NEW YORK STATE | Office for People With Developmental Disabilities

Solicitation of Interest
SOI OPD-2025-61
Electronic Dental Record Solution

Submission Due Date: December 29, 2025

1. AGENCY: NYS Office for People With Developmental Disabilities (OPWDD)

2. DIVISION/UNIT: Division of Fiscal Policy and Management/Contract Management Unit (CMU)

3. DESCRIPTION OF SERVICES: Electronic Dental Record Solution (EDRS)

4. OPPORTUNITY TYPE: Solicitation of Interest (SOI) OPD-2025-61

THIS IS NOT A REQUEST FOR PROPOSAL. THIS IS A SOLICITATION OF INTEREST. Per NYS Procurement Guidelines, prior to issuing a formal bid or request for proposals, an agency may reach out to the vendor community to determine the capabilities and interests of the marketplace in participating in a potential formal bid.

5. DATE OF ISSUE: December 2, 2025

6. DUE DATE FOR QUESTIONS AND REQUESTS FOR CLARIFICATIONS: December 9, 2025

7. ISSUANCE OF RESPONSES TO QUESTIONS / CLARFICATIONS: December 16, 2025

8. DUE DATE FOR SUBMISSION OF SOI RESPONSE: December 29, 2025

Qualified vendors may express interest by completing the Response Form attached and submitting it to: procurement@opwdd.ny.gov, by December 29, 2025.

9. DESCRIPTION:

OPWDD is soliciting email responses from potential bidders who are able and interested to provide an Electronic Dental Record Cloud Solution that meets the requirements outlined below. In addition, if there are any comments or concerns with the details in the SOI.

10. BACKGROUND:

The New York State Office for People With Developmental Disabilities (OPWDD) is the New York State (NYS) executive agency responsible for the provision, regulation, and oversight of services to NYS individuals with developmental disabilities (IDD). Per Mental Hygiene Law § 1.03 (22), individuals served by OPWDD have a documented history of diagnoses that may include, but are not limited to, intellectual disabilities, cerebral palsy, epilepsy, neurological impairments, and autism spectrum disorders. (https://opwdd.ny.gov/eligibility)

OPWDD provides services and supports directly and through a network of approximately 500 nonprofit service-providing agencies, with about 80% of services provided by the private nonprofits and 20% provided by state-run services. OPWDD also provides residential supports and services for approximately 43,000 individuals with developmental disabilities throughout New York State. OPWDD individuals reside in residential homes, group homes, and supported apartments, as well as institutional settings such as

developmental centers and a variety of secure facilities. OPWDD operates approximately 1,500 residential and institutional sites statewide.

Services provided to individuals through OPWDD involve dental care. OPWDD is seeking to upgrade their systems to improve efficiency and functionality, including interfacing with existing records retention solutions.

For more information, please visit: https://opwdd.ny.gov.

11. MANDATORY REQUIREMENTS:

Any potential bidders submitting a response to this SOI must meet the minimum qualifications listed below. Information demonstrating these qualifications must be incorporated into the interested Contractor's response.

11.1. A minimum of three years of professional experience in all of the following:

- Experience in designing, developing, and implementing solutions specifically for dental practice record keeping via a Cloud Based Solution.
- Experience in maintaining records with the same volume/size as OPWDD.
- Five current large installations with a service base of 20,000 people for each, utilizing a similar solution.
- Preference will be given to potential bidders who have experience working with individuals with IDD.

12. SERVICES:

12.1. Electronic Dental Record Solution (EDRS)

12.1.1. The solution chosen must have the ability to connect to OPWDD's Electronic Health Record (EHR), which will allow OPWDD to manage one platform for everything. This will allow OPWDD to enhance workflow and efficient communication within our dental clinics, while increasing the productivity of the staff and enhancing overall practice results. This will include the ability to move data and information for integration and successfully work with equipment in existence.

12.1.2. The Electronic Dental Record should streamline the daily business operations of our dental clinics and would include scheduling, documentation, and maintaining patient records. It would also include tracking insurance claims, charting dental history, e-prescribing, and imaging. Thus, decreasing the wait time for many people with developmental disabilities to receive services, as well as improving quality and comprehensiveness of the services provided.

