# Request for Proposal
# RFP #CC170
## Lakelands Digital Patient Access Initiative

**Anticipated Schedule of Events**

| Milestone | Date |
|---|---|
| RFP Issued | November 13, 2026 |
| RFP Submission Deadline | December 12, 2026 |
| Committee Evaluation and Selection | December 16, 2026 |
| Anticipated Notice of Award | December 23, 2026 |

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## General Information

**Self Regional Healthcare (SRH)** is a nonprofit, regional healthcare system headquartered in Greenwood, South Carolina, serving approximately 300,000 residents across the Lakelands region. The system includes SRH Medical Center, Abbeville Area Medical Center, Edgefield County Healthcare, and a network of primary care, specialty care, rural health, and outpatient facilities throughout its service area.

## Background Information

Self Regional Healthcare is seeking proposals for one or more components of an AI-enabled Patient Access Solution supporting a unified digital front door across outpatient practices, specialty clinics, pharmacy services, centralized scheduling, and patient access lines. Proposers may respond under one or more of the following solution categories: (1) an all-inclusive solution that provides both voice and non-voice automation as an integrated platform; (2) a voice automation-only solution for inbound and outbound telephone interactions; or (3) a non-voice automation solution for digital channels that is designed to integrate with a separate, overlaying voice automation solution.

Proposed solutions should use Epic-connected digital engagement and conversational self-service capabilities to help patients schedule and manage appointments, request prescription refills, complete intake and verification activities, obtain navigation support, receive coordinated communications, and resolve routine questions. Proposers must clearly identify each category included in their proposal, the capabilities provided within that category, how the proposed components integrate with SRH's existing environment and with other awarded components, and any dependencies or capabilities not included. SRH may award a single all-inclusive solution or complementary voice and non-voice solutions to separate vendors.

SRH will provide grant administration, procurement coordination, project governance, financial and compliance oversight, cybersecurity review, implementation tracking, vendor coordination, technical support, reporting, and operational transition through existing organizational resources and in-kind support.

**Federal Funding Notice:** This project is supported by the Centers for Medicare & Medicaid Services (CMS) Rural Health Transformation Program (RHTP) through a subaward from the State of South Carolina. SRH was awarded $30,966,205.28 in federal RHTP funds, which represents 100% of the total project costs.

As a result, the selected vendor and any subcontractors may be subject to applicable federal requirements. Proposers should refer to the Terms, Conditions, and Federal Requirements section of this RFP for additional information.

### Goals

The project will improve patient access and experience, reduce administrative burden, standardize digital intake and communication workflows, strengthen care coordination, and expand reliable access to services throughout the Lakelands region..

### Objectives

Objectives are to: (1) establish consistent digital patient access across SRH outpatient practices, specialty clinics, pharmacy services, centralized scheduling, and patient access lines; (2) support coordinated voice and non-voice automation through either one all-inclusive platform or interoperable component solutions; (3) use Epic-connected capabilities and existing communication channels to support seamless, context-aware interactions; and (4) automate approximately 70–80% of eligible routine patient interactions while preserving appropriate escalation to staff for care coordination and complex needs.

### Anticipated Contract Term

The anticipated implementation and initial performance period is January 1, 2027, through September 30, 2027. Proposers must identify the proposed subscription term, implementation period, renewal options, and any pricing adjustments and future operating expenses applicable after the grant-funded period.

## Scope Overview

SRH may award one all-inclusive solution or multiple complementary solution components. Proposals must be organized under one or more of the following categories:

(1) **All-Inclusive Solution**—an integrated platform providing both voice and non-voice automation, shared orchestration, unified administration, coordinated patient context, and end-to-end reporting;

(2) **Voice Automation Only**—inbound and outbound telephone automation that can operate as the voice layer for SRH's patient access environment and integrate with Epic, communication systems, and separately selected non-voice automation; or

(3) **Non-Voice Automation with Voice Integration**—automation across web, mobile, text messaging, chat, and other digital channels that integrates with an overlaying voice automation solution through documented interfaces, shared context, coordinated routing, and consistent workflow logic. Awarded vendors will provide applicable implementation services, workflow discovery and configuration, Epic integration, communication-system integration, testing, training, deployment, and initial optimization.

