West Virginia Purchasing Division

2019 Washington Street, East
Charleston, WV 25305
Telephone: 304-558-2306
General Fax: 304-558-6026
Bid Fax: 304-558-3970

The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at *wvOASIS.gov*. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at *WVPurchasing.gov* with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.

wvOASIS

Jump to: PRCUID Go | Home | Personalize | Accessibility | App Help | About

Welcome, Robert M Ross

Procurement | Budgeting | Accounts Receivable | Accounts Payable

Solicitation Response(SR) | Dept: 0506 | ID: ESR06292300000006737 | Ver.: 1 | Function: New | Phase: Final | Modified by batch , 06/29/2023

Header 4

List View

General Information | Contact | Default Values | Discount | Document Information | Clarification Request

Procurement Folder: 1228506

Procurement Type: Central Master Agreement

Vendor ID: VS0000039541

Legal Name: Coastal Cloud Holdings LLC

Alias/DBA: Coastal Cloud Holdings, LLC

Total Bid: $220,276.23

Response Date: 06/29/2023

Response Time: 11:59

Responded By User ID: CoastalCloud

First Name: Jennifer

Last Name: Hartshorne

Email: jennifer.hartshorne@coastalc

Phone: 8502941884

SO Doc Code: CRFQ

SO Dept: 0506

SO Doc ID: MIS2300000003

Published Date: 6/9/23

Close Date: 6/29/23

Close Time: 13:30

Status: Closed

Solicitation Description: CLOUD BASED STATEWIDE CASE MANAGEMENT SYSTEM

Total of Header Attachments: 4

Total of All Attachments: 4

	Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130	State of West Virginia Solicitation Response

Proc Folder: 1228506

Solicitation Description: CLOUD BASED STATEWIDE CASE MANAGEMENT SYSTEM

Proc Type: Central Master Agreement

Solicitation Closes	Solicitation Response	Version
2023-06-29 13:30	SR 0506 ESR06292300000006737	1

VENDOR

VS0000039541
Coastal Cloud Holdings LLC

Solicitation Number: CRFQ 0506 MIS2300000003

Total Bid: 220276.23000000000104773789644 **Response Date:** 2023-06-29 **Response Time:** 11:59:20

Comments:

FOR INFORMATION CONTACT THE BUYER
Crystal G Hustead
(304) 558-2402
crystal.g.hustead@wv.gov

Vendor Signature X **FEIN#** **DATE**

All offers subject to all terms and conditions contained in this solicitation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	One Time Implementation	0.00000	EA	456740.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: Please find our implementation delivery days estimates in our Technical Response on the Project Timeline.

Extended Description:

One Time Implementation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Initial Year Term	5.00000	YR	43697.800000	218489.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: Software activation will begin at contract execution.

Extended Description:

Initial Year Term

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	Year One Optional Renewal	0.00000	YR	43697.800000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: Software activation will begin at contract execution.

Extended Description:

Year One Optional Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
4	Year Two Optional Renewal	0.00000	YR	43697.800000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: Software activation will begin at contract execution.

Extended Description:

Year Two Optional Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
5	Year Three Optional Renewal	0.00000	YR	43697.800000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: Software activation will begin at contract execution.

Extended Description:

Year Three Optional Renewal

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
6	Additional user licenses	1.00000	EA	1787.230000	1787.23

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: The provided unit price for additional user licenses is contingent on the quote estimated for the requested 15 user licenses provided in the Q&A.

Extended Description:

Additional user licenses

CLOUD BASED STATEWIDE CASE MANAGEMENT SYSTEM

State of West Virginia,
Department of Administration,
Purchasing Division

TECHNICAL PROPOSAL:
CRFQ # MIS2300000003

Submitted by:

CoastalCloud

1 Hammock Beach Parkway, Suite 200
Palm Coast, FL 32137
coastalcloud.us

1 Hammock Beach Pkwy, Suite 200
Palm Coast, FL 32137

June 29, 2023

Crystal Hustead
Department of Administration Purchasing Division
2019 Washington Street
East Post Office Box 50130
Charleston, WV 25305-0130

Re: Solicitation No. CRFQ MIS2300000003, Cloud Based Statewide Case Management System

Dear Ms. Hustead,

Coastal Cloud is honored to submit our response to the Department of Administration's Purchasing Division regarding Solicitation No. CRFQ MIS2300000003, Cloud Based Statewide Case Management System.

Coastal Cloud is a **Salesforce certified Summit Partner based in Florida**, with a designation of multi-cloud expertise and **Salesforce Navigator Expert in Public Sector**, the highest possible certification for partners that serve Public Sector clients. We have a dedicated Public Sector team with decades of state government experience, deep technology and solution development skills, and implementation and delivery best practices.

Coastal Cloud's experience collaborating with public sector clients brings added value to your organization. We've spent the last 10 years developing trusted partnerships with clients in 32 states. We are a seasoned partner who understands your responsibilities and we have the know-how to quickly implement solutions to your greatest challenges. We bring real world experience, functional experts, technical experience, and public sector experts to the table.

