

REQUEST FOR PROPOSAL
RFP# 951080

Academic Operations & Curriculum Management System

RFP Timeline	
RFP Issue Date:	August 6, 2026
Deadline for Respondent Questions to MSU:	August 14, 2026
RFP Response Due Date:	September 2, 2026, 3:00 pm Eastern
Estimated Contract Award	November 2026

RFP Contact	
Name:	Lisa True
Unit:	MSU Procurement
Email:	truelisa@msu.edu

DESCRIPTION: Michigan State University (the “**University**” or “**MSU**”) is soliciting proposals through this Request for Proposal (“**RFP**”) for the purpose of integrated academic operations platform to support curriculum management, scheduling, assessment, advising, student progression, and institutional reporting across multiple campuses within Michigan State University’s College of Human Medicine (CHM). The requested services are more thoroughly described under the Scope of Work Section of this RFP. Firms intending to respond to this RFP are referred to herein as a “**Respondent**” or “**Supplier**.”

PROPOSAL INSTRUCTIONS

- PROPOSAL PREPARATION.** The University recommends reading all RFP materials prior to preparing a proposal, particularly these Proposal Instructions. Respondents must follow these Proposal Instructions and provide a complete response to the items indicated in the table below. References and links to websites or external sources may not be used in lieu of providing the information requested in the RFP within the proposal. Include the Respondent's company name in the header of all documents submitted with your proposal.

Document	Description	Response Instructions
Cover Page	Provides RFP title and number, important dates, and contact information for MSU	Informational
Proposal Instructions	Provides RFP instructions to Respondents	Informational
Respondent Information Sheet	Company and Contact Information, and Experience	Respondent must complete and submit by proposal deadline
Scope of Work	Describes the intended scope of work for the RFP	Respondent must complete and submit by proposal deadline
Pricing	Pricing for goods and services sought by the University through this RFP	Respondent must complete and submit by proposal deadline
Master Service Agreement	Provides legal terms for a contract awarded through this RFP	Deemed accepted by Respondent unless information required in Section 9, Master Service Agreement is submitted by proposal deadline
Appendix(s) A-B	Estimated users of system and data ownership and sharing expectations.	Respondent will use data provided for cost estimates.

- EXPECTED RFP TIMELINE.**

Activity	Date
Issue RFP	August 6, 2026
Deadline for Respondent Questions to MSU	August 14, 2026
RFP Response Due	September 2, 2026, 3:00 pm Eastern
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- CONTACT INFORMATION FOR THE UNIVERSITY.** The sole point of contact for the University concerning this RFP is listed on the Cover Page. Contacting any other University personnel, agent, consultant, or representative about this RFP may result in Respondent disqualification.
- QUESTIONS.** Respondent questions about this RFP must be submitted electronically by email to the contact listed on the cover page of this RFP. In the interest of transparency, only written questions are

accepted. Answers to all questions will be sent to Respondents via email. Submit questions by referencing the following: (i) Question Number, (ii) Document Name, (iii) Page Number, and (iv) Respondent Question. Please refer to **Section 2** above for the deadline to submit questions.

5. **MODIFICATIONS.** The University may modify this RFP at any time. Modifications will be sent via email. This is the only method by which the RFP may be modified.
6. **DELIVERY OF PROPOSAL.** The Respondent must submit its proposal, all attachments, and any modifications or withdrawals electronically via email to the contact listed on the cover page of this RFP. **The price proposal should be saved separately from all other proposal documents and should be sent as a separate attachment from the other proposal documents.** The Respondent should submit all documents in a modifiable (native) format (examples include but are not limited to: Microsoft Word or Excel and Google Docs or Sheets). In addition to submitting documents in a modifiable format, the Respondent may also submit copies of documents in PDF. Respondent's failure to submit a proposal as required may result in disqualification. The proposal and attachments must be fully uploaded and submitted prior to the proposal deadline. **Do not wait until the last minute to submit a proposal.** The University **may not** allow a proposal to be submitted after the proposal deadline identified in the Cover Page, even if a portion of the proposal was already submitted.
7. **MANDATORY MINIMUM REQUIREMENTS.** The RFP may contain minimum qualifications, which will be identified as "**Mandatory Minimum Requirements**" in the Scope of Work Section of this RFP. If the RFP does contain mandatory minimum requirements, any proposal not meeting these minimum requirements **will be deemed non-qualified and will not be considered.** All proposals meeting these mandatory minimum requirements will proceed for review and evaluation consistent with **Section 8, Evaluation Process.**
8. **EVALUATION PROCESS.** The University will convene a team of individuals from various Departments within MSU to evaluate each proposal based on each Respondent's ability to provide the required services, taking into consideration the overall cost to the University. The University may require an oral presentation of the Respondent's proposal; conduct interviews, research, reference checks, and background checks; and request additional price concessions at any point during the evaluation process. The following criteria will be used to evaluate each proposal:

Criteria	Weight
Functional alignment with Scope of Work	[35]%
Technical architecture, scalability, integrations, and reporting capabilities	[25]%
Ease of use for students and stakeholders	[15] %
Implementation approach, support model, and governance alignment	[15]%
Pricing Structure and overall value to the university	[10]%
	100%

9. **MASTER SERVICE AGREEMENT.** The University strongly encourages strict adherence to the terms and conditions set forth in the Master Service Agreement. The University reserves the right to deem a proposal non-responsive for failure to accept the Master Service Agreement. Nevertheless, the Respondent may submit proposed changes to the Master Service Agreement in track changes (i.e., visible edits) with an explanation of the Respondent's need for each proposed change. Failure to include track changes with an explanation of the Respondent's need for the proposed change constitutes the Respondent's acceptance of the Master Service Agreement. General statements, such as "the Respondent reserves the right to negotiate the terms and conditions," may be considered non-responsive.

- 10. CLARIFICATION REQUEST.** The University reserves the right to issue a Clarification Request to a Respondent to clarify its proposal if the University determines the proposal is not clear. Failure to respond to a Clarification Request timely may be cause for disqualification.
- 11. RESERVATIONS.** The University reserves the right to:
- a. Disqualify a Respondent for failure to follow these instructions.
 - b. Discontinue the RFP process at any time for any or no reason. The issuance of an RFP, your preparation and submission of a proposal, and the University's subsequent receipt and evaluation of your proposal does not commit the University to award a contract to you or anyone, even if all the requirements in the RFP are met.
 - c. Consider late proposals if: (i) no other proposals are received; (ii) no complete proposals are received; (iii) the University received complete proposals, but the proposals did not meet mandatory minimum requirements or technical criteria; or (iv) the award process fails to result in an award.
 - d. Consider an otherwise disqualified proposal, if no other proposals are received.
 - e. Disqualify a proposal based on: (i) information provided by the Respondent in response to this RFP; or (ii) if it is determined that a Respondent purposely or willfully submitted false or misleading information in response to the RFP.
 - f. Consider prior performance with the University in making its award decision.
 - g. Consider total-cost-of-ownership factors (e.g., transition and training costs) when evaluating proposal pricing and in the final award.
 - h. Refuse to award a contract to any Respondent that has outstanding debt with the University or has a legal dispute with the University.
 - i. Require all Respondents to participate in a Best and Final Offer round of the RFP.
 - j. Enter into negotiations with one or more Respondents on price, terms, technical requirements, or other deliverables.
 - k. Award multiple, optional-use contracts, or award by type of service or good.
 - l. Evaluate the proposal outside the scope identified in **Section 8, Evaluation Process**, if the University receives only one proposal.
 - m. Obtain and consider information from other sources concerning a Respondent, such as the Respondent's capability and performance under other contracts, the qualifications of any subcontractor identified in the Proposal, the Respondent's financial stability, past or pending litigation, and other publicly available information.
 - n. Utilize third parties to assist in the evaluation process, provided such parties are subject to confidentiality requirements.
- 12. AWARD RECOMMENDATION.** The contract will be awarded to the responsive and responsible Respondent who offers the best value to the University, as determined by the University. Best value will be determined by the Respondent meeting any mandatory minimum requirements and offering the best combination of the factors in **Section 8, Evaluation Process**, and price, as demonstrated by the proposal. The University will email a **Notice of Award** to all Respondents. A Notice of Award does not constitute a contract, as the parties must reach final agreement on a signed contract before any services can be provided. The awarded Respondent is prohibited from partnering with losing bidders unless the RFP specifically allows for such arrangement, and any violation of this prohibition may result in disqualification of the awarded Respondent.
- 13. GENERAL CONDITIONS.** The University will not be liable for any costs, expenses, or damages incurred by a Respondent participating in this solicitation. The Respondent agrees that its proposal will be considered an offer to do business with the University in accordance with its proposal, including the Master Service Agreement, and that its proposal will be irrevocable and binding for a period of 180 calendar days from date of submission. If a contract is awarded to the Respondent, the University may, at its option, incorporate any part of the Respondent's proposal into the contract. This RFP is not an offer to enter into

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a contract. This RFP may not provide a complete statement of the University's needs, or contain all matters upon which agreement must be reached. Proposals submitted via email are the University's property.

14. **FREEDOM OF INFORMATION ACT.** Respondent acknowledges that any responses, materials, correspondence or documents provided to the University may be subject to the State of Michigan Freedom of Information Act ("FOIA"), Michigan Compiled Law 15.231 *et seq.*, and may be released to third parties in compliance with FOIA or any other law. Questions about the Respondent's own performance can be directed to the RFP Contact indicated on page 1 of this document. Questions about the overall evaluation and any other post-award inquiries must be submitted via a formal FOIA request to the [Michigan State University FOIA office](#).

RESPONDENT INFORMATION SHEET

Please complete the following Information Sheet in the space provided:

Information Sought	Response
Contact Information	
Respondent's sole contact person during the RFP process. Include name, title, address, email, and phone number.	
Person authorized to receive and sign a resulting contract. Include name, title, address, email, and phone number.	
Respondent Background Information	
Legal business name and address. Include business entity designation, e.g., sole proprietor, Inc., LLC, or LLP.	
What state was the company formed in?	
Main phone number	
Website address	
DUNS# AND/OR CCR# (if applicable):	
Number of years in business and number of employees	
Would this represent a material portion of your organization's annual revenue?	
Legal business name and address of parent company, if any	
Has your company (or any affiliates) been a party to litigation against Michigan State University? If the answer is yes, then state the date of initial filing, case name and court number, and jurisdiction.	
Experience	
Describe relevant experiences from the last 5 years supporting your ability to successfully manage a contract of similar size and scope for the services described in this RFP.	
Experience 1	
Company name Contact name Contact role at time of project Contact phone Contact email	
1. Project name and description of the scope of the project 2. What role did your company play? 3. How is this project experience relevant to the subject of this RFP?	
Start and end date (mm/yy – mm/yy)	
Status (completed, live, other – specify phase)	
Experience 2	
Company name Contact name	

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Contact role at time of project Contact phone Contact email	
1. Project name and description of the scope of the project 2. What role did your company play? 3. How is this project experience relevant to the subject of this RFP?	
Start and end date (mm/yy – mm/yy)	
Status (completed, live, other – specify phase)	
Experience 3	
Company name Contact name Contact role at time of project Contact phone Contact email	
1. Project name and description of the scope of the project 2. What role did your company play? 3. How is this project experience relevant to the subject of this RFP?	
Start and end date (mm/yy – mm/yy)	
Status (completed, live, other – specify phase)	

SCOPE OF WORK

Please address each of the sections below in a written response, which can be completed on a separate sheet (using the same section headings).

