



Smarter Care. Connected Care.

# Humboldt County Department of Health and Human Services

Response to RFP No. DHHS2023-03 for a Homeless Management Information System

October 20, 2023

Proposal Contact:

Liddy Hintz

HSS Sr. Client Success Manager 11300

Switzer Road

Overland Park, KS 66210

[liddy.hintz@wellsky.com](mailto:liddy.hintz@wellsky.com)

315-430-7591

855.WELLSKY

wellsky.com



## 1.0 Introductory Letter

WellSky is delighted to partner with the Humboldt County Department of Health and Human Services (DHHS) by providing the nation's leading Homeless Management Information System (HMIS), *WellSky Community Services*, to help end homelessness across your communities. *WellSky Community Services* is used by over 50% of Continuums of Care (CoCs) across the United States (3 times more than any other HMIS vendor). It is the system of record for over 200 CoCs across 35 States, including 17 statewide HMIS systems and statewide coverage for an additional 3 states. WellSky works with eleven CoCs in California providing their HMIS solution and assisting with VASH imports where requested. The WellSky team also works closely with the Business, Consumer and Housing Agency in support of the Homeless Data Integration System for the state of California.

WellSky's highly configurable HMIS solution for Continuums of Care includes:

- Easy-to-use coordinated entry tools to prioritize individuals and families for services based on data collected at intake, assessment, and project exit
- Real-time housing and shelter unit availability
- Documentation of services and housing placements
- HMIS reports as required by the U.S. Department of Housing and Urban Development (HUD) and its federal partners

Support for team collaboration, management of services and activities, dozens of standard operational reports, and sophisticated *ad hoc* reporting and data visualization capabilities have been added and enhanced over years of working with HUD, states, counties, and CoCs to incorporate functionality needed to support to their specific guidelines, requirements, and policies.

For over 20 years, WellSky's unparalleled experience and expertise in developing case management software for social service programs in the collection, use, and reporting of data related to the individuals being assisted, and the nature of that assistance, has enabled WellSky clients to deliver exceptional care, improve operational efficiency, reduce cost, and meet the challenges of the rapidly changing and converging health and human services landscape.

The response that follows demonstrates WellSky's extensive background in the deployment and support of the nation's leading HMIS solution, as well as the breadth of whole person care solutions that WellSky continually evolves to help those in need.

Liddy Hintz is the contact person for this proposal. Her contact information appears on the front cover of this proposal.



## 2.0 Table of Contents

Proposals shall include a comprehensive table of contents that identifies submitted material by sections 1.0 through 10.0, and any subsections thereof, in the order listed above with sequential page numbers.

### Contents

1.0	Introductory Letter .....	2
2.0	Table of Contents .....	3
3.0	Signature Affidavit .....	4
4.0	Professional Profile .....	6
A.	Organization Overview .....	6
B.	Overview of Qualifications and Experience.....	8
5.0	Project Description .....	12
A.	Description of Services .....	12
B.	Quality Assurance Capabilities .....	30
6.0	Cost Proposal.....	32
7.0	Supplemental Documentation .....	35
8.0	References.....	36
10.0	Evidence of Insurability and Business Licensure .....	38
11.0	Exceptions, Objections and Requested Changes.....	39



### 3.0 Signature Affidavit

Each Proposal must contain a signed and completed Signature Affidavit, which is attached to this RFP as Attachment A – Signature Affidavit and incorporated herein by reference as if set forth in full. The Signature Affidavit must be signed by an authorized representative of the Proposer. Signature authorization on the Signature Affidavit shall constitute a warranty, the falsity of which shall entitle the County to pursue any and all remedies authorized by law. Receipt of all Addenda, if any, must be acknowledged on the bottom of the Signature Affidavit.

WellSky is pleased to provide the signed and completed Signature Affidavit on the next page.



**REQUEST FOR PROPOSALS NO. DHHS2023-03  
HOMELESS MANAGEMENT INFORMATION SYSTEM  
ATTACHMENT A – SIGNATURE AFFIDAVIT  
(Submit with Proposal)**

REQUEST FOR PROPOSALS – NO. DHHS2023-03 SIGNATURE AFFIDAVIT	
NAME OF ORGANIZATION/AGENCY:	WellSky Corporation
STREET ADDRESS:	11300 Switzer Road
CITY, STATE, ZIP	Overland Park, KS, 66210
CONTACT PERSON:	Liddy Hintz
PHONE #:	315-430-7591
FAX #:	913-871-9571
EMAIL:	Liddy.hintz@wellsky.com

Government Code Sections 6250, *et seq.*, the “Public Records Act,” define a public record as any writing containing information relating to the conduct of public business. The Public Records Act provides that public records shall be disclosed upon written request, and that any citizen has a right to inspect any public record, unless the document is exempted from disclosure.

In signing this Proposal, I certify that this firm has not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or agency to submit or not to submit a Proposal; that this Proposal has been independently arrived at without collusion with any other Proposer, competitor or potential competitor; that this Proposal has not been knowingly disclosed prior to the opening of Proposals to any other Proposer or competitor; that the above statement is accurate under penalty of perjury.

The undersigned is an authorized representative of the above-named agency and hereby agrees to all the terms, conditions and specifications required by the County in Request for Proposals No. DHHS2023-03 and declares that the attached Proposal and pricing are in conformity therewith.

Steve Greenberg  
Signature

Senior VP, Human & Social Services  
Title

Stephen Greenberg  
Name

10/20/23  
Date

This agency hereby acknowledges receipt / review of the following Addendum(s), if any)  
Addendum # [ ] Addendum # [ ] Addendum # [ ] Addendum # [ ]



## 4.0 Professional Profile

Proposals shall include a clear and concise narrative that identifies the Proposer's ability to provide a Homeless Management Information System with capabilities equivalent to those set forth in this RFP.

### A. Organization Overview

The professional profile must contain an overview of the structure and operation of the Proposer's organization, which includes, at a minimum, all of the following information:

1. The Proposer's organization name, physical location, mission statement, accreditation, certification and/or licensure status, legal organizational status, such as partnership, corporation or limited liability company, current staffing levels and overall budget.

WellSky is a for-profit, privately held corporation of approximately 2,200 employees, headquartered in Overland Park, Kansas. WellSky was incorporated in 1980 in New York. WellSky's revenue in FY 2023 was more than \$600 million.

WellSky is focused on helping the most vulnerable populations – whether those who are experiencing homelessness, those who are frail elderly, physically disabled, or intellectually and developmentally disabled citizens, to live independently in their own homes and communities. This has enabled WellSky clients to deliver exceptional care, improve operational efficiency, reduce cost, and meet the challenges of the rapidly changing and converging health and human services landscape by providing solutions to realize care's potential and to help address the social determinants of health. WellSky seeks to provide software solutions that enable whole-person care while simultaneously providing best-in-class measures to protect data security, integrity, and privacy.

2. A detailed description of the Proposer's current and previous business activities, including, without limitation:
  - a. The history of the Proposer's organization, including the date when the organization was founded and how innovation and high-quality performance is fostered thereby.
  - b. The total number of years the Proposer has been operating under the present organization name, and any prior organization names under which the Proposer has provided Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP.
  - c. The number of years the Proposer has been providing Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP.
  - d. The total number of government agencies for which the Proposer has provided Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP.

WellSky Corporation (rebranded in 2018) was incorporated in 1980. WellSky's Human & Social Services business unit is forged from three best-of-breed solution providers, Bowman Systems, Synergy Software Technologies, and Harmony Information Systems, each founded more than twenty years ago and specializing in community services and homelessness, aging, and human services, respectively. Since 2016, these solution providers, retaining many core team members, have been operating under a unified management structure and are fully integrated with the larger WellSky organization.



WellSky has been the trusted leader in HMIS software for over 20 years, developing and implementing HMIS and community care software that is reliable and highly configurable. WellSky has worked closely with HUD and the federal partners for over 20 years and WellSky team members have actively worked with HUD since the inception of the HMIS Vendors group in 2012. *WellSky Community Services* is used by over 50% of Continuums of Care (CoC) across the United States as the system of record by over 200 CoCs across 35 States, including 17 statewide HMIS systems and statewide coverage for an additional 3 states. WellSky currently works with over 35 different government agencies to provide HMIS services.

Over time, WellSky has grown significantly, allowing WellSky to expand its product portfolio and capabilities to support information management and reporting needs of agencies with large service areas, whether urban or rural, serving the homeless, those with behavioral health issues, general health issues, and substance abuse issues.

WellSky is confident in its abilities to provide a high-quality HMIS solution that meets HUD and federal partner requirements and much more. WellSky has more than 20 years of experience designing, implementing, and supporting data systems for social service providers and community networks.

3. A detailed description of any litigation regarding the provision of Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP that has been brought by or against the Proposer, including, without limitation, the nature and result of such litigation, if applicable.

WellSky has had no litigation with any HMIS clients. However, with over 15,000 client sites and nearly 2,000 employees, WellSky has been party to immaterial or irrelevant disputes from time to time.

4. A detailed description of any fraud convictions related to the provision of Homeless Management Information Systems with capabilities pursuant to the terms and conditions of public contracts, if applicable.

WellSky has had no fraud convictions of any kind, including any related to the provision of Homeless Management Information Systems with capabilities pursuant to the terms and conditions of public contracts.

5. A detailed description of any current or prior debarments, suspensions or other ineligibility to participate in public contracts, if applicable.

WellSky has had no current or prior debarments, suspensions, or other ineligibility to participate in public contracts.

6. A detailed description of any violations of local, state and/or federal regulatory requirements, if applicable.

WellSky has had no violations of local, state and/or federal regulatory requirements.



7. A detailed description of any controlling or financial interest the Proposer has in any other organizations, or whether the Proposer's organization is owned or controlled by any other organizations. If the Proposer does not hold a controlling or financial interest in any other organizations, that must be stated.

