

System and Security	Yes	No	Custom	3rd Party	Notes
Solution currently exists as an AAA hosted solution and is in production at sites that can be equated to the needs and sizing configuration of the El Dorado County.	X				
Solution has the ability to complete a data conversion.	X				
Solution provides secure, real-time access to data across clients, including families and consumers for the purpose of collaboration.	X				
Solution provides a dashboard to show users activities and responsibilities, including follow-up calls, upcoming activities, assessments due, care plans expiration and renewals.	X				
Solution provides automatic alerts to users for overdue, upcoming, and incoming tasks, referrals, activities, and events.	X				
Solution includes support for issuing consumers barcoded ID cards that use a standard barcode type for registering for services and scanner data entry.	X				
Solution supports communication and collaboration among programs, providers, and other stakeholders through unified global consumer records with access controlled according to security permissions at a program/form level	X				
Solution includes access based on security permissions that control what users may view, add, edit, or delete from the consumer record.	X				
Solution supports tracking of user actions (accessing a chart, reading chart items, running reports)	X				
Solution provides an administrative module allowing authorized users to configure screens, arrange fields, show and hide fields and screens by role, configure dropdown lists, define default values and manage security permissions without assistance from vendor technical resources. (Need to Track Senior Times Expiration Date.	X				
Solution provides warning indicators or error trapping when fields are not populated or populated incorrectly. At a minimum, this shall apply to all fields that are needed to complete California Department of Aging (CDA) reporting.	X				
Solution provides functionality to prevent duplicate clients by SSN or DOB	X				
Solution provides functionality to merge duplicate clients	X				
Solution allows all data lists and printouts to be exported to Excel.	X				
Solution supports printing of all sections of the consumer record.	X				
Solution allows importing of consumer photos	X				
Solution allows enrollment for contracted vendors, providers, physicians, and pharmacies	X				
Enrollment	Yes	No	Custom	3rd Party	Notes
Solution requires the user to enter data only once, and data appears and is used throughout the application without duplicate data entry.	X				
Solution provides a comprehensive consumer record that tracks consumer demographic and contact information.	X				
Solution supports enrollment in agency-defined care programs (Senior Nutrition, Senior Legal, MSSP, YANA, FCSP, SHEP, I&A, Senior Day Care, Elder ID Tracking) with program, enrollment date, status, expiration date, case manager, closed date, closed reason	X				
Solution supports tracking enrollment information, including level of care, physician(s), Insurance and Coverage Information(MediCal), and Current Medications	X				
Solution provides for County to update consumer information with a new or replacement Scan Card number	X				
Solution provides search ability to search existing active and inactive consumer records across all programs, by at least the following criteria: (first name, last name, address, telephone, number consumer id/case, SSN, DOB, County issued Scan Card)	X				
Case Management	Yes	No	Custom	3rd Party	Notes
Solution supports case and financial management for the full lifecycle of consumer care from initial inquiry for services to case closure, including information and referral; intake; assessment and reassessment; care planning and service authorization; service delivery and payment; case closure; monitoring/follow-up and reporting.	X				
Solution allows entry of multiple caregivers for a single consumer and a single caregiver caring for multiple consumers.	X				
Solution tracks history of changes between caregivers and care receivers	X				
Solution search supports finding consumer records based on caregiver and vice versa.	X				
Solution allows scheduling of activities including call, visits, follow-ups, and others with due dates and assign to users.	X				

Solution has ability to create Vouchers (Vendor, Issue Date, Expiration Date, Unites, Rate, Notes)	X				
Solution allows entry of Care Plans	X				
1. Solution has the ability to have multiple Care Plans by Program	X				
2. Solution has the ability to update status problems and add comments	X				
Solution allows entry progress notes, client or caregiver interaction (Date, Subject, Duration, Type, Location, Notes)	X				
1. Solution note functionality incorporates spell check functionality	X				
2. Solution includes the ability to relate a Progress Note to an item in a Service or Care Plan	X				
3. Solution provides user-defined templates for Progress Note	X				
4. Solution tracks date created, time created, and created by.	X				
5. Solution provides the ability to print progress notes in one step	X				
6. Solution provides linking of notes to current Care Plan	X				
Solutions providers Service Planning and Utilization (notes the source of pmt, provider, cost, service code, fund code, referred/purchased, etc)	X				
Solution tracks identifying and contact information for consumers, including, name, alias/AKA name, multiple addresses, multiple phone numbers, email address, and multiple identifying numbers.	X				
Solution tracks identifying and contact information about other individuals related to the consumer, including case managers, caregivers, care recipients, other involved professionals, emergency contacts, relatives, friends, and other persons.	X				
Solution tracks demographic and eligibility information, including: age, gender, race/ethnicity, veteran status, poverty status, disability status, frailty (ADLs / IDLs), nutritional risk, insurance coverage, income information, and other relevant information as prescribed by the California Department of Aging.	X				
Solution list care programs and providers associated with the consumer, including dates of enrollment or service.	X				
Solution provides a list of assessments in process and completed that are relevant to the consumer. The list contains key information such as assessment name, assessment date, next review date, and status, and is sortable, and filterable.	X				
Solution provides a list of calls that are relevant to the consumer. The list contains key information such as caller, call date and time, call type and completion status, sortable and filterable, with columns configurable by the user to easily access specific consumer call records.	X				
Services	Yes	No	Custom	3rd Party	Notes
Solution has ability to limit service codes by program	X				
Solution supports service delivery including recording service date, time, provider, site, program, service code, units and notes about service delivery.	X				
Solution supports recording of delivered services by individual consumer or to multiple consumers in bulk.	X				
Solution includes entering a service delivery and attaching multiple registered consumers to that service.	X				
Solution supports service uploads from Excel or similar application	X				
Solution includes recording of service delivery(s) to consumer(s) in a County specified remote portable scanner (ID Cards or Bar Codes) for later uploading to the Solution.	X				
Solution supports service authorization, including identifying services, frequencies, durations, and schedule of delivery.	X				
Solution prevents recording of unauthorized service deliveries when authorization is required.	X				
Solution supports recording/preventing of deliver of services with corresponding care plan, when needed by program.	X				
Solution retain and list historical service history.	X				
Assessments and Reassessments	Yes	No	Custom	3rd Party	Notes
					Harmony includes questions in our standard forms that likely address these items, but the catalog model allows the customer to define what their standard forms should be. Services could also create forms that match hard copy forms as part an additional services engagement.
Solution offers standard assessment forms listed below:	X				
1. Case Management Assessment	X				

