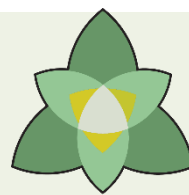
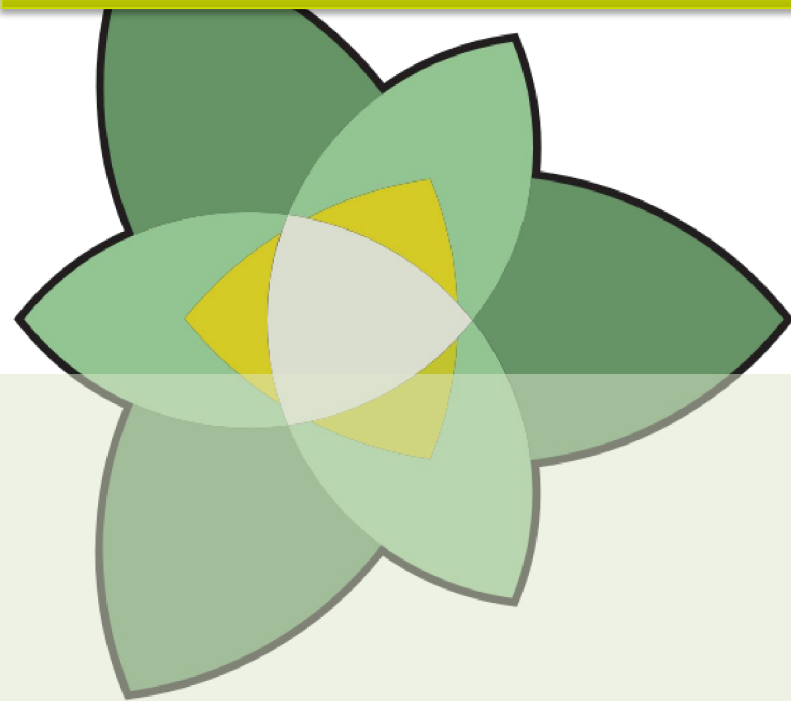


# Request for Proposal Clinical Management Platform

This solicitation should not be interpreted as a contract (implicit, explicit, or implied), nor does it imply any form of agreement to any potential candidate. In addition, no inference should be made that Trillium will purchase and/or implement in the future any of the programs or services proposed by the respondents.



**Trillium**  
HEALTH RESOURCES

Transforming Lives. Building Community Well-Being.

201 West 1st Street  
Greenville, NC 27858

# TABLE OF CONTENTS

<b>1. INTRODUCTION .....</b>	<b>3</b>
1.1. COMPANY MISSION AND BACKGROUND .....	3
1.2. PURPOSE OF RFP .....	3
1.3. DISCLAIMERS .....	4
<b>2. GUIDELINES FOR RFP PARTICIPATION .....</b>	<b>5</b>
2.1. RFP SUBMISSION .....	5
<b>3. SCOPE OF WORK .....</b>	<b>6</b>
3.1. OVERVIEW .....	6
3.2. BUSINESS EXPERIENCE .....	7
3.3. TECHNICAL REQUIREMENTS .....	9
3.4. IMPLEMENTATION AND SUPPORT SERVICES .....	11
3.5. GOVERNANCE AND COST .....	11
<b>4. ADMINISTRATIVE.....</b>	<b>12</b>
4.1. TIMELINE OF EVENTS .....	12
4.2. CONTACT INFORMATION .....	13



## 1. INTRODUCTION

### 1.1. COMPANY MISSION AND BACKGROUND

Trillium Health Resources (Trillium) is a Tailored Plan and Managed Care Organization (MCO) that is responsible for the management of the health care needs members who experience behavioral health , intellectual and/or development disabilities (IDD), and traumatic brain injuries (TBI) for 46 counties in North Carolina. Trillium manages physical health, behavioral health, IDD, TBI, pharmacy and vision services for approximately 98,000 members.

Trillium manages three plans:

1. Tailored Plan-whole person care for Medicaid beneficiaries who experience moderate or severe behavioral health needs, IDD or TBI.
2. Medicaid Direct-limited benefit, managed care plan for behavioral health, IDD and TBI services for Medicaid beneficiaries. Physical health, pharmacy and vision services are not in managed care and are overseen by NC Medicaid.
3. State Funded Services-limited benefit behavioral health, IDD and TBI plan for recipients who are uninsured or underinsured.