1. Background [See appendix D for Acronyms & key Terms]

Michigan State University College of Human Medicine (CHM) is seeking a comprehensive, integrated academic operations platform to support curriculum management, scheduling, assessment, advising, student progression, and institutional reporting across multiple campuses. This procurement is driven by the need to modernize academic workflows, reduce reliance on fragmented tools, and improve data consistency, compliance, and transparency. The solution must support role-based access, integrations with existing institutional systems, accreditation needs, and longitudinal tracking of student performance and advising activity. Our current primary systems include SIS, JustInTime Medicine (JIT), Desire2Learn (D2L), New Innovations, in house development platform used to manage clerkship students (FAME) and manual tools such as Excel, google calendars and Word. Challenges include lack of automation, audit trails, and system integration.

Michigan State University College of Human Medicine operates a distributed medical education model across eight community campuses throughout Michigan. The campuses are located in Lansing, Grand Rapids, Upper Peninsula, South East Michigan, Midland, Traverse City, Flint, and Detroit. The selected solution must support centralized health compliance management while providing consistent processes, real-time visibility, and college-level oversight for students, faculty, and administrators across all campus locations.

2. Scope of Work

The selected vendor shall provide a secure, scalable, cloud-based platform capable of managing academic scheduling, curriculum mapping, advising records, MSPE generation, assessment workflows, reporting, and student progression tracking. The system must support integration with MSU enterprise systems and enable compliance with FERPA, Liaison Committee for Medical Education (LCME) accreditation standards, and institutional governance.

Technical & Security Requirements

The solution must meet the following requirements. Cloud-based architecture with SSO integration; Role-based access and FERPA compliance; API and data integration capabilities; Audit logging and reporting; Scalable performance for multi-campus medical education; Security compliance (SOC-2 or equivalent)

Implementation and Support

The vendor must provide an implementation plan, project management support, training resources, and ongoing technical support. A detailed project timeline and change management plan should be included.

Pricing and Financial Model

Vendors must provide transparent pricing including implementation costs, licensing, support fees, and optional modules. Proposals should include multi-year cost projections. Vendors must

also specify which requirements necessitate additional programming and the cost model for such enhancements.

Vendor Qualifications

Vendors must demonstrate experience supporting medical degree granting institutions with complex multi-campus environments, including experience with accreditation and academic workflows.

Integration and Interoperability

Vendors should describe system integration capabilities compatibility with MSU Single Sign-On (SSO) integration capabilities, including compatibility with Microsoft Entra (Azure AD) and/or Okta, and additional capabilities to process data autonomously from MSU student information systems and clinical placement platforms. Secure data import and export functionality or APIs should be described, along with data governance practices that ensure MSU retains ownership and control of its data.

Security, Privacy, and Accessibility

The solution should comply with applicable privacy and security regulations, including FERPA, and meet accessibility standards such as ADA and Section 508. Vendors should describe data encryption practices, business continuity planning, disaster recovery capabilities, and uptime expectations.

Mandatory Minimum Requirements (MMR)

The following Mandatory Minimum Requirements must be met for a Respondent's proposal to be considered responsive. Proposals that do not clearly demonstrate compliance with **all** Mandatory Minimum Requirements will be deemed non-qualified and will not proceed to the evaluation phase. *[See appendix D for Acronyms & key Terms]*

1. Mandatory Vendor Pilot Environment Requirement

Vendors must provide a fully configured sample system environment aligned to Michigan State University College of Human Medicine (CHM) organizational structure for evaluation prior to selection.

- a. This environment must be available for a minimum of two (2) months and is required for vendor consideration.
- b. System configured to reflect CHM structure (campuses, roles, academic phases)
- c. Role-based permissions for all staff levels (administrators, faculty, advisors, staff)
- d. Ability for each role to run reports, create schedules, and manage workflows
- e. Capability to import and export data (student, schedule, reporting)
- f. Configured reporting dashboards aligned to CHM needs
- g. Audit logging and activity tracking enabled
- h. Hands-on access for CHM stakeholders to test real workflows
- i. Documentation and guided test scenarios provided

2. Privacy and Regulatory Compliance

The proposed solution must comply with all applicable federal and state privacy and security regulations governing student information, including, but not limited to:

- a. The Family Educational Rights and Privacy Act (FERPA).
- b. The Liaison Committee on Medical Education (LCME).
- c. The Health Insurance Portability and Accountability Act (HIPAA) as applicable.

Respondents **must** describe how their solution supports compliance with these regulations, including the use of role-based access controls and protections for sensitive student information.

3. Accessibility Compliance

- a. The proposed solution must comply with applicable accessibility requirements. The University is required to comply with the Americans with Disabilities Act of 1990 (ADA), and has adopted a formal policy regarding accessibility requirements for websites and software applications which is based on the World Wide Web Consortium (W3C) Web Content Accessibility Guidelines (WCAG) 2.2 Level AA.
- b. If this purchase is related to a digital product or service, then the supplier is required to submit a completed VPAT as part of their proposal for MSU's review.
 - i. VPAT Version 2.5 or 2.5Rev should be used.
 - ii. WCAG 2.2 Level AA should be included in the applicable standards/guidelines.
 - iii. The report should be completed within the last two years to be considered current.
 - iv. The report should include manual testing in the evaluation and methods.

- c. Reports prepared by third-party accessibility professionals are preferred over reports prepared internally by the supplier. Detailed explanations of the evaluation methods and of criteria remarks/explanations should be present in internally prepared reports. As part of MSU’s review of product accessibility, MSU may request access to a test or sample environment.
- d. The VPAT 2.5Rev WCAG is available here.

4. Institutional IT Security Review and Approval

The proposed solution **must** be capable of successfully completing Michigan State University’s IT security review and clearance process prior to contract execution. Respondents **must** complete the HECVAT security survey and return the completed form to MSU as part of your proposal. The most current version of the HECVAT security survey here: [Higher Education Community Vendor Assessment Tool \(HECVAT\)](#). Review the information on the page, download and complete the questionnaire, and return the completed form to MSU as part of your proposal.

5. Baseline Data Security Controls

The proposed solution **must** employ industry standard security practices to protect MSU data, including encryption of data at rest and in transit. Respondents **must** describe their security framework at a high level and confirm alignment with MSU institutional security expectations.

6. Core Principle

Student Information System (SIS) must remain as the authoritative system of record.

7. Use Case Analysis *[See appendix C for Use Cases] [See appendix D for Acronyms & key Terms]*

Vendors are **required** to review Appendix C: CHM Academic Affairs Use Cases and Required Vendor System Outcomes and complete the response grid below for each listed use case. Responses should clearly indicate whether the proposed vendor system currently meets the requirement, partially meets the requirement, requires configuration, requires customization, requires integration, or does not currently support the requirement. Vendors should provide enough detail for CHM to understand how the proposed system would meet the operational need, what implementation resources would be required, what limitations or assumptions apply, and whether the functionality has been successfully implemented in comparable medical education, health professions education, or academic affairs environments.

Delivery Type Definitions

Response Type	Definition
Standard	Functionality is available in the current system without additional configuration, customization, or integration.
Configurable	Functionality is available through administrative configuration using standard system tools.
Custom	Functionality requires vendor customization, development, or non-standard build.
Integration	Functionality depends on data exchange with another system, such as the university Student Information System, assessment systems, curriculum platforms, or reporting tools.
Roadmap	Functionality is planned but not currently available. Vendor must provide expected release timeline and implementation assumptions.

Not Available (N/A)	Functionality is not currently available and is not planned.
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Appendix C Vendor Response Grid

Vendors are required to review Appendix C: CHM Academic Affairs Use Cases and Required Vendor System Outcomes and complete the response grid below for each listed use case.

Priority	Use Case	Required Vendor System Outcome	Delivery Type (Definitions noted above)	Vendor Narrative Response
Priority 1: Scheduling	Use Case 1: Full M2 Schedule Build	Centralized M2 schedule build with Student Information System import, two-semester and three-semester pathway logic, Group A/B logic, rotation capacity, timing rules, conflict detection, calendar export, schedule validation, and audit tracking.		
Priority 1: Scheduling	Use Case 2: LCE Student Roster Intake, Student Profile Creation, and Campus Assignment	Student roster intake and profile creation for M3/M4 scheduling using Student Information System data, campus assignment, academic year, student status, configurable fields, roster updates, and audit tracking.		
Priority 1: Scheduling	Use Case 3: Required M3 Clerkship Schedule Build	Required M3 clerkship scheduling across campuses, clerkships, sites, departments, blocks, and date ranges with capacity enforcement, conflict detection, campus-specific rules, schedule views, exports, and audit tracking.		
Priority 1: Scheduling	Use Case 4: M3 and M4 Elective Preference Collection and Elective Schedule Build	Collection and scheduling of M3/M4 elective preferences, ranked choices, specialty interest alignment, elective availability, site capacity, priority sequencing, request status, approval tracking, reporting, and audit tracking.		
Priority 1: Scheduling	Use Case 5: Intercampus, External, Visiting Student, and VSLO-Related Scheduling Requests	Management of home campus, intercampus, partner institution, external, visiting student, and VSLO-related requests with request categorization, priority rules, offer/acceptance tracking, placement status, onboarding tracking, capacity management, and reporting.		
Priority 1: Scheduling	Use Case 6: Clinical Site, Hospital Approval, Department Communication, and Onboarding Tracking	Clinical site, hospital, and department placement workflows with site approval, department approval, placement status, required documentation, onboarding requirements, department-specific rosters, communication tracking, and audit history.		

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Priority 1: Scheduling	Use Case 7: Early Enrollment, Add/Drop, and Special Section Number Workflow	Early enrollment reporting, bulk enrollment workflows, add/drop generation, Records review, special section number requests, enrollment status tracking, Student Information System reconciliation, discrepancy reporting, and audit tracking.		
Priority 1: Scheduling	Use Case 8: LCE Schedule Reporting, Calendar Views, and Department-Level Schedule Communication	Centralized LCE schedule views, student/campus/clerkship/elective/site/department calendar views, department-specific reporting, role-based schedule access, calendar export, Power BI-compatible export, and communication tracking.		
Priority 1: Scheduling	Use Case 9: LCE Graduation Requirement, Credit, Grade, and Progress Tracking	LCE graduation requirement tracking, credit tracking, grade or completion tracking, configurable requirement rules, primary care selective tracking, clinical/non-clinical elective tracking, subspecialty maximum tracking, student-facing progress views, Student Information System reconciliation, reporting, and audit tracking.		
Priority 1: Scheduling	Use Case 10: Schedule Change and Disruption Management Across M2 and LCE	Centralized schedule change management across M2 and LCE with impacted-user identification, reassignment support, notification triggers, schedule validation, enrollment impact tracking, and audit logging.		
Priority 2: Student Status	Use Case 11: Student Status Assignment	Centralized Student Performance Committee dashboard aggregating Student Information System, assessment, progression, and professionalism data with status assignment, reason codes, timestamped decisions, and longitudinal status history.		
Priority 2: Student Status	Use Case 12: Status Letters	Dynamic student status letter generation using approved templates, Student Information System data, status assignment, reason code, template version control, approval tracking, sent date tracking, document retention, and PDF output.		
Priority 3: Evaluations	Use Case 13: Evaluation Assignment	Automated evaluation assignment based on schedule data, evaluator-student matching, configurable trigger rules, reminders, completion dashboards, real-time tracking, reassignment, and exportable reports.		
Priority 4: MSPE	Use Case 14: MSPE Generation	Automated MSPE generation using mapped academic, assessment, clerkship, competency, evaluation, narrative, and peer comparison data with logic-based text, draft review, version control, approval workflow, final PDF output, and archive.		
Priority 5: Curriculum Experiences	Use Case 15: Curriculum Ingestion and	Curriculum ingestion from existing curriculum content sources with assisted tagging, standardized taxonomy, faculty review, approval		