Collectively, the awarded solution or components must support conversational, context-aware engagement; scheduling and appointment management; prescription refill requests; patient navigation; intake and verification; routine inquiries; coordinated communications; and escalation to staff. Each proposer must define its proposal category, included capabilities, integration and interoperability requirements, implementation dependencies, exclusions, and responsibilities when working with SRH and other selected vendors. The vendor will work with SRH governance, operational, clinical, technical, cybersecurity, and compliance teams to implement the awarded scope by September 30, 2027.

# RFP Instructions & Protocols

## Notice to Interested Parties

Proposals must be submitted as a single PDF by email to RHTP@selfregional.org by December 12, 2026 before 11:59 PM EST ("RFP Submission Deadline").

The single PDF must include the complete proposal and all required appendices and supporting documents.
The email subject line must state: "**RFP Response_RFP Title_RFP #_Proposer Organization Name**."

## Response and Communication Protocols

Do not contact the requesting department. Interested proposers must email all questions and requests for additional information to RHTP@selfregional.org by December 12, 2026 before 11:59 PM.

The solicitation number and title must appear in the email subject line. Attempts to circumvent this requirement may result in rejection of the proposal as noncompliant.

SRH will issue official responses to proposer questions and any amendments to this RFP in writing. Only written responses and addenda issued by SRH are binding. Proposers are responsible for reviewing and acknowledging all addenda issued before the proposal deadline. Oral statements, informal communications, or information provided by any other source may not be relied upon.

## RFP Organization and Format

**Responses must follow the prescribed format detailed below in order to be accepted.**

Proposers should organize their proposals in the order listed below.

1. Transmittal Letter
2. Project Narrative, including a response to each Project Specification
3. Pricing
4. Appendix A: Signature Page
5. Appendix B: Deviation Form
6. Appendix C: Conflict of Interest Questionnaire
7. Appendix D: Certification Regarding Lobbying (if applicable)
8. Appendix E: Insurance Requirements

## Transmittal Letter

Proposer must submit a transmittal letter that accomplishes the following:

- Proposer's name and contact information
- Brief statement of interest in the project
- Length of time the proposal and pricing will remain valid (minimum of 60 days required)
- Name, title, and signature of an authorized representative
- Brief summary of relevant qualifications and experience
- Any exceptions to the RFP requirements or terms
- Confirmation of the proposer's SAM.gov registration status, if applicable, and confirmation that the proposer and its proposed subcontractors are not subject to an applicable federal exclusion or debarment.

## Project Narrative

The proposer should provide a detailed narrative describing its qualifications and proposed approach. The narrative should address each requirement included in the Project Specifications section and include the following:

1. The proposer should provide a statement explaining why it is uniquely qualified to provide the requested goods or services to SRH.
2. A summary highlighting the most important elements of this proposal.
3. Details about the proposer's overall qualifications and ability to address each specific requirement in the Project Specifications section of this RFP.
4. The qualifications, physical location, and background of the personnel who will be directly involved with this project.
5. Include a statement confirming that the proposer agrees to complete all applicable background checks and screenings, if required, before personnel begin work at SRH and/or affiliate facilities and to comply with SRH's identification, access, safety, and security requirements for on-site personnel.
6. If applicable, provide a list of current or recent clients receiving similar products or services, including each client's contact information, the size or scope of the engagement, and the length of service.
7. If applicable, disclose any current or pending litigation or regulatory matter that could affect the proposer's ability to perform the work. Disclosure will not automatically disqualify a proposer; however, failure to disclose may affect the proposer's eligibility or any resulting agreement.
8. If applicable, detailed technical information about the proposed solution and the infrastructure needed for implementation and ongoing support. This may include hardware, network, communications, third-party software, system integration, and other technical requirements.
9. Identification of all proposed subcontractors and subprocessors, including their roles, the products or services they will provide, and the portions of the work for which they will be responsible.