12.1.3. OPWDD currently does not have a uniform Electronic Dental Record, therefore, there is no transition of a solution or services.

12.2. Solution Integration

Cloud Based solution will be required to handle the data entry, retrieval, back up to EHR (via bridge), billing, and other information exchange with the existing EHR for approximately 900 – 1500 people with developmental disabilities per month throughout the state. Licensing is expected as follows:

12.2.1. Must have HL7 (standard for data exchange) system interoperability.

12.2.2. Can accommodate at least 75 concurrent logins.

12.2.3. Role based user interface: Administrative, Dentist, Hygienist. Authentication: NYS MFA – OPWDD users will sign in using their already established NYS IDs for up to 35 end users.

12.2.4. Four-hour call to fix repair SLA Maintenance. The system cannot be down more than four hours. 99.99% up time Monday - Friday.

12.2.5. Tie in with Carestream imaging software and EHR (Cx360) via bridge for patient data. Cx360 is the electronic health record that OPWDD currently uses. Solution must be compatible and able to communicate with Cx360. This should include service details/encounters needed for billing services, progress notes, and imaging. This solution will be required to integrate with future OPWDD EHR systems.

12.2.6. OPWDD requires the ability to include billing and billing coding.

12.3. Solution Based Reporting Requirements

12.3.1. Potential bidders may be required to report annually, or other timeframe agreed upon, information regarding the services performed. This may include, but is not limited to the total dollar amount invoiced for services performed during the preceding year; the number of vendor direct labor hours; customer assistance calls, time spent on site for training, etc.

12.3.2. Ability for user data reports on services, locations, staff, etc.

12.4. Telephone and Technical Support

Expectations include the provision of vendor technical services, such as product support/maintenance and off hours support (helpdesk). Potential bidders must have customer service available during normal working hours of OPWDD dental clinics, who will be able to assist users with any issues that may arise.

12.4.1. Potential bidders will provide full telephone support during normal clinic hours of operation. (7:00 am – 6:00 pm, Monday – Saturday) Dental care is primarily utilized during normal business hours but potentially may be provided for urgent services during off hours. Four-hour call to repair SLA. The system cannot be down more than four hours. 99.99% up time Monday - Friday.

12.4.2. Potential bidders will provide unlimited technical support via various channels, including email, telephone, remote support, on-line meeting (Webex, Teams, etc.) and other applications as necessary.

12.4.3. Potential bidders will provide solution updates, bug fixes and new features, and new versions of the Electronic Dental Record as they are released.

12.4.4. Potential bidders will provide minimal after-hours support for after-hour emergencies.

12.5. Training of OPWDD Provider Staff

Provision of training that is accessible and on-going as needed for system upgrades, new staff, or refresher training as needed.

12.5.1. Potential bidders will work collaboratively with OPWDD to ensure that all dental staff (dentists, hygienists, dental assistants, admin staff as applicable) are fully trained, either via on-site or remotely, to ensure knowledge and competency with system usage.

12.5.2. Potential bidders must be able to provide training, encompassing different learning styles to users. Training should be a mixture of on-line and in person for 25-35 Trainees, including administrative OPWDD Staff. (Statewide). Classroom delivery at locations determined by OPWDD at rollout (see below, section 12.6) for a minimum of five participants.

12.5.3. Must provide both written and electronic resources that provide plain language instructions for use and troubleshooting of the solution. This will include recordings of live online training modules for 24/7 access.

12.6. Location of Training Services

It is expected that some training services would be provided on-site at the following locations:

Region 1	**620 Westfall Road, Rochester, NY**
Region 1	5259 Parkside Drive, Canandaigua, NY
Region 1	703 E. Maple Avenue, Newark, NY
Region 1	295 Jemison Drive, Geneseo, NY
Region 2	249 Glenwood Road, Binghamton, NY
Region 3	200 Smith Drive, Corinth, NY
Region 3	500 Balltown Road, Schenectady, NY
Region 4	26 Center Circle, Wassaic, NY
Region 4	9 Wilbur Road, Thiells, NY

13. BILLING COSTS

OPWDD is seeking estimated costs associates with the requested solution and services in this SOI as follows, but not limited to:

13.1. Costs include set up / start up; purchase of equipment; monthly subscription fees if/as applicable, training of OPWDD staff; maintenance of equipment; technical assistance.

