

The University of Oklahoma
PURCHASING DEPARTMENT
2750 VENTURE DRIVE
NORMAN OK 73069

REQUEST FOR PROPOSAL

RFP# 8162-08

®

Clinic Information System

ISSUE DATE: April 9, 2008

CLOSE DATE/TIME: April 30, 2008; 2:00 PM CST

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For questions regarding this Request for Proposal contact:

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Or

Karen Hicks, Manager, email: karen-hicks@ouhsc.edu, Phone (405) 325-9846 Fax (405) 360-0481

1.0 SCOPE OF WORK

1.1 Summary

The Board of Regents of The University of Oklahoma (University) invites interested Suppliers to submit Proposals to furnish the University with Clinic Information System. Detailed specifications are located in Section 5.0 of this Request for Proposal document.

1.2 Coverage and Participation

Campus locations or University Components are listed in the table below. It is possible that coverage is intended for all or some of these locations or components. The University reserves the right to add and/or delete elements, or to change any element of the coverage and participation at any time without prior notification and without any liability of any kind or amount.

University Component
Main University – Norman
Center for Graduate Studies – Tulsa
OU Health Sciences Center (OUHSC) – Oklahoma City
OU – Tulsa Campus
OUHSC Nursing Program – Lawton
OUHSC Family Medicine Clinic – Enid
OUHSC College of Medicine – Tulsa
George Nigh Rehabilitation Institute – Okmulgee

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2.0 GENERAL INFORMATION AND INSTRUCTIONS

2.1 University Demographics

Created by the Oklahoma Territorial Legislature in 1890, the University of Oklahoma is a doctoral degree-granting research university serving the educational, cultural, economic and health-care needs of the state, region and nation. The Norman campus serves as home to all of the University's academic programs, except health-related fields. Both the Norman and Health Sciences Center colleges offer programs at the Schusterman Center, the site of OU-Tulsa. The OU Health Sciences Center, which is located in Oklahoma City, is one of only four comprehensive academic health centers in the nation with seven professional colleges. OU enrolls almost 30,000 students, has more than 2,000 full-time faculty members, and has 20 colleges offering 152 majors at the baccalaureate level, 160 majors at the master's level, 80 majors at the doctoral level, 38 majors at the first professional level, and 18 graduate certificates. The University's annual operating budget is \$1.2 billion. The University of Oklahoma is an equal opportunity institution. (11/15/06)

- OU ranks number one per capita among all public universities in the number of National Merit Scholars enrolled.
- The University of Oklahoma ranks in the top 10 in the nation in the Freshman Year Experience, among universities of comparable size, according to a national study by the Policy Center on the First Year of College. The study recognizes OU's initiatives for first-year students and its commitment to put students first.
- The Princeton Review ranks OU among the best in the nation in terms of academic excellence and cost for students.
- With seven Goldwater Scholars in the past two years, OU ranks in the top 10 universities in the entire nation to demonstrate leadership in science and mathematics.
- OU has over a \$1.5 billion impact on the state's economy each year.
- OU ranks first in the Big 12 and at the top in the nation in international exchange agreements with countries around the world. The University has 174 student exchange agreements with universities in 66 countries. More than 1,500 students from almost 100 countries are enrolled on OU's Norman campus.
- OU is one of the few public universities in the nation to cap the class size of first-year English composition courses at no more than 19 students.
- The University has created an Honors College with one of the largest honors programs among public universities in the United States. More than 2,600 students participate in small classes of 19 or less.
- Just one year after launching a five-year, \$50 million Campaign for Scholarship endowments, OU achieved its goal and has now passed the \$103 million mark, allowing the university to award thousands of new scholarships and ensure that OU will remain affordable and keep open the door of opportunity for all qualified students.
- OU continues to break private fund-raising records, with more than \$1 billion in gifts and pledges over the past decade, which has provided funding for dramatic capital improvements, the growth in faculty endowment and student scholarships.
- Since 1994, research and sponsored programs expenditures at OU have more than doubled, and OU continues to set new records for funding for externally sponsored research. OU ended FY 2007 with total expenditures of more than \$250 million.
- The OU Health Sciences Center in FY 2006 continued its impressive rate of research growth by achieving more than \$135 million in federal, state, corporate and nonprofit or foundation grants and contracts. Funding from the National Institutes of Health – considered to be the gold standard for research – was \$62.3 million.
- Since 1995, almost \$1.5 billion in construction projects have been completed, are under way or are forthcoming on OU's three campuses, the largest of which is the \$67 million National Weather Center.
- OU is home to one of the two largest natural history museums in the world associated with a university. The Sam Noble Oklahoma Museum of Natural History has more than 6 million artifacts and contains 198,000 square feet on 60 acres of land. The museum exhibits include the largest Apatosaurus on display in the world and the oldest work of art ever found in North America — a lightning bolt painted on an extinct bison skull.

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- The Fred Jones Jr. Museum of Art's collections total more than 8,000 works of art, including OU's Weitzenhoffer Collection of French Impressionism, the single most important gift of art ever given to a U.S. public university; the Adkins Collection, among the most important private collections in the nation of works by the Taos artists as well as Native American works of art; the former U.S. State Department Embassy art collection; and the Dorothy Dunn collection of Native American art.
- OU is one of only 25 public universities in America with an endowment above \$1.1 billion and has quadrupled, increasing from 100 to more than 460, the number of endowed faculty positions in the past 13 years, demonstrating a strong commitment to excellence.
- OU's 2007-08 freshman class is the largest at a four-year public university in Oklahoma history. More than 10 percent of the entire freshman class came from high school with a perfect 4.0 grade-point average.
- OU's Western History Collection is one of the largest collections in the world of documents and photographs, including a rare multi-volume portfolio on the Indians of the United States and Alaska by Edward S. Curtis.
- OU's Research Campus has been certified by the Oklahoma Department of Commerce as Site Ready, which enables the University to capitalize on fast-moving economic opportunities and enables site selectors to readily find quality land and facilities that meet nationally established criteria in a timely fashion.
- A major beautification campaign has transformed the appearance of the OU Health Sciences Center in Oklahoma City. The project has replaced a divided highway through campus with seven tiered gardens featuring traditional OU arches at each end. The new pedestrian walkway's landmarks include an OU Seed Sower sculpture at the west end, a clock tower at the east end, and a 70-foot granite fountain in the center.
- For the outdoor improvements to the Norman campus — gardens, fountains, sculptures, benches — the University of Oklahoma has won first place in the education category for Beautification and Landscaping in the statewide environmental competition. Gifts of over \$3 million have permanently endowed OU's gardens.
- OU has strong programs in international and area studies, with an International Programs Center led by Zach P. Messitte, a foreign policy expert with a doctorate in international politics and whose experience includes working for the United Nations and CNN.
- With nearly 400 doctors, OU Physicians is the state's largest physician group. Our practice encompasses almost every adult and child specialty. Many OU Physicians have expertise in the management of complex conditions that is unavailable anywhere else in the state, region or sometimes even the nation. Some have pioneered surgical procedures or innovations in patient care that are world firsts.
- About 125 of OU Physicians' doctors are OU Children's Physicians. These board-certified pediatric specialists committed their training and, now, their practices to the care of children. Many children with birth defects, critical injuries or serious diseases who can't be helped elsewhere come to OU Children's Physicians. Oklahoma doctors and parents rely on OU Children's Physicians depth of experience, nationally renowned expertise and sensitivity to children's emotional needs .
- The University of Oklahoma maintains one of the three most important collections of early manuscripts in the history of science in the United States. It includes Galileo's own copy of his work, which first used the telescope to support the Copernican theory, with corrections in his own handwriting.
- The University of Oklahoma Libraries ranks in the top two in the Big 12 in the number of volumes held, according to *The Chronicle of Higher Education*. The University of Oklahoma Library is the largest in the state with approximately 4.7 million volumes.
- OU's Julian P. Kanter Political Commercial Archive houses the world's largest collection of political commercials. With more than 90,000 commercials, the Archive includes political advertisements dating back to 1936 for radio and 1950 for television.
- The highly acclaimed journal of international literature, *World Literature Today*, is published at the University of Oklahoma.
- OU is home to the Neustadt International Prize for Literature, considered to be second in prestige only to the Nobel Prize and often referred to as the "American Nobel." Twenty-six Neustadt laureates, candidates and jurors have won the Nobel Prize in the past 38 years.

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- The OU Cousins program matches U.S. and international students to share informal and social experiences. Students may volunteer to live on international floors with half of the residents from the United States and half from other countries.
- *Dance Magazine* places the OU School of Dance in the top three of all dance programs in the country.
- OU's new 271-acre Research Campus is anchored by the Stephenson Research and Technology Center, where cutting-edge research into life science fields ranging from robotics to genomic studies is taking place, and the National Weather Center, which houses OU's academic and research programs in meteorology and the National Oceanic and Atmospheric Administration's Norman-based weather, research and operations programs.
- OU's largest supercomputer debuted as the fastest in the Big 12 and in Oklahoma history and among the top four among U.S. universities (excluding the big three National Science Foundation supercomputing centers).
- Since its creation in 1998, OU's Office of Technology Development has created 25 companies that have generated more than \$60 million in capital, over \$9.5 million in cash and more than \$12 million in current estimated equity value for the university. In addition, the companies have created in excess of 120 jobs, which pay on average nearly twice the median household income in Oklahoma.
- OU won the National Intercollegiate Debate Championship this year, as well as the Harvard, Northwestern and Wake Forest tournaments.
- OU's College of Education continues to be ranked in the top 10 percent of all graduate colleges of education by *U.S. News & World Report*.
- The OU College of Law is rated as one of the 15 best law schools in the United States, according to the *Thomas M. Cooley Guide*, and also received high marks by *U.S. News and World Report* and top scores in bar examination results.
- A major building project has doubled the size of the Law Center, refurbishing classrooms and creating a new library, a cutting-edge courtroom, and expanded student lounge and office facilities.
- OU President David Boren, a former U.S. senator and governor of Oklahoma, teaches an introductory course in political science each semester, and keeps in close touch with students.
- OU has one of the oldest comprehensive colleges of fine arts in the Great Plains states, with highly regarded schools of Music, Drama, Art and Dance, and programs in opera, musical theater, and sculpture.
- OU has won awards for new initiatives to create a sense of family and community on campus. OU is one of the very few public universities to twice receive the Templeton Foundation Award as a "Character Building College" for stressing the value of community.
- The University of Oklahoma has consistently been designated as one of America's 100 Best College Buys by Institutional Research & Evaluation, an independent higher education research and consulting organization.
- OU has established a faculty-in-residence program with faculty members and their families living in apartments in the student residence halls.
- Price College is ranked as one of the nation's top business schools at the undergraduate and graduate levels. Price College ranks in *U.S. News & World Report's* top 50 in undergraduate business schools and in the top 15 in undergraduate business specialties for international business.
- OU is one of a small number of Division I-A universities in the nation to receive the CHAMPS award for preparing student-athletes for life. The award is based on academic excellence, athletic excellence, personal development, community service and career development.
- *The Oklahoma Daily*, OU's student newspaper, and *Sooner* yearbook are consistently ranked among the best in the country.
- More Native American languages are taught for college credit at OU than at any other university in the world.