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and Related Curriculum Management	Auto-Tagging Engine	workflows, version control, mapping completeness reports, and exportable curriculum mapping data.		
Priority 5: Curriculum Experiences and Related Curriculum Management	Use Case 16: Curriculum Search and Natural Language Query System	Natural language search across curriculum content, metadata, objectives, materials, tags, years, phases, courses, clerkships, rotations, and content types with filters, summaries, session links, and exportable search results.		
Priority 5: Curriculum Experiences and Related Curriculum Management	Use Case 17: Curriculum Visualization and Mapping Engine	Interactive curriculum visualization, temporal mapping, content density review, heat maps, Sankey/alluvial/sunburst-style visualizations, overlays, filtering, drill-down, export, and accreditation-supporting reports.		
Priority 5: Curriculum Experiences and Related Curriculum Management	Use Case 18: Curriculum Gap Analysis and CQI Engine	Integrated curriculum, assessment, outcome, survey, and CQI tracking with gap analysis, stakeholder routing, intervention tracking, longitudinal reporting, and exportable accreditation evidence.		
Priority 5: Curriculum Experiences and Related Curriculum Management	Use Case 19: AI-Generated Learning Content and Assessment Support	AI-assisted, editable, source-linked learning content and assessment support aligned with curriculum tags, session objectives, approved source materials, faculty review, and role-based access.		
Priority 6: Careers and Elective Advising	Use Case 20: Longitudinal Career and Elective Advising Record	Centralized longitudinal advising record with required form assignment, student submission, advisor documentation, Careers team oversight, specialty/elective planning, completion dashboards, Power BI-compatible export, and FERPA-aligned role-based access.		

PRICING

Please include a Pricing proposal as identified below on a separate sheet.

Pricing proposals should be presented in a transparent manner that allows the University to evaluate total cost of ownership across multiple colleges, programs, and enrollment scenarios.

Preferred Pricing Structure

Michigan State University's preferred pricing approach is a per-student fee that covers the entire duration of a student's academic program. Academic programs supported by this RFP vary in length, commonly four (4) but up to eight (8) years. Pricing proposals should clearly describe how fees apply across the full program lifecycle.

Transition Student Population

In addition to pricing for newly matriculated students, the University anticipates a population of current students transitioning from existing systems.

Alternative and Subscription Based Pricing Models Based Pricing Models

Vendors may propose subscription based or all-inclusive pricing models, expressed as an annual per student or institutional fee, provided such pricing clearly defines the scope of services included and supports transparent cost comparison over time based or all-inclusive pricing models, expressed as an annual per student or institutional fee, provided such pricing clearly defines the scope of services included and supports transparent cost comparison over time.

Scalability and Enrollment Variability

Pricing proposals should reflect the scalable nature of the solution, including the ability to accommodate changes in enrollment volume, program length, and participating colleges over time, without requiring material restructuring of the pricing model.

Required Pricing Components

At a minimum, pricing proposals should address the following:

- Pricing structure and model(s) proposed.
- Coverage period and duration assumptions.
- Any implementation, onboarding, or transition costs.
- Recurring subscription or licensing fees.
- Cost escalation terms and contract renewal considerations.

Appendix A:

Estimated Student Population Ranges

The following estimates are provided to assist vendors in proposing scalable solutions. While final student enrollment figures may vary and cannot be determined with complete certainty, the University will provide a more accurate enrollment estimate prior to execution of any service agreement or contract. Actual counts may fluctuate during the contract term.

A.1 Student Population Estimates

College of Human Medicine (CHM): [800-900]

A.1.2 Annual Matriculation Estimates

College of Human Medicine (CHM): [192-198]

Vendors should describe how their pricing and system performance scale with changes in enrollment.

A.2 Administrative and Oversight Users (Estimated)

- College administrators: [6-10]
- College staff: [30]
- Read-only, audit, or leadership users: [8-20]
- IT, reporting, or integration support users: [4-12]

Appendix B:

Expanded Data Governance, Ownership, and Security Expectations

Michigan State University maintains institutional responsibility for student data. Vendors responding to this RFP should acknowledge and support the following expectations:

B.1 Data Ownership and Control

All data entered or generated by the system remains the property of Michigan State University. The selected vendor will function as a data processor and will not claim ownership of MSU data. MSU retains the right to access, export, and audit its data at any time during the contract term.

B.2 Data Residency and Retention

Data should be stored and processed within the United States unless otherwise approved. Vendors must clearly describe data retention policies, including timelines following contract termination. Secure data destruction or return procedures must be documented and verifiable.

B.3 Privacy and Regulatory Compliance

The solution should comply with applicable privacy and security regulations, including HIPAA and FERPA, and meet accessibility standards such as ADA and Section 508. Vendors should describe data encryption practices, business continuity planning, disaster recovery capabilities, and uptime expectations.

B.4 Security Standards

Data must be encrypted at rest and in transit. Vendors should describe incident response procedures, breach of notification timelines, and disaster recovery capabilities. Compliance with MSU IT security standards and third-party security assessments may be required prior to contract execution.

B.5 Integration and Interoperability

Vendors should describe system integration capabilities, including compatibility with MSU Single Sign-On (SSO) integration capabilities, including Compatibility with Microsoft Entra (Azure AD) and/or Okta. Additional capabilities to process data autonomously from MSU student information systems and clinical placement platforms. Secure data import and export functionality or APIs should be described, along with data governance practices that ensure MSU retains ownership and control of its data.

Appendix C

Priority 1: Scheduling

Use Case 1: Full M2 Schedule Build

CHM requires the vendor system to support complex M2 schedule development for a cohort-based curriculum that includes clinical rotations, simulated experiences, small groups, weekly large group sessions, exams, holidays, and pathway-specific sequencing. The system must support two M2 completion pathways: one completed across two semesters, and one completed across three semesters.

Current Workflow / Current State	Required Future Outcome
Scheduling is currently completed using multiple Excel files, including a master schedule file, Group A/B assignment file, rotation assignment tracker, and faculty/preceptor assignment sheets.	The vendor system must centralize M2 schedule development, reduce manual duplication, support pathway and group logic, enforce rotation capacity, and produce accurate student, faculty, site, and administrative schedules.
Student lists are exported from the university's Student Information System by CHM Records.	The vendor system must import student data from the Student Information System and use that data as the authoritative source for schedule-related attributes.
Clinical experiences curriculum assistants manually assign students to Group A/B.	The vendor system must support Group A/B logic and allow group assignment to drive schedule sequencing.
Clinical experiences curriculum assistants manually assign rotations.	The vendor system must support rotation assignments, site assignments, timing rules, and capacity constraints.
Course Directors, Assistant Directors, and clinical experiences curriculum assistants visually cross-check the schedule for conflicts.	The vendor system must identify overlapping assignments, timing conflicts, site capacity issues, and conflicts created by student absences, make-up exams, accommodations, or other schedule restrictions.
Adjustments are made iteratively until the schedule appears to be workable.	The vendor system must allow for schedule development, adjustment, validation, and export in a centralized environment with audit tracking.

Current Data Elements Used to Complete the Manual Calendar

The current manual schedule build uses the following data elements:

- Student ID from university Student Information System export
- Cohort
- Pathway (Two-semester M2 pathway OR Three-semester M2 pathway)
- Group assignment (Group A OR Group B)
- Rotation names
- Rotation sites

- Rotation site capacity
- Week number (1-40 structure)
- Session type
 - Weekly Scholar Group
 - Large Group Activity
 - Simulation Experience
 - Computer-based exam
 - Simulation exam
 - Vacation or holiday break
- Faculty/preceptor assignment
- Course Director and Assistant Director review
- Clinical experiences curriculum assistant review

Operational Risks Addressed by Future State

The vendor system must help reduce or prevent:

- Over-capacity assignments to clinical rotation sites
- Student schedule conflicts with exams, make-up exams, simulation events, accommodations, or other required academic activities
- Version control issues caused by reliance on locally saved or duplicated Excel files
- Lack of documentation regarding changes, restrictions, limitations, or decisions communicated to staff
- Manual schedule validation errors
- Lack of centralized audit trail

Required Future System Capabilities

The vendor system must:

1. Import student data from the university Student Information System.
2. Store student attributes needed for schedule development, including:
 - a. NetID
 - b. Student ID
 - c. PID
 - d. Student email address
 - e. Cohort
 - f. Academic year
 - g. Pathway
 - h. Enrollment program
 - i. M1/M2 campus
 - j. Accommodation indicator, where appropriate
 - k. Leave of absence or leave of health process indicator, where appropriate
 - l. Configurable user-defined fields
3. Support enrollment/program distinctions, including:
 - a. MD
 - b. MD/PhD

- c. MD/MBA
 - d. Oral and Maxillofacial Surgery
 - e. Leadership in Community and Public Health Certificate
 - f. Leadership in Rural Medicine Certificate
 - g. MPH
- 4. Enforce rotation site capacity.
- 5. Enforce rotation capacity by timing, recognizing that not all rotations are available every week.
- 6. Support a week's 1–40 scheduling structure.
- 7. Allow manual upload or maintenance of:
 - a. Clinical sites
 - b. Site capacity
 - c. Site contacts
 - d. Rotation availability windows
- 8. Enforce non-course prerequisites where applicable, such as required simulation skills check-offs before a rotation.
- 9. Identify conflicts related to absences, accommodations, exam make-ups, group sequencing, and other required activities.
- 10. Support Group A/B schedule logic.
- 11. Allow authorized users to make adjustments with a documented audit trail.
- 12. Support possible optimization assistance for rotation and schedule assignment.
- 13. Allow calendar query by:
 - Location
 - Phase
 - Rotation
 - Session
 - Student
 - Faculty
 - Site
 - Week
 - Group

Required Outputs

The vendor system must produce:

- Student schedules
- Exportable calendar format, including iCal and/or Google Calendar compatibility
- Real-time student schedule views
- Rotation assignment schedules
- Faculty/preceptor schedules
- Course Director schedule views
- Phase Director schedule views
- Site-based schedules

- Location-based schedule queries
- Session-based schedule queries
- Administrative reports for schedule validation
- Audit trail showing schedule changes, user, timestamp, and affected records

Response Requested: Vendors should describe how their system supports complex cohort-based schedule development, pathway-specific scheduling, Group A/B logic, clinical rotation capacity, site availability, schedule conflict detection, calendar export, and audit tracking.

Use Case 2: LCE Student Roster Intake, Student Profile Creation, and Campus Assignment

CHM requires the vendor system to support intake of M3 and M4 student data for Late Clinical Experience scheduling across eight CHM community campuses. The system must reduce manual demographic data collection, reduce duplicate student profile creation, and allow scheduling teams to begin LCE schedule development using accurate student, campus, academic year, and enrollment data from approved institutional sources.

Current Workflow / Current State

Current Workflow / Current State	Required Future Outcome
Campus teams receive lists of incoming M3 students from CHM teams and/or Records-related processes. Timing may vary, and rosters may change as students enter late, delay, or change status.	The vendor system must import student roster data from the university Student Information System and support ongoing updates when student status or start timing changes.
Each campus may follow a slightly different process for starting the scheduling cycle.	The vendor system must support a standardized core intake process while allowing campus-level configuration.
Staff manually collect email addresses, student ID numbers, demographic information, specialty interests, and related student data from Campus Solutions, surveys, or other sources.	The vendor system must reduce duplicate data collection by importing demographic and academic record data from approved institutional sources.
Staff manually create or maintain student profiles in a separate local system before schedule data can be entered or reported.	The vendor system must maintain LCE student scheduling profiles directly or through integration, without requiring manual recreation of student data in a separate system.
Campus teams may send surveys to incoming third-year students to collect demographics, specialty interests, and other information needed for scheduling.	The vendor system must support structured student data collection for scheduling-related information not available from the Student Information System.
Student lists may arrive late or change after schedules have already been drafted.	The vendor system must support roster changes, delayed starts, student withdrawals, schedule rework, and related downstream impacts.