Trillium does not provide direct care; Trillium builds and manages a network of qualified providers to offer services. We work with our provider network to strengthen foundations of well-being and help deepen connections between citizens and their communities.

For more information, please visit [Trillium Health Resources](#).

### 1.2. PURPOSE OF RFP

Trillium is seeking proposals for a modern, flexible Clinical Management Platform that improves care management and coordination across all health domains. The Clinical Management Platform must enable regulatory compliance with current contractual requirements with North Carolina Department of Health and Human Services (NC DHHS) and National Committee for Quality Assurance (NCQA) accreditation requirements as Trillium is an accredited Health Plan under NCQA. The Clinical Management Platform must support billing functions to be completed in working with other ancillary systems. The selected Clinical Management Platform must support Trillium's goals of reducing administrative burden, minimizing redundant processes, and optimizing overall system performance to drive efficiency and cost reduction. The new Clinical Management Platform should provide a secure environment including HIPAA and SOC 2 Type 2 audits, user-friendly experience for staff and a member/provider portal to allow for care team communications. Where possible, the Clinical Management Platform should include configurable AI, automation and other advanced tools to meet these objectives. It is also important that the platform reinforce Trillium's ownership

of all submitted and generated data through open access to all data elements and foster confident adoption through intuitive design and functionality.

The platform should enable real-time analytics and reporting to support configurable data-driven decision-making and provide actionable insights into patient care and population health. The platform and any downstream supporting vendors or partners must meet all health insurance industry security standards ensuring robust protection of personal and sensitive data. Additionally, it should be scalable and adaptable to accommodate 300% organizational growth and evolving industry demands. To ensure successful implementation, the solution must include comprehensive training programs that promote user adoption and enhance productivity across all user groups.

The purpose of this RFP is to solicit pricing and system information from platform vendors to allow Trillium to make a decision as part of its selection process. Responses to this RFP should focus on the vendor's offerings, capabilities, and experience within development of Clinical Management Platforms for all services managed by Trillium.

In addition, responses should include explanation of how the vendor can serve as a "one-stop shop" for many of Trillium's operational and customer service needs should Trillium decide to move in that strategic direction. A more specific list of the functions and technologies that are in-scope for this evaluation are listed within this document.

Trillium aims to complete selection of a new vendor within the next 60 days. Trillium aims to complete first phase implementation activities with a new vendor by **February 1, 2027**.

### 1.3. DISCLAIMERS

This document is the proprietary and exclusive property of Trillium, except as otherwise indicated. No part of this document in whole or in part may be reproduced, stored, transmitted, or used for design purposes without prior written permission from Trillium.

The information contained in this document is subject to change without notice. Trillium, at its discretion and without explanation to the prospective vendor, can at any time choose to discontinue this bid without obligation to such prospective vendor.

Trillium is not responsible for any expenses incurred by the vendor in preparing and submitting a response. The vendor's response or any contract discussions or negotiations will be at the sole cost of the vendor. No statement by Trillium may be considered a request or justification to increase or change inventory, staff, facilities, business relationships, or internal business processes. All actions by the vendor in response to this RFP, or subsequent discussions or negotiations, should be taken with the clear understanding that neither this RFP nor subsequent actions or omissions by Trillium shall in any way obligate Trillium to pay or reimburse the vendor for any costs or expenses the vendor incurs in conjunction with the RFP process.

All responses, inquiries and correspondence related to this RFP, including all reports, charts, displays, schedules, exhibits, and other documentation produced and submitted by the vendor as part of the response, shall become the property of Trillium once submitted. The decision(s) of the selection committee are not subject to appeal rights, nor is the publication of this RFP a guarantee that a contract will be issued.

Based on an evaluation of the responses received, vendors may be asked to participate in demonstration sessions to clarify or present additional information. Trillium will make every reasonable attempt to schedule each presentation at a time that is agreeable to the vendor.

Selected vendors may be invited to participate in a Live Final Negotiation and Best and Final Offer (BAFO) Session, during which key terms, non-negotiables, and requirements will be addressed in real time.