WellSky is a privately held corporation supported by significant investments from two of the world's largest private equity firms, TPG Capital and Leonard Green Partners. WellSky has grown organically and through acquisition, and as such has several wholly owned subsidiaries, though most new business is pursued under the parent, WellSky Corporation.

## B. Overview of Qualifications and Experience

The professional profile must contain an overview of the Proposer's qualifications and experience regarding the provision of Homeless Information Systems with capabilities equivalent to those set forth in this RFP, which includes, at a minimum, all of the following information:

1. A detailed description of the Proposer's overall experience regarding the provision of Homeless Information Systems with capabilities equivalent to those set forth in this RFP, which includes specific examples of the outcomes and successes of such projects.

WellSky developed the nation's first commercially available HMIS in 2001. Since then, WellSky has demonstrated a proven track record of implementing and supporting systems of various sizes, from small CoCs with 30 users to large statewide systems with over 2,000 users. WellSky has 17 statewide implementations and statewide coverage in an additional 3 states.

Some examples of CoC successes include:

- Ending Community Homelessness Coalition (TX-503). ECHO has partnered with WellSky for many years, expanding their use of Community Services with custom reports, additional modules and the addition of new projects. The Eligibility module allows case managers to quickly refer clients to projects based on based on requirements. ECHO was one of ten communities selected out of 130 applicants in 2016 for the HUD Youth Homelessness Demonstration Program where WellSky was able to supplement their expertise and help make the YHDP a success. ECHO also utilizes WellSky Professional Services for LSA guidance, data quality, and data collection analysis, which can be a time-consuming process, so that the CoC resources are better spent on efforts that directly benefit people experiencing homelessness.
- Center for Housing Solutions – Tulsa (OK-501). The Center for Housing Solutions Tulsa is a long-time WellSky client using Community Services for all 8 Oklahoma CoCs. They import data from several outside sources, including HUD-VASH, using *WellSky Community Services* custom import capabilities.

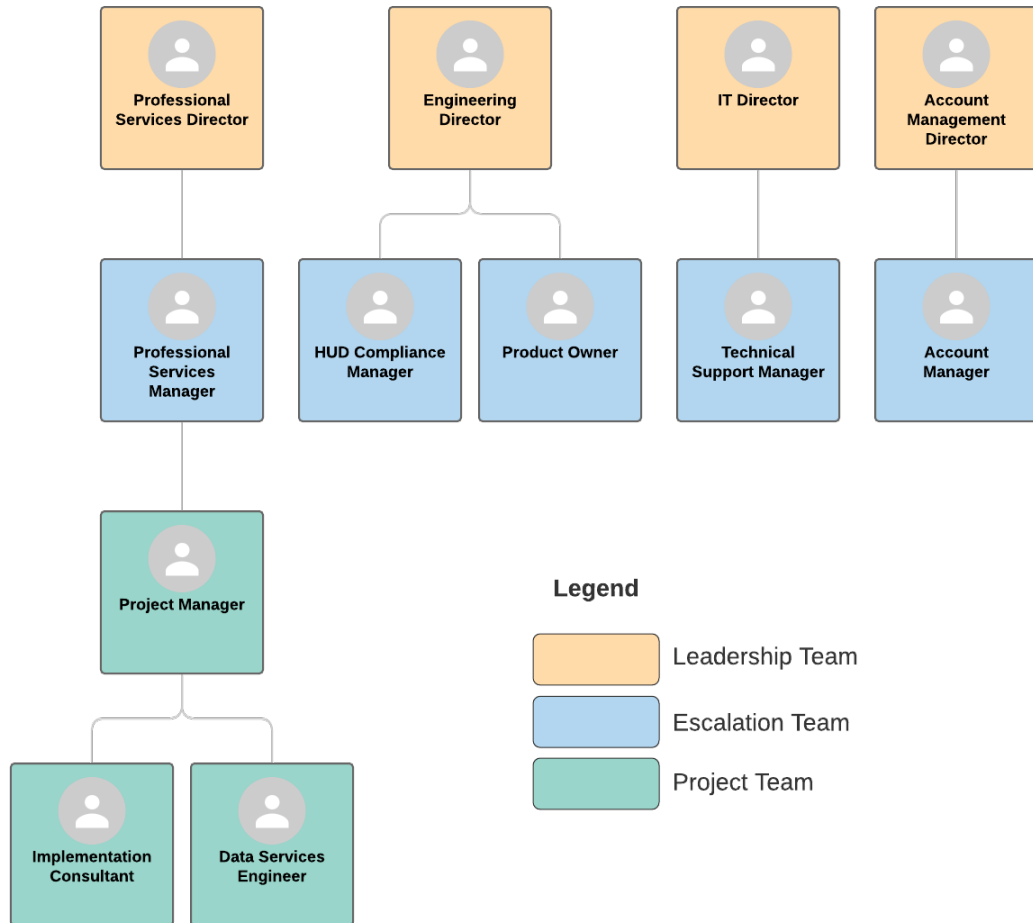




*WellSky Community Services* supports HUD and federal partner HMIS reporting requirements. It is a respected, time-tested case management system designed for CoCs and human services organizations serving people experiencing homelessness. The application has evolved in response to the increasing information management and reporting requirements of the federal and state homelessness initiatives. WellSky is committed to keeping *WellSky Community Services* fully attuned to the needs of homelessness services organizations at the state and local levels.

2. Identification of the Proposer's management team, key personnel and subcontractors that will be responsible for providing a Homeless Management Information System with capabilities equivalent to those set forth in this RFP, including, without limitation, any and all applicable organizational charts and/or diagrams.

Key personnel for DHHS's HMIS implementation include WellSky's Professional Services manager Kouri Linder, Technical Support manager Kristy Hudson, Solutions Owner Steven Millard and Compliance Manager Candice Wiseman-Hacker. These team members have comprehensive knowledge in the HMIS field. This knowledge combined with experience in *WellSky Community Services* uniquely positions these teams to help *WellSky Community Services* clients maximize their use of the application. WellSky does not rely on subcontractors to perform these supportive services.



WellSky Professional Services offers an array of data services. This can include assisting with data imports and exports, data integrations with third-party applications, and clean-up of historical data. Utilizing API (Application Programming Interfaces) functionality, the Professional Services team can assist in granting third-party applications real-time access to client and provider data stored within the *WellSky Community Services* database.

From helping clients achieve operational stability to reaching their data integration goals and everything in between, WellSky Professional Services has extensive experience with helping WellSky clients optimize their use of *WellSky Community Services*.

3. A detailed description of the qualifications and experience of key personnel and subcontractors that will be responsible for providing a Homeless Management Information System with capabilities equivalent to those set forth in this RFP, including, without limitation, job titles, responsibilities, special training, licenses, certifications and experience with other governmental agencies.



WellSky's Professional Services team is available to assist in enhancing DHHS' use of *WellSky Community Services*. Some functions available through Professional Services include operational assessments, data services and APIs.

WellSky Professional Services can perform operational assessments of a client's current use of *WellSky Community Services*. Team members review the current system configuration and usage which is used to inform suggestions on how to improve the current implementation based on best practices and system design. This is particularly useful for implementations of *WellSky Community Services* that were initially configured many years ago.

Qualifications for key team members include:

**Solutions Owner:**

Steve Millard – Steve has over 17 years of experience related to Homeless Management Information Systems (HMIS), including over 12 years as a WellSky teammate. Steve has served in various roles, including Training, Consulting, and Report Development. In his current role as Solutions Analyst for *WellSky Community Services*, Steve draws upon his many years of experience within the industry and with WellSky's HMIS solution to help define the solution road map and to serve as a direct liaison with the Engineering team. Steve has extensive experience working with and involving our client community in focus groups and client interview processes to continuously improve the *WellSky Community Services* solution.

**Manager, Technical Support:**

Kristy Hudson – After 13 years as a Senior Client Care Representative with WellSky, Kristy now leads the Technical Support Team for *WellSky Community Services*. During her tenure at WellSky, she has amassed a wealth of knowledge and expertise with the HMIS solution and industry.

**Solution Architect/Manager, Industry Compliance:**

Candice Wiseman-Hacker has over a decade of experience with *WellSky's Community Services* HMIS solution, working to develop and integrate HUD/Federal Partner Standards with *WellSky Community Services*. Candice focuses on ensuring industry compliance; coordinating with solutions management; representing WellSky at HUD Software Solutions Provider meetings; attending HUD and Federal Partner National Conferences preparing federal, state, and local report specifications; and answering technical assistance questions.

4. [A detailed description of how the Proposer's qualifications will help meet the County's objective of providing a high-quality Homeless Management Information System.](#)

WellSky has experienced, long-serving teammates who will make sure that DHHS is supported by the best-in-class team, particularly when it comes to the implementation of



a HUD and other federal partner compliant data systems. WellSky's HUD compliance manager, Candice Wiseman-Hacker, has over a decade of experience working to develop and integrate HUD standards within *WellSky Community Services*. WellSky's Client Services and Technical Support team have industry knowledge gained from working at community service providers and are also knowledgeable with HUD regulations and guidelines. WellSky compliance team members work closely with WellSky's development team members to align with HMIS regulations. A key goal is that WellSky solutions are flexible and built with full anticipation of future changes to HUD and other partner guidelines. This focus on our teammates' experience, knowledge, and skill is an important part of *WellSky Community Services*' success.

## 5.0 Project Description

Proposals shall include a clear and concise project description, which identifies the Proposer's ability to comply with the requirements, specifications and standards set forth in this RFP.

### A. Description of Services

The project description must contain an overview of the Homeless Management Information System that will be provided pursuant to the terms and conditions of the final Professional Services Agreement resulting from this RFP process, which includes, at a minimum, all of the following information:

1. A detailed description of the Homeless Management Information System that will be provided pursuant to the terms and conditions of the final Professional Services Agreement resulting from this RFP.

