

How to Purchase an MHA-PDS Compliant Client Management System (CMS)

A webinar for organizations seeking to choose an MHA-PDS compliant CMS

September 11, 2024



AMHO SUPPORT FOR ORGANIZATIONS ONBOARDING TO THE MHA-PDS



AMHO is one of three Coordinating Leads, alongside CMHA-Ontario and the Mental Health Partners

We are working with our respective members as well as with other community-based MHA providers to inform them and answer questions about the MHA-PDS onboarding process, timelines and requirements; and connect them to the CoE when appropriate.

AMHO has sourced the services of the consulting firm, Asurtec, to provide 1-on-1 support and tools to our members in the PDS onboarding process, including migration from non-compliant systems, decision support, technical support, and assistance with required paperwork and documentation.



Asurtec

**Addictions &
Mental Health**
ontario

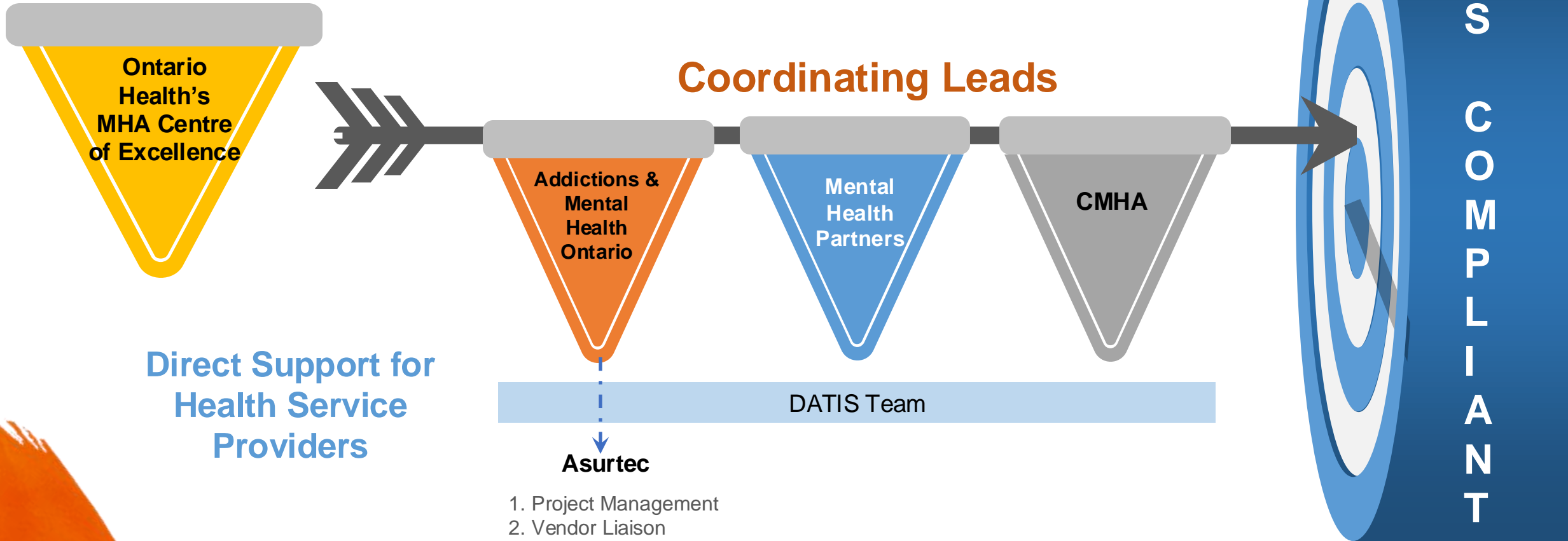
OBJECTIVE

To help you select and purchase a Client Management System (CMS) that is compliant with the Mental Health and Addictions Provincial Data Set (MHA-PDS) *and also meets your organization's needs.*

By the end of the webinar, you will:

1. Be familiar with a process and tools that you can use to select a PDS-compliant system; one that considers your organization's needs across several areas.
2. Understand the supports available through AMHO to help with your MHA-PDS onboarding.

PARTNERS



Direct Support for
Health Service
Providers

- 1. Project Management
- 2. Vendor Liaison
- 3. Data and Workflow System Alignment
- 4. Training and Change Management



WHAT IS THE MHA PROVINCIAL DATA SET?

Ontario Health's Mental Health and Addictions (MHA) Centre of Excellence (CoE) has introduced a standardized provincial data set called the Mental Health and Addictions Provincial Data Set (MHA-PDS).