14. STAFF

14.1. Staffing Changes

14.1.1. OPWDD shall be given two weeks' notice of any change to key personnel.

14.1.2. Any staffing represented as key personnel are anticipated to fulfill all deliverables and tasks throughout the entire life of the project. If staffing changes are required for any of the key personnel on the project prior to the completion of his or her assignment period, the potential bidders shall first, before proceeding with such removal, consult with and seek the approval of OPWDD. If, after said consultation, it is mutually agreed that such removal shall take place, the potential bidders shall provide the resumes of up to three potential replacements with similar or better qualifications for OPWDD's review and approval within three business days, or as otherwise agreed to by OPWDD.

14.1.3. OPWDD shall also have the right in its reasonable discretion to request removal of a potential bidders staff member at any time, and the potential bidders must provide the resumes of up to three potential replacements with similar or better qualifications for OPWDD's review and approval within three business days, or as otherwise agreed to by OPWDD. Any associated cost will be borne by the potential bidders. As documentation to facilitate knowledge transfer is the sole responsibility of the potential bidders, the replacement staff will be provided at no cost during the knowledge transfer period.

14.1.4. Where potential bidders' staff ceases work for reasons beyond the control of the potential bidders, the potential bidders must immediately notify OPWDD and provide the resumes of up to three potential replacements with similar or better qualifications for OPWDD's review and approval within three business days, or as otherwise agreed to by OPWDD. Reasons beyond the control of the potential bidders shall be defined as:

- death of the potential bidder staff member;
- disability or illness;
- potential bidder staff member resigns his or her position;
- termination for cause by the potential bidder;
- military service; or
- any other reason deemed acceptable by OPWDD.
- The provisions of this section do not preclude any potential bidder staff member from reasonable sick leave or annual leave.

14.2. Staffing Portfolio

The vendor must provide OPWDD with a Staffing and Organization Plan, upon contract execution, depicting each component of the respective project, all cross-cutting functional units of the organization/project, numbers, and types of staff for each component/function, and identified lines of authority governing the interaction of staff, and relationships with subcontractors. The names of management personnel must be shown on the organization chart and display key personnel and other staffing titles, how the project staff will be organized, located across the state, and how communication will be handled between the main site and any remote sites. The plan must include the total number of each staff for each function, outline sufficient numbers of staff in each role needed to support the scope and volume of this SOI, ratio for supervision, quality assurance and case management, and the designated full time key personnel. Identify staff that support the project but are not dedicated full time employees, subcontractors if any, please note must be pre-approved by OPWDD, their respective roles, and job descriptions for all professional, managerial, and supervisory positions.

14.2.1. Key Personnel and Roles

14.2.1.1. Account Executive: This role will be the primary point of contact, be responsible for learning the goals of this project and how the vendor can meet them. The account executive must be able to perform the duties stated below:

- Maintain strong client relationships and effectively understand client needs in delivering solutions.
- Provide a high level of customer satisfaction throughout the term of the contract.

14.2.2. Project Manager: This role will be responsible for making sure project adheres to the agreed upon project schedule and milestones. The project manager must be able to perform the duties stated below:

- Oversee the entire project from inception to completion.
- Be the key point of contact for ensuring the project remains on time, within scope and on budget.
- Facilitate communication among team members and stakeholders.
- Must have either a Project Management Professional (PMP) certificate or five years of progressive experience in project management and software development and deployment.

14.2.3. Developer Manager / Technical Lead: This role will be responsible for mapping out project development plans, including identifying project goals, timelines, required resources and potential roadblocks. The developer manager / technical lead must be able to perform the duties stated below:

- Key point of contact for all troubleshooting issues.
- Collaborate with cross-functional teams to translate business requirements into technical solutions.

14.2.4. Testing Supervisor / Release Manager: This role will oversee the testing process to ensure solution quality and performance before deployment. The testing supervisor / release manager must be able to perform the duties stated below:

- Coordination of release schedules.
- Foster communication between the development and operations teams.