*WellSky Community Services* is a highly configurable HMIS solution for Continuums of Care. It includes easy-to-use coordinated entry tools to prioritize people for services based on data collected at intake and assessment to make real-time referrals for housing and shelter. End users can easily document services provided, housing secured, and create case plans with goals. *WellSky Community Services* has on-demand HUD and federal partner reporting and HMIS CSV exporting built to required HUD, HHS, and SSVF specifications. The solution supports team collaboration, management of services and activities, and includes dozens of standard operational reports, as well as sophisticated ad hoc reporting and data visualization capabilities.

*WellSky Community Services* is available across major web browsers and utilized by users via tablets, phones, and other mobile devices, directly in the field. WellSky also offers a first of its kind mobile application that can allow people experiencing homelessness, those at risk of homelessness, or those recently housed with the ability to access their own HMIS data, view nearby resources and shelter capacity in real-time.



Below is a screen capture of the Home Page Dashboard, which is seen when a user first logs into the system. This view can be configured by user and what permissions are set for that user.

The screenshot shows the WellSky Home Page Dashboard. The top navigation bar includes the WellSky logo, 'Community Services', and a 'Support Role' dropdown. Below this, there's a 'ServicePoint Training Site' header with the WellSky logo and the date 'October 13, 2023'. The dashboard is divided into several sections:

- System News (3):** A table with columns 'Date' and 'Headline'. It lists three items:
 

Date	Headline
10/11/2023	System-wide Reporting Update
10/10/2023	Training Calendar
10/01/2023	Welcome!
- Agency News (1):** A section for agency news, currently empty.
- Activity Referrals (0):** A section for activity referrals, currently empty.
- Counts Report:** A summary of client and referral counts:
 

My Clients With Recent Exits:	Incoming Referrals:
0	28
My Clients:	Outgoing Referrals:
3	28
- Follow Up List (6):** A table with columns 'Client ID', 'Type', 'Date', and 'Time Remaining'. It lists six items:
 

Client ID	Type	Date	Time Remaining
1212	Goal	12/25/2022	Past
999	Goal	04/27/2023	Past
1212	Goal	04/27/2023	Past
999	Action Step	04/28/2023	Past
1212	Action Step	04/28/2023	Past
1212	Goal	10/01/2023	Past

Referrals can be seen on the user dashboard. An email can be generated and sent to the provider when a referral is made, notifying them that they have received a referral and need to log into the solution to access that referral. Reports can be generated to view information about referrals.



This is a view of the client profile. From this view, available tabs of the client record are visible.

Community Services

David Tweedie  
Support Role

Clients > Client Profile

**Client - (1212) Kenobi, Ben**

(1212) Kenobi, Ben

Release of Information: Ends 02/06/2024

-Switch to Another Household Member- Submit

**Client Information**

Summary **Client Profile** Entry / Exit Case Managers Case Plans Assessments

Service Transactions

**Client Record** Issue ID Card

Name	Kenobi, Ben
Name Data Quality	Full Name Reported
Alias	Obi-Wan
Social Security	111-22-3333
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	Yes (HUD)
Client ID	1212 🔍
Age	46

Change
Clear

**Client Demographics**

Date of Birth	05/25/1977
Date of Birth Type	Full DOB Reported (HUD)
To select multiple values hold down the "ctrl" or "cmd" key and click on each value	
Race and Ethnicity	Client prefers not to answer
Additional Race and Ethnicity Detail	
<b>Gender</b>	Man (Boy, if child)
If Different Identity, Please Specify	

Page 14 of 41



WellSky Community Services includes the ability to upload file attachments to client files from a variety of screens (e.g., Release of Information, Assessments, Case Plans, etc.). Most common file types (e.g., .docx, .xlsx, .pages, .pdf, and others) can be uploaded using a traditional “browse” interface by simply clicking on the attachment icon. Files are stored in a central location in the Client record and can be accessed from the various areas where uploads can occur, e.g., on the Client Intake screen, on the Release of Information screen, on the Case Plans screen, etc. Each document is accessible from those specific screens as well as a central “File Attachments” section of the Client Profile screen. WellSky’s robust data sharing model enables complete control over who can access these documents – supporting an entirely “open” system, in which any user has access, an entirely “closed” system, in which only users associated with the projects that added the documents have access, and any model between those two extremes.

Provider	HCPCS Code	Start Date	End Date	Pre-Authorization Code	# of Approved Units	
<span style="background-color: #00728f; color: white; padding: 2px 10px; border-radius: 5px;">Add Code</span>						
<b>Call Records</b>						
Start Date	Call ID	Call TI	Call Notes			
<b>Client Notes</b>						
<span style="background-color: #00728f; color: white; padding: 2px 10px; border-radius: 5px;">Add New Client Note</span> <span style="background-color: #00728f; color: white; padding: 2px 10px; border-radius: 5px; margin-left: 10px;">Print</span>						
<b>File Attachments</b>						
	Date Added	Name	Description	Type	Provider	Added From
✎	05/18/2023	FA Example.docx		docx	We Can House and Support Anyone - Emergency Shelter (ES)	Action Step
✎	05/18/2023	Test Attachment.txt	Just an example	txt	We Can House and Support Anyone - Permanent Supportive Housing (PSH)	Client Profile
✎	05/18/2023	FA Example.docx		docx	We Can House and Support Anyone - Emergency Shelter (ES)	Client Profile
<span style="background-color: #00728f; color: white; padding: 2px 10px; border-radius: 5px;">Add New File Attachment</span>						
<span style="font-weight: bold;">Showing 1-3 of 3</span>						

**Attachment Info** ✕

Name	Test Attachment.txt
Type	text/plain
Size	0 B
Added By	David Tweedie (1277)
Date Added	05/18/2023 05:34 PM
Added From	Client Profile
Description	Just an example

Download
View
Save & Exit
Close



The image below shows the Summary Tab of the client record. This tab and the order of tabs on the client record are configurable to match DHHS' workflow.

Community Services

David Tweedie  
Support Role

Client Profile

Client Profile (1212)

Client Profile (999)

Client Profile (1234)

Client Profile (111)

Client Profile (2147)

Client Profile (2098)

Client Profile (2157)

Client Profile (2099)

Edit Favorites Less

---

Home

Clients

Calls

Resources

Fund Manager

Shelters

Activities

Scans

Reports

Admin

Support

Logout

Clients > Client Profile

Type here for Global Search

**Client - (1212) Kenobi, Ben** 🔒

(1212) Kenobi, Ben

Release of Information: Ends 02/06/2024

-Switch to Another Household Member- Submit

**Client Information**

Summary	Client Profile	Entry / Exit	Case Managers	Case Plans	Assessments
Added to the system 11/20/2015 01:39 PM					
Name	Kenobi, Ben	Social Security	111-22-3333		
Date of Birth	05/25/1977 (Age 46)	U.S. Military Veteran?	Yes (HUD)		
Race and Ethnicity	Client prefers not to answer				
Gender					

**Service Transactions**

**Entry/Exits**

Program	Type	Project Start Date	Exit Date
We Can House and Support Anyone - Street Outreach (SO)	HUD	09/11/2023	
WellSky	HUD	09/11/2023	
We Can House and Support Anyone - Street Outreach (SO)	HUD	09/11/2023	
WellSky	HUD	09/11/2023	

**Services**

Start Date	End Date	Provider
08/01/2023	08/01/2023	WellSky
07/26/2023	07/26/2023	WellSky
07/26/2023	07/26/2023	WellSky
07/25/2023	07/25/2023	WellSky
05/18/2023	05/18/2023	We Can House and Support Anyone - Permanent Supportive Housing (PSH)
05/18/2023	05/18/2023	We Can House and Support Anyone - Emergency Shelter (ES)

Add Service Add Multiple Showing 1-6 of 18 Services
First Previous Next Last

Page 16 of 41





Project enrollments allow users to determine if the enrollment is specific to the client, certain members of the household or to the entire household. Users can view past project enrollments and information corresponding to that enrollment.

Clients > Client Profile

Type here for Global Search

🖨️ 🔔 ⭐ ?

**Client - (1212) Kenobi, Ben**

(1212) Kenobi, Ben  
Release of Information: Ends 02/06/2024

**Client Information**

Summary | Client Profile | **Entry / Exit**

*Reminder: Household members must*

Program	HUD	Start	End	[Icons]
We Can House and Support Anyone - Permanent Supportive Housing (PSH) (736)				
WellSky (0)				
We Can House and Support Anyone - Emergency Shelter (ES) (734)				
WellSky (0)				
We Can House and Support Anyone - Street Outreach (SO) (735)				
Example Welcoming Center (743)				
We Can House and Support Anyone - Emergency Shelter (ES) (734)	HUD	04/13/2023	04/29/2023	[Icons]
WellSky (0)	HUD	03/30/2023	03/31/2023	[Icons]
Example Hotel A (742)	Basic	04/28/2022	04/29/2023	[Icons]
We Can House and Support Anyone - Street Outreach (SO) (735)	HUD	05/04/2021	05/04/2021	[Icons]

Add Entry / Exit      Showing 1-10 of 15      First Previous Next Last

**Include Additional Household Members** Submit

**Household Members**

*To include additional Household Members, click the box beside each name. Only Members from ONE Household may be selected at a time.*

- (595) Non-custodial Caregiver(s)
- (1212) Kenobi, Ben
- (999) Solo, Leja Organa
- (596) Grandparent(s) and Child
  - (1234) or "Chewie" to his friends, Chewbacca,
  - (1212) Kenobi, Ben
- (622) Grandparent(s) and Child
  - (1212) Kenobi, Ben
  - (1234) or "Chewie" to his friends, Chewbacca,
  - (999) Solo, Leja Organa

Continue Cancel



WellSky Community Services includes a feature called “Case Plans” that allows end users to capture detailed case management information using a series of customizable dropdown menus to define broad goal categories and specific goal types (e.g., Employment -> Obtain a Job; Employment -> Increase Wages, etc.); Case Notes; Action Steps, which can be either for the case manager or the client to complete; and documentation of Services provided to assist the client in achieving the stated Goal. Each Goal and Action Step can be assigned Target Dates, Status and Outcome information, and Follow Up reminders that will appear on the assigned user’s Home Page Dashboard. Information from the Case Plans section is available in a standard report and is reportable in the proposed HMIS solution’s ad hoc reporting tools.