The MHA-PDS is a minimum set of routinely collected, client-level, standardized data elements that support direct service delivery and enable consistent and comparable reporting of service utilization, client outcomes & client characteristics across the Ontario Mental Health and Addictions sector.

To input data and report on the MHA-PDS, organizations must use one of four compatible Client Management Systems (CMS):

Vendor	CMS
CRMS	CRMS
EMHWare Solutions	EMHWare
Vitalhub Corp	TREAT
Vitalhub Corp	CaseWORKS

For more information see this resource [PDS Onboarding Overview](#)

WILL THIS PROVIDE BETTER DATA AND ANALYTICS?

WE CAN'T AFFORD THIS

THE NEW SYSTEM WILL MAKE OUR WORK EASIER, WITH LESS TIME SPENT ON DOCUMENTATION

WE DON'T HAVE THE STAFF OR TIME TO TAKE THIS ON RIGHT NOW

HOW WILL WE MOVE ALL OUR PAPER FILES INTO A SOFTWARE SOLUTION?

THIS WILL BE A CHANCE TO INTEGRATE OUR DATA SYSTEMS FOR MORE SOPHISTICATED REPORTING

THOUGHTS AND QUESTIONS AGENCIES MAY HAVE ABOUT PDS

FINALLY, WE ARE GOING DIGITAL!

THIS SORT OF CHANGE HASN'T ALWAYS BEEN SMOOTH IN THE PAST

IT WILL BE GREAT TO GET A NEW SYSTEM THROUGH A SUPPORTED PROCESS

HOW CAN WE MAKE THIS ALIGN WITH OUR NON-MHA ACTIVITIES AND FUNDERS?

BENEFITS OF THIS PROCUREMENT PROCESS



- Places organizations in the driver's seat.
- Helps you consider your organization's needs early, ahead of rushing to get quotes and book demos.
- Tools provide vendors with information they need to give you a realistic quote.
- Enables apples to apples comparison across systems.
- Offers fair and necessary competition between the vendors because all vendors receive the same information at the same time.
- An objective process that offers transparency, clarity and rigor to the decision.



PREPARING FOR PROCUREMENT

A. Conduct an Organizational-Assessment

1. What policies or directives should be followed?
2. Are there financial constraints?
3. Are there essential regulatory and reporting requirements?
4. What are the available internal resources?
5. Who will be impacted and how?
6. What must the new system do?

B. Develop the Request for Quotation (RFQ)

1. Summarize requirements using the tools in the [Procurement Toolkit](#)

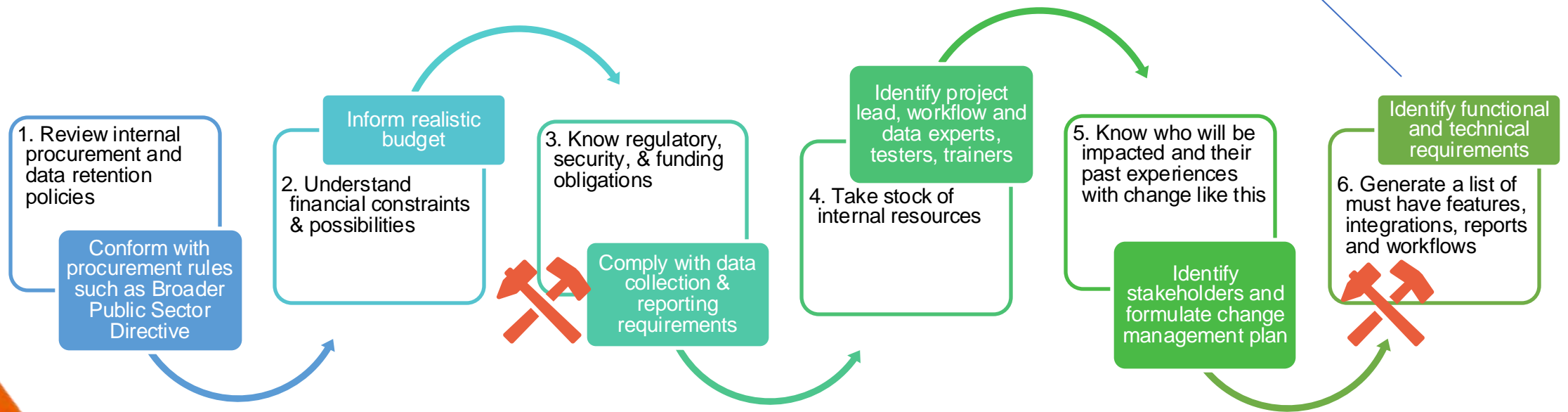
C. Issue the RFQ

1. Supply vendors with the completed [Procurement Toolkit](#)
2. Ask the vendors to complete the [Vendor Submission Form](#) by a defined date

Recommend: Forming a Vendor Evaluation Committee to support the information gathering and subsequent steps of procurement

A. Conduct Organizational Assessment

- Functional requirements refer to the features you need the system to do in day-to-day work.
- Technical requirements include things that specify needs for security, data storage, data migration, and ongoing vendor support.