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- The Gaylord College of Journalism and Mass Communication at OU is home to the Native American Journalists Association, the oldest and largest international organization for indigenous journalists.
- OU has been recognized as an outstanding university for Hispanic students by *Hispanic Outlook in Higher Education* magazine.
- The OU College of Engineering was recently listed by *Hispanic Business Magazine* as one of the top 10 engineering schools in the nation for Hispanics.
- The Carl Albert Congressional Research and Studies Center — the only congressional studies center located at a comprehensive research university — houses the papers of more than 50 current and former members of Congress, making it the nation's leading research center for congressional studies.
- OU's journalism and mass communication school was elevated to college status, thanks to a \$22 million gift from Edward L. Gaylord on behalf of the Gaylord family of Oklahoma City.
- The OU Health Sciences Center is one of only four comprehensive academic health centers in the nation with seven professional schools. It includes the colleges of Allied Health, Dentistry, Medicine, Nursing, Pharmacy, Public Health and Graduate Studies.
- The Donald W. Reynolds Department of Geriatric Medicine, established at the OU Health Sciences Center with an \$11.2 million grant from the Reynolds Foundation, is one of the premier programs in education, research and service to elders.
- OU is the only public university in Oklahoma to be included in the *Fiske Guide to Colleges*, which lists the top 10 percent of all U.S. universities.
- The Department of Communication's doctoral program is ranked among the top 20 programs in the country.
- The Princeton Review's 2006 *The Best 361 Colleges* noted that OU is one of the nation's best institutions for undergraduate education. The Princeton Review commends only about 15 percent of the best four-year colleges in America.
- The University frequently hosts national and international scholars and policy makers during major national conferences and symposia. Over the past few years, guests have included former President George Bush; former Soviet President Mikhail Gorbachev; former U. S. Secretaries of State Henry Kissinger, Colin Powell, James A. Baker III and Madeleine K. Albright; *News Hour's* Executive Editor and Anchor Jim Lehrer; author David McCullough; U. S. Supreme Court Justice Sandra Day O' Connor
- NBC's *Meet the Press* Moderator and Washington Bureau Chief Tim Russert; former British Prime Minister Margaret Thatcher; Nobel Peace Prize winner Archbishop Desmond Tutu; investigative reporter Bob Woodward; and award-winning broadcast journalist Katie Couric.
- The Native American literature program in the Department of English is ranked in the top two in the nation. The department's composition and rhetoric program is in the top six. And the department's cultural studies is ranked in the top five.
- OU's A. Max Weitzenhoffer Musical Theater Program is one of the very few university programs in the nation that provides students an opportunity to be in the same cast with professional Broadway actors in brand-new productions.
- The OU Press is the oldest in the Great Plains states and ranks among the 20 most important university presses in the United States. It is a leading publisher of books about Native Americans and the American West.
- The OU College of Law publishes the only law journal in the United States devoted exclusively to Native American legal issues.
- OU finished among the top 25 in each of the last six years in the Sports Academy Director's Cup Standings, which measures the overall strength of each Division I-A athletics program.

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- The Army ROTC program at OU has been named several times as one of nine national winners of the MacArthur Award, which recognizes outstanding battalions based on the ranking of graduating lieutenants, training scores and retention statistics.
- In 1999, a \$10 million grant to OU from the Charles and Lynn Schusterman Family Foundation of Tulsa supported the purchase of the BP Amoco property in Tulsa , enabling OU to establish a new community-based campus for the university's Tulsa programs.
- In 2003, the Schusterman Family lined their support of OU in Tulsa with the announcement of a \$10 million challenge grant for OU-Tulsa that will be used to help complete the first phase of the campus master plan for the Schusterman Center and will allow OU-Tulsa to expand degree programming in key areas.
- First- and second-year students receive outstanding instruction and mentoring under a program that brings over 50 retired full professors back to campus to teach their introductory courses.
- OU's Center for Continuing Education is one of the largest in the nation and serves 200,000 learners around the world.
- The OU Sooners have won 25 national championships in men's and women's sports with the latest coming in 2006 when the men's gymnastics team won its fourth title in five years. OU was the NCAA runner-up in 2001, 2004 and 2007.
- A total of 83 Sooner student-athletes earned Academic All-Conference honors during the 2006-07 academic year. A total of 11 teams had team GPAs above a 3.0 in the spring 2006 semester and 10 teams had a team GPA above 3.0 following the 2006 fall semester.
- More the 200 Sooner student-athletes were named to the spring 2006 and the fall 2006 Big 12 Commissioner's Honor Roll. A total of 42 OU student-athletes received special recognition on the spring list for earning a 4.0 GPA and 39 were honored for earning a 4.0 on the fall list.

2.2 Attention to Terms and Conditions

Suppliers are cautioned to thoroughly understand and comply with all matters covered under the Terms and Conditions section of this RFP.

2.3 RFP Evaluation Criteria

The evaluation of each Response to this RFP will be based on its overall competence, compliance, format, and organization. Pricing will be a criterion, but not necessarily the one receiving the most weight.

2.4 Schedule of Events

The following schedule will apply to this RFP, but may change in accordance with the University's needs.

April 9, 2008	Issue RFP
April 18, 2008, 2:00 PM CST	Last Day and Time Questions Will Be Accepted
April 30, 2008	RFP Closes at 2:00 PM, CST
May 1, 2008	Begin Evaluations
June 23-25, 2008	Board of Regents Approval
June 26, 2008	Award Notification

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2.5 Accommodations for People with Disabilities

If the Supplier or any of the Supplier's employees participating in this RFP need, or have questions about the University's accommodations for people with disabilities, please make arrangements with the contact listed below.

Name	Phone Number
Linda Johnson	405/325-2229

2.6 Performance Bond, Insurance or Similar Requirement

Suppliers should read the Terms and Conditions closely to determine whether a performance bond or similar requirement is indicated by this RFP. If so, such bond shall be issued to the Board of Regents of the University of Oklahoma and that complete and competent evidence of such coverage must be provided to the University in the Supplier's Proposal package.

2.7 Electronic and Information Technology Accessibility in Accordance with Section 508 of the Rehabilitation Act of 1998, as Amended. (Pursuant to Title 74, Section 85.7d and OAC 580:15-6-22)

All electronic and information technology procurements, agreements, and contracts shall comply with Oklahoma Information Technology Accessibility Standards issued by the Oklahoma Office of State Finance.

If this document does not meet your accessibility requirements, please contact Linda Johnson at (405) 325-2229 and appropriate accommodations will be made.

2.8 Health Insurance Portability and Accountability Act of 1996 (HIPAA)

To the extent applicable to this Request for Proposal, Supplier agrees to comply with the Health Insurance Portability and Accountability Act of 1996, as codified at 42 USC§ 1320d through d-8 ("HIPAA") and any current and future regulations promulgated thereunder including without limitation the federal privacy regulations contained in 45 C.F.R. Parts 160 and 164 (the "Federal Privacy Regulations"), the federal security standards contained in 45 C.F.R. Parts 160, 162 and 164 (the "Federal Security Regulations"), and the federal standards for electronic transactions contained in 45 C.F.R. Parts 160 and 162, all collectively referred to herein as "HIPAA Requirements." Supplier agrees to enter into any further agreements as necessary to facilitate compliance with HIPAA.

3.0 DEFINITIONS

Request for Proposal (RFP) - A competitive negotiation process. It is not to be confused with an Invitation to Bid (ITB), in which goods or services are precisely specified and price is substantially the only competitive factor. This RFP provides the University the flexibility to negotiate a mutually agreeable relationship. Price is considered, but is not the only factor of evaluation.

Supplier - For purposes of this RFP, "Supplier" means any entity responding to this RFP with the intention of winning the resulting award of contract, performing the work, and/or delivering the goods specified in the section titled "Detailed Specifications."

Successful Supplier - Any Supplier selected by the University to receive a notice of award as a result of this RFP and to enter into a contract to provide the University with the products or services sought by this RFP.

Respondent - Same as Supplier.

Provider - Same as Supplier.

CST – Central Standard Time

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Customer - Unless otherwise implied by the context of the specific provision within this RFP, "Customer" means a customer of the Supplier, other than the University.

Proposal - The entirety of the Supplier's Responses to each point of this RFP, including any and all supplemental offers or information not explicitly requested within this RFP.

Proprietary Information - Information held by the owner that if released to the public or anyone outside the owner's organization, would be detrimental to its interests. It is an issue of fact rather than opinion.

Response - Same as Proposal.

Supplier's Proposal - Same as Proposal.

Supplier's Response - Same as Proposal.

University - For purposes of this RFP, the scope of the term "University" is described in the paragraph titled "Scope" within the section titled "Terms and Conditions."

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4.0 TERMS AND CONDITIONS

4.1 Terms and Conditions for the Resulting Contract

4.1.1 Contractual Force and Effect

The following terms and conditions establish the University's rights and expectations with respect to the goods and/or services sought hereunder. Unless otherwise specifically proposed by the Supplier, each term or condition herein shall, upon award by the University, have the force and effect of a contractual understanding between the University and each Successful Supplier. The University may pursue any remedy legally available to it in the event the Supplier breaches or violates any such term or condition.

4.1.2 Contract Term (if applicable)

The University reserves the right to set, and so sets, the intended contract term at a period not to exceed five (5) years, beginning July 1, 2008 and ending June 30, 2009. Provided however that the University, as an agency of the State of Oklahoma, is prohibited from committing or otherwise obligating funds beyond the end of the then-existing fiscal year (June 30). Accordingly, the University shall have the option to terminate any contract at any time upon 30 days notice and to renew any contract awarded under this RFP for up to four (4) additional one-year periods beyond the first year, one year at a time, in sequence. Further, the University reserves the right to negotiate with the Supplier any additional contracts that would start prior to the intended expiration date, and/or has the option to extend the intended expiration date.

4.1.3 Performance Bond, Insurance or Similar Requirement

At its discretion or as mandated by law, ordinance, or regulation, the University may require the Supplier to post a performance bond in an amount set by law or at the University's discretion, as applicable; The University, at its discretion, may consider and accept, without any obligation to do so, alternate amounts and/or instruments proposed by Suppliers (for example, an interest bearing escrow account).

4.1.4 Date for Reckoning Prompt-payment Discount

For purposes of determining whether a prompt-payment discount, if applicable, may be taken by the University, the starting date of such reckoning period shall be the later of the date of a properly executed invoice or the date of completion of service and/or delivery of product.

4.1.5 Contract Status

The University may hold each Supplier's Response to this RFP as a legal offer to contract. If the University formally accepts such offer, a contractual relationship shall be deemed to exist and the University will so communicate to each Successful Supplier by issuing a notice of award.

4.1.6 Terms and Conditions of Resulting Contract are Incorporated by Reference

The specifications, terms, and conditions set forth in this RFP and any related award document shall be incorporated by reference without Supplier exception into any resulting contract between the University and any Successful Supplier.

4.1.7 Contract Format

The award notice will be a contract in the form of a document package comprising:

- All specifications, terms, conditions, and other particulars addressed by this RFP, whether in its original form or as amended by addenda;

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- Each Successful Supplier's Responses, affidavits, certifications, and other information provided hereunder;
- The results of any final negotiations on those matters eligible for negotiation; and
- Any additional agreements and/or stipulations.

4.1.8 Conflicting Provisions

Under no circumstance shall any provision be effective if it is later found to be in conflict with state statute or other superior directive. In the event of a conflict between or among any provision contained in the resulting contract, such conflict shall be resolved in the following order, most effect to least effect.

1. Original RFP
2. Negotiations on those matters eligible for negotiation
3. Additional agreements and/or stipulations
4. Supplier's Proposal

4.1.9 Discrepancies between Numbers and Words

In the event of a discrepancy between information written in numbers and the same information also written in words, the information written in words shall govern.

4.1.10 Settlement of Contract Disputes

In the event of dispute, doubt, or difference of opinion as to any matter related to any contract resulting from this RFP, the University reserves the right to select a ranking University executive officer to render a decision. Such decision shall be final and binding on all parties to the contract.

4.1.11 Termination for Default / Show Cause Letter / Certain Remedies

The University may terminate a contract resulting from this RFP, for reason of the Supplier's default, if conditions including but not limited to those described in the following list come into being.

- The Supplier is adjudged bankrupt, makes a general assignment for the benefit of the Supplier's creditors, or a receiver is appointed on account of the Supplier's insolvency.
- The Supplier persistently or repeatedly refuses or fails to perform any of the provisions of the contract; or so fails to make progress pursuant to the contract's terms; or so fails to meet any delivery dates that may be specified in the section titled "Detailed Specifications," except when extensions may be granted to carry on as required by the contract.
- The Supplier persistently or repeatedly refuses or fails to make prompt payment to subcontractors.
- The Supplier persistently or repeatedly disregards laws, ordinances, or the instructions of any duly authorized representative of the University
- The Supplier otherwise commits a substantial violation of any provision of the contract.