## **2. GUIDELINES FOR RFP PARTICIPATION**

### **2.1. RFP SUBMISSION**

All RFP submissions will describe and reference current platform offerings, capacities, capabilities, configurability, current implementation and other parameters. Future capabilities, product roadmaps, development plans, etc. may be added as call outs for future considerations in your RFP response, however RFPs will be evaluated on current capabilities and the answers supported by current platform realities. Any contract award resulting from this RFP will be based upon the most responsive vendor whose offer will be the most advantageous to Trillium in terms of overall current and future security, functionality needs, quality, cost/price, service, and factors as specified by the requesting business unit. Trillium reserves the right to accept or reject a bid and to thereafter enter negotiations with the selected vendor that is in the best interests of Trillium, in its sole discretion and without recourse to any bidder.

NOTE: Trillium reserves the right to:


- 🌱 Discontinue this bid process without obligation or liability to any potential suppliers
- 🌱 Reject any or all offers
- 🌱 Accept the most responsible bid even if it is not the lowest price offered
- 🌱 Award a contract on the basis of initial offers received, without discussions or requests for best and final offers


### 3. SCOPE OF WORK

#### 3.1. OVERVIEW


Please provide detail on your company size, legal name, tax ID number, address of corporate headquarters, and submitter's contact information. Please indicate the number of years your company has been in service providing platform development/execution services.

Please describe the ways your product supports compliance with:

 **NIST SP 800-53 Rev 5 Controls:** Describe how your platform aligns with NIST 800-53 security control families, particularly: Access Control (AC), Audit and Accountability (AU), Configuration Management (CM), Identification and Authentication (IA), Incident Response (IR), Risk Assessment (RA), System and Communications Protection (SC), and Supply Chain Risk Management (SR).

 **NC Statewide Information Security Manual Compliance:** Confirm your organization's ability to comply with the North Carolina Statewide Information Security Manual and associated policies (SCIO-SEC-301 through SCIO-SEC-318) as required by N.C.G.S. §143B-1376. This includes but is not limited to:

- Role-based access control with 90-day inactivity account disablement
- Multi-factor authentication for remote access and administrative functions
- Encryption at rest and in transit compliant with state encryption standards
- Incident response coordination with agency security personnel
- Personnel security provisions for contractor access to state data

 **Supply Chain Risk Management (SCRM):** Per SCIO-SEC-318, provide documentation of your organization's SCRM program including:

- Disclosure of all subcontractors, offshore partners, and third-party service providers with access to Trillium data
- Foreign Ownership, Control, or Influence (FOCI) disclosures
- Software bill of materials (SBOM) availability for deployed components
- Verification of supply chain integrity controls

NCQA requirements; list the NCQA accreditations that your platform supports or for which your platform has been audited

## 3.2. BUSINESS EXPERIENCE

Describe your organization's experience in the North Carolina market, as well as other markets, in working with organizations like Trillium to implement a Clinical Management Platform.

Include a list of at least three references with project descriptions and timelines from selection to launch.

Provide a detailed description of the capabilities included in your "out-of-the-box" single platform solution offering.













Identify which capabilities are included in your "out-of-the-box" single platform solution offering, i.e. integrated applications housed on a single/integrated database or data model without the need of special customization and/or bolt-on software.

Provide information on any evidenced-based practices or other industry standards, as it relates to managing care for members that have been incorporated in your "out-of-the-box" single platform solution offering.

Provide a detailed description of your platform's Health Insurance Portability and Accountability Act (HIPAA) compliance design, implementation, or audit validations including compliance for all vendors or partners used to support your platform, remote users, web portal access, mobile application access, and integration integrity including but not limited to API on-demand data sharing.

Describe how your platform supports the design for tailored care management in North Carolina.

Detail your system's capabilities in the following areas:

-  Risk Stratification
-  Population Health Screenings
-  Unmet Health Related Resource Needs Assessment and Screening
-  Comprehensive Health Assessment for Behavioral Health Populations
-  Care Plans for Behavioral Health Populations
-  Work Queues available within the system
-  Any automation of triggers or care alerts
-  Any letters that have the ability to be auto-generated within the system
-  Customer Service
-  Contact Center Platform
-  Member Portal
-  Provider Portal

- 🌟 Workflow Management (e.g. automated emails and notifications)
- 🌟 Medication information and Medication Reconciliation capabilities
- 🌟 Quality Management
- 🌟 Utilization Management
- 🌟 Benefits Management

Do you provide other relevant services, not listed above, that should be noted here? (Please specify.)