With a well-selected Vendor Evaluation Committee this may take approximately 2-3 focussed meetings

B. Develop RFQ Using Tools in the Toolkit

1. ORGANIZATIONAL PROFILE

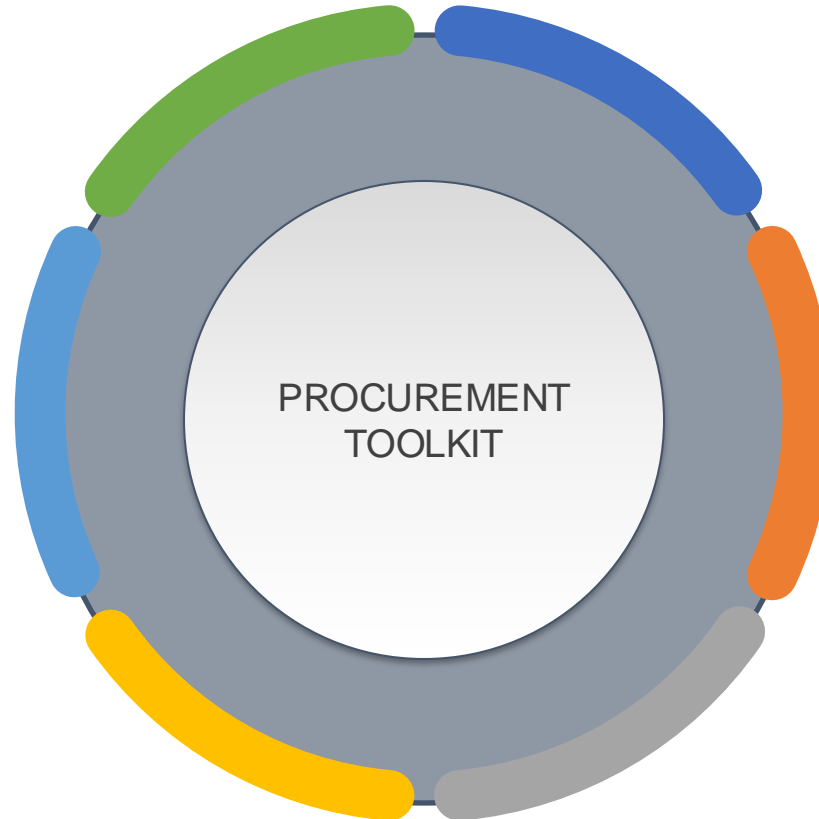
Questions about organization's budget, years of operation, programs and services that will use the CMS.

2. SCOPE OF SERVICES

Questions about the system currently in use, or where information is stored, number of active clients, number of staff who will use the system.

3. CMS REQUIREMENTS

A priority ranking of a list of functional and technical requirements. Organizations will identify features they must have, would be nice to have or do not need.



4. REPORTING REQUIREMENTS

Organizations will identify reports they use for funders, or operationally. As well as what data is pulled, from where, how often and for whom.

5. VENDOR EVALUATION MATRIX

Identify criteria the Vendor Evaluation Committee will use to assess vendors and systems with an assigned weighting. Vendors are scored against these criteria.

6. VENDOR SUBMISSION FORM

Vendors will receive tools 1-5 and provide organization with a quotation, inclusive of implementation plan and other important information to help make an informed decision.

Tools in the Procurement Toolkit

Question	Response
1. What programs and services will be in scope for the new CMS?	Tool 1: Organizational Profile
2. Describe the age group or population you serve.	
3. What is your organization's operating budget?	
4. Do you offer housing or	

Question	Response
About the existing system(s)	
1. What information about your clients is maintained outside of your current CMS that needs to be migrated (e.g., MS Word, Excel)?	Tool 2: Scope of Services
2. What is the number of systems you are planning to migrate from? Name each system.	

Tool #3 - CMS Functional & Technical Requirements					
Tool 3: CMS Requirements					
Domain	ID	Question	Yes/no	Priority 1) Must have 2) Nice to have 3) Not applicable	Comments/Details (if any)
Client Record	1.0	How are you currently managing your client information?			
	1.1	historical demographic information?			
	1.2	non-registered participants?			
	1.3	to the client record?			