The University may, in its sole discretion and without prejudice to any other right or remedy either terminate the contract or deliver to the Supplier a letter citing the instances of

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noncompliance and directing the Supplier to show cause why the contract should not be terminated (Show Cause Letter). The Supplier shall have ten (10) days to reply to the Show Cause letter and indicate why the contract should not be terminated. The Supplier shall then have thirty (30) days to cure the noncompliance cited in the Show Cause Letter. If the noncompliance is not cured within thirty (30) days, the University may negotiate a schedule to terminate the contract. In the event all or any part of the contract is terminated, the University may take possession of any and all materials and finish the contract by whatever methods the University may deem expedient. In such case, the Supplier shall not be entitled to any further payment until the contract is finished. The Supplier shall be liable for any excess costs incurred by the University to perform the balance of the contract. The rights and/or remedies of the University under these terms and conditions are not exclusive but are in addition to any other rights and/or remedies provided by law or the contract. The University reserves the right to refuse to consider Proposals received from the Supplier in Response to a RFP that the University may issue in the future.

4.1.12 Contract Modification

No change or modification to a contract resulting from this RFP shall take effect until all parties have agreed in writing to such change or modification.

4.1.13 Contract Assignment or Sublet

No Successful Supplier shall assign, transfer, or sublet, either in whole or in part, any contract resulting from this RFP, without prior written University approval.

4.1.14 Referencing of Orders

For each order issued against a contract resulting hereunder, the University intends in good faith to reference this RFP for pricing, terms and conditions, delivery location, and other particulars. However, in the event the University fails to do so, the University's right to such terms, conditions, and particulars shall not be affected; and no liability of any kind or amount shall accrue to the University.

4.1.15 No Waiver of Rights by the University

No delay or failure on the University's part to enforce any provision of this agreement shall constitute or be construed by any party as a waiver or limitation of the University's rights under any resulting contract.

4.1.16 Choice of Law and Venue

The resulting contract shall be construed under the laws of the State of Oklahoma and venue in any action and/or litigation commenced to enforce the contract shall be instituted in the appropriate courts of competent jurisdiction, in the State of Oklahoma.

4.1.17 Hold Harmless

Any Successful Supplier who becomes a party to any contract resulting from this RFP shall observe and execute indemnity and hold-harmless obligations in Response to the conditions included in, but not limited to those described in the following list. The beneficiaries of such hold-harmless obligations shall be the State of Oklahoma and the Board of Regents of the University of Oklahoma, including its agents, employees, and officers. The hold-harmless obligations apply to all claims, demands, losses, judgments and actions that may arise from the conditions included in, but not limited to those described in the following list, and all expenses associated therewith. The hold-harmless obligations extend to such Supplier's subcontractors and agents and shall be documented in any agreement between or among such parties.

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- Any injury or damage sustained by any person or property as a result of any act or omission by such Supplier.
- Any infringement by such Supplier of patents, trademarks, service marks, copyrights, or other forms of intellectual property.
- Any claim or amounts arising or recovered under Workers' Compensation law or any other law in consequence of any act or omission by such Supplier.

4.1.18 Actions of Supplier

The University is under no obligation whatsoever to be bound by the actions of any Successful Supplier with respect to third parties. The Supplier is not a division, partner, or agent of the University.

4.1.19 Liens

Each Successful Supplier shall keep the University free and clear from all liens asserted by any person or entity for any reason arising out of the furnishing of services or materials by or to the Supplier.

4.1.20 Laws and Regulations

Suppliers are solely responsible for keeping themselves fully informed of and faithfully observing all laws, ordinances, and regulations affecting the rights of their employees, and shall protect and indemnify the University, its officers and agents against any claims of liability arising from or based on any violation thereof. Supplier further agrees to affirm and certify in writing to the University in the event a contract between the University and the Supplier results from this RFP that:

4.1.20.1 Sexual or Violent Offenders Prohibited. No Supplier, subcontractor or their employee is registered or required to be registered as a sex or violent offender under the Oklahoma Sex Offender Registry Act or the Mary Rippy Violent Crimes Offender Act: and

4.1.20.2 Citizenship or Legal Alien Status Required. After July 1, 2008, pursuant to Okla. Stat. Ann. Tit.25,§ 1313, all Suppliers and subcontractors are registered with and participate in the Status Verification System; and in accordance with Okla. Stat. Ann. Tit. 68, § 2385.32, Supplier verifies that it, its subcontractors and their employees are authorized to work in the United States according to 8 U.S.C. § 1324(a)(4).

4.1.21 Prior Course of Dealings

No trade usage, prior course of dealing, or course of performance under other contracts shall be a part of any contract resulting from this RFP; nor shall such trade usage, prior course of dealing, or course of performance be used in the interpretation or construction of such resulting contract.

4.1.22 Availability to Other Colleges and Universities

In the event a contract between the University and the Supplier results from this RFP, the Supplier shall offer the same prices, terms, conditions, and all other particulars herein to all other institutions within the Oklahoma State Regents for Higher Education system. Provided however that the Supplier may apply fair and reasonable delivery cost adjustments to those institutions whose locations may be materially remote or proximate when compared to the delivery distances contemplated under this RFP.

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4.1.23 Federal, State, and Local Taxes, Licenses and Permits

Suppliers are solely responsible for complying with all laws, ordinances, and regulations on taxes, licenses and permits, as they may apply to any matter under this RFP. Suppliers shall, at no expense to the University, procure and keep in force during the entire period of the contract all such permits and licenses and pay such taxes.

4.1.24 Payment in Advance of Receipt of Products or Services Prohibited

As a state agency, the University is prohibited by statute from paying for products or services in advance. Payment provisions shall be in arrears, with late payment and interest calculated as provided by Oklahoma law.

4.1.25 Equal Employment Opportunity Requirements

In entering into a contract resulting from this RFP, the Supplier agrees to comply with Equal Employment Opportunity Affirmative Action requirements as stipulated in Executive Order 11246 as amended by Executive Order 11375 and all subsequent amendments and supplements thereto and superseding orders. The Supplier's failure to comply may result in Supplier disqualification and/or cancellation of award. Such disqualification and/or cancellation shall be at no fault or liability whatsoever to the University.

4.1.26 Service related report as a result of this Request for Proposal

If Request for Proposal includes a requirement to provide a written proposal, report or study, per 74 Okl. Stat. 85.41 (F)(1), Supplier will certify the following in any resulting contract or award:

Supplier certifies it has not previously provided the University or any other Oklahoma state agency with a product that is a substantial duplication of the written proposal, report or study required in this Agreement.

4.1.27 Insurance Requirements

Successful Suppliers shall, prior to beginning any work under any contract that may result under this RFP, acquire and have in effect minimum insurance coverage as set forth in the following table. The said minimum amounts are not intended to limit and do not or reduce any Supplier's liability.

Coverage Type	Minimum Amount
Workers Compensation	Statutory
Public Liability Insurance Bodily Injury: each person	\$1,000,000
Property Damage: each person	\$1,000,000
Per-Occurrence for All Claimants and Coverage	\$1,000,000

Successful Suppliers shall carry on their work in accordance with the requirements of the workers compensation law of the State of Oklahoma, and shall not reject the provisions thereof during the life of the contract. Successful Suppliers shall also protect themselves using liability insurance coverage against any and all claims for damages to persons or property which may arise out of operations under the contract, whether such operations be by the contractor, subcontractor, or anyone directly employed by either of them.

Prior to commencement of work under any contract that may result from this RFP; Successful Suppliers shall purchase and maintain property insurance coverage for the full insurable value of the property at the site of such work. If the policy evidencing such insurance coverage stipulates a deductible amount, Successful Suppliers shall pay the difference attributable to such deductible in any payments made by the insurance carrier

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on claims paid by such carrier. The University will not purchase insurance relative to this RFP unless otherwise stated herein.

Successful Suppliers shall file certificates of such insurance with the University, and such related coverage shall be subject to the University's approval.

4.1.28 Environmental Safety Requirements

All vendors providing products and/or services to the University shall comply with the provisions set forth in the following subparagraphs.

Vendors shall comply with all applicable Federal, State, and Local environmental, occupational, and safety statutes, regulations, and guidelines. Vendors will also obtain all permits required by these statutes and regulations. For example, the contractor shall file a notice of intent for storm water discharges with the Oklahoma Department of Environmental Quality if the project meets the permitting requirements.

Vendors shall be responsible for providing a training and education program for their employees which meets the requirements of the Federal Hazard Communication Standard (29CFR 1910.1200 or 29 CFR 1926.56) and/or the Oklahoma Hazard Communication Standard (Title 40, Sections 401-424) and the OSHA Blood borne Pathogen Standard (29 CFR 1910.1030), if applicable. Successful vendors shall submit proof of such training and education program prior to award.

Vendors shall not dispose of hazardous materials on University property or down sanitary or sewer drains, and shall not dispose of any materials, including water or wastewater, down storm drains.

All hazardous wastes generated by vendors are the responsibility and property of such vendors. Vendors shall dispose of them in an environmentally responsible manner and in compliance with all applicable laws and regulations.

Where biological or hazardous materials are used or transported by the vendor, the vendor is responsible for properly packaging and transporting the materials, providing appropriate training including spill response training for his/her employees, performing appropriate spill response activities when needed and notifying the appropriate regulatory agencies when required.

Vendors who encounter suspected asbestos-containing material (ACM) during the course of their work and who may disturb, contact, or damage the suspected ACM, must immediately stop work and contact the OU-Tulsa Environmental Health and Safety Office (EHSO), the OUHSC EHSO or OU ACM Remediation Services . That office will determine whether the material contains asbestos.

Vendors who use hazardous materials are responsible for notifying the appropriate EHSO in advance of the work and for providing Material Safety Data Sheets (MSDS) to the appropriate EHSO for those materials. Where University employees may be exposed to such materials, the contractor shall notify the appropriate EHSO and the affected University departments in advance of such exposures, and shall make every effort to minimize such exposures. Vendors/contractors shall minimize University employee exposures to dust, mold, paint odors, and other construction-related airborne hazards through the use of barriers and ventilation.

Any operation that has the potential to cause University employees to be exposed to noise levels in excess of OSHA allowable noise levels or hazardous substances in excess of OSHA allowable exposure limits shall be done after normal business hours and shall be

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scheduled 24 hours in advance with the appropriate EHSO.

Contractors performing hot work on OU property are responsible for having a company safety program that includes a hot work permit program. Contractors are responsible for performing hot work on OU property in a way that does not create hazardous conditions. Contractors performing hot work on OU-Tulsa or OUHSC campuses should provide a hot work permit to the EHSO prior to initiating hot work. Contractors performing hot work on the Norman campus should contact the University Fire Marshall.

Successful vendors shall ensure that any approved subcontractors comply with these requirements.

4.1.29 Recycled Materials

Oklahoma is an energy Conservation State and any comments are welcomed in your Proposal that would indicate energy savings.

4.1.30 Export Controlled Products

If Supplier's Proposal will include a product that is export controlled, a Response to the following questions should be included in the Proposal:

Is your product export controlled? _____

If yes, please state under what specific regulation. _____

Do you agree to mark it export controlled? _____

4.2 Terms and Conditions for this RFP

4.2.1 Contractual Intent / Right to Terminate and Recomence RFP Process

The University intends to contract with one or more Suppliers whose Proposals are considered to be in the best interests of the University. However, the University may terminate this RFP process at any time up to notice of award, without prior notice, and without liability of any kind or amount. Further, the University reserves the right to commence one or more subsequent RFP processes seeking the same or similar products or services covered hereunder.

4.2.2 Proposal Acceptance/Rejection

The University reserves the right to reject any or all Proposals. Such rejection may be without prior notice and shall be without any liability of any kind or amount to the University. The University shall not accept any Proposal that the University deems not to be in its best interests. The University shall reject Proposals submitted after the closing date and time.

4.2.3 Supplier's Understanding of the RFP

In responding to this RFP, the Supplier accepts the responsibility fully to understand the RFP in its entirety, and in detail, including making any inquiries to the University as necessary to gain such understanding. The University reserves the right to disqualify any Supplier who demonstrates less than such understanding. Further the University reserves the right to determine, at its sole discretion, whether the Supplier has demonstrated such understanding. Related to this, the University's right extends to cancellation of award if award has been made. Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to the University.

4.2.4 University Provides Information in Good Faith without Liability

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All information provided by the University in this RFP is offered in good faith. Individual items are subject to change at any time. The University makes no warranty or certification that any item is without error. The University is not responsible or liable for any use of the information, or for any claims attempted to be or asserted therefrom.