Current Data Elements Used

The current intake and profile creation workflow uses the following data elements:

- Student name
- Student ID
- PID
- NetID
- Student email address
- Cohort
- Academic year
 - M3
 - M4
- M3/M4 campus
 - Detroit
 - Flint
 - Grand Rapids
 - Lansing
 - Midland
 - Southeast Michigan
 - Traverse City
 - Upper Peninsula
- Enrollment program
 - MD
 - MD/PhD
 - MD/MBA
 - Oral and Maxillofacial Surgery
 - Leadership in Community and Public Health Certificate
 - Leadership in Rural Medicine Certificate
 - MPH
- Student start status
- Anticipated start term
- Delayed start indicator
- Leave of absence or leave of health indicator, where appropriate
- Accommodation indicator, where appropriate
- Specialty interest
- Student demographic fields required for scheduling, onboarding, or site placement
- Campus assignment
- Schedule track, where applicable

Required Future System Capabilities

The vendor system must:

1. Import student data from the university Student Information System.

2. Preserve the Student Information System as the authoritative source of truth for academic record data.
3. Store student attributes needed for LCE scheduling, including:
 - a. NetID
 - b. Student ID
 - c. PID
 - d. Student email address
 - e. Cohort
 - f. Academic year
 - g. M3/M4 campus
 - h. Enrollment program
 - i. Student status
 - j. Anticipated start term
 - k. Schedule track
 - l. Accommodation indicator, where appropriate
 - m. Leave of absence or leave of health indicator, where appropriate
 - n. Configurable user-defined fields
4. Support campus-specific intake processes.
5. Allow authorized staff to add scheduling-related fields not available in the Student Information System.
6. Support student completion of intake forms or surveys for scheduling-related information.
7. Allow student specialty interest to be captured and updated longitudinally.
8. Support roster changes after initial schedule development begins.
9. Notify impacted users when a roster change affects scheduling, enrollment, site placement, or graduation planning.
10. Maintain audit history for profile creation, profile updates, student status changes, and campus assignment changes.

Required Outputs

The vendor system must produce:

- LCE student roster
- Campus-specific student roster
- M3 roster
- M4 roster
- Student scheduling profile
- Student demographic export
- Student status change report
- Late-add or delayed-start report
- Campus assignment report
- Roster reconciliation report between vendor system and Student Information System
- Audit trail showing profile updates, user, timestamp, prior value, and new value

Response Requested: Vendors should describe how their system supports LCE student roster intake, Student Information System import, student profile creation, campus assignment, student status updates, configurable user-defined fields, roster change management, and audit tracking.

Use Case 3: Required M3 Clerkship Schedule Build

CHM requires the vendor system to support required M3 clerkship scheduling across campuses, clerkships, sites, departments, blocks, and date ranges. The system must allow authorized campus teams to build schedules, enforce capacity, identify conflicts, support local scheduling rules, and generate reports for clerkship teams and departments.

Current Workflow / Current State	Required Future Outcome
M3 clerkship schedules are currently built manually in Excel or similar spreadsheets.	The vendor system must centralize required M3 clerkship schedule development in a structured system.
Campus teams use master schedules and individual student schedules to determine where each student is assigned.	The vendor system must provide both student-level and campus-level schedule views.
Staff manually schedule students into clerkships based on required clerkships, availability, timing, and capacity.	The vendor system must support clerkship scheduling logic, block availability, site capacity, and student-level sequencing.
Clerkship schedule data may also be entered manually into a separate local system so reports or enrollment forms can be generated.	The vendor system must reduce duplicate entry and use schedule data for reports, enrollment workflows, and downstream processes.
Staff manually check schedules for overlapping rotations, missing clerkships, or incorrect timing.	The vendor system must identify conflicts, missing requirements, timing issues, and capacity concerns automatically.
Current campus processes may vary by location.	The vendor system must allow standardized scheduling fields with configurable campus-level workflow differences.

Current Data Elements Used

The current required clerkship scheduling workflow uses the following data elements:

- Student name
- Student ID
- PID
- NetID
- Student email address
- Academic year
- M3 campus
- Schedule track
- Required clerkship name
- Clerkship course number
- Clerkship section number
- Clerkship block
- Clerkship start date

- Clerkship end date
- Clerkship duration
- Clerkship site
- Clerkship department
- Clerkship campus
- Clerkship capacity
- Faculty/preceptor assignment, where applicable
- Clerkship coordinator
- Clerkship director
- Enrollment status
- Approval status
- Grade status, where applicable
- Student absence, leave, or accommodation indicator, where appropriate

Required Future System Capabilities

The vendor system must:

1. Support required M3 clerkship scheduling.
2. Support scheduling by:
 - a. Campus
 - b. Clerkship
 - c. Block
 - d. Date range
 - e. Site
 - f. Department
 - g. Student
3. Enforce clerkship capacity by:
 - a. Site
 - b. Department
 - c. Block
 - d. Date range
 - e. Campus
4. Prevent overlapping clerkship assignments.
5. Identify missing required clerkships.
6. Identify schedule conflicts related to:
 - a. Clerkship overlaps
 - b. Site capacity
 - c. Department capacity
 - d. Student absences
 - e. Leave of absence or leave of health
 - f. Accommodation-related scheduling needs
 - g. Required academic activities
7. Support campus-specific schedule tracks.

8. Allow schedule adjustments by authorized users.
9. Maintain a documented audit trail for all schedule changes.
10. Support real-time schedule views.
11. Allow staff to query schedules by:
 - Student
 - Clerkship
 - Site
 - Department
 - Campus
 - Block
 - Date range
12. Support the export of schedule data for reporting, enrollment, and operational needs.

Required Outputs

The vendor system must produce:

- M3 required clerkship schedule
- Student-level clerkship schedule
- Campus-level clerkship schedule
- Clerkship block schedule
- Site-based clerkship schedule
- Department-based clerkship schedule
- Clerkship capacity report
- Missing required clerkship report
- Schedule conflict report
- Administrative schedule validation report
- Exportable schedule file
- Audit trail showing schedule changes, user, timestamp, prior value, new value, and affected records

Response Requested: Vendors should describe how their system supports required M3 clerkship scheduling, campus-specific scheduling rules, clerkship capacity, site assignment, block scheduling, conflict detection, schedule reporting, export, and audit tracking.

Use Case 4: M3 and M4 Elective Preference Collection and Elective Schedule Build

CHM requires the vendor system to support collection, review, prioritization, and scheduling of student elective requests for M3 and M4 students. The system must support ranked elective preferences, specialty interest alignment, elective availability, site capacity, student-specific schedule windows, and campus-level review

Current Workflow / Current State	Required Future Outcome
Campuses may begin communication with Rising M3 students approximately six months before the early start date.	The vendor system must support early collection of student scheduling information and elective preferences.
Students may be asked to submit a ranked list of elective interests.	The vendor system must allow students to submit ranked elective preferences.
Elective interests may be based on prior career advising, specialty planning, or specialty choice worksheets.	The vendor system must allow elective requests to be connected to specialty interest or career advising information where appropriate.
Staff manually compare student elective preferences against local elective availability spreadsheets.	The vendor system must maintain or import elective availability and allow matching against student preferences.
Staff prioritize required clerkships first, then fill available two-week or other elective windows.	The vendor system must support sequencing logic that schedules required clerkships first and fill elective windows according to availability and rules.
Staff manually move down a student's ranked preference list to find an available elective.	The vendor system must support ranked preference review and assist with matching students to available electives.
M4 schedules are often built before M3 elective requests are finalized.	The vendor system must support scheduling priority rules across M4, M3, and other learner groups.
Elective availability may be managed by campus staff across hospital systems, external groups, departments, and sites.	The vendor system must maintain elective offerings, availability windows, capacity, contacts, prerequisites, and site-specific requirements.

Current Data Elements Used

The current elective scheduling workflow uses the following data elements:

- Student name
- Student ID
- Academic year
 - M3
 - M4
- Campus
- Specialty interest
- Career advising input, where applicable
- Elective preference list
- Elective ranking
- Elective name

- Elective course number
- Elective section number
- Elective type
 - Clinical
 - Non-clinical
 - Subspecialty
 - Primary care selective
 - Away
 - Off-cycle
 - Intercampus
- Elective duration
- Elective start date
- Elective end date
- Elective availability window
- Elective site
- Elective department
- Elective capacity
- Elective contact
- Required clerkship schedule
- Available elective window
- Approval status
- Enrollment status
- Site-specific application requirements
- Onboarding requirements

Required Future System Capabilities

The vendor system must:

1. Allow students to submit elective preferences.
2. Allow ranked elective preference submissions.
3. Store specialty interest and allow longitudinal updates.
4. Support linkage between elective preferences and career advising information where appropriate.
5. Maintain or import elective availability.
6. Store elective attributes, including:
 - a. Elective name
 - b. Course number
 - c. Section number
 - d. Site
 - e. Department
 - f. Duration
 - g. Availability window

- h. Capacity
 - i. Contact
 - j. Prerequisites
 - k. Application requirements
 - l. Onboarding requirements
7. Support elective scheduling for M3 and M4 students.
 8. Support priority rules for M4 scheduling before M3 elective scheduling were appropriate.
 9. Support matching student preferences to available elective windows.
 10. Identify unavailable, full, conflicting, or restricted elective options.
 11. Track the elective request status.
 12. Track elective approval status.
 13. Allow authorized staff to hold, release, or confirm elective spots.
 14. Maintain audit history for elective placement decisions.
 15. Support reporting by specialty interest, elective demand, site capacity, campus, and academic year.

Required Outputs

The vendor system must produce:

- Student elective preference report
- Ranked elective preference report
- Elective availability report
- Elective capacity report
- M3 elective schedule
- M4 elective schedule
- Student-level elective schedule
- Campus-level elective schedule
- Specialty interest/elective demand report
- Elective request status report
- Elective approval status report
- Schedule conflict report
- Audit trail showing elective placement changes, user, timestamp, prior value, new value, and affected records

Response Requested: Vendors should describe how their system supports student elective preference collection, ranked choice submission, specialty interest tracking, elective availability management, M3/M4 elective scheduling, scheduling priority rules, capacity enforcement, approval tracking, reporting, and audit tracking.

Use Case 5: Intercampus, External, Visiting Student, and VSLO-Related Scheduling Requests

CHM requires the vendor system to support scheduling requests involving home campus students, intercampus CHM students, students from partner institutions, external visiting students, and VSLO-related requests. The system must support request intake, placement review, approval of workflows, scheduling, documentation, onboarding, and reporting.