In addition to the list of positions above, the plan must also include the proposed titles and numbers of staff needed to fulfill the required deliverables. OPWDD reserves the right to request a resume (including qualifying details) for any staff member (including subcontracted staff) assigned to the project. Replacement of key personnel and any assigned staff to project must be approved by OPWDD. After approval is received from OPWDD, key personnel must only be replaced with staff of comparable or increased experience, training, and ability to the incumbent in the position. The vendor may only replace or alter the number, ratios, and distribution of staff in key personnel as proposed, with written approval of

OPWDD. In the event that OPWDD gives written approval of the termination, transfer, or reassignment of staff in key personnel, such personnel will remain assigned to the performance of duties under this contract until replacement personnel, approved by OPWDD, are in place performing the key personnel functions.

15. GENERAL REQUIREMENTS

15.1. All actions and activities performed by the vendor will be in accordance with all state and federal laws.

15.2. Potential bidder will comply with all applicable laws, rules, regulations, standards, guidelines, policies, procedures and bylaws of all applicable authorities and all policies, procedures and regulations of OPWDD.

15.3. Potential bidder has available staff to cover all agreed upon times of required coverage for customer service/support and on-site training.

15.4. Potential bidder must ensure that good faith efforts are made to include meaningful participation by MWBE and SDVOB and must meet the requirements of 5 NYCRR Subsection 142.4.

16. EQUIPMENT

OPWDD staff will use their existing equipment (PC / Laptop) to access the web-based application. No additional software should be required. If additional software, plug-ins or non-standard browser requirements are needed, those requirements need to be listed and acceptable by OPWDD.

17. INFORMATION MANAGEMENT

17.1. Records Retention

17.1.1. The potential bidders will be able to establish and maintain complete and accurate books, records, documents, accounts and other evidence directly pertinent to performance under a potential NYS contract (hereinafter, collectively, the “Records”).

17.1.1.1. The Records must be kept for the balance of the calendar year in which they were made and for ten (10) additional years thereafter. The State Comptroller, the Attorney General and any other person or entity authorized to conduct an examination, as well as the agency or agencies involved in a potential contract, shall have access to the Records during normal business hours at an office of the potential bidders within the State of New York or, if no such office is available, at a mutually agreeable and reasonable venue within the State, for the term specified above for the purposes of inspection, auditing and copying.

17.1.1.2. The State shall take reasonable steps to protect from public disclosure any of the Records that are exempt from disclosure under Section 87 of the Public Officers Law (the “Statute”) provided that: (i) the potential bidders shall timely inform an appropriate State official, in writing, that said records should not be disclosed; and (ii) said records shall be sufficiently identified; and (iii) designation of said records as exempt under the Statute

is reasonable. Nothing contained herein shall diminish, or in any way adversely affect, the State's right to discovery in any pending or future litigation.

17.1.2. All electronic records must be kept within the Continental United States.

17. 2. IT Infrastructure

17.2.1. Vendor must have the ability to securely separate person-level data, eligibility, and workflows for OPWDD-directed work;

17.2.2. Document imaging to accommodate the scope of work;

17.2.3. Knowledge Management System (KMS) – A searchable database that supports customer service infrastructure and gives staff quick access to key resources and records;

17.2.4. An end-user facing website that includes information about the vendor, secure sign on and available service options for troubleshooting and other support needs.

17.2.5. Capability to support secure file transfer system (SFT), to and from OPWDD and the end-user as indicated by the agency.

17.2.6. Vendor must support ability to send/receive secure information to OPWDD and dental service provider offices.

17.2.6.1. Cloud Based solution will be required to handle the data entry, retrieval, back up to EHR (via bridge), billing, and other information exchange with the existing EHR for approximately 900 – 1500 individuals per month throughout the state, as stated in section 12.2.

17.2.6.2. The vendor may be requested to also have access and data exchange with other agency-specific technology resources as needed. The vendor will meet the HL7 data exchange requirements.

18. CONTACTS

The following are the contacts for this SOI.