Coastal Cloud has a strong history of long-term engagements and successful public sector implementations including:

- **Florida Division of Emergency Management** - Enterprise Grants Management (FEMA and state emergency preparedness, response, recovery and mitigation; invoicing, time tracking, data analytics, mutual aid, sheltering, unmet needs, etc.) processing more than $6 billion in emergency funding during the pandemic.
- **Florida Department of Economic Opportunity** - Enterprise Grants Management (Community Development Grants, Economic Development and Workforce Grants, including CDBG-DR, CARES Act and American Rescue Plan) awarding $7 billion for over 85 programs in the last five years.

- **BCFS -** Case management, inventory and resource management for vaccine and antibody solutions during the pandemic.
- **One More Child** - Case management for family services, child welfare, foster care recruiting and other services.
- **City of Fort Worth Texa**s - Economic development and grants management, CARES Act

Coastal Cloud has successfully completed thousands of projects in 32 states across the country. Our 470+ employees are part of a 100% onshore company, meaning that our entire organization and team are based and work within the United States.

Our team has an unparalleled focus on customer success. We attribute our success to a unique company culture, nimble expertise, onshore-only teams, and a relentless focus on delivering quality and forging long-term customer relationships. Coastal Cloud's certified Salesforce consultants collectively hold over **1,700 Salesforce certifications**. We are the winner of Salesforce's Partner Innovation Award for Customer Success three years in a row, in 2020, 2021 and 2022, placing us **#1 across the globe** for Salesforce partners as rated directly by our customers.

We believe that our success is your success. We know the critical role that this technology can play to help your team and your employees. Our work is focused on the public sector because our employees believe in making a difference. Thank you for this opportunity to submit our proposal. We would love the opportunity to serve you and assist your agency. We believe you will be impressed with our team, our services and our solution.

Sincerely,

Heather Warrell, Director, Public Sector
heather.warrell@coastalcloud.us
(270) 300-0297

Table of Contents

Introduction

In today's increasingly connected world, having state-of-the-art connectivity and technology solutions is critical to successful government/customer relationships.Your request for a partner to assist in your digital transition to assist statewide guardians and their wards clearly recognizes the importance of a universal, integrated platform. We understand that now -- more than ever -- innovative solutions that can quickly scale to streamline your internal program development are critical, along with a focus on the connections with the residents served by your programs.

Coastal Cloud understands the myriad challenges our clients in the public sector face, from balancing the needs of a variety of constituents, to delivering results with limited budgets and time constraints. Coastal Cloud's proven Public Sector Delivery Team will deliver the transition desired by your agency team by implementing one platform that not only fits your needs now, but can adapt to future challenges. Our deep experience with State and local governments, our focus on innovative Public Sector solutions, and our one-of-a-kind culture are what set us apart.

Coastal Cloud is a Salesforce Multi-Cloud Expert Partner based in Palm Coast, Florida, with a Tallahassee solution center staffed with experts in using Salesforce to improve government processes. Through a unique consulting business model, the company provides implementations and managed services to assist clients in migrating to next-generation systems. Coastal Cloud was named to Inc.'s Best Workplaces and Florida Trend's Best Companies to Work. Coastal Cloud delivers services 100% onshore across a network of delivery centers in Florida, Kentucky, Washington DC, and Colorado.

Coastal Cloud recommends a customized solution built on Salesforce Public Sector Foundation, which offers market leading Platform as a Service (PaaS) and market leading Software as a Service (SaaS) solutions. Salesforce is a multi-tenant, cloud-based web application. Our solution will provide individual case management, data collection, case tracking, program management, investigation, compliance, communication, and reporting functions. This solution enables statewide guardians and other stakeholders across the state to operate within one unified platform with unique workflows, permissions, reports, dashboards, and requirements for each user, and allows for automatic routing and assignment of tasks, administrative interfaces and customizable dashboards for better management of tasks, workflows, and reporting.

Salesforce applications can automatically scale from one to tens of thousands of users. Processing more than five billion transactions each day, the platform is used for large-scale deployments. This scalability allows agencies to seamlessly add functionality to manage multiple grants and programs. The team Coastal

Cloud proposes in this response has helped agencies to scale up when they realized the benefits of the system and desired to expand.

➢ **Florida Division of Emergency Management**

Coastal Cloud's culture of client success is based on the ability to deliver quality solutions at speed, with great flexibility to our user's demands and with superb technical expertise for high volumes and complex interfaces. This has proven true recently as we built the premier vaccine management solution for the State of Florida in record time. Our solution was selected to support the vaccine administration of the most critical vaccination operations in the State, including all FEMA sites in Florida, and multiple large counties. Our solution offered a streamlined, touch-free check-in process, with results received within 48 hours in the early days of testing when other sites were returning results in 4-5 days. Patients were able to check-in ahead of arrival and remain in their cars at test/ vaccine sites. The foundational element of innovative technology and self-service significantly reduced labor costs, as staff and patients were able to make appointments, access test results and check-in from their own devices.