2. ADL	X					
3. IDL	X					
4. Nutrition Risk Assessment	X					
5. Mini Mental Health	X					
6. Vitals Entry (Date, Height, Weight, Pulse, Blood Pressure)	X					
7. Restricted Health Condition (Condition, Problems/Needs, Services for Objective and Person(s) Responsible, Goal/Time Frame, Measurement)	X					
8. Participant Assessment (Physical/Health/Mental, ADLs/Functionality, Mental/Cognitive, Emotional/Behavioral, Social History, Activity, Caregiver)	X					
9. Physical Therapy Evaluation (Medical History, Cognitive, ROM & Strength, Functional Skills, Balance, Gait, Neuro, Assessment, Goals)	X					
Solution provides the ability for agency-defined assessments by non-technical users without vendor assistance.	X					
Solution includes record of every assessment answer and the history of each response can be viewed by the user across differing assessment forms.	X					
Solution includes assessments that provide real-time calculations to assist in eligibility determinations and/or scoring.	X					
Solution includes for reassessments that may be conducted as needed and at prescribed intervals, with automated reminders to users.	X					
Solution offers a print version of assessments that match the online form	X					
Solution provides the ability to list assessment/reassessment conducted on consumers	X					
Information and Referral	Yes	No	Custom	3rd Party	Notes	
Solution supports creation of a call record at the time of contact or after the fact for contact with consumers or others seeking information or service referral.	X					
Solution seamlessly tracks anonymous calls (dummy client), as well as calls for named consumers.	X					
Solution differentiates between consumer and caller within a call record.	X					
Solution provides search capabilities to determine whether a consumer record exists in the database for the consumer (or caller and collateral contacts), and can automatically populate corresponding fields in the call record.	X					
Solution provides powerful resource searching tools to quickly find providers and make appropriate referrals. Additionally, Solution matches client's address / zip code to provide referral information to appropriate providers(s).	X					
Solution includes a call record that tracks information required for reporting, such as date and time of the call, source of the referral, date referral was received, call type, disability type, and call priority.	X					
Solution includes a call record that allows users to select call topics from an agency-defined list of items and can perform a search for available services by keyword.	X					
Solution includes Call activities and outcomes that are tracked in agency-defined drop-down menus.	X					
Solution enables staff to generate electronic referrals at the time of the call to internal departments and to providers with access to the Solution.	X					
Solution referrals identify the internal person for the referral and required action, and sets date for completion.	X					
Senior Nutrition	Yes	No	Custom	3rd Party	Notes	
Solution includes Meal Site Setup	X					
Solution includes a Daily Food Service Record with Date, Meal, Meals Received (C1,C2,Weekend,Prepared), Meals Served (C1,C2,Volunteer,Staff,Takeout,Weekend/Holiday, Senior/Non Senior), Donations/Revenue (C1,C2),Comments	X					
Solution includes Menus/Entree Recipes		X				This could be considered for a future product enhancement
Solution provides the ability to record food temperatures with date and time of recording		X				This could be considered for a future product enhancement
Solution provides tracking of Meals Served and Meals Delivered via Barcode card (Word or ID Card)	X					
Solution provides tracking of Consumer Route and Meal Delivery Schedule	X					
Solution provides the ability to enter meal services at the site level and client level (Dummy Client)	X					
Senior Legal	Yes	No	Custom	3rd Party	Notes	