Primary Contact	**Secondary Contacts**
Kelly Williams Contract Management Unit NYS Office for People With Developmental Disabilities 44 Holland Ave, 5th Floor Albany, NY 12229 Procurement@opwdd.ny.gov	Shannon Plasencia / Marc Kleinhenz Contract Management Unit NYS Office for People With Developmental Disabilities 44 Holland Ave, 5th Floor Albany, NY 12229 Procurement@opwdd.ny.gov

19. DISCLAIMER

This SOI is not a contract offer, and it is not an open solicitation for any services but rather an informational inquiry by OPWDD. This SOI does not commit OPWDD to conduct a procurement, award a contract, pay any costs incurred in preparing a response, or to procure or contract for services or supplies. Qualified entities are encouraged to respond to this SOI; however, failure to submit a response will not impact a respondent's ability to submit a response to any future competitive solicitation process (if any) for projects. Respondents are advised that all costs associated with responding to this SOI will be solely at their expense. There are no representations or warranties regarding the accuracy or completeness of the information contained in this SOI. Respondents are responsible for making their own evaluation of information and data contained in this SOI and for preparing and submitting responses to this SOI.

20. PROCUREMENT LAW

This is not a solicitation that will result in a contract, the procurement lobbying law does not apply; therefore, there is no restricted period.

21. SUBMISSION OF INTEREST RESPONSE

Included with the SOI, is a Response Form to be submitted if interested in providing the solution stated in this SOI to OPWDD.

NEW YORK STATE | Office for People With Developmental Disabilities

SOLICITATION OF INTEREST: ELECTRONIC DENTAL RECORD SOLUTION OPD-2025-61
(Use additional sheets as needed.)

VENDOR NAME: _____

Mandatory Requirements:

Is your business a dental software developing business? ☐ Yes ☐No

How many years have such services been provided by your business? _____ Years

Does your business provide Electronic Dental Record keeping services? ☐ Yes ☐No

Is your business able to provide cloud services to OPWDD clinics throughout the state? ☐Yes ☐No

Check all daily business operations that your solution provides to help dental clinics streamline workflow:

☐ Scheduling ☐ Documentation ☐ Patient Records Retention ☐ Tracking Insurance Claims ☐Billing/Coding

☐ Dental History Chart ☐ e-Prescribing ☐ Imaging ☐ Back Up of Data ☐ Multi-Factor Authentication Sign On

Briefly describe your experience designing, developing, and implementing solutions specifically for dental practice record keeping via a Cloud Based Solution. Include information regarding the volume and size of entities comparable to OPWDD (five current large installations with a service base of 20,000 people for each, utilizing a similar solution).

Does your business have experience working with ID/DD populations? ☐ Yes ☐No

Services and Solution Integration:

OPWDD users will utilize their existing equipment to access the cloud solution.

Is additional software or plug-ins required? ☐ Yes ☐No

If additional software, plug-ins or non-standard browser requirements are needed, please list those requirements:

Does your cloud solution have the ability to connect to an existing Electronic Health Record (EHR) (Cx360) via bridge for patient data, including service details/encounters (progress note, imaging)? ☐ Yes ☐No

Does your cloud solution have the ability to connect with future EHR Systems that OPWDD may deploy? ☐ Yes ☐No

Does your cloud solution have HL7 interoperability standards for data exchange? ☐ Yes ☐No

Can your cloud solution accommodate at least 75 concurrent logins? ☐ Yes ☐No

Does your cloud solution provide a role-based user interface? ☐ Yes ☐No

Potential bidders may be required to report annually, or other timeframe agreed upon, information regarding the services performed. This may include, but is not limited to the total dollar amount invoiced for services performed during the preceding year; the number of vendor direct labor hours; customer assistance calls, time spent on site for training, etc.