Summary
Client Profile
Entry / Exit
Case Managers
Case Plans
Assessments

**Goals**

Date Set	Provider	Classification	Type	Status	Outcome	Notes	Latest Note Date
05/18/2023	We Can House and Support Anyone - Emergency Shelter (ES)	Education	Get GED	In Progress			05/18/2023
04/04/2023	WellSky	Health	Obtain assistive devices, service animals, or technology	In Progress			
04/01/2023	We Can House and Support Anyone - Emergency Shelter (ES)						
03/14/2023	WellSky						

[Add Goal](#)

**Case Plans File Attachments**

Date Added ▾

[Add New File Attachment](#)

[Print Case Plan](#)

**Goal**

**Goal - (1212) Kenobi, Ben**

**Household Members**

To update Household members for this Goal, click the box beside each name.

(595) Non-custodial Caregiver(s)

(1212) Kenobi, Ben

(999) Solo, Leia Organa

[Include Additional Household Members](#)

<b>Provider *</b>	We Can House and Support Anyone - Emergency Shelter (ES) (734) <a href="#">Search</a> <a href="#">My Provider</a> <a href="#">Clear</a>
<b>Case Manager</b>	Housing Support Specialist Extraordinaire ▾
<b>Date Goal was Set *</b>	04 / 01 / 2023
<b>Classification *</b>	Housing ▾
<b>Type *</b>	Obtain Supportive Housing ▾
<b>Goal Description</b>	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>
<b>Target Date</b>	04 / 30 / 2023

Page 18 of 41



Service Transactions are used to assign services and make referrals for the individual client, their entire household, or specific individuals of their household. System Administrators can create a “quick list” of service codes used frequently to assist users in accessing service codes quickly and easily.

The screenshot displays the 'Edit Service' interface in the WellSky system. At the top, there are tabs for 'Client Information' and 'Service Transactions'. The main section is titled 'Edit Service' and contains a 'Household Members' section. A message states: 'To update Household members for this Service, click the box beside each name.' Below this, there are two checked entries: '(601) Other' with sub-entries '(1212) Kenobi, Ben (Primary Client)' and '(1234) or "Chewie" to his friends, Chewbacca'. A button labeled 'Include Additional Household Members' is located to the right. Below the household members, there is a form with fields for 'Service Provider \*' (WellSky (0)), 'Creating User' (David Tweedle), 'Start Date \*' (07 / 25 / 2023), 'End Date' (07 / 25 / 2023), 'Service Type \*' (Rental Deposit Assistance (BH-3800.7250)), 'Provider Specific Service' (-Select-), 'Service Location' (-Select-), 'Service Staff' (-Select-), and 'Service Notes'. A dropdown menu is open for 'Service Type \*', showing a list of options including 'Brew Pubs (PL-6000.1500-150)', 'Bus Fare (BT-8300.1000)', 'Case/Care Management (PH-1000)', 'Emergency Shelter (BH-1800)', 'Housing/Shelter (BH)', 'Local Transportation (BT-4500)', 'Rapid Re-Housing Programs (BH-0500.7000)', 'Rental Deposit Assistance (BH-3800.7250)', 'Rent Payment Assistance (BH-3800.7000)', 'Section 8 Housing Choice Vouchers (BH-7000.4600-700)', and 'Rental Deposit Assistance (BH-3800.7250)'. An 'Edit Service Provider' dialog box is also open, showing a 'Changes to' section and fields for 'Service Provider \*' and 'Service Type \*'. Buttons for 'Submit' and 'Cancel' are visible at the bottom of the dialog.



Once services are selected, providers who offer at least one of the selected services are displayed. Users can see the number of selected services that the provider offers.

**Service Code Quicklist**

- Bus Fare (BT-8300.1000)
- Case/Care Management (PH-1000)
- Emergency Shelter (BH-1800)
- Housing/Shelter (BH)
- Local Transportation (BT-4500)
- Residential Housing Programs (PH-0500-7000)

Add Terms
Service Code Look-Up
Add Terms & Go To Search Results

**Referral Provider Quicklist**

Provider

Bob's Shelter Services (18) ▾

Add Provider

Bed Availability

▶ Search for Providers

**Selected Providers**

	Provider ▲	Type	Phone	Location	Last Updated
-	Bob's Shelter Services	Level 1	602-231-4567	Phoenix, AZ 85020	06/18/2021
-	WellSky	Level 1	318-213-8780	Shreveport, LA 71101	10/13/2023

Showing 1-2 of 2



Once a provider or a group of providers is chosen, the user can make a referral to those providers from this screen. A place is provided to determine if the client's need is met, partially met, or not met. *WellSky Community Services* has a corresponding report so that unmet needs can be identified.

**Referral Data**

Needs Referral Date *	10 / 13 / 2023    3 : 00 : 22 PM
Referral Ranking	High
VI-SPDAT Score	Please Select a VI-SPDAT Score <input type="button" value="Search"/> <input type="button" value="Clear"/>
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score <input type="button" value="Search"/> <input type="button" value="Clear"/>
VI-FSPDAT Score	Please Select a VI-FSPDAT Score <input type="button" value="Search"/> <input type="button" value="Clear"/>
Projected Follow Up Date	10 / 13 / 2023
Follow Up User	WellSky (0) <input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/> Test Test

Check to notify Community Services Providers by Email.

**Referrals** [Send Summary](#)

Referred-To Provider	Case/Care Management	Emergency Shelter	Housing/Shelter	Referred Clients
Bob's Shelter Services (18)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1212) Kenobi, Ben

**Need Data**

Date of Need \* 10 / 13 / 2023 3 : 00 : 22 PM

**Selected Needs**

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
Case/Care Management (PH-1000)		Documents Pending <input type="button" value="v"/> Service Pending <input type="button" value="v"/> -Select- <input type="button" value="v"/>	



WellSky Community Services has an optional Eligibility Module. This module looks at provider eligibility criteria set up by system administrators and matches clients to those providers based on assessments and information from the client record.

**Eligibility Service Code Quick List**

Eligibility Service Code Quick List

- Case/Care Management (PH-1000)
- Rent Payment Assistance (BH-3800.7000)
- Emergency Shelter (BH-1800)
- Transitional Housing/Shelter (BH-8600)

^  
v

Add Selected Service Terms
Add All Quick List Terms
Add All Eligibility Terms
Service Code Look Up

---

**Eligibility Service Search Results**

Service Term	Service Code	Eligible	Potential	Ineligible
<input type="checkbox"/> <span style="font-size: 0.8em;">+</span> Rent Payment Assistance	BH-3800.7000	3/11 <span style="font-size: 0.8em;">🔍</span>	4/11 <span style="font-size: 0.8em;">🔍</span>	4/11 <span style="font-size: 0.8em;">🔍</span>

Check ALL Terms
Uncheck ALL Terms
Showing 1-1 of 1

The system shows the user the number of providers the client is eligible to receive services from, the providers that they are not eligible to receive services from and those where they may be eligible for services. The user can view and answer additional questions to determine eligibility for those potential providers. By clicking beside ineligible providers, the user can see why the client did not qualify for services from that provider.



System Reports allow users to set parameters for canned reports. This is an example of a Clients Served Report. Users can drill down further into report results by clicking on the blue numerals in the report.

**Client Served Report**

**Report Options**

Reporting Group	<input type="button" value="Choose Reporting Group"/> <input type="button" value="Clear"/>
Provider	WellSky (0) <input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
Services	<input type="radio"/> This provider AND its subordinates <input checked="" type="radio"/> This provider ONLY <input checked="" type="checkbox"/> Services Provided (other than shelter or referred services) <input checked="" type="checkbox"/> Shelter Stays <input type="checkbox"/> Referrals Served by the Selected Provider(s)
Grouping	<input checked="" type="radio"/> Clients Receiving Services as a Family <input type="radio"/> Clients in a Household
Funding Source	-Select- <input type="button" value="Lookup"/>
Service Code	-Select- <input type="button" value="Lookup"/>
Served Date Range	10 / 01 / 2022 <input type="button" value="Calendar"/> <input type="button" value="Refresh"/> to 10 / 01 / 2023 <input type="button" value="Calendar"/> <input type="button" value="Refresh"/>
Served Before Date Range (Old client count)	___ / ___ / ___ <input type="button" value="Calendar"/> <input type="button" value="Refresh"/> to ___ / ___ / ___ <input type="button" value="Calendar"/> <input type="button" value="Refresh"/>
Treat Open-Ended Services/Referrals as 1-day Services	<input checked="" type="radio"/> Yes <input type="radio"/> No
Legal Adult Age	18

**Report Details**

CLIENTS SERVED	Old	New	Total
<b>A. Adults</b>	0	84	84
Male	0	39	39
Female	0	14	14
No Single Gender	0	5	5
Questioning	0	1	1
Transgender	0	2	2
Client Doesn't Know/Client Refused	0	1	1
Data Not Collected	0	22	22



*WellSky Community Services* includes ad hoc reporting tools offering DHHS several methods to use when generating reports. Report Writer, as seen above, pulls simple count number reports and can be downloaded in a .CSV format.