As a part of the RFP process, Trillium is requesting screenshots of the platform in use to get a preliminary understanding of the user interface design, general usability, and functionality. As such, please provide 1-2 screenshots of the following screens:

- 🌟 Member information screen(s)
- 🌟 Provider information screen(s)
- 🌟 Assessment or Screening screen(s)
- 🌟 Care Plan screen(s)

Has your organization created custom code for the workflow management module of your platform? If so, please estimate the percentage of your customers for which you have created customized code for Behavioral Health and I/DD specific workflows (e.g. crisis management). If so, please describe how the custom code is supported across new versions of your platform with or without rewriting, new, development efforts and expense, as well as validated deployment.

Trillium has an interest in understanding the flexibility and robustness of your platform's configurable on-demand reporting capabilities. Please provide 2 to 4 screenshots showing the sample fields that a report/pivot can be based off for the following functions:

- 🌟 Task List for Care Manager or Care Team members
- 🌟 Member Needs / Task list or Dashboard

Trillium has system users that require access to the platform remotely. Please indicate the following and provide screen shots where the answer is yes:

- 🌟 Does the application allow for mobile tablet/PC access?
- 🌟 Are there any capabilities that work in an offline mode? If so, please list.

Does your organization provide Business Process Outsource (BPO) services? If so, does Trillium have the option to use an onshore only model? If not, do you partner with a specific 3rd party BPO provider? (Please specify.)

Does your organization partner with any offshore vendor to deliver platform or other services required for your RFP response? If yes, please list all.



Provide the following information regarding your organization's security governance:

- 🌱 Name and contact information for your Chief Information Security Officer (CISO) or equivalent
- 🌱 Date of most recent independent security assessment or penetration test
- 🌱 Summary of findings and remediation status from your last SOC 2 Type 2 audit
- 🌱 Your organization's process for notifying customers of security incidents and data breaches, including contractual notification timelines
- 🌱 Insurance coverage for cyber liability and professional errors & omissions

### 3.3. TECHNICAL REQUIREMENTS

Provide a detailed description of your platform's software design architecture and how it supports modular or phased implementation and "buy only what you need" software, services, or configuration.

Please detail the hardware, network, and communication infrastructure requirements and third-party software needed to support your application, as well as any other technical information including internal or external cloud hosting services necessary to understand how to fully deploy and support your application:

In your response, address whether your organization created custom code for the workflow management module of your platform and provide estimates of the percentage of your customers for which you have created customized code for Behavioral Health and I/DD specific workflows (e.g. crisis management). Trillium is interested in understanding how autonomously we will be able to manage and configure the platform on an ongoing basis. Please indicate the approximate percentage of your current customers who independently perform "basic" modifications and/or configurations (e.g. business workflow rule setting) to the platform without engaging you, the platform vendor, and/or a 3rd party service provider. Please indicate the approximate percentage of customers that independently perform "advanced" modifications and/or configurations (e.g. creation of a new D-SNP benefit plan) to the platform without engaging you, the platform vendor, and/or a 3rd party service provider.

Trillium requires robust APIs and SDKs to allow for certainty of high degree of rapid customizations (attributed to NC DHHS visions/plans) while maintaining the critical vendor upgrade path (we do not want to create a one-off Trillium centric solution that becomes costly to maintain and/or fails to leverage all future vendor upgrades).

Describe your platform's capabilities in terms of configurable report-writing, customer-controlled data analytics, and configurable or optional artificial intelligence.

- 🌱 Identify whether or not your system allows for self-service reporting as "out-of-the-box" functionality.

- ✿ Describe your system's capabilities as it relates to custom reports that your customer creates on-demand and as needed.

Describe your experience and plan for addressing Trillium's needs for the following software interfaces and data extracts:

Support interoperability standards including FHIR, HL7 (v2/v3), X12, and flat file formats (e.g., CSV, XML, JSON).

Include a configurable data mapping and transformation engine for aligning incoming and outgoing data to state-defined schemas.

- ✿ Offer Master Data Management (MDM) capabilities for entity resolution, de-duplication, and data reconciliation across multiple sources.
- ✿ Enable secure data transport via protocols such as SFTP, REST APIs, and ensure compliance with North Carolina state-defined transmission requirements.
- ✿ Provide comprehensive audit logging, pre-submission validation reports, and configurable outbound data scheduling to support compliance and traceability.
- ✿ The proposed solution must provide full access to all application data via a well-documented, stable, and versioned API (Application Programming Interface). Data access via database backups (e.g., .bak files, flat file exports) is not our preferred method for routine data integration, access, or extraction.