## Optional Features, Products, and Supplemental Features

Proposers are encouraged to describe in detail any optional features, products, or services that could benefit SRH but are not included in the minimum requirements of this RFP. Optional items may include additional training, maintenance, enhanced service levels, alternative pricing options, upgrades, or other supplemental offerings.

Each optional item should be clearly described and identified separately from the primary proposal. Pricing for optional items should be itemized separately and should not be included in the base proposal price.

## Insurance Coverages

Proposers must maintain the insurance coverages in accordance with Appendix E.

## Quality Assurance

The proposer should describe its quality assurance processes, including how it will monitor performance, identify and correct deficiencies, document quality activities, and report results to SRH. The response should identify applicable performance measures, escalation procedures, and responsibility for corrective action.

### References

Provide a minimum of three (3) customer references for projects involving goods or services similar to those requested in this RFP. References should relate to comparable projects completed by the proposer, preferably for hospitals or other healthcare organizations. For each reference, include the organization's name, contact person, address, telephone number, and email address.

NOTE: SRH will not accept references submitted after the proposal deadline or by a method other than the one identified in this RFP. SRH may contact the references to confirm or clarify the information provided and may consider those responses when evaluating proposals. SRH is not required to seek clarification of incomplete reference information.

### Proposal Pricing

Pricing should be itemized for all products and services requested in this RFP. Brief notes may be included when needed to explain a specific line item. The proposer should include all costs associated with its proposal and clearly identify any assumptions, exclusions, optional costs, or additional fees. SRH may select and award the products or services that best meet its needs.

### Payment and Discounts

The proposer should include a proposed payment schedule that aligns with the pricing provided and the anticipated agreement. The proposer should also describe any available discounts, including early-payment discounts and the terms under which each discount would apply.

## Evaluation and Review Process

### Review Process

This RFP is not intended to favor any proposer and is designed to identify the proposal that provides the best overall value to SRH. The Evaluation Committee will review and evaluate the proposals, or individual portions of the proposals. Following the initial evaluation, SRH may identify a short list of proposers for further consideration. SRH may conduct discussions or interviews with those proposers and may negotiate final pricing, schedules, and other terms before making a final selection. Any final selection will be subject to SRH's applicable review and approval process.

SRH may reject any proposal that is late, materially incomplete, nonresponsive, or not submitted in accordance with the requirements of this RFP.

### Evaluation Methodology

Each RFP response will be evaluated and scored using the criteria below. Each category will be scored from 0 to 5. Scores will support SRH's determination of the proposal that provides the best overall value, subject to any discussions, interviews, negotiations, and required reviews or approvals.

#### Evaluation Criteria

| Scoring Category | Description | Maximum Points Available |
|---|---|---|
| Relevant Experience & References | Demonstrated experience with similar projects, qualifications, past performance, and references. | 5 |
| Technical Approach | Understanding of requirements, quality of proposed solution, methodology, and innovation. | 5 |
| Project Timeline & Work Plan | Realism and feasibility of implementation schedule, milestones, and project management approach. | 5 |
| Organizational Capacity | Availability of staffing, resources, infrastructure, and ability to successfully complete the project. | 5 |
| Cost/Price | Cost reasonableness, value for money, and alignment with proposed scope of work. | 5 |
| | **Total Points Available** | **25** |

When determining how many points to give each scoring category, the following rating scale can be used:

**Rating Scale**

| Rating | Descriptor | Guidance |
|---|---|---|
| **5** | Exceptional | Addresses the scoring category exceptionally well, with clear and convincing information, substantial strengths, and no significant weaknesses. |
| **4** | Very Good | Addresses the scoring category well, with sufficient supporting information, clear strengths, and only minor weaknesses. |
| **3** | Acceptable | Adequately addresses the scoring category and provides sufficient information for evaluation. Any weaknesses are manageable. |
| **2** | Marginal | Partially addresses the scoring category but includes significant weaknesses, gaps, or unclear information. |
| **1** | Poor | Minimally addresses the scoring category and includes major weaknesses, substantial gaps, or insufficient supporting information. |
| **0** | Unacceptable / Unresponsive | Does not address the scoring category or provides information that is insufficient or unacceptable for evaluation. |

# Project Specifications

Your proposal must specifically address, in narrative form, each requirement specified herein. You must confirm and describe your ability and intention to meet each requirement. Failure to address a specified requirement can result in disqualification of your proposal.