4.2.5 Proposal Costs

The University is not liable in any manner or to any extent for any cost or expense incurred by any Supplier in the preparation, submission, presentation, or any other action connected with proposing or otherwise responding to this RFP. Such exemption from liability applies whether such costs are incurred directly by the Supplier or indirectly through the Supplier's agents, employees, assigns, or others, whether related or not to the Supplier.

4.2.6 Determination of and Information Concerning Supplier's Qualifications

The University reserves the right to determine whether a Supplier has the ability, capacity, and resources necessary to perform in full any contract resulting from this RFP. The University may request from Suppliers information it deems necessary to evaluate such Suppliers' qualifications and capacities to deliver the products and/or services sought hereunder. The University may reject any Supplier's Proposal for which such information has been requested but which the Supplier has not provided. Such information may include but is not limited to:

- Financial resources
- Personnel resources
- Physical resources
- Internal financial, operating, quality assurance, and other similar controls and policies
- Resumes of key executives, officers, and other personnel pertinent to the requirements of the RFP
- Customer references
- Disclosures of complaints or pending actions, legal or otherwise, against the Supplier

4.2.7 Pre-Proposal Conference

The University may hold a pre-Proposal conference related to this RFP. The University will determine whether attendance by responding Suppliers shall be mandatory or optional. Further, the University may disqualify any responding Supplier who does not attend such pre-Proposal conference for which the University has determined Supplier attendance to be mandatory. With respect to this RFP, the University's determinations in this connection are documented in the section titled "Instructions / Schedules / Information."

4.2.8 Selection, Negotiation, Additional Information

Although the University reserves the right to negotiate with any Supplier or Suppliers to arrive at its final decision and/or to request additional information or clarification on any matter included in the Proposal, it also reserves the right to select the most responsive Supplier or Suppliers without further discussion, negotiation, or prior notice. The University presumes that any Proposal is a best-and-final offer.

4.2.9 Revisions to the RFP

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The University may revise any part of this RFP for any reason by issuing addenda. The University will communicate addenda to all Suppliers on record as having received this RFP, and such Suppliers are responsible for the information contained in such addenda, whether or not they acknowledge receipt. The University is under no obligation to communicate such addenda to Suppliers who notify the University that they will not be responding to this RFP. The University may determine whether an addendum will be considered as part of this RFP and/or as part of any contract resulting therefrom. The University shall reject Suppliers' Responses to addenda if such Responses are received after the RFP closing date and time.

4.2.10 Supplier Visits to University Site(s)

The University may require Suppliers to visit and inspect any site that the University determines relevant to this RFP. The University may determine whether the visit(s) by responding Suppliers shall be mandatory or optional. Further, the University may disqualify any responding Supplier who does not visit if the University has determined a visit is mandatory. With respect to this RFP, the University's determinations in this connection are documented in the section titled "Instructions / Schedules / Information."

4.2.11 Proposal Organization

Suppliers shall present Proposals in a format that can be readily incorporated into a contract as prescribed in section 4.1.7 titled "Contract Format." Suppliers may present narrative Proposals provided that such Proposals follow the same outline and numbering scheme of this RFP, including full descriptive cross-references to all requirements listed in the section titled "Detailed Specifications." Suppliers shall ensure that their Proposals include page numbers and are organized in a manner that will facilitate the University's evaluation of them. The University reserves the right to reject without prior notice and without liability of any kind or amount any Proposal that it deems overly complex, disorganized, or difficult to evaluate. The University reserves the right to make such a decision without any input or communication from any other party. Suppliers shall ensure that, at a minimum, their Proposals contain the components set forth in the following list.

- Original required sections from this RFP
- Any additional Responses in corresponding sequence order
- Any additional supporting data

4.2.12 Pricing and/or Revenue Proposal

Suppliers shall indicate pricing and/or revenue offers in the appropriate spaces and/or areas provided in this RFP. Suppliers shall ensure that any departure from this condition results in an offer that is clearly cross-referenced to the applicable sections within this RFP. For any material departure from this condition, Suppliers shall provide clear and unambiguous explanations of how the departure relates in detail to the applicable sections within this RFP. If the Supplier responds with an "All or None" Proposal, it shall be clearly and unambiguously marked as such.

The University may presume and hold as the Supplier's final offer all pricing and/or revenue offerings, whether stated as amounts or percentages, and/or whether or not offered on an all-or-none basis, if not otherwise specified by the Supplier. The University may accept or reject in part or entirely the Supplier's pricing and/or revenue offerings when such offerings are not on an all-or-none basis. The University prohibits the changing of pricing and/or revenue Proposals after the RFP closing date and time. Unless otherwise specifically proposed by the Supplier, the University reserves the right to hold such pricing and/or revenue Proposal as effective for the entire intended contract term. The University

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may prescribe the manner and method by which pricing and/or revenue offerings shall be communicated in the Supplier's Proposal. The University may reject any Proposal in which the pricing and/or revenue offering does not conform to such prescribed manner and method. Suppliers shall indicate pricing and/or revenue offers in the appropriate spaces and/or areas provided in this RFP. Suppliers shall ensure that any departure from this condition results in an offer that is clearly cross-referenced to the applicable sections within this RFP. For any material departure from this condition, Suppliers shall provide clear and unambiguous explanations of how the departure relates in detail to the applicable sections within this RFP. If the Supplier responds with an "All or None" Proposal, it shall be clearly and unambiguously marked as such.

4.2.13 No Obligation to Select Lowest Pricing

The University is under no obligation whatsoever to select as most responsive the Proposal that demonstrates the lowest pricing.

4.2.14 Errors and Omissions in This RFP / Enhancements

Suppliers shall bring to the University's attention any discrepancies, errors, or omissions that may exist within this RFP. Suppliers shall recommend to the University any enhancements in respect to this RFP, which might be in the University's best interests.

4.2.15 Errors and Omissions in Suppliers' Proposals

The University may accept or reject any Supplier's Proposal, in part or in its entirety, if such Proposal contains errors, omissions, or other problematic information. The University shall determine the materiality of such errors, omissions, or other problematic information.

4.2.16 Required Signatures

The University may reject any Supplier's Response if it is not signed and/or notarized as indicated and/or required on the areas, spaces, or forms provided within this RFP.

4.2.17 Proposal Submission and Opening

The University shall, at the specified closing date and time, open and document the date and time on all Proposals that are otherwise in order. The University will make no immediate decision at such time. The University will allow interested parties to attend such opening for purposes of learning which Suppliers have responded. However, the University will not disclose any information contained in any Proposal until after formal notice of award and execution of any contract resulting from this RFP. When multiple documents are scheduled to be opened at the same date and time, the University will open documents with individuals present in sequential order by document number. The University will hold unopened any Proposals received after the closing date and time, and will not consider such Proposals. The University reserves the right to retain or dispose of any such Proposals at its discretion; however, the University may at its discretion, return such Proposals to their related Suppliers, but only at such Supplier's request and at no cost or expense whatsoever to the University.

4.2.18 Notification of Non-selection

The University reserves the right not to notify Suppliers whose RFP Responses are not selected for further consideration or notice of award. If the University decides to notify such Suppliers in writing, it will send the notifications to the address indicated in each such Supplier's Proposal.

4.2.19 Withdrawal of RFPs

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Suppliers may withdraw their Proposals at any time prior to the RFP closing date. Suppliers may request to withdraw their Proposals after the RFP closing date and any time prior to notice of award. The University shall have sole authority to grant or deny such a request. In the event the University grants such a request, it may withhold issuing future RFPs to such Suppliers.

4.2.20 Evaluation Criteria

The University reserves the right to establish the criteria by which it will evaluate each Supplier's Response to this RFP and by which it will determine the most responsive, capable, and qualified Supplier(s).

4.2.21 Pre-Award Presentations

The University reserves the right to require presentations from the highest ranked Suppliers, in which they may be asked to provide information in addition to that provided in their Proposals.

4.2.22 Pre-Award Negotiations

The University reserves the right to negotiate prior to award with the highest ranked Suppliers for purposes of addressing the matters set forth in the following list, which may not be exhaustive.

- Obtaining the lowest and best pricing and/or revenue agreement
- Resolving minor differences and scrivener's errors
- Clarifying necessary details and responsibilities
- Emphasizing important issues and points
- Receiving assurances from Suppliers

4.2.23 Effective Period of Proposals

Under this RFP, the University shall hold that Suppliers' Responses to this RFP shall remain in effect for a period of ninety (90) days following the closing date, in order to allow time for evaluation, approval, and award of the contract. Any Supplier who does not agree to this condition shall specifically communicate in its Proposal such disagreement to the University, along with any proposed alternatives. The University may accept or reject such proposed alternatives without further notification or explanation.

4.2.24 Rejection of Supplier Counter-offers, Stipulations and Other Exceptions

Any Supplier exception, stipulation, counter-offer, requirement, and/or other alternative term or condition shall be considered rejected if State law or University policy govern the issue as solely determined by the University and unless specifically accepted in writing by the University and thereafter incorporated into any contract resulting from this RFP.

4.2.25 University's Right to Use Supplier's Ideas / Proprietary Information

If the Supplier needs to submit Proprietary Information with the Proposal, the Supplier shall ensure that it is enclosed in a separate envelope from the Proposal and that it is clearly designated and conspicuously labeled as such.

The University shall have the right to use any ideas that are contained in any Proposal received in Response to this RFP, along with any adaptation of such ideas. Selection or rejection of the Proposal shall not affect the University's right of use. Provided, however, that subject to 4.2.27, the University will, in good faith, and to the extent permitted by applicable law, honor any Supplier information that is clearly designated and conspicuously

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labeled as proprietary. The University shall not be liable in any manner or in any amount for disclosing Proprietary Information if such information is not clearly so designated and conspicuously so labeled. The University shall likewise not be liable if it did not know or could not have reasonably known that such information was proprietary.

4.2.26 Supplier's Need to Use Proprietary Rights of the University

All information proprietary to the University and disclosed by the University to any Supplier shall be held in confidence by the Supplier and shall be used only for purposes of the Supplier's performance under any contract resulting from this RFP.

4.2.27 Public Record

Once finalized, documents resulting from this RFP, including the resulting award(s), are available for public inspection pursuant to the Open Records Act. Copies are provided upon written request to the University's Open Records Office. The University shall not be liable in any manner or in any amount for disclosing Proprietary Information if such information is required by law to be disclosed.

4.2.28 Proposal Pricing to Reflect University's Tax Exempt Status

Proposal pricing shall be exclusive of taxes. The University of Oklahoma is exempt from taxes, including State Sales Tax, Property (Ad Valorem) Tax, and Federal Excise Tax. The exemption authority is Oklahoma State Tax Code, Title 68, OS 1981, Article 13, Section 1356 and Federal Tax Exempt number 736017987.

4.3 Terms and Conditions for Communications between the University and Suppliers

4.3.1 Communications and Inquiries between the University and Suppliers

Supplier inquiries and requests for clarification related to this RFP should be directed to the University official indicated in the following table: **IN WRITING ONLY.**

Linda Johnson, Senior Buyer
Purchasing Department
University of Oklahoma
2750 Venture Drive
Norman, OK 73069
Email: linda-johnson@ouhsc.edu

Applicable terms and conditions herein shall govern communications and inquiries between the University and Suppliers, as they relate to this RFP. Informal and formal communications shall commence and cease as described in the following subparagraphs. Informal communications shall include but are not limited to requests from/to Suppliers or Suppliers' representatives of any kind or capacity, to/from any University employee or representative of any kind or capacity, for information, comments, speculation, etc. Formal communications shall include but are not limited to verbal and/or written presentations and pre-award negotiations under this RFP.

4.3.1.1 Start and Stop Dates for Formal and Informal Communications

On the date that the Supplier receives this RFP, informal communications shall cease and formal communications shall commence. On the date that the University notifies responding Suppliers of this RFP's results and executes the

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resulting contract with the Successful Supplier(s), informal communications may resume and formal communications must cease.

4.3.1.2 Verbal versus Written Communication

Verbal communication shall not be effective unless formally confirmed in writing by the specified University procurement official in charge of managing this RFP's process. In no case shall verbal communication override written communication.