WellSky | Community Services  
ServicePoint Training Site  
WellSky  
October 13, 2023

Reports > ReportWriter

ReportWriter

30 Day Interim Report

Tables Fields Filters Counting Preview Options

Report Preview

Client ID	First Name	Last Name	Entry Exit ID	Review Date	Point in Time Type	User Creating
1814	Jean	Picard	3448	09/20/2023	Interim Review	Liddy Hintz
2212	Headless	Horseman	3473	10/10/2023	Interim Review	Will Bailey
2211	Katrina	Van Tassel	3474	10/10/2023	Interim Review	Will Bailey
2210	Ichabod	Crane	3476	10/10/2023	Interim Review	Will Bailey
2213	Rhy	Maresh	3478	10/05/2023	Interim Review	Will Bailey
2214	Kell	Maresh	3479	10/05/2023	Interim Review	Will Bailey
2215	Walter	Kugrich	3481	10/06/2023	Interim Review	Will Bailey
2217	Romeo	Montague	3482	10/03/2023	Interim Review	Will Bailey
2218	Juliet	Capulet	3483	10/03/2023	Interim Review	Will Bailey
2219	Kay	Pierski	3484	10/03/2023	Interim Review	Will Bailey
2220	Laurie	Zelasko	3485	10/03/2023	Interim Review	Will Bailey
2236	Dina	Doe	3504	09/27/2023	Interim Review	Diandria Kraus
2241	Desiree	Happy	3506	09/25/2023	Interim Review	Diandria Kraus

Download Full Report

Showing 556-568 of 568

First Previous Next Last

For more advanced reporting needs, WellSky offers fully integrated access to a third-party reporting tool, SAP BusinessObjects. It provides powerful, flexible, and advanced reporting solutions options that adheres to the data sharing model rules within the *WellSky Community Services* application to ensure all users have access to custom report functions while also ensuring only the data a particular user is allowed to view is accessible via reports.



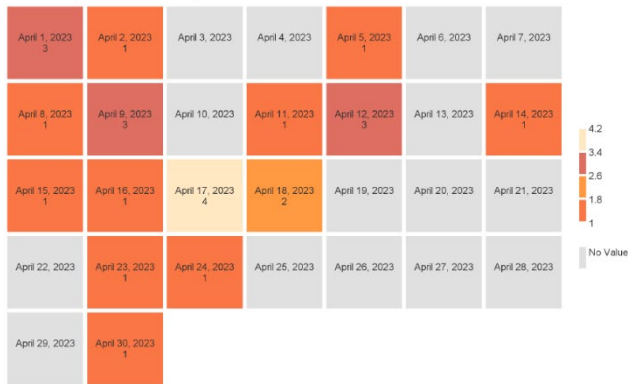


All data captured in *WellSky Community Services* is fully reportable, meaning that clients can design custom reports for additional analysis. Clients have the option to modify a local copy of the WellSky standard reports to minimize the initial design and development effort or can build custom report formats, queries, data visualization, analytics, etc. Each of the custom modified or custom designed reports can be saved for future use. Reports can also be scheduled to run and delivered to a user's inbox.

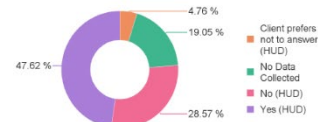
Monthly Dashboard Report  
Tab E - Calendar Heat Map  
Report Range: 4/1/2023 to 4/30/2023

April 2023

Count of Program Entries Per Day



Veteran Status Counts



Average Length of Time



Features and functions of *WellSky Community Services* include:

- Dashboard
- Follow Up list
- System News and Announcements
- Alerts
- Counts Reports
- Shadow functionality
- Ability to “backdate” data entry to the day the data was collected
- Global search
- Fuzzy search features to display near matches
- Configurable client record
- Ability to create assessments and forms
- File attachments and images
- ROI functionality
- Household groupings
- Case Plans and case notes
- Service transactions
- Referral documentation
- Eligibility search and matching
- Client merge



- Provider management
- Medicaid billing
- CSV/XML imports and exports
- Custom assessments and measures
- Canned system reports
- Ad hoc reporting
- Role and provider level-based security

*WellSky Community Services* provides CoCs with flexibility by offering customization in a number of areas. Within the client record, system administrators can configure tabs on the client record and the client record summary to match their agency's workflows. These assessments and forms can be created to capture information needed to meet a variety of reporting requirements and to make informed referrals to organizations for services and housing options. Prioritization tools can be utilized in assessments to allow people with the greatest need to receive services quickly. Historical data from the client's previous assessment responses can be viewed as the current assessment is completed so that any changes can be noted.

The Administrator Dashboard provides system administrators with the ability to configure and customize *WellSky Community Services* to best meet DHHS and the CoC's needs. System administrators can establish data sharing rules to govern which participating organizations can access any given client's information and specifically what information is accessible to the organizations that did not enter the data. It is from this dashboard that user information can be managed and maintained, including role-based permissions, project affiliations, user licenses, and when their access to the system will expire. Provider accounts can also be managed to give provider agencies access to various aspects of the system, such as specific modules and assessments. System Administrators can use the Admin Dashboard to create assessments and data elements, and worksheets specific to providers. If a user has difficulty using the system, a system administrator can shadow that user to help troubleshoot the issue.

## **Reporting**

*WellSky Community Services* has robust reporting capabilities, ranging from audit reports and standard HUD and federal partner reports such as the CoC APR, ESG-CAPER, PATH and LSA export, to ad-hoc reporting. Ad hoc reporting offers organizations several methods to use when generating reports. Report Writer pulls simple count reports and can be downloaded in a CSV format. For more advanced reporting needs, WellSky offers fully integrated access to SAP's BusinessObjects. BusinessObjects follows the same data sharing model rules the application follows that are designed to allow users to have access to custom report functions while also maintaining the visibility settings for that user. Data captured in *WellSky Community*



*Services* is fully reportable, so clients can design custom reports for additional analysis. Many clients choose to modify a local copy of the WellSky standard reports to minimize the initial design and development effort. Users can save and immediately share the report with others within their account.

For particularly complex reports, WellSky Professional Services is available to assist. WellSky Implementation Consultants coordinate with system and/or report administrators to gather requirements and intended functionality of the report. The Implementation Consultant will then iteratively build the report, gathering feedback from system/report administrators, until the report meets requirements. Users can generate customized printable blank forms within BusinessObjects that can be used as a template for capturing data. These BusinessObjects documents can be updated to display the data as it is recorded from *WellSky Community Services*.

Before a new client is added into the solution, there are several mechanisms in place to prevent duplication, such as requiring the user to search the database for the client before adding them and providing “smart” search logic for client records that may closely match the original search parameters. If record duplication does occur, the Administrator Dashboard has a merge feature that system administrators can use to de-duplicate data. The system will identify potential duplicate clients for the administrators based on similar entries. If the administrator knows of two records that should be merged, the client records can be selected by the administrators regardless of whether the system has identified them as potential duplicates.

System Administrators can create new users and make changes to current users through the User Admin module. This module also gives system administrators granular privacy and security controls to set user access as well as agency and/or program affiliations for that user. The system will generate temporary passwords that administrators can provide to the users. Users will be prompted to change their temporary passwords upon first login and can reset their passwords at any time using the Forgot Password feature. Password complexity requirements are always enforced. In addition to managing security settings for users, system administrators can establish rules governing which participating organizations can access any given client’s information and specifically what information is accessible to the organizations that did not enter the data.

As part of *WellSky Community Services’* multi-tiered approach to securing access to the system and securing data stored in the system, any activity in the system is logged into an audit trail. An audit report can be generated using various parameters to view activity within the system.



*WellSky Community Services'* Home Page Dashboard includes two News sections: one that displays information accessible to users systemwide; the other that displays information accessible only to users associated with a specific agency/program. An alert icon is displayed in a header section of every screen to draw users' attention to any unread messages. These news sections are maintained by system administrators and can even include hyperlinks to webpages, such as DHHS' homepage. Additionally, the Home Page Dashboard has a user-specific Follow Up section that displays a list of clients with whom the user is supposed to follow up, hyperlinks to both the client profile, as well as the specific section of the client record that has been flagged for follow up, and a Due Date for when the follow up is set to be completed. Reminders can also be sent to users to complete follow-up tasks. These reminders appear on the user's Home Page Dashboard.

DHHS system administrators can create assessments and forms specific to Humboldt County with custom fields, including local prioritization factors.

### **User Access**

*WellSky Community Services* includes user management features that allow DHHS system administrators to assign each user an access level and role that determines what features and functionality the user will be able to access. Additional settings offer further refinement of specific permissions a given user might need. At any time, system administrators can make a user profile inactive to prevent that user from logging in. Additionally, a user expiration date can be set to inactivate a user profile on a specific date.

*WellSky Community Services* includes the ability for DHHS system administrators to configure data sharing rules based on project groups that are applied to field level data as it is saved. The solution supports the premise that individuals receiving services and support have the final control over granting consent to share data. Accordingly, users with appropriate permissions can alter the data sharing rules for an individual client as needed, e.g., to allow for sharing data in some fields but not others.

### **Security**

*WellSky Community Services* uses 256-bit+ encryption at rest and in transit using SSL certificates; includes an automatic logoff feature for user inactivity; prevents concurrent login; requires both username and password, where passwords must be sufficiently complex; and user actions are logged in an audit schema automatically. Multi-factor authentication is planned for the calendar year 2024.

As part of WellSky's ongoing efforts to maintain the highest standard of information security for our clients, WellSky has contracted with independent, third-party providers



to routinely assess the compliance, security, and risk of our information systems. This is evident through routine vulnerability and penetration testing and the successful completion of the SSAE 16 / Service Organization Controls (SOC) 1 Type II and SOC 2 type II, which included detailed testing of WellSky's controls related to network connectivity, firewall configuration, secure software development life cycle, computer operations, database access, data transmissions, backup, disaster recovery, fire suppression, physical security, and more. This commitment to excellence further demonstrates that WellSky's policies, procedures, and infrastructure for data security, confidentiality, processing integrity, availability, and privacy meet or exceeded the most stringent criteria.

2. A detailed description of any additional system specifications, capabilities and/or services that the Proposer believes may add value to the Homeless Management Information System that will be provided pursuant to the terms and conditions of the final Professional Services Agreement resulting from this RFP process.

*WellSky Community Services* has several optional modules or add-ons that may benefit DHHS.