The proposed solution must address the project requirements below and clearly identify any exception, third-party dependency, or item that is not currently available and remains on a future product or service roadmap. Responses must describe the technical approach, implementation responsibilities, staffing, schedule, risks, pricing, reporting, security, privacy, responsible AI controls, training, support, service levels, and transition assistance.

### Project Requirements

The selected vendor or vendors must deliver the awarded category or categories and associated implementation services.

**Category 1 – All-Inclusive Solution** must provide an integrated voice and non-voice platform with common orchestration, consistent patient context, coordinated workflows, unified administration, and consolidated reporting.

**Category 2 – Voice Automation Only** must support inbound and outbound telephone automation, natural-language interaction, identity verification, transactional workflows, routing and transfer to staff, and integration with Epic and any separately selected non-voice solution.

**Category 3 – Non-Voice Automation with Voice Integration** must support automation through web, mobile, text messaging, chat, and other digital channels and must integrate with an overlaying voice automation solution so that patient context, workflow state, authentication status where appropriate, routing, escalations, and outcomes can move consistently between channels.

Across all categories, the awarded scope may include workflow discovery and design; digital intake; conversational self-service; patient-access workflows; Epic and communication-system integration; appointment scheduling and management; prescription refill requests; intake and verification; service navigation; routine inquiry response; and coordinated communications. Proposers must clearly identify included and excluded capabilities, dependencies, integration points, system-of-record responsibilities, data ownership, interface monitoring, failure handling, and the approach to working with SRH and other selected vendors.

The awarded solution or combined components must use Epic context and workflow logic, as applicable, to personalize interactions, support proactive and responsive outreach, maintain continuity across channels, securely verify identity, capture structured information, write appropriate results back to Epic, and escalate to staff with relevant context.

The awarded scope must also include applicable testing, training, change management, deployment, stabilization, initial optimization, documentation, knowledge transfer, adoption monitoring, and operational transition. Collectively, the solution components should contribute to automating approximately 70–80% of eligible routine interactions without eliminating staff

review where clinical, privacy, safety, or operational judgment is required.

## Ownership and Use

**Project deliverables:** Proposers must describe SRH's ownership and continuing use rights for project-specific assessments, workflow designs, configurations, integrations, scripts, reports, dashboards, training materials, test records, and operational documentation. Identify all pre-existing vendor materials and third-party intellectual property incorporated into deliverables, together with any restrictions or licenses needed for SRH and its authorized support providers to use, maintain, and modify the delivered solution. Final ownership and intellectual-property terms will be established in the resulting agreement.

**Software and licensing:** Identify all Epic, Microsoft, VMware, cybersecurity, AI, and other third-party licenses or subscriptions required for the proposed scope, distinguishing existing SRH entitlements from new purchases. State license ownership, authorized users and environments, duration, renewal and support charges, transfer restrictions, and rights following expiration or termination. Do not represent third-party intellectual property as transferable to SRH unless the applicable license permits it.

**Data ownership and permitted use:** SRH retains ownership of its data. Vendor and subcontractor access and use must be limited to performance of the awarded services and purposes expressly authorized by SRH in writing, subject to the resulting agreement and applicable privacy and security requirements. Proposers must disclose proposed hosting, subprocessors, data transfers, and any secondary use of SRH data. Use of SRH data to train AI models, develop commercial products, or support marketing or other unrelated purposes requires SRH's prior written authorization.

**Maintenance and asset records:** Identify responsibilities and separately priced terms for warranties, maintenance, updates, security patches, replacement, and ongoing support. Provide applicable asset inventories, serial numbers, license and entitlement records, warranty information, configuration records, and operational documentation needed for SRH to support the implemented solution.