4.3.1.3 University's Response to Communications from Supplier

The University will make a good-faith effort to provide a written Response to each written request for clarification as described in section 2.4 – Schedule of Events.

4.3.2 Inquiries about Interpretations

All requests for interpretations shall be formal and written. The University may treat Responses to such requests as Revisions to the RFP, which are discussed in this section in the subparagraph titled "Revisions to the RFP."

4.3.3 Apparently Conflicting Information Obtained by Supplier

The University is under no obligation whatsoever to honor or observe any information that may apparently conflict with any provision herein, regardless of whether such information be obtained from any office, agent, or employee of the University. Such information shall not affect the Supplier's risks or obligations under a contract resulting from this RFP.

4.3.4 Collusion Prohibited

In connection with this RFP, Supplier collusion with other Suppliers or employees thereof, or with any employee of the State, including any employee of the University, is prohibited and may result in Supplier disqualification and/or cancellation of award. Any attempt by the Supplier, whether successful or not, to subvert or skirt the principles of open and fair competition may result in Supplier disqualification and/or cancellation of award. Such disqualification and/or cancellation shall be at no fault or liability whatsoever to the University.

4.3.5 Improper Business Relationships / Conflict of Interest Prohibited

In connection with this RFP, each Supplier shall ensure that no improper, unethical, or illegal relationships or conflict of interest exists between or among the Supplier, the University, and any other party to this RFP. The University reserves the right to determine the materiality of such relationships, when discovered or disclosed, whether intended or not; and to decide whether or not Supplier disqualification and/or cancellation of award shall result. Such disqualification and/or cancellation shall be at no fault or liability whatsoever to the University.

4.4 Terms and Conditions for Packaging and Transmitting Proposals

4.4.1 Corrections, Changes, and Providing Information on Forms within the RFP

Suppliers shall ensure that an authorized individual initials each correction using pen and ink. Suppliers shall use pen and ink or typewriter in providing information directly on pages, or copies thereof, contained within this RFP.

4.4.2 Transmittal

Suppliers shall submit the original and **two (2) copies** of the RFP as well as **one (1)** electronic copy (s) in compact disc format to the address below. Sealed Proposals shall be

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Or

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opened by the Purchasing Department at the address indicated below and at the time and date indicated in 4.4.5 of this Request for Proposal.

Purchasing Department
University of Oklahoma
2750 Venture Drive
Norman, OK 73069

4.4.3 Faxes Not Accepted

The University shall not accept Proposals sent by fax or electronic mail.

4.4.4 Binding and Marking

Suppliers shall ensure that the original and each copy are individually bound. When submitting more than one Proposal, Suppliers shall ensure that units are clearly marked; for example, as "Original of Proposal One," "Copy One of Proposal One," "Original of Proposal Two," "Copy One of Proposal Two;" and so on.

4.4.5 Marking of Envelopes

Suppliers shall ensure that sealed transmittal envelopes clearly and conspicuously display the following identifying information in addition to any other information otherwise required for transmittal.

RFP # R-8162-08
Closing date: April 30, 2008 at 2:00 PM, CST

4.5 Terms and Conditions Specifically Related to the Software Provided by the Supplier

4.5.1 Software Warranty

Licensor warrants to the OU College of Dentistry that the software delivered, documentation and all services rendered hereunder will conform with the Licensor's advertised specifications and will be free from defects. Licensor warrants that the software will be free of time-based, event-based or activity based self-disabling codes. Licensor warrants that any documentation provided by Licensor hereunder will accurately and faithfully support the software provided to the OU College of Dentistry. Licensor shall inform the OU College of Dentistry, in writing, immediately, of any errors or defects found in the software by Licensor or any other user.

4.5.2 Warranty Against Self Disabling Codes

Licensor warrants that the Software shall not contain any time-based, activity-based or event based self-disabling codes.

4.5.3 Warranty Against Spyware, Malware, and Collection of Private Information

Licensor warrants that products purchased by the OU College of Dentistry do not contain spyware, malware, and/or that the products do not collect and/or distribute information that could be considered private without the OU College of Dentistry and the actual users' express consent.

4.5.4 Software Indemnification

Licensor warrants that it has the full right to grant this entire license to Licensee. At Licensor's expense, Licensor shall hold harmless, indemnify, and defend the OU College of Dentistry against any claim that the Software or Documentation infringes a patent, copyright, trade secret or other proprietary right of a third party in the United States and shall pay all costs, damages, and attorney's fees that a court finally awards as a result of

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such claim or that are paid in settlement of such claim. To qualify for such defense and payment, the OU College of Dentistry will: (i) give Licensor prompt written notice of such claim; and (ii) subject to statutory duty of the Oklahoma Attorney General, allow Licensor to control, and fully cooperate with Licensor in, the defense and all related negotiations. In the event that such claims are raised against both the OU College of Dentistry and Licensor, the OU College of Dentistry may, at its option and expense, retain its own counsel to act as co-counsel in such defense and related to negotiations.

Licensor's obligation under this Section is conditioned upon the OU College of Dentistry's agreement that, if the operation of the Software becomes, or in Licensor's reasonable opinion is likely to become, the subject of such claim, the OU College of Dentistry shall permit Licensor, at Licensor's option and expense, either to procure the right for the OU College of Dentistry to continue to use the Software or to replace or modify the Software so that it becomes non-infringing and that said replacement software or modifications meets or exceeds the functionality of the original software. In the event neither of these options is available, Licensor agrees to refund to the OU College of Dentistry the license fee, and Professional Services fees paid to Licensor.

4.5.5 Source Code

Licensor shall place and maintain a current (updated) documented copy of the source code of said software with a mutually agreed upon escrow agent for a minimum of ten (10) years. Should Licensor cease operation for any reason or cease to provide maintenance and support for the software to the OU College of Dentistry or a substantial portion thereof, the OU College of Dentistry shall be provided with a copy of all updated source codes and documentation at no charge.

4.5.6 Modifications

The OU College of Dentistry may customize the software or integrate the software into other programs, but only for its own use. Any portion of the software included in an updated, modified, or derivative work shall be used only by the OU College of Dentistry and shall be subject to all of the terms and conditions of this License Agreement. The modifications and changes made by the OU College of Dentistry shall belong to the OU College of Dentistry, and shall include the unique elements and institutional (dental school) developed middleware.

4.5.7 Copies of Software

The OU College of Dentistry may copy the software into any machine-readable or human readable form to provide sufficient copies necessary to support the OU College of Dentistry's use of the licensed software as provided in this Agreement.

4.5.8 Transfer

The OU College of Dentistry shall have the ability to install and access on any computer system or site at the OU College of Dentistry and affiliated clinics.

4.5.9 Acceptance

Upon installation of the software by Licensor, Licensor shall demonstrate to Licensee the operation of the software in Licensee's test and live environments to be performing in accordance with the provided documentation and specifications.

Acceptance of the software shall occur after one hundred and eighty (180) consecutive calendar days of Stable operation following First Productive Use. At Licensee's option, the running of the one-hundred and eighty (180) calendar day period may be halted from time to time for non-Urgent Issue(s), and shall be restarted to day zero for Urgent Issue(s), as defined in this Agreement. Upon successful completion of the one-hundred and eighty

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(180) calendar day period, Licensee shall notify Licensor, in writing, of Licensee's acceptance of the software and agrees not to unreasonably withhold such notice.

"First Productive Use" shall mean seventy-two (72) hours of continuous operation after the date on which the software is first used with Licensee's live data to perform the intended function of the software. First Productive Use shall be restricted to the live production system and will not include the test systems.

"Stable" shall mean computer jobs, tasks, transactions or procedures consistently performing in accordance with the provided documentation and specifications. The software should end in a normal mode and not end abnormally.

"Urgent Issue" shall mean any issue that results in a loss of major system functionality; a loss of data recovery; or incorrect data as defined by Licensee.

4.5.10 Right to Protect Information Resource Security

The OU College of Dentistry shall reserve the right to change or modify without consent any information resource, including but not limited to operating systems, hardware, and/or network configuration, in order to protect information resources at the OU College of Dentistry against any security vulnerabilities and unauthorized access or abuse.

In the event that maintenance is provided by the Licensor, Licensor warrants that upon routine maintenance and/or notification by the OU College of Dentistry of a security vulnerability that maintenance shall include installation of operating system and/or application patches and upgrades that will protect information resources at the OU College of Dentistry against any security vulnerabilities and unauthorized access or abuse.

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5.0 SPECIFICATIONS

5.1 General

The minimum requirements and the specifications for the Services, as well as certain requests for information to be provided by Proposer as part of its proposal, are set forth below.

5.2 Minimum Requirements

Each Proposal must include information that clearly indicates that Proposer meets each of the following minimum qualification requirements:

Demonstrated ability to understand key clinic information and patient care processes in an academic health center, including administration, hospital/medical, and business processes, student assessment and management, and patient management through the development of a comprehensive implementation plan.

- Provide names of schools with software installed that are of the same size as the OU College of Dentistry, with the same missions, and located on an academic health campus. In the list include modules / major functional areas in use by these schools. The implementation plan will include: the vendor's assessment strategy for the OU College of Dentistry; work flow narratives or diagrams; sample screens, queries, and reports for business-accounting processes, student management, student assessment, and patient management; examples of system alerts / messaging that supports both administrative-business and clinical-electronic record functions. The electronic record needs to demonstrate a comprehensive data collection to support general dentistry in an educational environment.

Demonstrated ability to understand the application software planned for digital radiography and understands the associated software integration points.

- Provide the names of three schools the vendor's system has been installed and integrated with a digital radiology PACS (Picture ArChiving System). Include a technical description of the software interface to a typical PACS.
- Provide the names of three schools the vendor's system has been installed and integrated with Dolphin Imaging. Include a technical description of the software interface to Dolphin Imaging.

Demonstrated ability to understand the OU College of Dentistry's technology infrastructure and provide CIS / EDR enterprise software whose response is sub-second at the server level in an environment comparable to the OU College of Dentistry;

- Provide names of schools with software installed that are of the same size as the OU College of Dentistry, with the same missions, and located on an academic health campus. Provide benchmarks on expected performance (time) to: log in; open a patient electronic record; open a patient history; access images; post procedures, charges, and schedule a patient at the point of care. After implementation, these benchmarks should be reproducible in the OU College of Dentistry environment. List major factors that would impede system performance at OU College of Dentistry.

Demonstrated ability to quickly identify and solve the technical issues that arise and provide adequate guidance to minimize operational risks;

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- Provide References from schools utilizing system. Description of Support services including hours of operations, modalities to report problems, technical mechanisms to apply fixes and troubleshoot the system and number of personnel dedicated to give support. Describe how the Vendor support team interacts with its programming staff to bring successful resolution to problems.

Demonstrate an ability to convert legacy system data (for example, patient demographics, treatment plans, account history);

- Names of schools whose legacy systems the Vendor has converted and name of and version of the legacy system converted. List what types of data were electronically moved from a legacy system to the vendor's system. Provide description of process to convert legacy system and validate conversion.
- The OU College of Dentistry is mainly interested in legacy systems that it has in place. i.e. Dentrix, Windent, QR, and ViewPoint.

Demonstrate an ability to provide custom training manuals, multimedia training materials and end user training jointly with the OU College of Dentistry staff and faculty; the OU College of Dentistry will retain training materials for future training needs;

- List the names of schools whose faculty, staff, and students that were trained by the vendor. If not trained by vendor, list who provided training. Provide example training manual, videos, and online access to system training resources. Provide list of any schools custom training material was developed for and the role of vendor in the development of training materials.

Demonstrate an ability to provide project resources capable of meeting schedule and budget objectives;

- References of schools with software installed. List of key personnel dedicated to the OU College of Dentistry installation, training and maintenance support and allocation of time to support the OU College of Dentistry at initial installation, during training, and after system rollout. Provide timetable that identifies major steps for completing project as well as the role of the vendor and the OU College of Dentistry.

Develop a collaborative relationship that provides for institutional input into product direction and that effectively mentors and provides knowledge transfer to the OU College of Dentistry staff of modifications, reports, training course maintenance, and interfaces resulting from system implementation.

- Provide References of schools with software installed and how they have been represented at User Groups / Focus Groups for input software troubleshooting, development and future enhancements. Describe your systems / companies "User Groups" functionality, meeting schedule, meetings history, and mechanism dental schools have to input of system design and future development.