Can you meet these requirements? ☐ Yes ☐No

Training and Technical Support:

Is your business able to provide training for dental clinics throughout the state, especially during rollout? ☐ Yes ☐No

If yes, which? (check all that apply): In-Person ☐ Yes ☐No Online ☐ Yes ☐No Self-paced ☐ Yes ☐No

*It is expected that some training services would be provided on site at the following locations:

Region 1	620 Westfall Road, Rochester, NY
Region 1	5259 Parkside Drive, Canandaigua, NY
Region 1	703 E. Maple Avenue, Newark, NY
Region 1	295 Jemison Drive, Geneseo, NY
Region 2	249 Glenwood Road, Binghamton, NY
Region 3	200 Smith Drive, Corinth, NY
Region 3	500 Balltown Road, Schenectady, NY
Region 4	26 Center Circle, Wassaic, NY
Region 4	9 Wilbur Road, Thiells, NY

Can your business provide both written and electronic resources plain language instructions for use and troubleshooting of the solution?

☐ Yes ☐No

Will recordings of live online training modules be provided for 24/7 access? ☐ Yes ☐No

Does your business have capacity to provide full telephone support during normal clinic hours of operation? ☐ Yes ☐No

Can your business provide telephone support during off hours? ☐ Yes ☐No | Please provide additional details below:

Can your business provide four-hour call to fix repair SLA Maintenance? ☐ Yes ☐No

In addition, can your business provide technical services via various channels such as email, remote support, online meetings (WebEx, Teams, Etc.), or other application as necessary? ☐ Yes ☐No | Please provide additional details below:

Does your business provide regular updates to your solution (bug fixes, new features, new versions as they are released? ☐ Yes ☐No ☐ Other, explain:

Staffing:

Does your business have adequate staffing to meet the needs of OPWDD, including rollout, training, maintaining the solution, fixes, customer service, modifications? ☐ Yes ☐No

Does your business have a staffing plan in place to maintain adequate staffing to meet the needs of OPWDD? ☐ Yes ☐No

Please describe the Key Personnel and Roles: (may attach a staffing plan, including roles, education and qualification min/max).

All actions and activities performed by the vendor will be in accordance with all state and federal laws.

Potential bidder will comply with all applicable laws, rules, regulations, standards, guidelines, policies, procedures and bylaws of all applicable authorities and all policies, procedures and regulations of OPWDD.

Records Retention:

Does your solution have the ability to maintain records for up to 10 years in a secure method? ☐ Yes ☐No

Will these records be accessible to the Office of the State Comptroller, Office of the Attorney General, or other authorized entity conducting an examination (inspection, auditing, copying), during regular business hours at the office of a potential bidder within the State of New York? ☐ Yes ☐No

Are the records maintained in a protected state to prevent disclosure to unauthorized entities? ☐ Yes ☐No

Are the records kept within the Continental United States? ☐ Yes ☐No

Does your cloud solution provide automatic or manual data retention management? ☐ Automatic ☐Manual ☐ None

If Automatic, please describe how dates are set for deletion and what roles set these requirements:

IT Infrastructure and Security:

Does the solution securely separate person-level data? ☐ Yes ☐No

Does the solution allow document imaging to accommodate the scope of work? ☐ Yes ☐No

Does the solution have a searchable database? ☐ Yes ☐No

Does the solution support customer service infrastructure? ☐ Yes ☐No

Provides quick access to key resources and records? ☐ Yes ☐No

Does the solution have an end-user facing website that includes information about the vendor? ☐ Yes ☐No

Secure sign-on? ☐ Yes ☐No

Troubleshooting, Help, and Support options? ☐ Yes ☐No

Does the solution have a secure file transfer (SFT) component? ☐ Yes ☐No

Is the potential bidder able to provide access and data exchange with other agency specific technology resources upon request? ☐ Yes ☐No

Other:

Is the solution FedRAMP certified and if so at what level? ☐ Yes ☐No | Level:

Where would the data be stored as it must be within the Continental US?

Can a solution manage records retention, such as can coding be embedded in the interface to purge the dental records once the retention of 10 years is met? Would this also purge them from the EHR at OPWDD?

What are the Standard/Defined Maintenance Window(s)

How many minor code/Maintenance releases are there per year?

How many major code releases are there per year?

Will there be a Test or UAT Site to test code changes and affects on OPWDD data / processes

Additional Comments:

SIGNATURE:

VENDOR ADDRESS:

VENDOR E-MAIL:

VENDOR TELEPHONE: