.
- Upload and creation of forms within the EHR.
- Assessment tracking and progress monitoring tools.

**2. Customizability and Patient Engagement:**

- Customization of user experience and workflows.
- Student/family portals for document sharing and engagement.
- Electronic signature capture from clinicians, supervisors, and parents/guardians.

**3. Data Integration and Reporting:**

- Allows integration with existing AERIES student information system.
- Cloud-hosted platform with customizable dashboards.
- Ad hoc reporting and productivity/utilization reporting by tiered services.
- Dynamic student record generation via lookup functionality.
- Caseload dashboards and service tracking overviews.
- Developing interoperability with HLPUSD and other district tools with data transfers in real-time or near-real-time time transfer.
- Supporting secure data transfer protocols for external behavioral health providers.

**I. Vendor Scope of Work and Expectations**

The vendor will serve as a critical implementation and operational partner in support of HLPUSD’s consolidated billing system. This section outlines the core areas of work expected from the selected vendor across all implementation phases. While detailed responsibilities are outlined below, HLPUSD expects vendors to demonstrate a proactive, collaborative, and flexible approach to problem-solving, partnership development, and system refinement over time.

The vendor will be responsible for the following:

- a. System Design & Implementation
- Providing a cloud-based or hybrid solution with high-level security and encryption.
  - Collaborate with HLPUSD to assess program potential and operational readiness for all billing programs. (LEA-BOP and CYBHI Multi-payer fee Schedule)

- Customizing workflows for behavioral health data collection, entry, and retrieval.
  - Documentation of compliance and audit trails to demonstrate adherence to state and federal guidelines.
  - A strategic plan outlining the steps for continuous improvement and scalability of billing operations to accommodate future needs, including changes in regulations, ensuring long-term sustainability and continuous improvement.
- b. Data Management & Security
- Ensuring compliance with all relevant federal and state regulations (FERPA, HIPAA, COPPA, California Education Code).
  - Providing secure authentication and user access management.
  - Offering backup, disaster recovery, and business continuity features.
- c. Integration
- Developing interoperability with HLPUSD and other district tools with data transfers in real-time or near-real-time time transfer.
  - Supporting secure data transfer protocols for external behavioral health providers.
- d. Training and Capacity Building Support
- Deliver comprehensive training for program coordinators, providers, billing staff, technical leads, and administrators during implementation and at least biannually thereafter.
  - Trainings must cover documentation requirements, billing procedures, system use, and DHCS audit expectations.
  - Provide onboarding and ongoing access to a Coordinator Handbook, training calendar, FAQs, and step-by-step system user guides.
  - Offer tiered training options and "train the trainer" modules to support scalable internal coaching.
  - Supplying user documentation, online help, and technical assistance.
- e. Maintenance & Updates
- A support and maintenance plan for the EHR and billing system, including but not limited to regular system updates, security patches, performance improvements, and troubleshooting.
  - Service Level Agreements (SLA) for response times and issue resolution.
- f. System Configuration and Customization:
- Configure the EHR and billing system to reflect HLPUSD centralized billing system under one NPI, with customizable permissions for schools.
  - Enable individualized templates for different provider types (e.g., LMFT/LCSW, SLPA, OT, School Nurse, PPS Credentialed Providers, Certified Wellness Coaches, etc.).
  - Integrate with district AERIES databases and enable regularly scheduled syncs (with little to no manual entry).
- g. Service Documentation and Billing Workflow:
- Build workflows for documentation, referrals, consent management, and treatment plans to support daily use.
  - Ensure real-time eligibility checks and claim validation prior to submission.
  - Provide tools for internal review, supervision approval, and error prevention.
  - Process claims submission and reconciliation with support for Carelon and DHCS. Reporting and Communication:
- H. Reporting and Communication:
- Generate dashboards and scheduled reports for provider productivity, service utilization, claim status, and revenue.
  - Provide quarterly fiscal and program bulletins to inform users of billing, compliance, or system changes.
  - Share policy or billing guidance updates from DHCS or other applicable agencies.
- I. Audit and Compliance Support:
- Support all audits and monitoring visits with document retrieval and response assistance.
  - Offer compliance reviews and gap analyses to help agencies stay audit-ready.
  - Maintain documentation logs, revision history, and access controls for all EHR and billing data.
- J. Client Support and Technical Assistance:
- Provide a responsive Help Desk during standard business hours (phone/email/chat).
  - Assign a dedicated account manager and billing/EHR liaison for HLPUSD.
  - Support optional in-person visits, training refreshers, and quarterly office hours.

- Offer continued consultation to improve billing performance, increase claimable services, and ensure complete adoption.
- Maintain and upgrade the system to align with current regulations.
- Provide real-time technical support and monthly status check-ins.
- Maintain service availability during school hours (7:30 AM–4:30 PM PT).
- Offer optional in-person support visits (at least annually or as requested).

IV. Deliverables

- Detailed project implementation plan.
- Fully configured behavioral health records data system.
- Staff training sessions and training materials.
- User manuals and administrative guides.
- Ongoing technical support and system maintenance

V. Timeline

Vendors must provide a project timeline that includes, at a minimum:  
RFP Release Date:

- Proposal Submission Deadline:
- Vendor Selection & Award:
- Implementation Start:
- System Go-Live:

VI. Evaluation Criteria

Proposals will be evaluated based on:

- Compliance with security and regulatory requirements.
- Demonstrated experience with school districts and behavioral health records.
- Technical capabilities and system interoperability.
- Cost-effectiveness and value-added services.
- References and track record with similar implementations.

VII. Compliance Requirements

Vendors must certify compliance with:

- Family Educational Rights and Privacy Act (FERPA)
- Health Insurance Portability and Accountability Act (HIPAA)
- Children’s Online Privacy Protection Act (COPPA)
- California Education Code & Data Privacy Laws
- System Overview and Key Functional Capabilities

Briefly describe your third-party billing and EHR platform. Summarize how your solution supports the LEA-BOP and Multi-Payer Fee Schedule billing, as well as documentation, referral system, supervision, reporting, and compliance. Highlight any unique or value-added features.

- Data Systems and Reporting

Describe how your system supports secure, FERPA and HIPAA-compliant data collection, integration, and reporting for HLPUSD. Your response should explain how your approach supports daily operational needs, as well as long-term data access, transparency, and accountability.

Your response may include (but is not limited to):

- Integration with student information systems (AERIES)
- Management of enrollment, insurance data, and eligibility verification
- Capture, storage, and management of student consent records
- Role-based access and permission settings for clinical and billing data
- Data security, storage and duration, archival policies, and purging processes
- Ownership and access to all data at the conclusion of the contract
- Tools and processes to ensure timely, transparent reporting to Consortium partners
- Support for accurate reconciliation and distribution of earned revenue based on verified claims and services
- Training and Support Summarize your user training approach, help desk availability, and ongoing technical assistance. Indicate how you will provide materials, updates, and personalized support t
- Company Profile and Experience Briefly describe your organization’s mission, structure, and relevant experience with school based billing in school districts.

END OF SECTION

**SECTION 07**

**FIRM INFORMATION & CERTIFICATION**

Contractor's company name:			
Address:			
Telephone:			
Contact person's name:			
Mobile telephone:			
E-mail:			
Years in business under current company name:			
Gross revenue of the Firm for the past three (3) years:			

\$	Year _____	\$	Year _____
----	------------	----	------------

Indicate the form of Contractor's firm (type of business entity):

<input type="checkbox"/> Individual	<input type="checkbox"/> Sole Proprietorship
<input type="checkbox"/> Partnership	<input type="checkbox"/> Limited Partnership
<input type="checkbox"/> Limited Liability Company	<input type="checkbox"/> Joint Venture
<input type="checkbox"/> Corporation, State: _____	
<input type="checkbox"/> Other: _____	

List the following for each corporation officer, general partner, limited partner, owner, etc. (as applicable) for the Contractor's type of entity. For joint ventures, include this information for each entity in the joint venture and the percent ownership of each joint venture. Attach all additional information on separate signed sheets as needed.

Name	Position	Years with Co.	% Ownership

**RFP ADDENDA ACKNOWLEDGEMENT.** Receipt and acceptance of the following addenda is hereby acknowledged:

No. _____, Dated _____	No. _____, Dated _____
No. _____, Dated _____	No. _____, Dated _____
No. _____, Dated _____	No. _____, Dated _____

\_\_\_\_\_ Or check here if **No** addenda were issued.