Current Workflow / Current State	Required Future Outcome
Some campuses manage requests from other institutions and schedule those students with CHM-affiliated hospital systems.	The vendor system must support external and visiting student request intake and scheduling.
Some campuses manage requests using VSLO-related workflows.	The vendor system must support integration, import/export, or documented workflow compatibility with VSLO.
Campuses manage external requests, intercampus requests, and home campus scheduling in a defined sequence.	The vendor system must support request categorization, scheduling priority rules, and placement tracking by request type.
Staff may schedule M4 students first, then M3 requests, then partner or external requests, then intercampus requests, then VSLO requests.	The vendor system must allow configurable scheduling windows, request windows, and priority sequencing.
VSLO-related activity may require demographic data, offer tracking, acceptance tracking, payment status, forms, onboarding data, and arrival information.	The vendor system must support collection, import, tracking, and storage of request and onboarding data needed for visiting students.
Staff must keep request activity organized across email, spreadsheets, VSLO, local systems, and hospital workflows.	The vendor system must centralize request status, placement status, and documentation.

Current Data Elements Used

The current intercampus, external, and VSLO-related workflow uses the following data elements:

- Student name
- Student email
- Student phone number
- Student ID, where applicable
- Home institution
- CHM campus
- Requesting campus
- Receiving campus
- Learner type
 - Home campus CHM student
 - Intercampus CHM student
 - Partner institution student
 - External student
 - Visiting student

- VSLO applicant
- Rotation requested
- Elective requested
- Requested dates
- Approved dates
- Site
- Department
- Hospital system
- Capacity
- Request source
 - Internal
 - Intercampus
 - External
 - VSLO
- Offer status
- Acceptance status
- Payment status, where applicable
- Form status
- Letter or confirmation status
- Arrival/reporting instructions
- Onboarding requirements
- Onboarding completion status
- Health or compliance documentation, where applicable
- Site approval status
- Department approval status
- Enrollment status, where applicable

Required Future System Capabilities

The vendor system must:

1. Support intercampus request intake.
2. Support external visiting student request intake.
3. Support partner institution request intake where applicable.
4. Support VSLO integration, import/export, or documented workflow compatibility.
5. Store learner type and request source.
6. Allow request categorization by:
 - a. Home campus
 - b. Intercampus
 - c. External
 - d. Partner institution
 - e. VSLO
 - f. Away

- g. Off-cycle
- 7. Support configurable request windows.
- 8. Support configurable scheduling priority rules.
- 9. Track offer status.
- 10. Track acceptance status.
- 11. Track payment status, where applicable.
- 12. Track required forms.
- 13. Track confirmation letters or reporting instruction letters.
- 14. Track arrival/reporting information.
- 15. Track onboarding documentation.
- 16. Track hospital/site approval.
- 17. Track department approval.
- 18. Track placement status.
- 19. Prevent over-capacity placements across home, intercampus, external, and VSLO learner groups.
- 20. Allow authorized users to view all request activity by learner type, site, campus, department, and date range.
- 21. Maintain audit history for request intake, approval, placement, and schedule changes.

Required Outputs

The vendor system must produce:

- Intercampus request report
- External request report
- Visiting student request report
- VSLO-related request report
- Request status dashboard
- Offer and acceptance report
- Payment status report, where applicable
- Required form completion report
- Onboarding completion report
- Site approval report
- Department approval report
- Learner type report
- Placement capacity report
- Schedule conflict report
- Audit trail showing request changes, user, timestamp, prior value, new value, and affected records

Response Requested: Vendors should describe how their system supports intercampus requests, external requests, visiting student workflows, VSLO integration or compatibility, request prioritization, offer and acceptance tracking, onboarding tracking, capacity management, reporting, and audit tracking.

Use Case 6: Clinical Site, Hospital Approval, Department Communication, and Onboarding Tracking

CHM requires the vendor system to support clinical site and hospital approval workflows for clerkships, electives, intercampus requests, external requests, and visiting students. The system must support placement requests, approval/denial tracking, required documentation, onboarding requirements, and department-specific communication.

Current Workflow / Current State	Required Future Outcome
Staff manually send schedule spreadsheets or request lists to hospital systems and departments.	The vendor system must support structured site, hospital, and department placement request workflows.
Hospitals or departments respond with approval or denial of requested rotations.	The vendor system must track placement approval, denial, pending status, and alternate placement needs.
Some programs require additional applications or information before approving rotations.	The vendor system must track site-specific application and onboarding requirements.
Staff send letters or department-specific schedule communications showing only the students assigned to that department or elective.	The vendor system must generate department-specific communications and reports without exposing unrelated student information.
Staff may pull a report by elective and location and copy/paste it into a communication to the department.	The vendor system must generate department-specific reports directly from schedule data.
Scheduling and follow-up communication often occur through email.	The vendor system must centralize placement communication, approval status, and documentation.

Current Data Elements Used

The current clinical site and onboarding workflow uses the following data elements:

- Student name
- Student email
- Student phone number, where appropriate
- Campus
- Academic year
- Rotation name
- Clerkship or elective name
- Course number
- Section number
- Site
- Hospital system
- Department

- Site contact
- Department contact
- Rotation start date
- Rotation end date
- Number of students requested
- Number of students approved
- Number of students denied
- Approval status
- Application requirements
- Onboarding requirements
- Required forms
- Health or compliance documentation, where applicable
- Reporting instructions
- Confirmation letter status
- Communication sent date
- Communication recipient
- Placement status

Required Future System Capabilities

The vendor system must:

1. Maintain clinical site, hospital system, and department records.
2. Maintain site contact and department contact information.
3. Support placement request workflows.
4. Track site approval status.
5. Track department approval status.
6. Track approval, denial, pending, and alternate placement statuses.
7. Store application requirements by site, department, rotation, or learner type.
8. Store onboarding requirements by site, department, rotation, or learner type.
9. Track onboarding completion.
10. Track required forms.
11. Track communication sent to sites and departments.
12. Generate department-specific student rosters.
13. Generate site-specific student rosters.
14. Allow communications to include only appropriate student information.
15. Support role-based access to site, department, and student placement information.
16. Maintain audit history for approvals, documentation, and communication.

Response Requested: Vendors should describe how their system supports clinical site records, hospital approval workflows, department communication, site-specific reports, onboarding tracking, required form tracking, role-based communication, and audit history.

Use Case 7: Early Enrollment, Add/Drop, and Special Section Number Workflow

CHM requires the vendor system to support early enrollment reporting, add/drop request workflows, special section number requests, Records review, and reconciliation with the Student Information System. The system must reduce manual form creation, email-based request tracking, duplicate entry, and manual reconciliation.

Current Workflow / Current State	Required Future Outcome
Staff manually enter schedules into a separate local system to generate early enrollment reports.	The vendor system must generate early enrollment reports or electronic submissions directly from approved schedule data.
Early enrollment reports are sent to Records to initiate enrollment for the upcoming semester.	The vendor system must support routing, review, validation, and status tracking for Records-related enrollment workflows.
A large number of enrollment lines may be generated for a single semester.	The vendor system must support bulk enrollment reporting or bulk submission workflows.
After early enrollment, schedule changes require add/drop forms.	The vendor system must support add/drop request generation, routing, status tracking, and audit history.
Add/drop forms may be generated per student, even when multiple changes are needed.	The vendor system must support student-level and bulk change request workflows where appropriate.
Add/drop requests are currently sent by email and may require follow-up if missed or incomplete.	The vendor system must support a queue, status, or workflow for enrollment changes.
Records manually enter add/drop changes into the Student Information System.	The vendor system must preserve Records review/validation authority and support reconciliation with the Student Information System.
Off-cycle or away rotations may require special section number requests.	The vendor system must support special section number requests and track approval before final enrollment change processing.
After a special section number is approved, staff may need to update the local system and submit an additional add/drop request.	The vendor system must support linked workflows so special section approval can connect to the related enrollment change.

Current Data Elements Used

The current enrollment and add/drop workflow use the following data elements:

- Student name
- Student ID
- PID
- Academic year
- Campus
- Course number

- Section number
- Clerkship or elective name
- Rotation name
- Start date
- End date
- Semester
- Block
- Add course
- Drop course
- Prior course/section
- New course/section
- Off-cycle indicator
- Away rotation indicator
- Special section number request
- Special section number approval
- Location
- Site
- Department
- Request submitted date
- Request submitted by
- Records review status
- Enrollment completed date
- Student Information System confirmation status
- Discrepancy or correction status

Required Future System Capabilities

The vendor system must:

1. Generate early enrollment reports from approved schedule data.
2. Support bulk enrollment reporting or submission.
3. Route enrollment requests to Records or authorized reviewers.
4. Support Records validation before final enrollment action.
5. Track enrollment request status.
6. Generate add/drop requests from schedule changes.
7. Support add/drop requests at the student level.
8. Support bulk add/drop change workflows where appropriate.
9. Track add/drop request status.
10. Support special section number requests.
11. Track special section number approval.
12. Link special section number approval to the related enrollment change.
13. Maintain a history of prior and new course/section data.
14. Support reconciliation with the Student Information System.

15. Identify discrepancies between vendor system schedule data and Student Information System enrollment.
16. Notify authorized users when enrollment requests are approved, denied, pending, incomplete, or require correction.
17. Maintain audit history for all enrollment, add/drop, and special section workflows.

Response Requested: Vendors should describe how their system supports early enrollment reporting, bulk enrollment workflows, add/drop generation, Records review, special section number requests, enrollment status tracking, Student Information System reconciliation, discrepancy reporting, and audit tracking.

Use Case 8: LCE Schedule Reporting, Calendar Views, and Department-Level Schedule Communication

CHM requires the vendor system to provide centralized, real-time LCE schedule views and reports for students, campus teams, clerkship coordinators, departments, sites, course/clerkship leaders, Records, and Academic Affairs leadership. The system must reduce reliance on spreadsheets as the only centralized schedule view.

Current Workflow / Current State	Required Future Outcome
Campus teams use master spreadsheets as the primary source for seeing where students are scheduled.	The vendor system must provide centralized schedule views that reduce reliance on master spreadsheets.
Staff use spreadsheets because current Student Information System views may show one learner at a time and may not provide a full calendar or cohort view.	The vendor system must allow users to view schedules by student, cohort, date, clerkship, elective, campus, site, block, and department.
Departments and clerkships may request reports showing which students are scheduled in specific clerkships, blocks, or electives.	The vendor system must generate clerkship, elective, site, and department reports directly from schedule data.
Staff may manually prepare letters or reports for departments using master schedule data.	The vendor system must support generation of department-specific schedule communications.
Staff cannot send a full master schedule to a department when it includes unrelated student information.	The vendor system must support role-based, limited-scope reporting so departments receive only appropriate student information.
Scheduling communication often happens by email.	The vendor system must centralize reporting, communication status, and schedule data access.

Current Data Elements Used

The current reporting and calendar workflow uses the following data elements:

- Student name
- Student email

- Student phone number, where appropriate
- Academic year
- Campus
- Clerkship
- Elective
- Rotation
- Course number
- Section number
- Block
- Date range
- Site
- Department
- Location
- Faculty/preceptor, where applicable
- Clerkship coordinator
- Department contact
- Learner type
- Enrollment status
- Approval status
- Schedule status
- Communication sent date
- Communication recipient

Required Future System Capabilities

The vendor system must:

1. Provide real-time LCE schedule views.
2. Provide student-level schedule views.
3. Provide cohort-level schedule views.
4. Provide campus-level schedule views.
5. Provide clerkship-level schedule views.
6. Provide elective-level schedule views.
7. Provide site-level schedule views.
8. Provide department-level schedule views.
9. Provide date-range and block-level schedule views.
10. Support calendar views by:
 - Day
 - Week
 - Month
 - Block
 - Semester
 - Academic year
11. Support exportable calendar formats, including iCal and/or Google Calendar compatibility.

12. Generate department-specific reports without exposing unrelated student information.
13. Generate clerkship reports showing students scheduled by block and date.
14. Generate elective/location reports.
15. Support communication tracking when reports or letters are sent.
16. Allow role-based access to schedule views and reports.
17. Support export to Excel, CSV, PDF, or other required formats.
18. Support Power BI integration or export where appropriate.

