REQUEST FOR VENDOR PROPOSALS

For Candidate Management System

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CHC Mission

To advance the homeopathic profession by certifying individuals who meet and maintain a recognized standard of professional and ethical competence in classical homeopathy and to assist the general public in choosing appropriately qualified homeopaths.

CHC Vision

We envision a healthcare system that encompasses certified classical homeopathic practitioners to be accessible to all.

CHC Purpose

The purposes of the CHC are to advance the homeopathic profession by certifying individuals who meet and maintain a recognized standard of professional and ethical competence in classical homeopathy and to assist the general public in choosing appropriately qualified homeopaths.

Summary and Background

The Council for Homeopathic Certification (CHC) seeks a software consulting organization (SCO) to assist with Candidate management. As part of its 2022 Strategic Plan, the CHC is soliciting proposals from SCO to cost-effectively manage Candidate Management System. The CHC has achieved widespread recognition within the homeopathic community, and with the CHC 's global expansion, homeopathy is poised to claim an important place in the spectrum of integrative healthcare.

Formed in 1991, the CHC desires to create one meaningful national standard for practitioners of classical homeopathy, promoting a unified profession of highly qualified and certified practitioners. Further, the CHC envisions a healthcare system that encompasses certified classical homeopathic practitioners who are accessible by all. In pursuit of its vision, the CHC advances the homeopathic profession by certifying individuals who meet and maintain a recognized standard of professional and ethical competence in classical homeopathy. Also, the CHC assists the general public in choosing appropriately qualified practitioners. During the past 30 years, the CHC has certified nearly 1200 homeopathic practitioners, and, currently, 640+ certified practitioners are in good standing. In 2022, the CHC was Re-accredited by the National Commission for Certifying Agencies (NCCA), designating it as the only accredited homeopathic certification organization in the industry.

The psychometrically valid and reliable certification exam is offered twice yearly in the US and Canada to graduates from US- or Canada-based accredited homeopathic programs and to eligible graduates from homeopathic programs outside of the US or Canada.

FUNCTIONAL/CONSULTING REQUIREMENTS FOR PROPOSALS

The CHC seeks to work with one vendor to fulfill the requirements for **Candidate Management System** as outlined below:

1. **Essential Considerations (apply to both registration and recertification management)**
2. **Essential Requirements for UX**
3. **Essential Requirements for Admin Capability**

Please check the requirements mentioned below that you can support

1. **Essential considerations for both Application and Recertification**
   ☐ The CHC will require assistance transitioning current data into the new system.
   ☐ To maintain CHC/Accreditation security standards, admin must feature multiple levels of security.
   ☐ An accessible, attractive and user-friendly/intuitive online application is required.
   ☐ There must be configurable on-screen dynamic hints for the application process.
   ☐ There must be automated and customizable on-screen prompts and automated email to leads, inquiries, and also during process, confirmations and reminders.
   ☐ User/Admin "dashboard" must display current status and pending tasks.
   ☐ After certification is completed, user data is upgraded to recertification status.
   ☐ Certified Directory — we want to export or integrate certificants on our CHC Website.
   We would like assistance in order to display a dynamic, seamless, searchable directory of all current certificants on our website. This directory should be searchable by Name, Location, Zip, Specialty, Language, and/or specific credentials.
   ☐ Help/Support ticketing system when users request support from CHC Admin.
   ☐ Admin needs to be able to easily view and export reports regarding individual user or group of users' current status.
   ☐ All Data should be easily Transferrable.

2. **Essential Requirements for UX (See also Appendix A)**
   a) **For Certification**
      ☐ User enters basic data such as name, address, phone, email, school graduation,etc.
      ☐ User is required to upload supporting documentation
      ☐ User is required to select mode of exam delivery (in person or Live Remote proctoring)
      ☐ User is required to make payment of application fee with initial application
      ☐ User is required to make payment for registration fee once application is approved
      ☐ User sees on-screen messages – tool tips and prompts
      ☐ User receives automated emails giving confirmations and reminders throughout process
      ☐ User "dashboard" displays current status and pending tasks
      ☐ On screen support button to open a "ticket" that is relayed to CHC admin
      ☐ All correspondence and support should be recorded with the user's profile