**Transition, return, and disposition:** Describe how SRH data, configurations, documentation, and applicable administrative access will be securely transferred to SRH or its designated successor at completion, expiration, or termination. Identify export formats, transition assistance, associated costs, and any limitations. Return or securely destroy retained SRH data as required by the resulting agreement, subject to applicable retention obligations, and document completion. Retirement, transfer, return, or disposal of replaced equipment must follow SRH-approved procedures, including secure data sanitization and applicable grant requirements.

## Operational Experience

Proposers must describe experience delivering solutions comparable to the category or categories proposed for hospitals, integrated delivery networks, rural health systems, and Epic customers. All-inclusive proposers must demonstrate experience operating coordinated voice and non-voice automation as one solution. Voice-only proposers must demonstrate experience serving as an overlaying voice layer and integrating with digital automation, Epic workflows, and staff-assisted operations. Non-voice proposers must demonstrate experience providing digital automation that interoperates with a separate voice solution while maintaining context and workflow continuity.

Responses must identify the proposed components and services and explain how the approach supports personalized interactions, transactional workflows, proactive outreach, secure escalation, operational visibility, and multi-vendor accountability where applicable. Proposers must also describe operational expertise in patient access, scheduling, registration and intake, contact-center operations, workflow redesign, change management, and performance improvement; proposed project leadership and resources; implementation methodology; quality controls; governance cadence; issue and risk management; training; post-go-live optimization; ongoing support; outcome measurement; and coordination required from SRH and other vendors. Preference may be given to firms with experience supporting regional health systems, rural hospitals, Critical Access Hospitals, and multi-entity Epic environments.

## Billing and Pricing

Proposers must submit a detailed, itemized, not-to-exceed pricing schedule organized by the solution category or categories proposed: **Category 1 — All-Inclusive Solution**; **Category 2 — Voice Automation Only**; and **Category 3 — Non-Voice Automation with Voice Integration**. Category 1 pricing must identify the complete integrated price for voice and non-voice

automation, including shared orchestration, administration, integrations, reporting, and support. Category 2 pricing must separately identify voice platform fees, telephony, inbound and outbound usage, minutes or transaction charges, call routing and transfer, Epic and communication-system integration, and integration with any separately selected non-voice solution. Category 3 pricing must separately identify web, mobile, text messaging, chat, digital workflow, messaging or transaction charges, Epic and communication-system integration, and the interfaces required to operate with an overlaying voice automation solution.

Each applicable category schedule must identify implementation services, workflow configuration, labor, travel, infrastructure, tools, licenses, third-party costs, project management, testing, training, deployment and go-live support, optional services, ongoing support, warranties, maintenance, proposed rates by role, estimated hours or FTEs, unit prices, quantities, milestone payments, assumptions, exclusions, rate protections, travel policy, invoice detail, payment terms, and discounts. Shared costs must be allocated transparently across categories, and proposers responding to multiple categories must provide standalone pricing for each category as well as any bundled price offered. SRH makes no commitment to award the full amount or every category.

## Project Management and Documentation

Each proposer's project management documentation must include monitoring, reporting, documentation, and compliance requirements proposers should address.

- Project charter
- Governance structure
- Detailed work plan
- Schedule, dependencies, and responsible parties
- Risk and issue management
- Workflow and technical documentation
- Security and continuity documentation
- Testing plans and records
- Training records
- Go-live readiness
- Routine status and performance reporting
- Performance measures the proposer must help track or report
- Final evaluation, transition, and closeout documentation.

## Implementation

For each proposed category, the proposer must provide a detailed implementation plan aligned to the anticipated January 1, 2027 through September 2027 period. The plan must include discovery, design, configuration, integration, testing, training, deployment, stabilization, initial optimization, and transition to ongoing operations; identify vendor, SRH, and other-vendor responsibilities; define milestones, dependencies, acceptance criteria, resource requirements, governance, risk and issue management, change control, communication, and status reporting; and describe the approach to phased deployment across participating settings.

**Category 1** plans must address coordinated deployment of voice and non-voice capabilities. **Category 2** and **Category 3** plans must include joint design, interface specifications, end-to-end testing, operational handoffs, shared incident management, and coordinated release management with the complementary automation vendor. The vendor must provide role-based training, administrator enablement, technical and workflow documentation, knowledge transfer, go-live support, and a clearly defined post-launch support and service-level model.