The Eligibility Module lets providers make proper referrals to CoC member organizations. This module automatically matches a client's assessment responses to member organizations' eligibility requirements. Users can view those organizations whose eligibility requirements are met by the client and make a referral in a few simple clicks. Users can also view the reasons a client was deemed ineligible for services from specific organizations and answer additional questions if there was not enough information to determine their eligibility. Some WellSky clients use the Eligibility Module in their Coordinated Entry workflow to make referrals to a centralized Coordinated Entry Provider. Referrals can be made quickly and easily from the Eligibility Module, streamlining the referral process while standardizing client referrals.

Fund Manager is a module that can enhance DHHS' use of *WellSky Community Services*. This module provides seamless grant management in real-time while integrating with client records. Funding cycles can be created for each fund to establish start and end dates, fund amounts and providers who have access to those funds. Fund requests can be made from within the service detail record, creating an efficient process for staff. Once fund requests are created, they are sent to approval queues, providing oversight to the distribution of funds prior to funds being disbursed. Vouchers can even be generated and printed from the application for clients to take to a participating vendor, such as a local grocery store. Fund Manager is a powerful and valuable tool, equipping DHHS with a full understanding of how funds are spent, and which clients have been assisted using those funds.

Activities is a module that allows users to enroll clients into virtually any kind of activity, e.g., counseling sessions, educational classes, or seminars, etc. Client attendance is



easily tracked for each activity's session and service transactions can be associated with each activity for easy reporting. This module also includes basic volunteer management capabilities, including tracking individual and/or group volunteer hours for which time sheets can be generated for tracking in-kind service hours.

Additionally, WellSky is pleased to announce that *WellSky Community Services Mobile* is now available. This app provides people who are assisted by organizations using *WellSky Community Services* greater control of their care and personal information. The app works on mobile devices and desktop computers. People in need of services do not need an account to view services that are available in their area, such as food, shelter, or counseling. Those who choose to create an account can access a portion of their current and historical data that is stored in *WellSky Community Services*. This allows them to share data with service providers to get the help they need with fewer questions and more information. The app provides real-time access to data in the user's *WellSky Community Services* record. In addition to displaying content from a person's Community Services record, the Mobile App presents data from the Resources module so that users can locate available service providers independently. This feature enables users to map a provider's location, call for availability, or learn more about the organization and eligibility requirements. *WellSky Community Services Mobile* is also fully configurable, so DHHS could choose to not enable certain access (like displaying Case Plan or Assessment information) and then choose to add that functionality at a later date.

## B. Quality Assurance Capabilities

The project description shall include an overview of the Proposer's policies and procedures regarding quality control, which includes, at a minimum, all of the following information:

1. A detailed description of the Proposer's understanding of the requirements, challenges and potential hurdles applicable to the provision of a Homeless Management Information System with capabilities equivalent to those set forth in this RFP.

WellSky meets DHHS' HMIS goals with a standard implementation of *WellSky Community Services* that enables robust coordinated entry processes, project enrollment tracking and outcomes evaluation, real-time emergency shelter and housing availability information, and the ability to meet local and Federal reporting requirements. WellSky's Professional Services team has extensive experience implementing this solution, training local administrators on how best to maintain the implementation over time and training the end users on the most efficient data entry workflows.

After several years of working in *WellSky Community Services*, some CoC's will elect to work with Professional Services on an Operational Assessment. WellSky Professional Services will coordinate with the Client to evaluate and document the current usage of the solution at a high-level, focusing on "pain points." WellSky calls this the "Operational Assessment Analysis" document. Once summarized, Professional Services will add a





Recommendations section to the document to illustrate options to address issues or to otherwise optimize the solution beyond current state.

2. A detailed description of the processes that will be utilized to ensure that a Homeless Management Information System with capabilities equivalent to those set forth in this RFP is provided in accordance with any and all applicable local, state and federal laws, regulations, policies, procedures and standards, including, without limitation, any and all applicable confidentiality, security and privacy requirements set forth in the California Confidentiality of Medical Information Act, the United States Health Information Technology for Economic and Clinical Health Act and the United States Health Insurance Portability and Accountability Act of 1996 and any and all applicable data collection, management and reporting requirements established by the United States Department of Housing and Urban Development.

*WellSky Community Services* can be configured using role and provider-based data visibility settings to meet California Confidentiality of Medical Information Act, United States Health Information Technology for Economic and Clinical Health Act, and United States Health Insurance Portability and Accountability Act of 1996 HIPAA and CMIA compliant.

### **Post Implementation Technical Support**

WellSky is committed to timely resolution of day-to-day issues, whether solution questions or technical items. For example, Service Interruption tickets are reviewed and addressed with focus until they are resolved. Long-term development needs are addressed over time, in collaboration with each client. General questions are usually resolved the same day. WellSky's Client Support team is available each weekday from 8:00 am to 7:00 pm Eastern. The Help Desk maintains a 24-hour support line for emergencies and system outages.

WellSky utilizes an agile development methodology with time-boxed iterative releases, maximizing efficiency in getting new features out to clients. WellSky's development team works close with WellSky's client facing teams (support, client services, sales) to make sure that user experience and client functionality needs are directing and prioritizing development. They take feedback directly from the client base as well. User research and the User Experience story drive WellSky's development culture.

*WellSky Community Services* comes with a built-in searchable and well-organized help documentation system. Topics are separated by category and area of functionality and include detailed screenshots and instructions for using the system.

Additionally, WellSky provides administrators with access to the Support Hub, which includes an extensive library of additional documents including user guides, workflow documents, manuals, training materials and more.



User manuals are generated for WellSky created BusinessObjects reports. Manuals include important information such as set-up and configuration, report logic and calculations, field mapping, and required workflow, where applicable. Technical assistance with reports specifics and workflow is available for HUD and Federal Partner reports and exports. Workflow guidance, and information about changes to data collection and reporting are provided on an ongoing basis.

WellSky has 20 years of experience using the train-the-trainer methodology to prepare customers to train their end-users.

WellSky also offers ongoing training in report writing and system administration using our Professional Services team. This training is typically held onsite at a customer's facility; however, training can be delivered remotely, as well. In addition, one-to-many classroom style training events are offered periodically at WellSky HQs in Overland Park, KS for our *WellSky Community Services* customer base.

3. A detailed description of the expected communication channels between the Proposer and DHHS – Social Services, including, without limitation, how potential problems and/or disputes will be resolved.

Clients have access to the Support Hub, where they can input and track cases with WellSky's technical support team. Users can filter cases to view cases by open or closed status, all cases, or most recently viewed cases. Each case displays the status of that case as well as the latest update. WellSky's technical support team provides status updates and timelines as they are made available.

In addition, DHHS will be assigned a Client Success Manager who works closely with System Administrators to answer technical and training questions.

## 6.0 Cost Proposal

**A. Price Quotes.** Proposals shall include an itemized list of any and all costs and expenses associated with the provision of a Homeless Management Information System with capabilities equivalent to those set forth in this RFP. Cost information should be presented in a form that is substantially similar to the Cost Proposal Form that is attached to this RFP as Attachment B – Cost Proposal Form and incorporated herein by reference as if set forth in full. In addition to the above-referenced cost information, Proposals should also include a detailed explanation of how the costs and expenses in each budget line item were estimated and the justification for such costs and expenses.





**REQUEST FOR PROPOSALS NO. DHHS2023-03**  
**HOMELESS MANAGEMENT INFORMATION SYSTEM**  
**ATTACHMENT B – COST PROPOSAL FORM**  
**(Submit with Proposal)**

Itemize all costs that will be incurred by the County for the provision of Services set forth in RFP No. DHHS2023-03. Price Quotes shall include any and all costs associated with the provision of such Services. A narrative should be attached to clarify any pricing data submitted.

<b>A. Personnel Costs</b>	
<b>Title:</b> <b>Salary Calculation:</b> <b>Duties Description:</b>	\$0.00
<b>Title:</b> <b>Salary Calculation:</b> <b>Duties Description:</b>	\$0.00
<b>Title:</b> <b>Salary Calculation:</b> <b>Duties Description:</b>	\$0.00
<b>Total Personnel Costs:</b>	<b>\$0.00</b>
<b>B. Operational Costs</b>	
<b>Item:</b> Community Services – Per User Fee – Tier 1 –Annual (Legacy) <b>Description:</b> 60 Users @ \$349 each (includes 60 report licenses) - Additional Users licenses can be added (one-time fee \$230.00)	\$20,940.00
<b>Item:</b> Community Services – 211 LA County’s Taxonomy of Human Services <b>Description:</b> Annual Fee	\$450.00
<b>Item:</b> Community Services – SSL Certificate <b>Description:</b> Annual Fee	\$420.00
<b>Item:</b> Community Services – Training Site <b>Description:</b> Annual Fee	\$3,150.00
<b>Total Operational Costs:</b>	<b>\$24,960.00</b>
<b>C. Consumables/Supplies</b>	
<b>Item:</b> <b>Description:</b>	\$0.00
<b>Title:</b> <b>Description:</b>	\$0.00
<b>Title:</b> <b>Description:</b>	\$0.00
<b>Total Consumable/Supplies:</b>	<b>\$0.00</b>
<b>D. Transportation/Travel</b>	
<b>Title:</b> <b>Description:</b>	\$0.00
<b>Total Transportation/Travel:</b>	<b>\$0.00</b>
<b>E. Other Costs</b>	
<b>Title:</b> <b>Description:</b>	\$0.00
<b>Total Other Costs:</b>	<b>\$0.00</b>



<b>F. Indirect Costs</b>	
<b>Title:</b>	\$0.00
<b>Description:</b>	
<b>Total Other Costs:</b>	<b>\$0.00</b>
<b>Total:</b>	<b>\$24,960.00</b>

**Personnel Costs:** Include all employee costs, but not those incurred by independent contractors, with each employee type listed separately. Examples of calculations are: Fifteen percent (15%) of Two Thousand Dollars (\$2,000.00) per month, multiplied by six (6) months; or Twenty (20) hours multiplied by Fifteen Dollars (\$15.00) per hour, multiplied by fifty-two (52) weeks plus any applicable benefits.