5.3 Additional Questions Specific to this RFP

Proposer must submit the following information as part of Proposer's proposal:

Answers to Questions in **EXHIBIT ONE**: Vendor Specifications Questionnaire.

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5.4 Detailed Specifications

5.4.1 Scope of Work

Contractor will provide the following services to University:

The scope of this project includes the purchase, installation, configuration and license for use of a “point of care” HIPAA compliant enterprise clinic information system & electronic dental record system (CIS / EDR) at the OU College of Dentistry and its clinics. It is also to include conversion of data in the existing clinic information system, implementation services, technical and end-user training, technical and end-user documentation, along with technical and functional support post-implementation including maintenance.

It is anticipated that implementation of the new CIS / EDR will occur in three phases:

Phase I – Assessment of the OU College of Dentistry clinics environment and creation of an implementation plan.

Phase II - Replacement of the current clinic information system and migration of all existing data.

Phase III - Implementation of the electronic patient record and all modules of the CIS / EDR including digital radiography.

5.4.2 The Detailed Work Plan (all phases)

1. Collaborative Phased Implementation plan including recommendations for hardware (primary CIS / EDR servers and terminal service / Citrix servers, workstations-clients), software operating systems and configuration, specifications and recommendations for necessary peripheral devices (printers, card readers, biometric entry, signature pads).
2. Appoint a vendor project leader to which all questions / issues will be communicated.
3. Appoint project team members.
4. Train implementation team.
5. Keep the OU College of Dentistry Project Manager and Implementation Team informed of progress, problems, potential problems and plans.
6. Provide objective project status reports to the Project Manager as requested by the OU College of Dentistry.
7. Define implementation strategy, sequence, scope, timetable and responsibilities.
8. Conduct fit / gap analysis.
9. Define implementation alternatives with advantages and disadvantages, where appropriate.
10. Define implementation parameters for efficient and effective operation of the system in the OU College of Dentistry environment.

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11. Design system acceptance testing processes to ensure proper operation of the system in the OU College of Dentistry environment.
12. Recommendations to change business processes necessary to accommodate vendor software.
13. Design and implement strategy for training system users, operational support staff, and students including the systems utilization on student owned laptops.
14. Install the clinic information system software.
15. Jointly draft a project plan for migration to new clinic information system.
16. Create data (field) mapping document for main and satellite clinics.
17. Design and implement data conversion processes.
18. Convert existing clinic information data.
19. Conduct on-site functional test of clinic information software.
20. Install and partner in the configuration the CIS / EDR software.
21. Conduct on-site functional test of electronic dental record software.
22. Tailor the clinic information system and electronic dental record (CIS / EDR) software to meet the OU Health Science Center functional security requirements.
23. Customize, if justified and approved by the steering team.
24. Develop interfaces to other systems.
25. Develop production reports.
26. Develop an analysis, specifications and recommendations for data warehousing and creating custom reports.
27. Implement end user reporting capability.
28. Conduct final unit and system acceptance testing.
29. Conduct software and application performance tuning.
30. Provide end user and system support staff training and documentation.
31. Provide final data scrubbing and conversion.
32. Implement system cutover.
33. Provide on-site problem management for duration of time determined by the OU College of Dentistry.
34. Develop operational support processes and procedures, including processing maps.
35. Coordinate with the project manager, implementation team members and training specialist.
36. Provide post-implementation work to support the new system and provide in writing 30 days prior to new software upgrades to the systems pertinent information describing upgrade enhancements, changes to configuration, and or new functionalities.
37. Understand, be accountable and sign the Oklahoma University HIPAA Business Associates Agreement.

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Detailed work plans contain task level detail for all resources including the OU College of Dentistry, and other parties. Tasks must have descriptions, type of resource required, and amount of time required, elapsed time, start and completion dates, and tasks statuses. Documentation on assumptions made in developing the work plan must be included.

The respondent should have direct responsibility for tasks defined in the work plan. Use of terms such as 'coordinate', 'assist' and 'advise' should be avoided.

5.4.3 Minimum project deliverables

1. A detailed fit / gap analysis report that defines the functionality of the system to be implemented.
2. An implementation strategy report that defines the general sequence of events and scope. The report should also include but not be limited to:
 - a. Key issues in the system setup.
 - b. Definition of implementation milestones.
 - c. Recommendation on data conversion, including historical data.
 - d. Plan and implementation for interface with digital imaging systems and the OU College of Dentistry clinic support applications.
3. A report on recommended project staffing.
4. A detailed implementation plan.
5. A detailed data conversion plan, including field mapping document, for testing and implementation.
6. A document addressing all assumptions made in creating the implementation plan.
7. Clear strategy and specifications for remote secure access to the systems.
8. An implementation team-training plan.
9. A high-level plan for system user training with a preliminary training matrix listing information such as topics to be covered, training courses required, duration of each class, maximum attendees, facilities required, and so on.
10. Operational Clinic Information System and Electronic Dental Record (CIS / EDR).
11. Acceptable system performance (sub-second) at the software server level.
12. Effective and efficient operational support processes and procedures, including disaster recovery support and all support options (i.e. 24 hour, seven days a week versus 8 to 5 Monday through Friday).
13. The OU College of Dentistry Customized Training manuals (paper and electronic).
14. Trained and effective end users. Accurately converted data, including a balanced accounts receivable.
15. Effective and efficient integration with digital radiography systems.
16. Use of ADA-ANSI standards for key data objects and data elements.
17. Trained system support staff.
18. Project status reports.

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19. Issue papers, if necessary.

5.4.4 System Specifications: Functional

The vendor's response to this RFP must include a description of how the functionality below is provided in the proposed system. If the functionality is not present in the software, the vendor should indicate if the functionality can be provided at extra cost and provide an estimate of that cost.

The system's functionality must include the following:

5.4.4.1 Clinic Information System (CIS):

1. Patient Registration
 - a. With record checking to minimize duplication of records.
2. Provider Identifiers and Demographics
3. Patient Financial Management:
 - a. Accounting down to the cash drawer level.
 - b. Billing, an intuitive electronic encounter, and collections management module.
 - c. Statement and Claims processing
 - i. Claims error checking.
 - ii. Standard and user customizable edit of claims prior to submission.
 - iii. Interface to outside insurance and claims processing vendors.
 - d. Dental and medical insurance management – both electronic X.12 and paper.
 - i. List claims clearinghouse vendors utilized by other similar organizations your system has been implemented.
4. Intuitive User-defined Patient Scheduling
5. Patient Assignment / Provider Family
6. Patient Recall
7. Patient Chart Tracking
8. Patient Management
 - a. Status of care
 - b. Timeliness of care
 - c. Summary of treatments and interventions
9. Student Management
 - a. Student Evaluation / Grading
 - b. Student Attendance
 - c. Student Progress / Activity Reports
10. Intuitive On-Screen Patient Alerts
11. Reporting – utilizing ODBC or JDBC-compliant database (querying and reporting without degrading system performance which may require establishing data-warehouses)
12. Ad Hoc system Inquiry capability with adequate system performance
13. Secure Back Office Error correction capability / portal for posting multiple transaction corrections

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14. The ability to support the creation, by the OU College of Dentistry, of “children” databases
15. Inventory Management
 - a. Instrument and Materials Management
 - b. Dispensary Management
 - c. Sterilization Management
16. Dental Laboratory Management Custom patient communications integrated to the system (using Microsoft Office applications)
17. Interface to document management – ability to scan paper documents and link e-copy to CIS / EDR
18. Support for Multiple Practices – System must support multiple separate clinics (e.g. satellite clinics and faculty practice)
19. HIPAA compliant System logging

5.4.4.2 Electronic Dental Record (EDR)

1. Demographics / Codified Medical Alerts / Codified Medical Conditions
2. Chief complaint(s)
3. Medical History and Physical Assessment
4. Dental History
5. Extra-oral Examination / Charting / Conditions
 - a. Including fields for diagnostic codes
 - b. Graphical interface
6. Intra-oral Examination / Charting / Conditions
 - a. Including fields for diagnostic codes
 - b. Graphical interface
7. Oral Pathology
8. Treatment Planning
 - a. Phases and Sequence
 - b. Multiple plans
 - c. Graphical representation
9. Informed Consent
10. Authenticated queries regarding structured progress notes
11. Support for e-signatures
12. Linkages / interfaces to specialty modules
13. Electronic Prescriptions module
14. DICOM Compliant digital imaging integration – ability to integrate with various digital radiography and intra-oral photography systems, which includes but is not limited to:
 - Air Techniques
 - Dentrix Dental Systems
 - GE Healthcare / Soredex USA
 - Gendex Dental Systems
 - Kodak Dental Systems
 - Planmeca USA
 - Schick Technologies

Provide a list of existing interfaces to digital imaging systems and your intention to add others with the expected timeframe.

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5.4.5 System Specifications: Technical

The OU College of Dentistry operates a variety of desktops, laptops, and server platforms. The desktop and laptops are primarily Apple Macintosh computers. There are a small number of Microsoft Windows based computers in use.

The information requested below will help us assess how well the proposed system will fit into our technical environment. Please provide details or descriptions for the following:

1. Describe the hardware architecture(s) supported by the product.
2. Describe, at the component level, if the recommended hardware configuration required meet or exceed system performance requirements. If alternatives are proposed, please describe them as well.
3. Describe the software architecture(s) of the product. Name and describe database engine / tool used in product. What software components reside on the client PC versus the server? What middleware is required? What are specifications for printing information off of the system? Can CIS and Electronic Dental Record be run in Windows Terminal Services on client? If so, describe hardware and software requirements to implement in the OU College of Dentistry environment.
4. Describe, at the component level, all software required, regardless of the platform, to operate the system effectively and efficiently.
5. Describe the technical evolution of the product over the next 3 – 5 years.
6. Provide a graphical data schema that includes all “primary” tables. The data schema should also include a representation of fields used to join all primary tables.
7. Provide a schedule of anticipated software releases for the next two years, including major and maintenance releases of the software, and written descriptions of new, enhanced or changed functionality to the system.
8. Provide a listing of events over the last three years that may have forced a customer to upgrade one component or all portions of the software. Demonstrate the history of the product in terms of backwards compatibility. Provide in writing 1 year ahead of time major changes in required operating systems, database managers, data warehouse software, and emulation software required for future releases.
9. Describe how end user reporting is supported in your system. Is the database directly accessed or are reporting tools used on an operational data store, data mart or warehouse?
10. Provide an estimate of the type (functional & technical) and number of the OU College of Dentistry personnel required to operate and support your system in a ‘typical’ customer environment. Describe the attributes of a ‘typical’ environment.
11. Describe vendor support mechanisms for trouble shooting and resolving issues remotely.
12. Provide costs of annual maintenance agreements for five years (ref. Section 5.6.1 Pricing)
13. Describe application and system limitations (# of concurrent users / # of total providers and patients in database / data storage / server memory / network sustained bandwidth).

5.5 Miscellaneous Provisions

5.5.1 Personnel

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The Contractor shall maintain a staff of properly trained and experienced personnel to ensure satisfactory performance under this Contract. The Contractor will also assign to the OU College of Dentistry a designated representative who will be responsible for the coordination and administration of the OU College of Dentistry's requirements.

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5.6 Pricing (SUPPLIER COMPLETES)

5.6.1 Detailed Pricing should be entered in this section.

PRICING AND DELIVERY SCHEDULE

Proposal of: Clinic Information System

To: The Board of Regents of the University of Oklahoma Health Sciences Center

Ref.: Software and Implementation Services related to the Clinical Information System
Electronic Dental Record for the OUHSC College of Dentistry

Category	Year 1	Year 2	Year 3	Year 4	Ongoing
Annual Maintenance If more than one level of support is offered, list below: 1. Level One 2. Level Two 3. Level Three	First year should be included with the price of the software.				
Software License					
Data Conversion					
Implementation					
Training & Documentation					
Upgrades					
Fit / Gap Analysis					
Additional Interfaces					
Custom Reporting					

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Category	Year 1	Year 2	Year 3	Year 4	Ongoing
Other Customization (Please List)					
Total					

Delivery Schedule of Events and Time Periods

The project shall begin within thirty (30) days of the acceptance of the contract award.