Solution provides Calendar Appointments to create client contacts (Date, Time, Duration, Provider, Notes)	X				
Solution allows tracking of legal files (Estate Planning, Public Benefits, Abuse, Health Care, Real Property, Consumer Issues)	X				
Senior Day Care	Yes	No	Custom	3rd Party	Notes
Solution provides volunteer hour tracking	X				
Solution allows entry of Consumer Attendance Schedule	X				
Solution allows rate calculations based on Scheduled Days per Week, Level of Care, After Hour Cost, Agency Reimbursement Rate	X				
Solution provides tracking of client attendance by Type (Attend, Makeup, Absent)	X				
Solution provides tracking for Centrally Stored Medications (Medication, Dose, Instructions, Exp Dt, Filled Dt, Started Dt, Stopped Dt, Prescribing Physician, Prescription Number, Refill, Pharmacy, Disposed Dt, Qty Disposed)	X				
Solution has the ability to Enter Payments and Print Statements	X				
Solution provides Plan of Care (Background, Problems/Needs, Services for Objective and Person(s) Responsible, Goal/Time Frame, Progress Report Comments)	X				
Solution compatible with tables	X				Assessments and scanning solutions are compatible with tablets.
SHEP	Yes	No	Custom	3rd Party	Notes
Solution provides way to track class attendance (Consumer and Non Consumer)	X				
Reporting	Yes	No	Custom	3rd Party	Notes
Solution provides comprehensive standard reports on client and service information.	X				
Solution reports may be configured by users through a variety of parameters, filters, and grouping to produce customized reports without assistance from technical resources.	X				
Solution provides custom report-generation for enterprise management	X				Solution includes Harmony Advanced Reporting for custom report generation.
Solution allows users to save, share, and organize customized reports for repeated use.	X				
Solution security permissions limit data retrieved by reports, ensuring authorized users only see information they are allowed to see.	X				
Solution allows reports to be exported to Microsoft Excel format for additional analysis.	X				
Solution standard reports includes but is not limited to reports addressing following categories and subcategories:	X				
Administrative					
User Login Report	X				
Potential Duplicate Consumer Listing Report	X				
List of Physicians	X				
List of Pharmacies	X				
Assessments by Program					
Reassessments Monitoring Report (Expiring or Past Due)	X				
No assessment in place for consumers that received services within a specified timeframe.	X				
Missing ADL/IADL reports	X				
Care Plans by Program					
Care Plan Monitoring Report (Expiring or Past Due)	X				
Missing Care Plans	X				May be completed in Harmony Advanced Reporting
Consumers by Program					
New Consumers (Unduplicated)	X				
Active Consumer Listing (Unduplicated)	X				
Active Consumer Mailing Labels	X				
Active Consumer Call Logs	X				
Summary of Consumers under a specified age.	X				
Consumers with missing mandatory demographics, ADL/IADLs and Nutrition Risk.	X				
Listing of Caregivers with no Care Receivers on file	X				
Consumer Quarterly Report	X				
Consumer Services List Report	X				
Expiring Enrollments	X				
Activity/Referral Report	X				
C.I.F. (Client Information Form) - Client demographics, case manager, physician, emergency contact, Medi-Cal information, SSN, Level of care, etc.	X				

S.A.F. (Service Authorization Form) -This is generated each time payment is processed for services that are to be reimbursed	X				
Services by Program					
Over-service report	X				May be completed in Harmony Advanced Reporting
Summary of services delivered, including non-registered units, registered units, clients served (registered and non-registered), and total cost of units delivered.	X				
Detail service delivery report, which includes daily units delivered by service by provider.	X				
Service Demographics	X				
Service Suspension Report	X				
Information and Referral					
Call Follow-up Report	X				
Call Mailing Label Report	X				
Call Profiler Report	X				
Call Referral Report	X				
Call Summary Report	X				
Call Topic Report	X				
Senior Nutrition					
					Harmony likely provides this but, additional information is needed to validate fulfillment of the requirement with standard reporting
Site Login Sheets	X				
Frozen Meal Labels	X				
Weekly Route Sheet by Site	X				
Weekly Route Sheet with Site Bar Codes	X				
Meals by Consumer Demographics	X				
Meal Counts by Site (C1, C2, Senior Volunteer, Volunteer, Senior Staff, Staff, Takeout, Guest, Weekend)	X				
Monthly Donation and Revenue Report (Site, Date,C1, C2, Total)	X				May be completed in Harmony Advanced Reporting
Consumer Meal Services by Site (Consumer Service Detail)	X				
Senior Day Care					
Attendance (Avg Fee by Client)	X				
Senior Day Care Projected /Actual Report	X				
Client Month Invoices	X				
Volunteer Hours Report (Name, Start Date, Month, Current Yr, Prev. Yr, Cum To Date)	X				
Vital Reports	X				May be completed in Harmony Advanced Reporting
Solution includes County and State of California specific reporting including:					
CDA	X				
CARS	X				
Legal	X				
NAPIS	X				
CSBG	X				
Closeout					