Response Requested: Vendors should describe how their system supports centralized LCE schedule views, calendar views, department-specific reporting, clerkship reports, elective reports, role-based schedule access, calendar export, Power BI-compatible export, and communication tracking.

Use Case 9: LCE Graduation Requirement, Credit, Grade, and Progress Tracking

CHM requires the vendor system to support LCE graduation requirement tracking for M3 and M4 students (LCE), including required clerkships, electives, credits, grades, selective requirements, clinical/non-clinical elective categories, subspecialty limits, and student-facing progress visibility. The system must support tracking of requirements not fully represented in the Student Information System while preserving the Student Information System as the authoritative source of truth for academic record data.

Current Workflow / Current State	Required Future Outcome
Some campuses maintain grad-audit or track documents outside the Student Information System.	The vendor system must support structured graduation requirement tracking for LCE students.
Grad audits may track rotations, grades, credits, and other requirements in one document that follows the student through M3 and M4.	The vendor system must provide longitudinal student progress tracking across M3 and M4.
Some grad-audit documents are stored in Teams or other shared locations, and students may be given view-only access.	The vendor system must provide student-facing access to approved schedule and progress information where appropriate.
Staff may update grades or completion of information in multiple places, including the grad audit, a local system, and the Student Information System.	The vendor system must reduce duplicate tracking and support reconciliation with the Student Information System.
Certain graduation requirements may not be fully tracked in the Student Information System, such as primary care selective completion, clinical/non-clinical elective categories, and maximum weeks in a subspecialty elective.	The vendor system must support configurable academic requirement rules beyond basic course enrollment.
Staff may trust local grad-audit documents because they can control and verify them directly.	The vendor system must provide reliable, transparent, auditable requirement tracking that staff can validate and use operationally.

Current Data Elements Used

The current grad-audit and progress tracking workflow uses the following data elements:

- Student name
- Student ID
- Academic year
- Campus
- Clerkships scheduled
- Clerkships completed
- Electives scheduled
- Electives completed
- Course number
- Section number
- Rotation dates
- Credits scheduled
- Credits completed
- Grade
 - Pass
 - Conditional Pass
 - No Pass
 - Other applicable grade status
- Required clerkship completion
- Elective requirement completion
- Primary care selective completion
- Clinical elective completion
- Non-clinical elective completion
- Subspecialty elective weeks
- Maximum subspecialty elective limit
- Remaining requirements
- Student-facing view status
- Last updated date
- Updated by

Required Future System Capabilities

The vendor system must:

1. Support graduation requirement tracking.
2. Track required clerkship completion.
3. Track elective completion.
4. Track credits scheduled.
5. Track credits completed.
6. Track grades or completion status where appropriate.
7. Support primary care selective requirement tracking.
8. Support clinical elective requirement tracking.

9. Support non-clinical elective requirement tracking.
10. Support subspecialty elective tracking.
11. Enforce or flag maximum weeks allowed in a subspecialty elective.
12. Support configurable graduation requirement rules.
13. Display scheduled, completed, and remaining requirements.
14. Allow authorized staff to validate requirement completion.
15. Provide student-facing view-only access to approved progress information where appropriate.
16. Support reconciliation with the Student Information System.
17. Identify discrepancies between vendor system records and Student Information System records.
18. Maintain audit history for requirement updates, credit updates, grade updates, and completion of changes.

Response Requested: Vendors should describe how their system supports LCE graduation requirement tracking, credit tracking, grade or completion tracking, configurable requirement rules, primary care selective tracking, clinical/non-clinical elective tracking, subspecialty maximum tracking, student-facing progress views, Student Information System reconciliation, reporting, and audit tracking.

Use Case 10: Schedule Change and Disruption Management

CHM requires the vendor system to support schedule changes after initial schedule publication, including disruptions related to leaves, absences, site changes, rotation reassignment, exam changes, accommodations, or other operational adjustments.

Current Workflow / Current State	Required Future Outcome
Schedule changes are currently handled through email and Excel edits.	The vendor system must provide centralized schedule change management with impact analysis, reassignment support, notification triggers, and audit logging.
There is no central tracking mechanism for schedule disruptions or downstream impacts.	The vendor system must identify impacted students, faculty, sites, and administrators when a schedule change is entered.
Staff manually determine who needs to be notified.	The vendor system must trigger notifications to appropriate users and roles based on the type of schedule change.
Changes may relate to leave of absence, leave of health, or other manual processes.	The vendor system must be able to incorporate triggers from forms or workflows that are currently manual.

Required Future System Capabilities

The vendor system must:

1. Identify impacted students automatically when a schedule change occurs.
2. Identify impacted faculty, preceptors, rotation leads, course directors, phase directors, and administrative staff.
3. Suggest reassignment options where feasible.
4. Support schedule reassignment based on:
 - a. Rotation availability

- b. Site capacity
 - c. Student pathway
 - d. Group assignment
 - e. Required prerequisites
 - f. Academic timing
- 5. Trigger notifications for schedule changes.
- 6. Support disruption triggers related to:
 - a. Leave of absence
 - b. Leave of health
 - c. Student absences
 - d. Rotation site changes
 - e. Faculty/preceptor changes
 - f. Simulation changes
 - g. Exam or make-up exam conflicts
 - h. Accommodation-related scheduling needs
- 7. Maintain an audit log of all schedule changes.

Required Audit Log Fields

The vendor system must track:

- Who made the change
- What changed
- Previous value
- New value
- Date and time of change
- Reason for change
- Impacted student(s)
- Impacted faculty/preceptor(s)
- Impacted site(s)
- Notifications triggered
- Whether reassignment was completed

Response Requested: Vendors should describe how their system supports schedule change management, impact analysis, reassignment recommendations, notifications, and audit logging.

Priority 2: Student Status

Use Case 11: Student Status Assignment

CHM requires the vendor system to aggregate academic, assessment, progression, and professionalism-related data to support Student Performance Committee review and student status assignment.

Current Workflow / Current State	Required Future Outcome
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Student status is currently tracked using Excel spreadsheets and a dashboard in development.	The vendor system must provide a centralized Student Performance Committee dashboard using data from the Student Information System, assessment sources, and authorized staff-entered tracking fields.
Staff manually pull data and reference materials, including academic performance policies and progression guidance.	The vendor system must aggregate relevant data into a structured review view.
Student Performance Committee reviews occur outside the system.	The vendor system must support committee review, status assignment, history, reason code assignment, and timestamped decisions.
Status assignments are entered manually.	The vendor system must maintain longitudinal status history without overwriting prior status decisions.

Required Data Elements

The vendor system must be able to aggregate and display the following:

From the Student Information System:

- Course name
- Final grade
 - Pass
 - Conditional Pass
 - No Pass
- Credits earned
- USMLE Step 1 result
- USMLE Step 2 result

From assessment sources:

- Exam type
 - Comprehensive Necessary Science Exam
 - Progress Clinical Skills Exam
- Exam score
- Exam threshold indicator, where applicable

From staff tracking:

- Professionalism concerns
- Progression delays
- Leave of absence or leave of health indicators, where applicable
- Other authorized academic concern indicators

Required Status Field Values

The vendor system must support the following student status values:

- On Track
- Academic Concern
- Academic Warning
- Critical Academic Status

Required Reason Codes

The vendor system must support configurable reason codes, including:

- Course Failure
- Exam Below Threshold
- Professionalism
- Progression Delay

Required Future System Capabilities

The vendor system must:

1. Aggregate data from the Student Information System and assessment sources.
2. Provide a Student Performance Committee dashboard.
3. Allow authorized users to assign student status.
4. Require reason code selection when applicable.
5. Preserve prior status assignments.
6. Prevent overwriting historical status records.
7. Timestamp status decisions.
8. Record the user who entered or approved the status.
9. Allow reporting by cohort, campus, status, reason code, and academic year.
10. Support export for committee documentation and institutional reporting.

Response Requested: Vendors should describe how their system aggregates academic and assessment data, supports committee review, assigns student status, maintains status history, and preserves timestamped decision records.

Use Case 12: Status Letters

CHM requires the vendor system to generate student status letters using approved templates, structured student data, status assignments, reason codes, and decision history.

Current Workflow / Current State	Required Future Outcome
Status letters are currently generated using Word mail merge and an Excel data source.	The vendor system must dynamically generate status letters from approved templates and structured student status data.
Letters are manually prepared and manually sent.	The vendor system must support version control, approval tracking, sent date tracking, and audit history.
Version issues can occur due to manual templates and manual data merging.	The vendor system must ensure the correct template version is used and preserve letter history.

Required Data Sources

The vendor system must pull from:

- Student Information System student information
- Vendor system student status field
- Vendor system reason code field

- Student Performance Committee decision record
- Approved letter templates

Required Future System Capabilities

The vendor system must:

1. Generate letters dynamically from approved templates.
2. Pull student demographic and academic information from the appropriate source.
3. Pull student status and reason code from the vendor system.
4. Allow template version control.
5. Track approval status.
6. Track sent date.
7. Preserve prior letters and versions.
8. Prevent accidental overwriting of prior communications.
9. Support export to PDF.
10. Support documentation of who generated, reviewed, approved, and sent the letter.

Required Tracking Fields

The vendor system must track:

- Letter type
- Template version
- Student status
- Reason code
- Generated date
- Generated by
- Approved date
- Approved by
- Sent date
- Sent by
- Delivery method
- Final PDF or archived document

Response Requested: Vendors should describe how their system supports dynamic letter generation, template version control, approval of workflows, document retention, and audit tracking.

Priority 3: Evaluations

Use Case 13: Evaluation Assignment

CHM requires the vendor system to assign evaluations automatically based on student schedules, rotation assignments, evaluator-student relationships, and configurable timing rules.

Current Workflow / Current State	Required Future Outcome
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MICHIGAN STATE UNIVERSITY

Evaluations are currently managed in a separate evaluation system.	The vendor system must support evaluation assignment, triggering, completion tracking, reminders, and reporting.
Administrators manually create evaluator-student matches.	The vendor system must automatically assign evaluations based on schedule and rotation data.
Evaluations are triggered approximately three days before the end date.	The vendor system must allow configurable trigger rules based on rotation end date, session end date, clerkship timing, or other defined rules.
Faculty complete evaluations through emailed links.	The vendor system must support evaluator notification, completion links, reminders, and real-time tracking.

Required Data Elements

The vendor system must support:

- Student
- Evaluator
- Rotation
- Rotation dates
- Evaluation form
- Evaluation type
- Course or clerkship
- Site
- Faculty/preceptor assignment
- Trigger date
- Due date
- Completion status

Required Future System Capabilities

The vendor system must:

1. Auto-assign evaluations based on schedule data.
2. Match evaluators to students based on rotation, site, course, or clerkship assignment.
3. Trigger evaluations based on configurable rules.
4. Send automated notifications.
5. Send automated reminders.
6. Provide completion dashboards.
7. Track incomplete evaluations.
8. Allow administrators to intervene or reassign evaluations.
9. Support real-time evaluation tracking with Student-level evaluation status and Evaluator-level completion status.
10. Support export of evaluation completion and compliance data.

Required Outputs

The vendor system must produce:

- Evaluation completion dashboard

- Student-level evaluation status
- Evaluator-level completion status
- Rotation-level evaluation status
- Incomplete evaluation report
- Reminder report
- Evaluation assignment audit log

Response Requested: Vendors should describe how their system assigns evaluations based on schedules, supports configurable trigger rules, sends reminders, tracks completion, and supports administrative oversight.