    b) For Recertification

- ☐ User info is transferred from certification module
- ☐ Users must sign/fill out forms for Ethics Statement, Fitness to Practice Statement, Claim for CEU's and to upload supporting documentation for Continuing Education Credits. (CEU's) etc.
- ☐ Users can select the various activities and upload documents required for each activity with user-friendly interface
- ☐ If a user has excess credits beyond what is required for that year, the profile must carry over those excess credits to the following year
- ☐ User is required to make payment for recertification.
- ☐ User sees on-screen messages and/or automated emails with task completion confirmations or reminders throughout process.
- ☐ User sees dashboard that lists current status and pending tasks and/or in progress stages.
- ☐ User's actions trigger creation of digital certificate and digital badge.
- ☐ Upon completion, an official dated, customized digital certificate and digital badge is emailed.

3. Essential Requirements for Admin Capability

    a) For Certification

- ☐ Admin sees same or similar "dashboard" as user -showing current status and pending tasks
- ☐ Administration of form must provide option to add/customize demographic and/or other fields
- ☐ Admin must be able to access application data and any uploaded documents for verification.
- ☐ Admin staff must be able to easily retrieve, review and/or transfer user's documents to another drive, with option to download single or multiple user's docs.
- ☐ Admin needs to be able to easily view and export reports regarding individual user or group of users' current status.
- ☐ Admin can configure on-screen messages (tool tips and prompts)
- ☐ Admin can configure automated emails with standardized messages at every step — particularly where the application is left incomplete by a candidate.
- ☐ Built-in ticket/help desk functions to support admin
- ☐ After taking the exam, the user will get a score report – which is manually generated using the testing platform. However, in addition… we would like to manually enter the score into the user's profile and have that action trigger an automated email with score (email to be worded and designed by admin). Hence, exam score will become part of user profile.

b) **For Recertification**

☐ Admin can access dashboard that lists current status and pending tasks for each recertificant

☐ Current status is defined as…

- **Active** – User can recertify annually
- **Lapsed** – If recertification requirements are not met by February 28th, the CCH credential lapses. Reactivation of a lapsed credential is possible if the credential has been lapsed for two (2) years or less. Reactivation of a lapsed credential requires four actions:
  - Complete and submit the CCH Credential Reactivation Form. To receive the form, please submit an online request.
  - Upload documentation of 15 CEUs per lapsed year (see CEU Requirements)
  - Pay recertification fee per each lapsed year(s)
  - Pay $100 reactivation fee If the credential has been lapsed for more than two years, the credential is expired.
- **Expired** – Failed to recertify for 2 years. Expired certificants may reactivate the credential by taking the CHC Exam at the Retake Fee.
- **Newly Certified** – Recent certificants ar not required to re-certify the year they take the exam.

☐ Built-in ticket/Help Desk function

☐ Note: The CHC audits a minimum of 10% of recertificants to confirm that they have sufficient documentation for CEU's. Hence, the uploaded documentation must be securely stored where staff can easily retrieve and review and transfer to another drive if desired.

☐ Multiple users should have the access to run the audits for quality assurance at every level of candidate certification and recertification management.

☐ Automated reminders to recertify would go out to all certificants (plus newly certified if they are due). Admin must be able to edit and/or compose any standardized messages regarding certification/recertification.

Proposal Instructions, Guidelines and Timing

This Request for Proposal (RFP) presents the requirements for an open and competitive process.

ISSUE DATE	April 13, 2023
REQUESTS FOR CLARIFICATION DUE	April 27, 2023
RELEASE ANSWER TO CLARIFICATION	May 3, 2023
DUE DATE FOR PROPOSALS	May 10, 2023, 5pm EST email all proposals to Sheetal Tiwari at chcpres@homeopathicdirectory.com
VENDOR WILL BE SELECTED	May 25, 2023
VENDOR CONTRACT MUST BE FINALIZED	June 1, 2023
A FULLY FUNCTIONAL SYSTEM MUST BE COMPLETED BY	August 1, 2023
BUDGET	$4,000 - $7,000 annually for subscription Or $20,000 - $24,000 for one-time outright purchase of custom built software

To be considered, all proposals must include:
- Company overview & qualifications for this project
- Description of personnel who would support CHC
- Marked checklist of requirements mentioned above. Additional commentary welcome but not required
- Sample screen shots, links to any sample demonstrations
- Fee proposal
- References - minimum of two

We look forward to your proposal.

Thank you!

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