*Continues on next page*

**CERTIFICATION**

I certify under penalty of perjury under the laws of the State of California that I am duly authorized to bind the company named herein, and further certify that all of the contents contained in this RFP submission are true and correct.

Date: \_\_\_\_\_

Proper Name of Contractor: \_\_\_\_\_

Signature: \_\_\_\_\_

By: \_\_\_\_\_ (Print Name)

Title: \_\_\_\_\_

END OF SECTION

**SECTION 08**

**PROVIDER / FIRM REFERENCES**

List **five (5) to eight (8)** clients for which your Firm has worked during the past **five (5) years** for similar services. The District will use the information provided by the references to assess your firm's ability to provide the services outlined in the scope of work and the information you provide as part of Section 10.

Company Name:
Company Address:
Company Contact Person, Telephone and E-mail:
Scope/Description of Work:
Contract Dates:
Annual Contract Value:

Company Name:
Company Address:
Company Contact Person, Telephone and E-mail:
Scope/Description of Work:
Contract Dates:
Annual Contract Value:

*Continues on next page*

Company Name:
Company Address:
Company Contact Person, Telephone and E-mail:
Scope/Description of Work:
Contract Dates:
Annual Contract Value:

Company Name:
Company Address:
Company Contact Person, Telephone and E-mail:
Scope/Description of Work:
Contract Dates:
Annual Contract Value:

Company Name:
Company Address:
Company Contact Person, Telephone and E-mail:
Scope/Description of Work:
Contract Dates:
Annual Contract Value:

Company Name:
Company Address:
Company Contact Person, Telephone and E-mail:
Scope/Description of Work:
Contract Dates:
Annual Contract Value:

Company Name:
Company Address:
Company Contact Person, Telephone and E-mail:
Scope/Description of Work:
Contract Dates:
Annual Contract Value:

Company Name:
Company Address:
Company Contact Person, Telephone and E-mail:
Scope/Description of Work:
Contract Dates:
Annual Contract Value:

END OF SECTION

**SECTION 09**

**NONCOLLUSION DECLARATION**  
**Public Contract Code § 7106**

TO BE EXECUTED BY RESPONDENT AND SUBMITTED WITH PROPOSAL

The undersigned declares:

I am the \_\_\_\_\_ [PRINT YOUR TITLE]

of \_\_\_\_\_ [PRINT FIRM NAME],

the party making the foregoing Proposal.

The Proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The bid is genuine and not collusive or sham. The Respondent has not directly or indirectly induced or solicited any other Respondent to put in a false or sham bid. The Respondent has not directly or indirectly colluded, conspired, connived, or agreed with any Respondent or anyone else to put in a sham bid, or to refrain from bidding. The Respondent has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the Respondent or any other Respondent, or to fix any overhead, profit, or cost element of the bid price, or of that of any other Respondent. All statements contained in the bid are true. The Respondent has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof, to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a Respondent that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the Respondent.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on the following date:

Date: \_\_\_\_\_

Proper Name of Respondent: \_\_\_\_\_

Signature: \_\_\_\_\_

By: \_\_\_\_\_ (Print Name)

Title: \_\_\_\_\_

END OF SECTION

**SECTION 10**

Section Intentionally Left Blank

END OF SECTION

**SECTION 11**

**BUDGET AND COST PROPOSAL**

Vendors must provide:

Itemized costs for software, implementation, training, and ongoing support.

Annual maintenance and licensing costs.

Any additional fees for integrations or customizations.

END OF SECTION

**SECTION 12**

**CERTIFICATIONS TO BE COMPLETED BY PROVIDOR**

**THE UNDERSIGNED MUST CHECK EACH BOX AND EXECUTE THIS FORM AND HEREBY CERTIFIES TO THE GOVERNING BOARD OF THE DISTRICT THAT:**

- The undersigned is a representative of the Provider,
- The undersigned is familiar with the facts herein certified and acknowledged,
- The undersigned is authorized and qualified to execute this Agreement and these certifications on behalf of Provider and that by executing this Agreement undersigned is certifying the following items.