The following list summarizes the reporting and submission requirements for all programs and services that will be migrated to the new client management system. Add more rows as needed.

INDEX #	Service/ Program Providing Report	Reporting To:	What is the Data Pulled for Reporting Requirements	Data Stored In / Pulled From (Name of system)	Reporting Steps	Current Sharing or Method of Transfer e.g. courier, uploaded, emailed	Reporting Frequency (e.g., monthly, quarterly)
1	Tool 4: Reporting Requirements						
2							

Criteria on which selection decision is based	Sample Weighting Scheme
Cost	35%
Functional/Reporting Requirements	25%
Implementation Plan	25%
Ongoing Support	10%
Contract Terms	5%
References	Pass/Fail

Tool 5: Vendor Evaluation Matrix

Vendor Information

Please fill out the following form, naming one person to be the Proponent's contact for the RFP process and for any clarifications or communication that might be necessary.

Table 1: Proponent Details

Full Legal Name of Proponent:	
Any Other Relevant Name under which Proponent Carries on Business:	
Street Address:	
City, Province, State:	
Postal Code:	
Phone Number:	

Tool 6: Vendor Submission Form

C. Issue the RFQ

1. Share completed Toolkit (Tools 1-5) with the vendors.
2. Ask vendors to complete the Vendor Submission Form (Tool 6) by the date you decided in your plan.



Someone from the Asurtec team will contact you to see if you need support using the tools and to help in receiving a quote from vendors