Priority 4: MSPE

Use Case 14: MSPE Generation

CHM requires the vendor system to support Medical Student Performance Evaluation generation by aggregating academic, enrollment, clerkship, competency, evaluation, narrative, and peer comparison data into a controlled document generation process.

Current Workflow / Current State	Required Future Outcome
MSPEs are currently built using Word templates and manual mail merge processes.	The vendor system must support automated MSPE generation using mapped data fields, approved templates, narrative logic, document review workflows, and final PDF output.
Data are pulled from multiple systems.	The vendor system must aggregate required data from the Student Information System, assessment/evaluation sources, and authorized manual inputs.
Narratives are manually written and copied into Word.	The vendor system must support narrative insertion, logic-based text, manual editing, and version control.
Multiple drafts are reviewed manually.	The vendor system must track draft versions, review status, approvals, and finalization.

Required Data Elements

From the Student Information System:

- Grades
- Enrollment
- Leave of absence information, where applicable
- Academic record information required for MSPE generation

From assessment/evaluation sources:

- Clerkship evaluations
- Competencies
- Narrative evaluation content
- Assessment outcomes, where applicable

From manual or authorized administrative input:

- Peer comparison tables

- Narrative summaries
- Remediation information
- Final review edits

Required Logic

The vendor system must support logic-based document generation, including insertion or conditional display based on:

- Pass
- Conditional Pass
- No Pass
- Remediation
- Clerkship completion
- Evaluation data
- Required narrative categories

Required Future System Capabilities

The vendor system must:

1. Auto-generate MSPE documents using approved templates.
2. Map fields from source systems into the MSPE template.
3. Support manual entry and editing of narrative sections.
4. Support logic-based text insertion.
5. Maintain document version control.
6. Support draft review workflows.
7. Track approval and finalization.
8. Produce a final PDF.
9. Preserve prior versions.
10. Support audit tracking.

Required Outputs

The vendor system must produce:

- Draft MSPE
- Final MSPE PDF
- Version history
- Review status report
- Missing data report
- Student-level MSPE readiness report
- Finalized MSPE archive

Response Requested: Vendors should describe how their system supports MSPE generation, field mapping, narrative logic, draft review, version control, final PDF generation, and document retention.

Priority 5: Curriculum Experiences and Related Curriculum Management

Use Case 15: Curriculum Ingestion and Auto-Tagging Engine

CHM requires the vendor system to ingest curriculum information from existing curriculum content sources and support structured tagging, review, approval, and reporting across multiple taxonomies. This use case supports scalable curriculum mapping and consistent tagging across sessions, objectives, materials, and related curriculum artifacts.

Current Workflow / Current State	Required Future Outcome
Curriculum content is housed in Just in Time Medicine.	The vendor system must be able to ingest curriculum content from Just in Time Medicine through an agreed data exchange process.
Tagging, where completed, is manual.	The vendor system must support automated or assisted tagging suggestions.
Tagging may involve multiple faculty and staff, which can create inconsistent language or taxonomy application.	The vendor system must support standardized taxonomy management, editable tagging, review workflows, and approval of tags.
Session content, assessment questions, and curriculum objectives are not centrally connected.	The vendor system must support connection or mapping among session content, learning objectives, assessment items, and curriculum standards where data are available.

Required Content for Ingestion

The vendor system should support ingestion of:

- Session pages
- Learning objectives
- Session descriptions
- Session metadata
- Associated materials, where available
- Curriculum phase, week, and course structure
- Curriculum tags and mappings, where available

Required Tagging Taxonomies

The vendor system should support tagging or mapping to:

- Educational Program Objectives
- Professional Activities
- USMLE Content Outline
- NBME Insights
- AAMC keywords
- LCME standards

- CHM internal taxonomy
- Course objectives
- Session objectives
- Discipline
- Organ system
- Content type

Required Faculty Workflow

The vendor system must support:

1. Automated or assisted tag suggestions.
2. Faculty or curriculum administrator review.
3. Tag editing.
4. Tag approval.
5. Tag version history.
6. Identification of unmapped or partially mapped content.
7. Reporting on tagging completeness.

Required Future System Capabilities

The vendor system must:

1. Support API integration or scheduled data import from Just in Time Medicine.
2. Support nightly, weekly, or otherwise agreed data exchange if real-time integration is not required.
3. Provide a tagging interface.
4. Provide an editable taxonomy structure.
5. Support version control of tags.
6. Support approval workflows.
7. Support reporting on mapping completeness.
8. Support export of mapped curriculum data.

Required Outputs

The vendor system must produce:

- Curriculum mapping reports
- Tagging completeness reports
- Unmapped content reports
- Taxonomy-specific curriculum reports
- Session-to-objective mapping
- Session-to-standard mapping
- Exportable curriculum mapping data

Response Requested: Vendors should describe how their system ingests curriculum content, supports assisted tagging, manages taxonomies, supports faculty review and approval, maintains version control, and reports curriculum mapping completeness.

Use Case 16: Curriculum Search and Natural Language Query System

CHM requires the vendor system to support advanced curriculum search across years, phases, sessions, objectives, materials, content types, concepts, and delivered curriculum content.

Current Workflow / Current State	Required Future Outcome
Curriculum searching is currently manual and keyword-based.	The vendor system must support advanced search and natural language query capabilities.
Search is limited to existing curriculum page titles or content.	The vendor system must support search across indexed curriculum content, metadata, tags, objectives, and associated materials where available.
Users cannot reliably search across concepts or distinguish delivered content from stated objectives.	The vendor system must support concept-level search and display where content appears in objectives, session materials, cases, slides, videos, or assessment-related materials where available.
Cross-year search capability is limited.	The vendor system must support search across M1, M2, M3, M4, phase, week, course, clerkship, rotation, and other curriculum structures.

Example Query Needs

The vendor system should be able to support queries such as:

- Where is fatigue taught mechanistically?
- Where do we cover e-cadherins in actual teaching?
- Show where gastrointestinal inflammation mechanisms are taught across rotations.
- Where are CT pancreas images used in the curriculum?
- Where is CBC interpretation taught mechanistically?
- Where is horseshoe kidney taught before a specific week?

Required Search Filters

The vendor system must allow filtering by:

- Discipline
- Organ system
- Content type
 - Video
 - Slide
 - Case
 - Pre-learning material
 - Session page
 - Assessment item, where available
- Year
- Week

- Phase
- Course
- Clerkship
- Rotation
- Campus, where applicable
- Curriculum taxonomy
- Objective
- Standard

Required Future System Capabilities

The vendor system must:

1. Provide natural language search.
2. Index content across relevant curriculum systems or imported content sources.
3. Support metadata-based filtering.
4. Connect search results to curriculum tags.
5. Display results in a way that supports students, faculty, advisors, curriculum developers, and academic achievement coaches.
6. Allow export or reporting of search results where appropriate.
7. Reports showing where content appears by phase, week, session, course, or clerkship.

Response Requested: Vendors should describe how their system supports natural language curriculum search, content indexing, metadata filtering, concept-level search, and cross-year search.

Use Case 17: Curriculum Visualization and Mapping Engine

CHM requires the vendor system to support dynamic curriculum visualization, temporal mapping, content density review, and curriculum design reporting.

Current Workflow / Current State	Required Future Outcome
Curriculum visualization is currently limited to Excel and Power BI.	The vendor system must support dynamic and interactive curriculum visualization.
Current visualization is not real-time or interactive.	The vendor system must support filtering, drill-down, and export of visualization outputs.
Temporal sequencing, content density, and depth of coverage are difficult to visualize.	The vendor system must support visualizations that show when, where, how often, and to what depth content is taught.
Curriculum design evidence requires manual preparation.	The vendor system must produce exportable reports and visuals that support curriculum committee review, leadership review, CQI, and accreditation evidence.

Required Visualization Types

The vendor system should support visualizations such as:

- Time versus content density graphs
- Heat maps
- Sankey diagrams
- Alluvial diagrams
- Sunburst diagrams
- Curriculum sequence maps
- Curriculum coverage maps
- Assessment overlay views

Example Visualization Need

The vendor system should be able to display:

- X-axis: Week across M1 and M2
- Y-axis: Number of Pharmacology sessions
- Overlay: Organ system, discipline, or assessment performance

Required Future System Capabilities

The vendor system must:

1. Provide multiple visualization options.
2. Support multi-variable filtering.
3. Support drill-down from summary view to session-level detail.
4. Support export of visuals.
5. Support use in curriculum committee, leadership, CQI, and accreditation reporting.
6. Allow users to identify gaps, redundancies, sequence issues, and content density concerns.

Response Requested: Vendors should describe how their system supports curriculum visualization, temporal mapping, content density review, overlays, filtering, drill-down, and export.

Use Case 18: Curriculum Gap Analysis and Continuous Quality Improvement Engine

CHM requires the vendor system to support curriculum gap analysis and continuous quality improvement by connecting curriculum coverage, assessment outcomes, student performance, survey data, and longitudinal intervention tracking.

Current Workflow / Current State	Required Future Outcome
Gap analysis is currently manual and retrospective.	The vendor system must support automated or assisted curriculum gap analysis.
Data sources are disconnected.	The vendor system must support data integration or mapping among curriculum coverage, assessment outcomes, survey responses, and student performance indicators.
Step performance, graduation questionnaire data, and internal assessments are reviewed separately.	The vendor system must support correlation or comparison between curriculum coverage and outcome measures.

Longitudinal tracking of interventions is difficult.	The vendor system must support tracking of curriculum changes and whether interventions improve future outcomes.
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Required Data Inputs

The vendor system should support use of:

- Curriculum coverage data
- Session-level mapping
- Assessment performance
- Internal assessment results
- USMLE performance data, where available
- Graduation questionnaire data
- Student survey data
- Course or clerkship evaluation data
- Curriculum change records
- CQI action plans

Example Gap Analysis Need

The vendor system should support a workflow such as:

1. Identify underperformance in Biochemistry.
2. Map where Biochemistry is taught.
3. Map where Biochemistry is assessed.
4. Identify gaps, redundancies, timing issues, or insufficient reinforcement.
5. Generate report.
6. Route report to stakeholders.
7. Track curriculum change.
8. Review whether the intervention improved performance in future years.

Required Future System Capabilities

The vendor system must:

1. Support data integration between curriculum, assessment, and outcomes data.
2. Support gap analysis reports.
3. Support routing of reports to stakeholders.
4. Support CQI workflow tracking.
5. Support longitudinal tracking of interventions.
6. Support follow-up review by year or cohort.
7. Support export of CQI evidence.
8. Allow users to determine whether a curriculum intervention had the intended effect over time.

Response Requested: Vendors should describe how their system supports curriculum gap analysis, correlation of curriculum and outcomes data, CQI workflow routing, intervention tracking, and longitudinal reporting.

Use Case 19: AI-Generated Learning Content and Assessment Support

CHM requires the vendor system to support faculty and student use of AI-assisted learning content and assessment support, with alignment to curriculum tags, learning objectives, and approved source materials.

Current Workflow / Current State	Required Future Outcome
Faculty manually create practice questions, summaries, and teaching materials.	The vendor system should support AI-assisted generation of learning and assessment support materials.
There is no centralized system support for AI-generated practice materials or content summaries.	The vendor system should support controlled generation, editing, review, and alignment with curriculum content.
Quality and consistency may vary when materials are created manually and independently.	The vendor system should support editable outputs and alignment with approved curriculum tags and source materials.