**Operational Costs:** Include any and all direct and indirect expenses associated with the proposed outreach, engagement, behavioral health treatment and social rehabilitation services, except consumable supplies and travel, including, without limitation rent, office supplies, postage, paper, communications, equipment, contract labor or services and overhead or administrative costs, with each cost type listed separately.

**Consumable Costs:** Include any and all items that will be consumed by participants or staff, including, without limitation, food and meeting supplies.

**Transportation Costs:** Include any and all vehicle purchase and/or rental costs, employee per-mile reimbursements and other travel-related expenses.

**Other Costs:** Include anything not already covered in the budget categories above, with each such expense listed separately.

**Overhead and Administrative Costs:** Per federal guidance, overhead and administrative costs may not exceed ten percent of (10%) of the total modified costs.



**B. General Instructions and Requirements.** The following is an outline of the general information and requirements applicable to price quotes:

1. Price quotes shall be valid for a minimum of one hundred eighty (180) days from the Proposal submission deadline of October 20, 2023.
2. Price quotes shall include any exceptions, deviations and clarifications pertinent to the provision of a Homeless Management Information System with capabilities equivalent to those set forth in this RFP that may assist in the evaluation of such price quotes.
3. The total budget set forth in the price quote shall not exceed any local, state or federal maximum allowances applicable to the provision of a Homeless Management Information System with capabilities equivalent to those set forth in this RFP.

WellSky acknowledges the General Instructions and Requirements as they relate to this proposal.

## 7.0 Supplemental Documentation

Proposals shall include any and all documents that will assist the County in evaluating the Proposer's ability to comply with the requirements, specifications and standards set forth in this RFP, including, without limitation, any and all administrative policies, procedures and best practices that will be used to facilitate the provision of a Homeless Management Information System with capabilities equivalent to those set forth in this RFP, and any and all required licensure, certification and/or accreditation documents.

On the following pages, WellSky has provided an example of the type of workflow documents provided when HUD or a federal partner changes project set up requirements. Documents are posted for download or review in Support Hub. Page numbering is non-sequential.

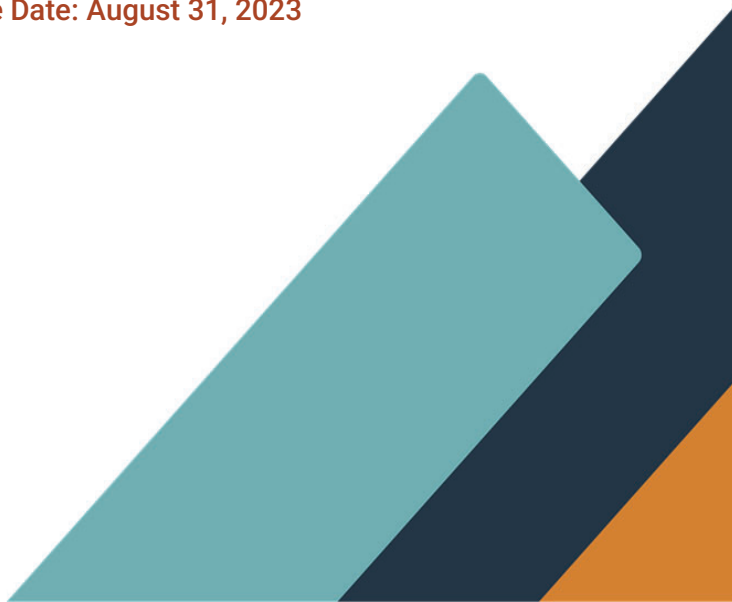


# Community Services

## CS 5.14.18 Project Descriptor Data Elements Set Up Guidance

Version #1

**Release Date: August 31, 2023**



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### Contact Us

WellSky Corporation  
11300 Switzer Road  
Overland Park, KS 66210  
<http://www.wellsky.com>

**Support Hub:** <https://portals.force.com/supporthub/login>



## Contents

- 2.02 Project information ..... 1
- 2.08 HMIS Participation Status..... 2
- 2.09 CE Participation Status..... 3
- C4 Translation Assistance Needed "Preferred Language" picklist..... 5



## 2.02 Project information

The FY 2024 Data Dictionary requires a new dependent field named **RRH subtype** which displays only when the **Project Type** is set to "PH-Rapid Re-Housing".

- Select an **RRH Subtype** of either "RRH: Services Only" or "RRH: Housing with or without Services".
- "RRH: Services Only" – An RRH project that provides services only and does not provide ongoing rental assistance or support any inventory for participants. This option must be selected if the ongoing housing assistance for all program participants is provided by another funding source (e.g., Housing Choice Voucher, HUD VASH, or other RRH project).
  - Identify whether the services that are being provided are in conjunction with a residential project which is a separate project in the HMIS (e.g., a service-only project for case management that services one or more PH projects). If so, select "Yes" for "If Services Only for "Project Type" or "RRH: Services Only subtype, AddAffiliated with a residential project" and record the appropriate project ID(s) in the **Project ID(s) of the residential project(s) affiliated with SSO or RRH: Services Only Project** data panel.

Project Type	PH - Rapid Re-Housing (HUD) <span style="float: right;">▼</span>
If PH-Rapid Re-Housing, identify subtype	RRH: Services Only <span style="float: right;">▼</span>
If Services Only for "Project Type" or RRH: Services Only sub type, Affiliated with a residential project <input checked="" type="radio"/> Yes <input type="radio"/> No	

Project ID(s) of residential project(s) affiliated with SSO or RRH: Services Only project
Project Identifier Provider
<input type="text" value="abcxyz"/>
<span style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px;">Add Project Identifier</span> <span style="float: right; font-size: small;">Showing 1-1 of 1</span>

- If an RRH project has a 'Services Only' subtype, no inventory records should be created in **Bed and Unit Inventory** information.
  - If there are existing **Bed and Unit Inventory** records for this subtype, system administrators should add an Inventory End Date of "9/30/2023."
- "RRH: Housing with or without services" – An RRH project that offers ongoing rental assistance that may or may not be accompanied by financial or other supportive services to participants. This option must be selected if the project receives any ongoing rental funds, even if not all project participants receive housing assistance funds from the RRH project.



Project Type	PH - Rapid Re-Housing (HUD) ▼
If PH-Rapid Re-Housing, identify subtype	RRH: Housing with or without services ▼

- Projects that are “PH – Rapid-Rehousing” with a subtype of “RRH: Housing with or without services” require Bed and Unit Inventory records.
- If at any point a project changes from one subtype to another, the project information record must be closed and a new record opened with the new subtype identified.

There is no data mapping for this element so it must be manually updated for every PH-Rapid Re-Housing project.

## 2.08 HMIS Participation Status

The FY 2024 Data Dictionary requires a new data element named “**HMIS Participation Status**”. This element is transactional, meaning the values can change over time, however, date validation logic prevents more than one row from being valid on any given date. This data element must be filled in for all projects marked Continuum Y/N as “Yes”.

The **HMIS Participation Status** data panel contains the following fields:

- **HMIS Participation Status**
  - Not Participating
  - HMIS Participating
  - Comparable Database Participating
- **Participation Status Start Date**
- **Participation Status End Date**

Values for this field will be mapped from several existing Project Descriptor Data Elements.

- **Uses Community Services**
- **Victim Service Provider**
- **Operating Start Date**
- **Operating End Date**
- **Comparable Database (Optional)**

Mapping guidance is a combination of HUD’s mapping guidance and the use of the optional Comparable Database field:

- If **Victim Service Provider** and **Comparable Database (Optional)** are both set to “Yes” then **HMIS Participation Status** will be set to “Comparable Database Participating”.



- If **Victim Service Provider** is set to “Yes” and **Comparable Database (Optional)** is set to “No” or is null, then **HMIS Participation Status** will be set to “Not Participating”.
- If project set to **Uses Community Services** is “Yes” then **HMIS Participation Status** will be set to “HMIS Participating”.
- If project set to **Uses Community Services** is “No” then **HMIS Participation Status** will be set to “Not Participating”.
- **Participation Status Start Date** and **Participation Status End Date** mirror the dates found in **Operating Start Date** and **Operating End Date**

HMIS Participation Status		
Participation Status	Participation Status Start Date	Participation Status End Date
HMIS Participating (HUD)	10/01/2023	
<a href="#">Add Participation Status</a> <span style="float: right;">Showing 1-1 of 1</span>		

System administrators should review the **HMIS Participation Status** for accuracy.

## 2.09 CE Participation Status

The FY 2024 Data Dictionary requires a new element called **CE Participation Status**. This element is designed to identify a project’s type of engagement in the local Coordinated Entry System (CES). It captures information about whether a project is an access point for the CES and whether the project accepts referrals from the CES. This element is transactional, meaning the values can change over time, however, date validation logic prevents more than one row from being valid on any given date. This element must be filled in for all Projects marked Continuum Y/N as “Yes”.

The **CE Participation Status** data panel contains the following fields:

- **CE Participation Status Start Date**
  - Record the **CE Participation Status Start Date** as the first day on which all elements are accurate.
- **CE Participation Status End Date**
  - If a project’s **CE Participation Status** changes, add a **Participation Status End Date** to the record and create a new row with the updated values.
  - If a project ceases operations, the **Participation End Date** for the current record should be the same date as the project’s **Operating End Date**.



**Coordinated Entry Access Point**

- Indicate whether the project is a **Coordinated Entry Access Point**. Access points are the places—either virtual or physical—where an individual or family in need of assistance accesses the coordinated entry process.
- A “Yes” value in **Coordinated Entry Access Point** displays several options. Select as many options from the list below as applicable:
  - Homelessness Prevention Assessment
  - Crisis Housing Assessment
  - Housing Assessment
  - Direct Services

**Project Receives CE Referrals**

- Projects that receive referrals through the CES should have a “Yes” response to **Project Receives CE Referrals**. Project IDs from those projects identified in this element as receiving referrals will be used to generate an option list in **4.20 Location of Crisis Housing or Permanent Housing Referral**.