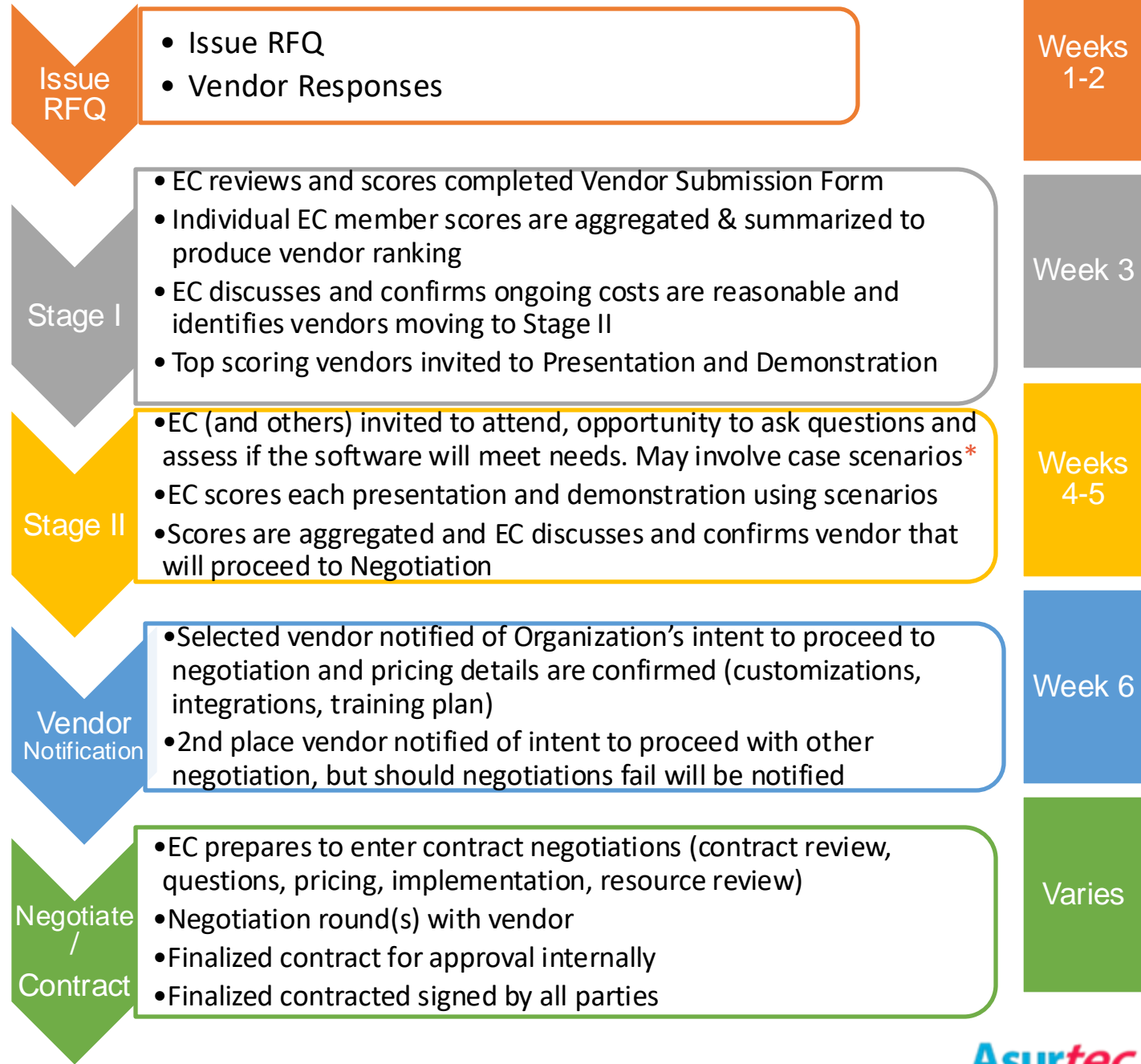
PROCUREMENT PROCESS

EC = Evaluation Committee

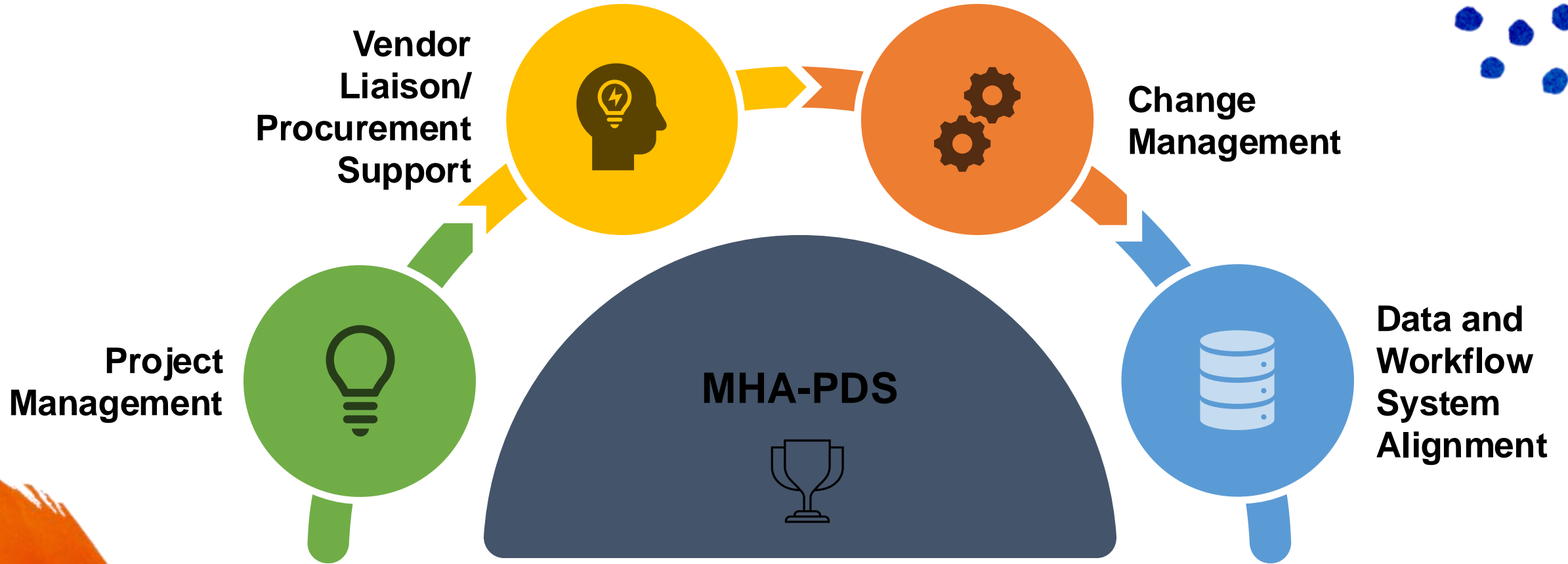
General Pricing based on Scope of Services

Consider shared tenant options

More specific pricing based on deeper discussions with vendor



ASURTEC SERVICE OFFERINGS



NEXT STEPS

1. Review the presentation and Procurement Toolkit
2. Form the Vendor Evaluation Committee
3. Complete the tools
4. Submit tools to vendors

Reach out to Asurtec at [AMHO PDS@asurtec.com](mailto:AMHO_PDS@asurtec.com) for support



Someone from the Asurtec team will contact you to see if you need support using the tools and to help in receiving a quote from vendors

Q & A



Asurtec

Addictions & Mental Health
ontario

Thank
You