Attach work plan showing delivery date.

Completion Date: _____

University's Payment Terms

University's standard payment terms for services are "Net 45 days." Proposer agrees that University will be entitled to withhold twenty percent (20%) of the total payment due under the Agreement until after University's acceptance of the final work product. Indicate below the prompt payment discount that Proposer will provide to University:

Prompt Payment Discount: _____% _____ days / net 30 days

Progress Payment:

80% Delivery and installation

20% Testing and final acceptance (Ref. Section 4.5.9)

For questions regarding this Request for Proposal contact:

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Or

Karen Hicks, Manager, email: karen-hicks@ouhsc.edu, Phone (405) 325-9846 Fax (405) 360-0481

Exhibit One

Vendor Specifications

Instructions for use:

1. The sections below allow for a Y/N response. Indicate a YES response by typing / writing in the space provided. A blank or no response will assume a NO answer.
2. If the vendor wishes to customize the software or service, indicate the cost, if any, here and on the pricing schedule (**SECTION 5.6.1 of this RFP**).
3. Where requested, provide explanatory notes.

Installation:

1. Do you provide procedures, documentation, and media associated with the product installation?
2. Does your organization accept responsibility for fixing installation-related "bugs" and / or "bugs" detected during installation?
3. If yes:
 - a. Is on-site support provided?
 - b. Is there a cost associated with this on-site support?
Please Specify: _____
4. Do you provide a test and production environment for ease in testing new data elements, screens, reports and processing?
5. If yes, do you provide procedures and documentation associated with running tests?

Training:

6. Do you provide training that supports the initial software/application implementation?
7. If yes, does the curriculum include:
 - a. Inquiry / reporting training for department administrators
 - b. Technical training for system administrators
 - c. Management overview sessions
8. How is training accomplished?
 - a. Computer-based tutorial
 - b. Classroom / lecture
 - c. Hands-on exercises
 - d. Other _____

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9. Do you provide training materials in support of classroom training sessions?
10. Do your training materials and training exercise scenarios support an academic healthcare setting? If not, what scenarios are used: _____
11. Do you have the capability to conduct classroom training:
 - a. At the OU College of Dentistry facilities
 - b. At local vendor facilities
 - c. At remote vendor facilities
 - d. Other _____
12. Are the following components included in the technical training:
 - a. File structures & record formats
 - b. Cycle (daily, weekly, monthly, quarterly, annual) processing procedures
 - c. Update and transaction processing procedures
 - d. Backup procedures
 - e. Recovery procedures
 - f. Shutdown procedures
 - g. Performance tuning procedures
13. Do you provide training materials supporting enhancements and new releases?
14. Do you include / provide follow-up training for enhancements and new releases?

Product Support:

15. Do you provide telephone support for:
 - a. Application software support (system administrators)
 - b. Help Desk (users)
 - c. Questions (non-issues)
16. Is there a cost associated with this support?
If yes, what are the costs? _____ per _____
17. Are there different support personnel available for general, application, and technical issues?
18. Does your telephone support include a toll free number?
19. Indicate the days per week and hours per day (including time zone) during which your telephone support is available.

20. Do you provide support via the Internet or e-mail for:
 - a. Application software support (system administrators)

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- b. Help Desk (users)
21. Is there a cost associated with this support?
If yes, what are the costs? _____ per _____
22. Does your organization provide on-site support in Oklahoma City, Oklahoma to assist in the diagnosis and resolution of application software problems, if so requested?
23. If yes, is there a per hour support charge?
Hourly Support Charge: \$ _____
24. If yes, is the client responsible for the travel and living expenses?

Maintenance:

25. Do you maintain a software "bug" (errors) list that includes both references to formal fixes and / or documented workarounds?
26. If yes, do you distribute this list to your client base on a scheduled basis? Please attach the latest publication in your RFP response.
27. How do you distribute "bug" fixes?
a. Electronically (modem / Internet / e-mail attachments)
b. CD or DVD (mail)
28. Do you provide telephone support for client installation of "bug" fixes?
29. Do you provide diagnostic aids to assist with problem resolution?
30. Are there restrictions to programming modification by the client that affect support? If yes, attach your policy statement on user modifications in your RFP Response.
31. Are third party vendors involved in maintaining your software? If yes, please attach a listing of these vendors and the products or services that they provide in your RFP response.

Enhancements and New Releases:

28. Do you provide regular maintenance upgrades as part of the standard support/maintenance agreement?
29. Do you provide new version releases as part of the standard support/maintenance agreement?
30. For new releases do you:
a. Include changes only

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- b. Include complete replacement
 - c. Both **a** and **b** depending on the scope of change
31. Do you have a software enhancement and future release list and schedule? If yes, please attach to your RFP response.
32. Do you provide telephone support for client installation of enhancements and new releases?
33. Do you provide utilities that handle file/ data conversion if a release involves file changes, field length changes, etc.?
34. Must all new releases be accepted?
35. Are there time constraints placed on the installation of product updates?
36. How often are new releases or product updates made?

37. Are prior releases supported? If yes, specify how many prior versions are maintained and how long they will be supported.
38. Are updates to the documentation provided?

Technical Considerations:

28. Specify the recommended database: _____
29. Is the database license bundled with your product?
30. Are database administrator activities minimal?
31. What specific versions of the supported database platform can the software work on?
32. How many patches or service packs (or equivalent) have been created in the last 18 months?
33. What version of the databases and OS would a customer have to utilize to run the application today and the next planned release(s)?
Today: _____
Next Release: _____
49. Specify the recommended operating system: _____
50. Are there undefined tables/fields that can be utilized to add some fields to the application for any unmet needs?
51. Would the physical software components be spread over multiple servers?

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52. Can this be implemented in “terminal emulation mode” solution, please explain to what extent, what mechanism / tools that have been used in previous implementations and recommended specifications for hardware and software?

53. Is this a thin client tool, please explain to what extent and hardware and software required for this implementation?

54. Do you provide any tools or guidelines for sizing the hardware requirements and if so what are they?

Documentation:

The following section provides the opportunity for the vendor to describe the documentation associated with the software detailed in the previous section.

Indicate if the following detail items are contained in your system documentation. In addition, please provide us with a complete set of your documentation manuals with your response.

We are willing to sign a non-disclosure form, if required, and will return the set to you at the end of our evaluation process.

System Overview Diagrams:

1. Diagrams depicting the flow of processing (process flowcharts)
2. Diagrams depicting the points of interface and transfer of information between functions / programs
3. Diagrams depicting on-line file update processing
4. Diagrams depicting batch processing including generation and printing of batch reports
5. Diagrams depicting system inputs and outputs

Technical Documentation:

6. Procedures required to successfully install the software package
7. Procedures required to successfully operate the system

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8. Backup, restore/recovery and restart procedures
9. "Bug" (error) detection and reporting procedures
10. Listing of required files, file formats, file layouts, and join conditions for all major files or tables
11. Data element descriptions and definitions by field level
12. Run books (batch processing dependencies, schedules, run parameters), if applicable
13. Procedures and/or narrative covering the following topics:
 - a. Data storage in database or files
 - b. Application characteristics (on-line, batch, shared data base programs)
 - c. Security
 - d. System logs
 - e. Error handling

End User Documentation:

14. System overview
15. Descriptions of functions, transactions, and outputs of the system
16. Screen layouts and descriptions inclusive of data entry screens, inquiry only screens, and menus
17. System navigation, both between data elements on the screen and between screens
18. Descriptive error message listing inclusive of corrective action
19. Login and logoff procedures
20. Ad hoc report writer information and user instructions

Software License Agreement:

The following section provides the opportunity for the vendor to describe the software license agreement associated with the software detailed in the previous section.

Please provide a current copy of your software license agreement in your response.

1. The software license agreement will grant to the OU College of Dentistry the following unlimited rights and privileges:
 - a. The ability to install and run the software package on multiple servers at different locations.

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- b. The ability to obtain source code with the purchase of the software.
 - c. A reasonable guarantee of 99.99% up time for the software.
 - d. Incorporation of the RFP response into the license agreement.
2. Do you offer an acceptance test period?
If yes, how long is the acceptance test period? _____
3. If the acceptance test produces unacceptable results, can the product be returned for a full refund?
4. In the event of disaster recovery, can the software run on a server at a remote site?
5. Does the software require a 'license key'?

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Global and Technical Requirements:

Operating Requirements:

1. Capable of supporting five hundred (500) concurrent sessions
2. Client runs on the following platforms:
 - Apple OS X (All versions)
 - Windows XP
 - Windows Vista (for future reference)
 - Web Browser(s)
 - Safari
 - Firefox
 - Internet Explorer
3. Capable of utilizing Windows Terminal Service / Citrix for laptops and workstations.
4. Utilizes a non-proprietary programming language
5. Utilizes a standard SQL database with readily available ODBC or JDBC drivers
6. Utilizes a non-proprietary database/file structure. (IBM, DEC, HP, SUN or Novell file structures are considered so well known and heavily used as to be unofficially non-proprietary)
7. Utilizes an unmodified operating system from one of the following major vendors: IBM, DEC, HP, SUN, Microsoft, and Apple.
8. Maintains a consistent server response time of less than one second per transaction.

Screen Functionality / Data Editing:

9. Provides on-line/real-time updates to database(s) and reference tables.
10. Provides access to all functions via functionally grouped menus and sub-menus.
11. Uses function keys for quick exit or quick access to common functions.
12. Provides "fast path" or direct access method for access to screens and functions, while maintaining proper security.
13. Allows for user-defined validation and edit criteria.
14. Utilizes data verification tables that are maintained by the user.
15. Allows use of default responses where applicable to minimize keystrokes.

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16. Displays the translation or description of an entered or displayed coded field on the screen.

On-Line Help:

17. Provides online Help functions at the following levels:
 - a. Functional level
 - b. Screen level
 - c. Data field level
18. Functional level help screen text outlines the purpose and action, including secured access, for each available function.
19. Screen level help provides instructions to the user regarding the use of the program function keys.

Database / File Information:

20. Maintains last change date and user-ID for reference table files.
21. Provides a means to restore the database and automatically reprocess transactions that occurred since the restore.
22. Provides reliable database analysis tools to review the state and integrity of the database structure.
23. Provides reliable database reorganization utilities.
24. Provides automatic clean up of temporary work files to minimize disk usage.
25. Provides data archiving capability.

Application Modifications:

26. Provides capability to make modifications to:
 - a. System-provided screens
 - b. System-provided reports
 - c. System-provided interfaces
27. Provides ability to develop the following user-defined items to allow for institution specific requirements:
 - a. New screens
 - b. New reports
 - c. New interfaces

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28. Provides modification or definition capability of screens, reports and interfaces through:
 - a. Application tools or utilities
 - b. Programming language

Interfaces:

29. Provides an interface engine.
30. Provides for real-time interface of data to external systems.
31. Provides for real-time interface of data from external systems.
32. Provides for batch interface of data to external systems.
33. Provides for batch interface of data from external systems.
34. Provides for user definition of data fields to be interfaced to and from the system with easy modification of defined data fields as needed.
35. Provides for the automatic scheduling of batch interfaces on a daily, weekly or monthly basis.
36. Provides for on-demand processing of interfaces as needed.
37. Provides for background processing of scheduled and on-demand interfaces so that no user terminal is locked while processing takes place.
38. Provides control reports listing individual records and dollar amounts interfaced from various external systems.
39. Provides totals and subtotals of data interfaced.
40. Provides exception reports detailing any errors that occurred during interface processing.

Reporting/ Printing Capabilities:

41. Provides user-defined reporting capability.
List end user reporting tools supported:

42. Provides printing of reports and documents at default printer locations.
43. Provides printing of reports at user specified printer location(s).
44. Provides printing of reports upon user request.
45. Provides ability to establish default and changeable print characteristics, such as number of copies, double-sided, condensed print, etc.

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46. Provides capability to set up user-defined schedule for report processing.
47. Provides ability to print output to a disk file.
48. Provides ability to print user-defined forms.
49. Provides ability to route print jobs based on user I.D., function, report type, etc.

Network:

50. Proposed system utilizes TCP/IP.
51. Are there any bandwidth requirements?

Remote Access:

52. Proposed system can utilize CISCO VPN for remote access.
53. System is accessible by remote users.
54. Remote access is secure and encrypted.