# Terms, Conditions, and Federal Requirements

## General Solicitation Conditions

- SRH may reject any or all proposals, cancel or amend the solicitation, waive minor informalities, request clarifications, negotiate, or make no award.
- All proposal preparation costs are the vendor's responsibility.
- A proposal is an offer and may be incorporated into the final contract. The executed contract and incorporated amendments will control in the event of conflict.
- Vendors must protect confidential information and clearly identify claimed proprietary information.
- SRH is not bound by oral statements or vendor assumptions not accepted in writing.
- The vendor must maintain insurance, licenses, staffing, and controls appropriate to the work and required by the final agreement.
- No work may begin before a fully executed agreement and required purchase authorization.

## Federal Award Compliance

This procurement is supported by federal award or subaward funds. Before the final contract is executed, SRH Legal, Grants, and Procurement will review the contract type, total value, funding source, scope of work, award and pass-through terms, and applicable provisions of 2 CFR Part 200 to determine which federal clauses and related federal, state, and SRH requirements must be incorporated. The selected vendor must comply with all requirements identified through that review and included in the final contract.

- Documented competition and procurement integrity.
- Conflict-of-interest and organizational conflict disclosures.
- Contractor oversight, records access, retention, audit cooperation, and performance documentation.
- Cost and price analysis and disclosure necessary to establish reasonableness.
- Applicable affirmative steps supporting small, minority, women-owned, veteran-owned, and labor surplus area firms.
- Applicable domestic preference, recovered-material, debarment, telecommunications, lobbying, equal opportunity, labor, clean air and water, inventions, and termination provisions.
- Applicable contract provisions identified in 2 CFR 200.327 and Appendix II to Part 200.
- Maintenance of records supporting invoices, performance, deliverables, equipment, and grant reporting.

## Flow-Downs and Contract Provisions

The selected vendor must flow down applicable federal, privacy, security, data-use, and award requirements to its subcontractors, subprocessors, and suppliers. The final contract is expected to include provisions addressing remedies, termination, applicable laws, records access, audit, privacy, security, incident notification, data ownership and permitted use, data return and destruction, AI governance when applicable, indemnification, insurance, intellectual property, warranties, service levels, deliverable acceptance, transition assistance, and applicable federal award clauses. Any exception must be identified in the Deviation Form with proposed alternative language.

# Appendix A

**RFP # CC170 | Lakelands Digital Patient Access Initiative**

The proposer must meet the specifications of this RFP.

*****THIS SIGNATURE PAGE MUST BE INCLUDED IN THE PROPOSAL IN THE ORDER SPECIFIED IN THE RFP ORGANIZATION AND FORMAT SECTION*****

Do not include sales tax in the proposal because SRH is tax-exempt. SRH will provide applicable tax-exemption documentation upon request. Submit the proposal and all required supporting documents as a single PDF by email to RHTP@selfregional.org.

Proposers should identify any applicable business classification(s) in the field provided below, including small business, minority-owned, women-owned, veteran-owned, or other. If applicable, include the certifying organization or certification number. If no classification applies, enter "None."

| | |
|---|---|
| **Business Classification** | **Certifying Organization or Certification Number** |

By signing this proposal, the proposer represents and warrants that it has read and understands this RFP and its terms and conditions; agrees to provide the equipment, supplies, or services described below at the stated prices and in accordance with the specifications listed below or attached; and confirms that all prices and quotations will remain valid for **60 days** from the proposal submission deadline.

| | |
|---|---|
| **Company/Contractor** | **Mailing Address** |
| **Federal Tax Identification Number** | **City, State, Zip Code** |
| **Unique Entity Identifier** | **Fax Number (include area code)** |
| **Email Address** | **Telephone Number (include area code)** |
| **Authorized Representative Name & Title** | **Date** |
| **Authorized Representative Signature** | |

# Appendix B

## DEVIATION FORM

**All deviations from this Solicitation must be noted on this form.** If no entry is made on the Deviation Form, the proposer confirms its full agreement with and compliance with the Specifications, Terms, and Conditions.