**Labor Code Sections 1860-1861 (Workers' Compensation).** In accordance with Labor Code section 3700, every Provider will be required to secure the payment of compensation to his or her employees. I acknowledge and certify under penalty of perjury that I am aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

---

**Labor Code Section 6401.9 (Workplace Violence Prevention).** I acknowledge and certify under penalty of perjury that I am aware of the provisions of Section 6401.9 of the Labor Code which require every employer, as specified in more detail in that section, to comply with the following:

- Establish, implement, and maintain, at all times in all work areas, an effective workplace violence prevention plan containing specified information;
- Record specified information in a violent incident log for every workplace violence incident;
- Provide initial and ongoing effective training of employees on workplace violence with training material appropriate in content and vocabulary to the education level, literacy, and language of employees;
- Create and maintain records of workplace violence hazard identification, evaluation, and correction for a minimum of five years; and
- Allow access to those records by employees and their representatives without cost.

I will comply with these provisions before commencing the performance of the Work of this Contract.

---

**Government Code Sections 8355-8357 (Drug-Free Workplace).** I acknowledge and certify under penalty of perjury that I will provide a drug-free workplace by doing all of the following:

- (1) Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited in the person's or organization's workplace and specifying the actions that will be taken against employees for violations of the prohibition.
- (2) Establishing a drug-free awareness program to inform employees about all of the following:
  - (A) The dangers of drug abuse in the workplace.
  - (B) The person's or organization's policy of maintaining a drug-free workplace.
  - (C) Any available drug counseling, rehabilitation, and employee assistance programs.
  - (D) The penalties that may be imposed upon employees for drug abuse violations.
- (3) Requiring that each employee engaged in the performance of the contract or grant be given a copy of the statement required by subdivision (a) and that, as a condition of employment on the contract or grant, the employee agrees to abide by the terms of the statement.

I also acknowledge that this Contract may be subject to suspension of payments under the contract or grant or termination of the contract or grant, or both, and the Provider or grantee thereunder may be subject to

debarment, in accordance with the requirements of the above-referenced statute, if the contracting or granting agency determines that any of the following has occurred:

- (1) The Provider or grantee has made a false certification under Section 8355.
- (2) The Provider or grantee violates the certification by failing to carry out the requirements of subdivisions (a) to (c), inclusive, of Section 8355.

I also acknowledge that the Department of General Services shall establish and maintain a list of individuals and organizations whose contracts or grants have been canceled due to failure to comply with the above-referenced statute. This list shall be updated monthly and published each month. No state agency shall award a contract or grant to a person or organization on the published list until that person or organization has complied with the above-referenced statute.

---

**Tobacco-Free Environment.** Pursuant to, without limitation, 20 U.S.C. section 6083, Labor Code section 6400 et seq., Health & Safety Code section 104350 et seq. and District Board Policies, all District sites, including the Project site, are tobacco-free environments. Smoking and the use of tobacco products by all persons is prohibited on or in District property. District property includes school buildings, school grounds, school owned vehicles and vehicles owned by others while on District property.

I acknowledge and certify under penalty of perjury that I am aware of the District’s policy regarding tobacco-free environments at District sites, including the Project site and acknowledge and certify that I will adhere to the requirements of that policy and not permit any of my firm’s employees, agents, subcontractor, or my firm’s subcontractor’ employees or agents to use tobacco and/or smoke on the Project site. The District also prohibits electronic cigarettes, “vaping” or similar product uses on District sites.

---

**I ACKNOWLEDGE AND CERTIFY UNDER PENALTY OF PERJURY THAT I AM DULY AUTHORIZED TO LEGALLY BIND THE PROVIDER TO ALL PROVISIONS AND ITEMS INCLUDED IN THESE CERTIFICATIONS, THAT THE CONTENTS OF THESE CERTIFICATIONS ARE TRUE, AND THAT THESE CERTIFICATIONS ARE MADE UNDER THE LAWS OF THE STATE OF CALIFORNIA.**

Date: \_\_\_\_\_

Proper Name of Provider: \_\_\_\_\_

Signature: \_\_\_\_\_

By: \_\_\_\_\_ (Print Name)

Title: \_\_\_\_\_

END OF SECTION