If a project’s **CE Participation Status** changes from one type to another, an End Date must be added for that record to indicate the day that **CE Participation Status** ended. A new record must then be created to indicate the new **CE Participation Status** with a **Participation Status Start Date** to be the date the new status begins. There should be no gaps between the **Participation Status End Date** and the next entry with a **Participation Status Start Date**.



**CE Participation change example**

	CE Access Point	Provided by CE Access Point Project	Receives Referrals	Start Date	End Date
Project A	N	—	Y	7/1/2022	12/31/2022
Project A	Y	Shelter assessments only	Y	1/1/2023	4/30/2023
Project A	Y	Both shelter and prevention assessments	Y	5/1/2023	

There is no data mapping for this element so it must be manually updated for all active Continuum Y/N is “Yes” projects.

## C4 Translation Assistance Needed “Preferred Language” picklist

The FY 2024 Data Dictionary requires a new data element named **C4 Translation Assistance Needed**. To use this field, system administrators must set up the “Preferred Language” picklist.

System Administrators will need to work in partnership with the CoC to activate “Twenty languages or a similar number that is reasonable and appropriate within the given HMIS implementation.” These languages are set at the implementation level, not per CoC.

- The picklist will populate with all the possible values as provided by HUD in the “FY2024 HMIS C4 Translation Assistance Needed Supplemental List”.
- “Different Preferred Language”, “Client Doesn’t Know”, “Client Prefers not to Answer”, and “Data Not Collected” will be set to “active” and should remain as options in the picklist.
- System administrators, in partnership with the CoC’s participating in the implementation’s HMIS, will work together to create a list of approximately 20 values to populate in the picklist. Values are activated by clicking on the Curved Arrow icon next to the value.
- System administrators should not add new values to the picklist.



**Edit Picklist Information**

<b>Name *</b>	Preferred Language
Description	Preferred Language

Sort Model:  Alphabetical  Custom

**Picklist Values**

[Add New Value](#)

Name	
1	Acholi
2	Afar
3	Afrikaans
4	Ahtna





## 8.0 References

**A. Reference Data Sheet.** Proposals shall include a complete and verified Reference Data Sheet, which is attached to this RFP as Attachment C – Reference Data Sheet and incorporated herein by reference as if set forth in full, that includes present and past performance information from a minimum of two (2) former clients, preferably governmental agencies, to whom the Proposer has provided Homeless Information Management Systems with capabilities equivalent to those set forth in this RFP within the past three (3) years.

**B. Required Information.** The performance information provided with each reference must be clearly correlated to the provision of Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP. Each reference must include, at a minimum, all of the following information:

1. The name, physical address, email address and telephone number for the current contact person of each referenced client.
2. The dates on which the Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP were provided to each referenced client.
3. A detailed description of the Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP that were provided for each referenced client, including, without limitation, the time period in which such Homeless Management Information Systems were delivered.
4. A detailed description of how the Homeless Management Information Systems with capabilities equivalent to those set forth in this RFP that were provided by the Proposer led to accomplishment of each referenced client's goals and objectives.
5. Verification that all information provided in the Reference Data Sheet is true and correct to the best of the Proposer's knowledge.



**REQUEST FOR PROPOSALS NO. DHHS2023-03**  
**HOMELESS MANAGEMENT INFORMATION SYSTEM**  
**ATTACHMENT C – REFERENCE DATA SHEET**  
**(Submit with Proposal)**

REFERENCE DATA SHEET		
Provide a minimum of two (2) references with name, address, contact person and telephone number whose scope of business or services is similar to those of Humboldt County (preferably in California). Previous business with the Humboldt County does not qualify.		
<b>NAME OF AGENCY:</b>	FL512 -St. John's County CoC	
<b>STREET ADDRESS:</b>	400 Health Park Blvd	
<b>CITY, STATE, ZIP:</b>	St. Augustine, FL 32086-5790	
<b>CONTACT PERSON:</b>	Paige Stanton, Director of Social Innovations	<b>EMAIL:</b> <a href="mailto:Paige.stanton@flaglerhospital.org">Paige.stanton@flaglerhospital.org</a>
<b>PHONE #:</b>	(904) 209-0655	<b>FAX #:</b>
<b>Department Name:</b>	Housing & Community Development	
<b>Approximate County (Agency) Population:</b>	306,841	
<b>Number of Departments:</b>	54	
<b>General Description of Scope of Work:</b>	Implementation and support of HMIS for CoC programs and operations.	
<b>NAME OF AGENCY:</b>	County of Glenn	
<b>STREET ADDRESS:</b>	125 E. Walker St.	
<b>CITY, STATE, ZIP:</b>	Orland, CA 95963	
<b>CONTACT PERSON:</b>	Rebecca Groppi, Program Specialist	<b>EMAIL:</b> <a href="mailto:rgroppi@countyofglenn.net">rgroppi@countyofglenn.net</a>
<b>PHONE #:</b>	(530) 934 - 1443	<b>FAX #:</b>
<b>Department Name:</b>	Community Action Agency	
<b>Approximate County (Agency) Population:</b>	28,675	
<b>Number of Departments:</b>	60	
<b>General Description of Scope of Work:</b>	Implementation and support of HMIS for CoC programs and operations.	



## 9.0 Evidence of Insurability and Business Licensure

All Proposers shall submit evidence of eligibility for all insurances required by the sample Professional Services Agreement that is attached hereto as Attachment D – Sample Professional Services Agreement and incorporated herein by reference as if set forth in full. Prior to the execution of the final Professional Services Agreement resulting from this RFP process, the Successful Proposer will be required to produce certificates of the required insurance, including, without limitation, a certified endorsement naming the County as an additional insured. However, Proposers should not purchase any additional insurance until the Professional Services Agreement resulting from this RFP process has been awarded. In addition, all Proposers shall certify the possession of any and all required licenses and/or certifications required for the provision of a Homeless Management Information System with capabilities equivalent to those set forth herein.

WellSky has provided a Certificate of Insurance as a separate attachment to its response.



## 10.0 Exceptions, Objections and Requested Changes

Proposers should carefully review the terms, conditions and requirements set forth in this RFP and the sample Professional Services Agreement attached hereto. Any exceptions, objections or requested changes to any portion of this RFP, and/or the sample Professional Services Agreement attached hereto, shall be clearly identified and explained in the Proposal. Descriptions of any exceptions, objections or requested changes should include the page and section number of the referenced portion of this RFP or the sample Professional Services Agreement attached hereto. Protests based on any exception, objection or requested change to this RFP, and/or the sample Professional Services Agreement attached hereto, shall be considered waived and invalid by the County, if the exception, objection or requested change is not adequately identified and explained in the Proposal.

Page #	Section	Provision	WellSky Comment
25	3.A.	Termination without Cause	WellSky prices its solutions on an annual basis, so clients may terminate at the end of the then-current term.
26	7	Reports	WellSky seeks to clarify that it will work with the County to complete any reasonably requested reports agreed upon by the Parties
26-27	8.B. and C.	Inspection of Records & Audit Costs	WellSky seeks to ensure that the audits occur in a mutually agreed upon time and manner, including costs associated with the same.
27	9	Monitoring	As WellSky supports clients across the country, we must ensure that our business and operations follow WellSky policies and procedures.
27	10	Confidential Information	As WellSky supports clients across the country, we must ensure that our business and operations follow state and federal law, along with WellSky policies and procedures. Further, we will need to ensure that the Business Associate Agreement aligns with agreements in effect with other similarly situated WellSky clients.
28	11.A.	Nondiscriminatory Delivery of Social Services	WellSky seeks removal as this is not relevant to the technology software and services anticipated to be provided under this engagement.
29	14	Indemnification	WellSky seeks to ensure that the Indemnification provision aligns with agreements in effect with other similarly situated WellSky clients



29	15	Insurance Requirements	WellSky seeks to align this provision with WellSky's insurance policies.
32	17.A.	General Legal Requirements	As WellSky supports clients across the country, we must ensure that our business and operations follow state and federal law, along with WellSky policies and procedures.
32	17.C.	Accessibility Requirements	Section 508 of the ADA is constantly changing and improving. To demonstrate compliance, WellSky has completed a Voluntary Product Accessibility Template and will work with the County to address concerns through WellSky's product roadmap.
33	18	Provisions Required By Law	WellSky seeks to include any such provisions by statutory reference and language insertion in the four corners of the agreement to ensure the Parties agree on applicable terms.
33	20	Protocols	WellSky seeks to clarify that any agreement to such protocols is made effective in writing.
33	22	Assignment	WellSky is private equity owned and must have flexibility to change ownership without consent of clients.
34	28	Title to Information	This engagement contemplates the licensing of a SaaS platform for use by the County during a specific period of time. WellSky seeks to clarify that there is no intention of assigning any right, title, or interest in any work product, software, or services under this engagement.
34	31	Subcontractors	WellSky seeks to clarify that for the purposes of this section, "subcontractor" shall not include any third-party component or services provider for the generally available software or services provided by WellSky.
35	32	Attorneys' Fees	WellSky seeks to clarify that a prevailing party is entitled to <i>request</i> attorneys' fees be ordered in any such action.
35	34	Conflicting Terms or Conditions	WellSky seeks to clarify that if the Agreement and any other terms in exhibits or other agreements have a similar clause, but the clauses do not conflict, the clauses shall be read together.
38	Exhibit A	Scope of Services	WellSky seeks to negotiate and agree upon the scope of services to be provided under the



			Agreement should WellSky be selected as vendor of choice.
42	Exhibit D	Business Associate Agreement	WellSky seeks to align this BAA with WellSky's standard business associate agreement terms in place with other similarly situated clients, including permitted uses, and notice requirements.
N/A	New Exhibit	WellSky's Master License and Services Agreement	WellSky seeks to include its Master License and Services Agreement in the resulting contract to add licensing terms and other applicable rights and obligations terms. The Master License and Services Agreement can be found at <a href="https://wellsky.com/cloud-services-master-license-and-services-agreement/">https://wellsky.com/cloud-services-master-license-and-services-agreement/</a>