Provide a Service Level Agreement (SLA) specifies target turnaround times (TAT) along with clearly defined penalties and/or fee reductions for failure to meet those commitments.

Role based user access controls; user audit capabilities

End to End Billing Capabilities, including:

- ✿ Claims intake and submission via 837
- ✿ Batch billing upload and export capability,
- ✿ File validations & data integrity,
- ✿ Support CMS and ANSI standards,
- ✿ Rate setting capability,
- ✿ Ability to accommodate multiple HCPCS code and modifier combinations
- ✿ Claim bundling capability,
- ✿ Customized Reporting, queues and dashboards for staff,
- ✿ 835 EFT and ERA payment positing
- ✿ AI and customization capabilities
- ✿ Batch Claim Voids & Batch Claims Reconciles

- 🌟 All claim details shown on one page

### 3.4. IMPLEMENTATION AND SUPPORT SERVICES

Please describe your typical implementation timeframe from selection to platform go live.

Does your company serve as the lead on implementation for the platform? If not, do you partner with a specific 3rd party provider? (Please specify.)

Do you provide ongoing in-house support in the following areas? If not, do you partner with a specific 3rd party provider? (Please specify.)

- 🌟 Application development
- 🌟 Benefit and Plan configuration
- 🌟 Member Assessment customization
- 🌟 Adding Standardized Assessments to the platform

End User Groups to consult on future development.

Please describe your standardized system release/update protocols.

Please describe the platform and support capabilities related to training; provide screenshots where possible:

- 🌟 End-user training materials (e.g. Trillium “train-the trainer”, provider communication and training materials, etc.)
- 🌟 Hands-on demonstration training environment for use during training
- 🌟 Training when upgrades and enhancements are developed
- 🌟 Ad hoc for Trillium staff when needed

### 3.5. GOVERNANCE AND COST

Detail the cost for your software solution. The information should distinguish between one-time for implementation and on-going costs and include a summary of the expected costs for each of the first five years. Assume a count of 134,600 members.

Pricing Grid		
Cost Description	Cost	Assumptions / Additional Info
Implementation (Break out phases if applicable.)		
Ongoing PMPM Cost Approximation (Membership minimums and/or pricing tiers)		
License Purchase Cost Approximation (If the option is available)		
Upgrades/Ongoing Maintenance (Annual fee or percentage)		

Pricing Grid		
Cost Description	Cost	Assumptions / Additional Info
4 X Growth impacts on pricing		
10 X Growth impacts on pricing		
Other Pricing Factors		
Alternative Pricing Arrangements		

## 4. ADMINISTRATIVE

Vendor must submit the response in writing using the link provided. Response should be submitted via to [Clinical Management Platform RFP Submission](#)

Responses to this RFP, received by January 2, 2026, will be evaluated by January 30, 2026. All vendors will be notified, in advance, of a possible meeting with our evaluation team at our office, if required.

### 4.1. TIMELINE OF EVENTS

Event	Date
Request For Proposal Distribution	December 3, 2025
Question Period Deadline (Link for submitting questions below) <a href="#">Vendor Question and Answer Form Platform RFP</a>	December 15, 2025
RFP Response Deadline (Link for submitting RFP below) <a href="#">Clinical Management Platform RFP Submission</a>	January 2, 2026
Vendor Selection On Or Before	January 30, 2026
Pre-Implementation Activities	Immediately Following Selection
Target Implementation	February 1, 2027 or earlier

Responses to the RFP are to be delivered to the Trillium contact no later than 5 PM ET January 2, 2026. Responding companies will be asked to continue or exit the process based on the assessment of information received in the RFP.

Based on an evaluation of the proposal responses received, vendors may be asked to participate in interviews and/or site visits to support and clarify their proposals.

Upon invitation and acceptance to participate in demonstrations, vendor(s) will receive detailed demonstration scripts and supplemental questions. Vendor(s) must be prepared to

demonstrate how their proposed solution will meet Trillium's requirements using the provided demonstration scripts. In addition, responses to all supplemental questions must be prepared by the demonstration date.

Vendors should not attempt to contact any of Trillium's personnel unless specifically requested by Trillium. Failure to comply may result in disqualification from the selection process.

## **4.2. CONTACT INFORMATION**

Please direct questions concerning this RFP to: [Vendor Question and Answer Form Platform RFP](#)