Back-up / Disaster Recovery:

55. System provides forward data recovery.
56. System utilizes redundancy to provide high availability.
57. System utilizes mirroring.
58. System can be backed up by BakBone's NetVault software.
59. System can be backed-up without downtime.
60. System allows for remote disaster recovery testing and restore.
61. System capable of backup through a Storage Area Network (SAN) system.

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5.7 References

Please provide the names and phone numbers of five (5) customer references using the products or services specified in the section titled "Detailed Specifications."

Customer Company Name	Contact Person	Telephone Number

5.8 Pending Litigation or Formal Complaints

Please provide information regarding any pending litigation or formal complaints against you.

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The University of Oklahoma

RFP# R8162-08

Close Date/Time – 04/30/08 – 2:00 PM CST

6.0 SIGNATURES (SUPPLIER COMPLETES)

6.1 COLLUSION AFFIDAVIT (SUPPLIER COMPLETES - NOTARIZATION REQUIRED)

Explanation. With regard to any competitive RFP for goods or services which is issued by the State of Oklahoma or any of its agencies, Oklahoma laws require each Supplier to execute and submit a notarized sworn Statement of Non-Collusion. This statement assures the State that the Supplier has not in any way subverted or skirted the principles of competition by colluding with other Suppliers or with any employee of the State.

Action. This affidavit immediately follows. Please ensure it is duly completed and correctly executed by an authorized officer of your company.

_____, of lawful age, being first duly sworn, on oath affirms:

- 1. (s) he is the duly authorized agent of, the Supplier submitting the competitive RFP which is attached to this statement, for the purpose of certifying the facts pertaining to the existence of collusion among Suppliers and between Suppliers and state officials or employees, as well as facts pertaining to the giving or offering of things of value to government personnel in return for special consideration in the letting of any contract pursuant to the RFP to which this statement is attached;
2. (s)he is fully aware of the facts and circumstances surrounding the making of the RFP to which this statement is attached and has been personally and directly involved in the proceedings leading to the submission of such RFP; and
3. Neither the Supplier nor anyone subject to the Supplier's direction or control has been a party; a) to any collusion among Suppliers in restraint of freedom of competition by agreement to RFP at a fixed price or to refrain from bidding; b) to any collusion with any state official or employee as to quantity, quality or price in the prospective contract, or as to any other terms of such prospective contract, nor; c) in any discussions between Suppliers and any state official concerning exchange of money or other thing of value for special consideration in the letting of a contract.

FIRM _____ DATE OF DELIVERY _____
SIGNATURE _____ DISCOUNT PAYMENT TERMS _____
NAME , TITLE _____ ACCEPT UNIVERSITY PCARD _____
PRINCIPAL ADDRESS _____ SEAL OR STAMP
CITY/STATE/ZIP _____
PHONE/EMAIL _____
ORDER ADRESS IF DIFFERENT _____ Subscribed and sworn before me this _____ day of _____ , _____
CITY/STATE/ZIP _____ NOTARY PUBLIC (OR CLERK OR JUDGE)
PHONE/EMAIL _____ My Commission Expires: _____

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6.2 Business Relationships Affidavit (Supplier completes - notarization required)

Explanation. This affidavit is required to detect whether an illegal or inappropriate business relationship exists between a Supplier and the University.

Action. This affidavit immediately follows. Please ensure it is duly completed and correctly executed by an authorized officer of your company. If none of the business relationships described below pertain to the Supplier, the affiant should so state.

I, _____, of lawful age, being first duly sworn, on oath says that (s)he is the agent authorized by the bidder to submit the attached bid. Affiant further states that the nature of any partnership, joint venture, or other business relationship presently in effect or which existed within one (1) year to the date of this statement with the architect, engineer, or other party to the project is as follows:

Affiant further states that any such business relationship presently in effect or which existed within one (1) year prior to the date of this statement between any officer or director of the bidding company and any officer or director of the architectural or engineering firm or other party to the project is as follows:

Affiant further states that the names of all persons having any such business relationships and the positions they hold with their respective companies or firms are as follows:

Signed

Name and Title

Company

F.E.I.N. #

Subscribed and sworn to before me this ____ day of _____, 19____.

Notary Public

My Commission Expires _____

(SEAL)

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6.3 EEO Certificate of Compliance - Contracts over \$10,000 (Supplier completes)

Explanation. This certificate is required under Executive Order 11246 (as amended). In entering into any resulting contract over \$10,000, the Supplier agrees to comply with the Equal Employment Opportunity requirements stipulated in Executive Order 11246 as amended by Executive Order 11375 and 11141 and as supplemented in Department of Labor regulations (41 CFR Part 60 et. seq.).

Action. This certificate immediately follows. Please ensure it is duly completed and correctly executed by an authorized officer of your company.

Equal Opportunity Clause

During the performance of this/these contract(s) the contractor agrees as follows:

The contractor will not discriminate against any employee or applicant for employment because of race, sex, color, religion, sex, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and employees are treated during employment, without regard to their race, sex, religion, color, or national origin. Such action shall include, but not be limited to the following:

Employment, upgrading, demotion or transfer; recruitment or recruitment advertising; lay-off or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.

The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, stated that all qualified applicants will receive consideration for employment without regard to race, sex, religion, color or national origin.

The contractor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided by the agency contracting officer, advising the labor union or workers' representative of the contractor's commitments under Section 202 of Executive Order 11246 of September 24, 1965, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

The contractor will comply with all provisions of Executive Order 11246 of September 24, 1965 and of the rules, regulations and relevant orders of the Secretary of Labor.

The contractor will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations and orders.

In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of such rules, regulations, or orders, this contract may be canceled, terminated or suspended in whole or part and the contractor may be declared ineligible for further government contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

The contractor will include the provisions of Paragraphs A through G in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to Section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or Supplier.

The contractor will take such action with respect to any subcontract or purchase order as may be directed by the Secretary of Labor as a means of enforcing such provisions including sanctions for noncompliance: Provided, however, that in the event the contractor becomes involved in, or is threatened with, litigation with a subcontractor or Supplier as a result of such direction, the contractor may request the United States to enter such litigation to protect the interests of the United States.

Certification of Non-segregated Facilities

By the submission of this bid and/or acceptance of purchase order(s) during the above period, the bidder, offerer, applicant, or subcontractor certifies that he does not maintain or provide for his employees any segregated facilities at any of his establishments, and that he does not permit his employees to perform their services at any location, under his control, where segregated facilities are maintained.

He certifies further that he will not maintain or provide for his employees any segregated facilities at any of his establishments, and that he will not permit his employees to perform their services at any location, under his control, where segregated facilities are maintained. The bidder, offerer, applicant, or subcontractor agrees that a breach of this certification is a violation of the equal opportunity clause in this contract. As used in this certification, the term "segregated facilities" means any waiting rooms, work areas, rest rooms and wash rooms, restaurants and other eating areas, time clocks, locker rooms and other storage or dressing areas, parking lots, drinking fountains, recreation or entertainment areas, transportation, and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, sex, religion, color or national origin, because of habit, local custom, or otherwise. He further agrees that (except where he has obtained identical certifications from proposed subcontractors for specific time periods) he will obtain identical certifications from proposed subcontractors prior to the award of subcontracts exceeding \$10,000 which are not exempt from the provisions of the equal opportunity clause; that he will retain such certifications in his files; and that he will forward the following notice to such proposed subcontractors (except where the proposed subcontractors have submitted identical certifications for specific time periods).

Disabled Veteran and Vietnam Era Veteran Affirmative Action Program Requirements

In entering into any contract which exceeds \$10,000, the bidder agrees to comply with Disabled Veteran and Vietnam Era Veteran Affirmative Action Program Requirements as stipulated in Public Law 93-508 and all amendments thereto. Failure to comply with the requirements of Public Law 93-508, Title 41, CFR60-250 and Title 41, CFR60-741 and all amendments thereto shall be deemed a material breach of this agreement and shall subject this contract to cancellation and rescission at the option of the University of Oklahoma. Copies of the applicable portions of this law are available from the University of Oklahoma Purchasing Office if required.

These provisions must be included in any subcontracts awarded involving this bid.

CERTIFICATION

If awarded this contract _____ agrees to comply with all above provisions.
(Company)

(Signature)

(Name and Title)

(Date)

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The University of Oklahoma

RFP# R8162-08

Close Date/Time – 04/30/08 – 2:00 PM CST

6.4 (EEO Certificate of Compliance - Contracts over \$50,000 (Supplier completes))

Explanation. This certificate is required under Executive Order 11246 (as amended). In entering into any resulting contract over \$50,000, the Supplier agrees to comply with the Equal Employment Opportunity requirements stipulated in Executive Order 11246 as amended by Executive Order 11375 and 11141 and as supplemented in Department of Labor regulations (41 CFR Part 60 et. seq.).

Action. This certificate immediately follows. Please ensure it is duly completed and correctly executed by an authorized officer of your company. *Note: if the Supplier has 50 employees or less, this certificate is not required*

In the event that any resulting contract exceeds \$50,000 and the contractor has more than 50 employees, the contractor agrees to submit Standard Form (EEO-6) to the Joint Reporting Committee (unless previously submitted). The report must be submitted within 30 days after the award of the contract. This requirement is waived if the contractor has submitted this report within the past twelve (12) months.

If awarded a contract over \$50,000 and the contractor has more than 50 employees, the contractor agrees to develop and maintain on file a written Affirmative Action Program. The elements of this program are as follows:

Identification and analysis of problem areas inherent in minority employment and an evaluation of opportunities for utilization of minority group personnel.

The specific steps which should be taken to guarantee equal employment opportunity in the identified problem areas and, where deficiencies exist, the development of specific goals and timetables.

A table of job classifications.

Approval by an executive official of the contractor.

Utilization Evaluation: The evaluation of utilization of minority group personnel shall include the following:

An analysis of minority group representation in all job categories.

An analysis of hiring practices for the past year, including recruitment sources and testing, to determine whether equal employment opportunity is being afforded in all job categories.

An analysis of upgrading, transfer and promotion for the past year to determine whether equal employment opportunity is being afforded.

Maintenance of Programs: Within 120 days from the commencement of the contract, each contractor shall maintain a copy of separate affirmative action compliance programs for each establishment, including evaluations of utilization of minority group personnel and the job classification tables, at each local office responsible for the personnel matters of such establishment. An affirmative action compliance program shall be part of the manpower and training plans for each new establishment and shall be developed and made available prior to the staffing of such establishment. A report of the results of such program shall be compiled annually and the program shall be updated at that time.

Information on compliance with Affirmative Action Program requirements is also contained in Office of Federal Contract Compliance Revised Order No. 14.

These provisions must be included in any subcontracts awarded involving this bid.

CERTIFICATION

If awarded this contract _____ agrees to comply with all above provisions.
(Company)

(Signature)

(Name and Title)

(Date)

For questions regarding this Request for Proposal contact:

Linda Johnson, Senior Buyer, email: linda-johnson@ouhsc.edu Phone (405) 325-2229 Fax (405) 360-0481

Or

Karen Hicks, Manager, email: karen-hicks@ouhsc.edu, Phone (405) 325-9846 Fax (405) 360-0481

6.5 Certification of Proposal (Supplier completes)

Explanation. This certification attests to the Supplier's awareness of and agreement to the content of this RFP and all accompanying provisions contained herein.

Action. This certificate immediately follows. Please ensure it is duly completed and correctly executed by an authorized officer of your company.

This Proposal is submitted in Response to Request for Proposal _____ issued by the University of Oklahoma. The undersigned, as a duly authorized officer, hereby certifies that

(Company)

agrees to be bound by the content of this Proposal and agrees to comply with the terms, conditions and provisions of the referenced Request for Proposal (RFP) and any addenda thereto in the event of an award. Exceptions may be noted only as stated in the RFP. The Proposal shall remain in effect for a period of ninety (90) calendar days as of the Due Date for Responses to the RFP.

Person(s) authorized to negotiate in good faith on behalf of this firm for purposes of this Request for Proposal are:

(Name) (Title)

(Name) (Title)

Signature

Printed

Title

Date

F.E.I.N.

For questions regarding this Request for Proposal contact:

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