Required AI-Assisted Outputs

The vendor system should support generation of:

- Practice multiple-choice questions
- Rationales
- Content summaries
- Teaching analogies
- Student self-study materials
- Faculty teaching support materials

Example Use Needs

The vendor system should support:

- A student requesting practice questions from Immunology sessions.
- A faculty member requesting analogies for neuroscience teaching.
- A faculty member generating draft questions aligned to a specific session or objective.
- An academic coach generating study support tied to documented curriculum content.

Required Future System Capabilities

The vendor system should:

1. Generate AI-assisted content aligned with curriculum tags.
2. Generate AI-assisted content aligned with session objectives.
3. Generate editable outputs.
4. Allow faculty review and modification.
5. Support quality review or approval where appropriate.
6. Preserve connection to source content.
7. Avoid unsupported generation that is not tied to curriculum data.
8. Support role-based access to AI-assisted tools.

Response Requested: Vendors should describe how their system supports AI-assisted content generation, curriculum alignment, editable outputs, source linkage, review workflows, and appropriate role-based access.

Priority 6: Careers and Elective Advising

Use Case 20: Longitudinal Career and Elective Advising Record

CHM requires the vendor system to provide a centralized, role-based, longitudinal advising record for career advising and elective advising across all campuses and academic years. The system must support required advising milestones, ad hoc advising, specialty planning, elective planning, completion monitoring, documentation, reporting, and FERPA-aligned access control.

Current Workflow / Current State	Required Future Outcome
Advising communication and documentation currently occur through email, Word/PDF documents, content pages, and ad hoc spreadsheets.	The vendor system must centralize advising records, forms, documentation, completion tracking, specialty interests, elective needs, and advising history.
Advising forms are distributed through email or shared links.	The vendor system must assign required advising records automatically based on academic year.
Students complete and return documents manually.	The vendor system must allow students to submit forms, upload documents, and update specialty interest.
Advisors review documents and provide feedback through email or meetings.	The vendor system must allow advisors to view submissions, upload documentation, add notes, update status, and maintain time-stamped advising records.
The Careers team manually tracks completion, if tracked at all.	The vendor system must allow the Careers team to view all students across campuses, monitor completion, edit records as needed, and report missing requirements.
Additional advising interactions occur through meetings or email and are not consistently documented.	The vendor system must support multiple updates per advising record and maintain a longitudinal, append-only advising history.

Current Systems and Locations

Current advising information may be distributed across:

- Email
- Word documents
- PDF documents
- Advising forms
- Content pages
- Ad hoc spreadsheets
- Meeting notes
- Individual advisor records

Current Data Elements

Current advising data may include, inconsistently:

- Student name
- Student ID
- Campus
- Academic year
- Form completion
- Specialty interest
- Advising notes
- Elective interests or needs
- Meeting documentation
- Advisor feedback
- Specialty advisor signature, where required

Required Advising Forms and Milestones

The vendor system must support required and ad hoc advising record types, including:

- M1 Fall Advising
- M1 Spring Advising
- M2 Summer Advising
- M2 to M3 Transition Planning
- M3 Introduction to Clerkships
- M3 to M4 Transition
- Specialty Advisor Signature
- M4 Residency Application Preparation
- M4 Interview Recap
- Rank Order List Preparation
- Specialty advising
- Parallel planning
- Elective advising
- Follow-up meetings
- Other ad hoc advising interactions

Required Data Model

Each student must be able to have multiple advising records.

Each advising record must include structured fields.

Student Fields from the Student Information System

- Student name
- Student ID
- Email
- Campus
- Academic year
- Enrollment program, where applicable
- Cohort, where applicable

Advising Record Fields

- Form type
- Advising type
- Submission date
- Last updated date
- Status (Completed, Not Completed, In Progress)
- Notes/comments
- File attachment or document link
- Specialty interest
- Elective interest or needs
- Advisor
- Specialty advisor, where applicable
- Required signature, where applicable
- Last activity date

Required System Behavior

1. Record Creation and Assignment

The vendor system must:

- Automatically assign required advising records based on academic year.
- Allow manual creation of ad hoc advising records.
- Allow creation of specialty advising records.
- Allow creation of elective advising records.
- Allow creation of parallel planning records.
- Allow follow-up records to be linked to prior advising interactions.

2. Student Interaction

Students must be able to:

- Submit required advising forms.
- Upload documents.
- Update specialty interest.
- Update elective interests or needs.
- View assigned advising requirements.
- View completion status.

3. Advisor Interaction

Advisors must be able to:

- View assigned students.
- View student submissions.
- Upload additional documentation.
- Add notes and comments.
- Update advising status.
- Review longitudinal advising history for assigned students.
- Document meetings and follow-up.

4. Careers Team Interaction

The Careers team must be able to:

- View all students across all campuses.
- Monitor completion across required advising forms.
- Edit or update records as needed.
- Run reports.
- Identify missing forms.
- Identify students needing follow-up.
- Review specialty interest trends.
- Review elective advising needs.
- Review advising engagement by campus and academic year.

5. Longitudinal Tracking

The vendor system must:

- Maintain history of all advising interactions.
- Support multiple updates per record.
- Prevent overwriting of prior advising notes.
- Require time-stamped updates.
- Record the author of each update.
- Preserve historical specialty interest changes.
- Preserve historical elective interest or need changes.
- Link follow-up interactions to prior advising records where appropriate.

6. Completion Monitoring

The vendor system must determine per student:

- Which required advising forms are completed.
- Which required advising forms are not completed.
- Which forms are in progress, if applicable.
- Last activity date.
- Missing advising milestones.
- Outstanding signature requirements.
- Outstanding specialty advising requirements, where applicable.

7. Filtering and Search

The vendor system must allow all relevant fields to be indexed and searchable.

The vendor system must allow filtering by:

- Campus
- Academic year
- Form type
- Advising type
- Status
- Submission date
- Last updated date
- Specialty interest
- Elective needs

- Advisor
- Missing requirement
- Completion status

Reporting Requirements

The vendor system must support centralized reporting for:

- Students missing one or more required advising forms
- Completion rates by campus
- Completion rates by academic year
- Completion rates by form type
- Completion rates by advising type
- Specialty interest trends
- Elective advising needs
- Parallel planning needs
- Overall advising engagement
- Advising activity by campus
- Advising activity by academic year

All reports must be:

- Exportable to CSV or Excel
- Filterable by campus and academic year
- Filterable by form type and status
- Available to authorized roles only

Required Dashboards

The vendor system must provide dashboards or equivalent reporting views for:

Completion Overview

- Percentage of students with all required forms complete
- Percentage of students with missing items
- Percentage of students with incomplete or not-started requirements

Campus View

- Completion distribution across all campuses
- Student-level missing requirements by campus
- Campus comparison reports

Academic Year View

- M1 completion status
- M2 completion status
- M3 completion status
- M4 completion status

Missing Forms View

- Student-level missing requirements
- Missing forms by form type

- Missing forms by campus
- Missing forms by academic year

Form Completion Breakdown

- Completion rates per required form
- Completion rates per advising milestone
- Completion rates over time

Specialty Interest Dashboard

- Specialty distribution
- Specialty trends over time
- Specialty changes by academic year
- Specialty trends by campus

Elective Needs Dashboard

- Aggregate elective planning demand
- Elective interest by specialty
- Elective needs by campus
- Elective needs by academic year

FERPA-Aligned Access Control

The vendor system must enforce role-based access.

Role	Required Access
Student	Own advising records only
Advisor	Assigned students only
Careers Team	Full access to advising records across all campuses
Student Performance Committee	No access to advising notes
Academic Affairs authorized leadership	Reporting access as defined by role
System administrator	Configuration access as defined by institutional policy

Response Requested: Vendors should describe how their system supports longitudinal advising records, required advising form assignment, student submission, advisor documentation, Careers team oversight, completion tracking, dashboards, Power BI export, and FERPA-aligned role-based access.

Appendix D

ACRONYMS & KEY TERMS

CORE ACADEMIC SYSTEMS

Acronym	Full Name	Definition	Source/System
SIS	Student Information System	Authoritative system for enrollment, grades, transcript, academic record	Institutional
JIT	Just in Time Medicine	CHM homegrown web based system used for curriculum content, guidance, and some operational tracking (non-authoritative)	CHM/Homegrown
D2L	Desire2Learn	Learning management system used for course delivery and materials	Institutional
NI	New Innovations	Current system used for evaluations, case logging, and scheduling (to be replaced)	Legacy

CURRICULUM STRUCTURE (SDC)

Acronym	Full Name	Definition
SDC	Shared Discovery Curriculum	CHM curriculum model integrating science and clinical experiences
ECE (M1)	Early Clinical Experience	M1 year—primary care + foundational science integration
MCE (M2)	Middle Clinical Experience	M2 year—rotations + systems-based curriculum
LCE (M3 & M4)	Late Clinical Experience	M3–M4 years—core clerkships and electives

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ASK	Advanced Skills & Knowledge	Longitudinal M3–M4 course integrating science + clinical reasoning
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SCHEDULING & INSTRUCTIONAL TERMS

Acronym	Full Name	Definition
WSG	Weekly Small Group	Small group session tied to curriculum
LGA	Large Group Activity	Lecture or large group session
SIM	Simulation	Simulation-based clinical training
RSG	Required Small Group	Required structured small group session
Group A/B	Cohort Split	Students divided into groups for rotation balancing
Rotation	Clinical/Non-Clinical Block	Assigned learning experience (hospital, clinic, or academic)

ASSESSMENT & EXAMS

Acronym	Full Name	Definition
CPE	Clinical Performance Evaluation	Evaluation of student performance in clinical settings
MCE (M2) Eval	Middle Clinical Experience Evaluation	Evaluations tied to M2 rotations
FCE	Faculty Clinical Evaluation	Faculty assessment of student performance
PCSE	Progress Clinical Skills Exam	Clinical skills exam used for competency tracking

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CNSE	Comprehensive Necessary Science Exam	NBME-based knowledge exam
CASE	Clinical Assessment of Skills Exam	Assessment used in clinical curriculum
CBSE	Comprehensive Basic Science Exam	NBME-style exam used for knowledge benchmarking

STUDENT STATUS & GRADING

Acronym	Full Name	Definition
SPC	Student Performance Committee	Governing body for academic status decisions
P	Pass	Student met expectations
CP	Conditional Pass	Deficiency identified but remediable
CPP	Conditional Pass / Pass	CP successfully remediated
CPN	Conditional Pass / No Pass	CP not successfully remediated
N	No Pass	Student did not meet requirements
Status Indicator	Academic Standing Level	On Track, Concern, Warning, Critical

MSPE & PERFORMANCE

Acronym	Full Name	Definition
MSPE	Medical Student Performance Evaluation	Official residency application document summarizing student performance
CAD	Community Assistant Dean	Faculty responsible for final MSPE summary
AOA	Alpha Omega Alpha	Medical honor society

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GHHS	Gold Humanism Honor Society	Honor society recognizing humanism in medicine
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CAREERS & ADVISING

Acronym	Full Name	Definition
C&EA	Careers & Elective Advising	CHM advising structure for career planning
Advising Form	Required Advising Documentation	Structured forms used for tracking advising interactions
Specialty Interest	Career Focus Area	Student-selected specialty pathway

COMPLIANCE & GOVERNANCE

Acronym	Full Name	Definition
FERPA	Family Educational Rights and Privacy Act	Federal law governing student data privacy
LCME	Liaison Committee on Medical Education	Accrediting body for this medical school
CQI	Continuous Quality Improvement	Ongoing evaluation and improvement processes



MASTER SERVICE AGREEMENT

(see attached)

Please refer to Section 9 of the RFP Instructions when reviewing the Master Services Agreement terms and