Each response to this Solicitation must include a Deviation Form stating the prospective vendor's commitment to the provisions of this Solicitation. An individual authorized to execute contracts must sign the form. Any exception to the terms and conditions identified in this Solicitation Package must be expressly stated on the Deviation Form.

**THIS DEVIATION FORM MUST BE SIGNED BY EACH PROPOSER WHETHER THERE ARE DEVIATIONS LISTED OR NOT, AND SUBMITTED WITH THIS SOLICITATION**

| SPEC # / Section # / Page # | Deviation(s) |
|---|---|
| | |

_____ _____ _____

**Authorized Representative Name & Title** **Authorized Representative Signature** **Date**

# Appendix C

## CONFLICT OF INTEREST QUESTIONNAIRE

Each proposer must complete and sign this form. Disclose any actual, potential, or perceived conflict involving the proposer, its personnel, or SRH. If none exists, select "No conflict."

| | |
|---|---|
| **Proposer Legal Name** | |
| **Project / Solicitation** | |
| **Primary Contact** | |
| **Email / Telephone** | |

**Select one:**

☐ No conflict exists.

☐ A conflict or relevant relationship is disclosed below.

| | |
|---|---|
| **Individuals / Organizations Involved** | |
| **Nature of Conflict or Relationship** | |
| **Proposed Mitigation** | |

**Certification:** I certify that the information provided is complete and accurate and that the proposer will promptly disclose any change during the solicitation or contract term.

_____ _____

**Authorized Representative Name & Title** **Authorized Representative Signature**

_____ _____

**Date** **Email / Telephone**

# Appendix D

## CERTIFICATION REGARDING LOBBYING

*Submit only if the bid or offer exceeds $100,000 and federal funds are involved.*

| | |
|---|---|
| **Proposer Legal Name** | |
| **Project / Solicitation** | |
| **Grant Program, if applicable** | |
| **Solicitation / Contract Number** | |

**Certification:** The undersigned certifies, to the best of their knowledge and belief, that no federally appropriated funds have been or will be used to influence federal officials or members or employees of Congress in connection with a federal contract, grant, loan, or cooperative agreement. This certification must be included in applicable lower-tier awards, and all subrecipients must certify and disclose accordingly.

This certification is a material representation of fact and a prerequisite under 31 U.S.C. § 1352. Failure to file the required certification may result in applicable civil penalties.

**Authorized Certification:** The undersigned certifies that the information provided is true and accurate and is authorized to execute this certification on behalf of the proposer.

_____ _____

**Authorized Representative Name & Title** **Authorized Representative Signature**

_____ _____

**Date** **Email / Telephone**

# Appendix E

## INSURANCE REQUIREMENTS

The selected vendor must maintain insurance appropriate to the work throughout the contract term. Coverage must be issued by insurers authorized to do business in South Carolina and acceptable to SRH.

| Coverage | Minimum Requirement |
|---|---|
| Commercial General Liability, including product liability | $3,000,000 per occurrence / $5,000,000 aggregate |
| Medical Malpractice Professional Liability Insurance | $3,000,000 per occurrence / $5,000,000 aggregate, if applicable |
| Cyber / Privacy Liability | $5,000,000 per occurrence / $5,000,000 aggregate |
| Automobile Liability | No less than $1,000,000 per accident for bodily injury and property damage, including coverage for hired/non-owned auto exposures. |
| Workers' Compensation | Statutory limits and employers' liability required by law |

**Evidence of Coverage:** Before work begins, the selected vendor must provide certificates of insurance demonstrating compliance with Appendix E and any additional insurance requirements included in the final agreement. Updated certificates must be provided upon renewal and upon SRH's request. SRH and its applicable affiliates must be named as additional insureds on liability coverage where appropriate. Coverage must be primary and noncontributory, include waiver of subrogation where permitted, and provide advance notice of cancellation or material change to the extent available under the policy.

SRH may require additional coverage or revised limits based on the nature and risk of the final scope of work. The proposer must identify any requested exception to the insurance requirements in Appendix B: Deviation Form when submitting its proposal.