➢ **One More Child**

One More Child is a nonprofit organization that provides services to vulnerable children and struggling families. One of their programs serves single moms who are working toward self-sufficiency by creating a network of care, guidance and support in local communities. One More Child needed a solution that allowed moms to be able to better self service their service planning, and to streamline interactions with case workers. Coastal Cloud's solution provides a portal that empowers Moms to apply for the program, and to set and achieve goals. Coastal Cloud's solution is being used as a case management, service planning, funding management and program performance management tool. In addition, we have created a foster parent recruiting tool for One More Child to assist in matching foster parents and children in need of homes across the state.

These are just a few of many solutions Coastal Cloud has successfully implemented that are relevant to the critical technology your organization is looking for. We will bring the same commitment and focus to that we have delivered to public sector organizations all over the country.

Coastal Cloud's experience collaborating with public sector clients brings added value to your agency. Developing deep partnerships with public sector clients in more than 28 States, our experience sets us apart from other partners. Coastal Cloud's culture of client success is based on the ability to deliver quality solutions at speed, with great flexibility to our user's demands and with superb technical expertise for high volumes and complex interfaces. Coastal Cloud has a strong history of successful implementations and a wide variety of solutions on the Salesforce platform for state and local government in Florida, Georgia, Alabama, Michigan, Kentucky, South Carolina, Virginia, Colorado, Oregon, New Mexico, Texas, as well as the U.S. Department of Agriculture and U.S. Department of Housing and Urban Development.

The Salesforce Advantage

Salesforce provides a single enterprise platform that delivers multiple services and enables agencies to rapidly configure solutions specifically tailored to your mission and requirements. Salesforce solutions free data from legacy systems, empower customers, and connect organizations, and employees to administer services in powerful new ways. The Salesforce Platform is the lowest risk and fastest way to securely build, connect, optimize, and deploy every kind of app tailored for any type of use case.

The key advantages of Salesforce solutions include:
Enterprise Cloud Platform. Salesforce built and maintains a multi-tenant application architecture that has been designed to enable the Salesforce service to scale securely, reliably and cost-effectively. The Salesforce Platform offers a core set of technologies that not only power the Salesforce Software as a Service (SaaS) and high-productivity application Platform as a Service (PaaS) products, but also allows organizations to build and rapidly deploy custom apps with just a few clicks all from a single canvas, connecting data from any system, and managing it from anywhere on any desktop and mobile device.

Secure, Private, Scalable, and Reliable. The Salesforce service has been designed to provide customers with 100% trusted privacy with the highest levels of performance, reliability and security. Salesforce has built, and continues to invest in a comprehensive security infrastructure, including firewalls, intrusion detection systems, and encryption for transmissions over the Internet, which Salesforce monitors and tests on a regular basis. Salesforce built and maintains a multi-tenant application architecture that has been designed to enable the Salesforce service to scale securely, reliably and cost-effectively. The Salesforce multi-tenant application architecture maintains the integrity and separation of customer data while still permitting all customers to use the same application functionality simultaneously. With multi-tenancy, all Salesforce customers run their applications on a common infrastructure. This means that every customer is always on the latest release of Salesforce applications, and has access to the latest technology. Multi-tenancy means that it is easier to scale new users and applications. With multi-tenancy, customers don't have to worry about managing infrastructure.

FedRAMP Certified SaaS/PaaS At the Highest Level. One of the reasons for Salesforce's success in government is their investment in delivering a secure Cloud experience. The service has been designed to provide Salesforce customers with privacy and high levels of performance, reliability, and security. Salesforce cloud-based solutions, Software as a Service (SaaS) and Platform as a Service

(PaaS), are FedRAMP certified at the High Impact level to provide the agency with the assurance that its data is secure. Focusing on a cloud-based application platform allows the agency to minimize internal administration, while providing organizational agility, speed-to-value, and ease-of-use for a broad range of stakeholders.

Mobile First, Mobile Everything. Salesforce applications are mobile-enabled out of the box (no coding required) and can be accessed from any mobile device, anywhere, at any time. You will be able to provide mobile access to any/all applications and data that reside on the Salesforce platform. Internal users will experience a consistent UI across a variety of mobile devices, including iOS and Android smartphones and tablets.

High Levels of User Adoption. Salesforce has designed its solutions to be intuitive and easy to use. Salesforce solutions contain many tools and features recognizable to users of popular consumer web services, so users are more familiar with the user interface than typical enterprise apps. As a result, users can often use and gain benefit from their solutions with minimal training.

Collaboration is Embedded into all Aspects of the Solution. Collaboration is critical to organizational effectiveness and productivity. Salesforce provides numerous standard collaboration capabilities that are embedded into the fabric of how users work within the system with a complete record of activity. This includes unstructured communications, reports, dashboards, triggered alerts, document management, universal search, knowledge management, mobility and much more.

Accelerated Time to Value. The Salesforce service can be deployed rapidly since customers do not have to spend time procuring, installing or maintaining the servers, storage, networking equipment, security products, or other infrastructure hardware and software necessary.

Seamless Integration. Salesforce provides a set of APIs that enable customers and independent software developers to both integrate our solution with existing third-party, custom, and legacy apps and write their own application services that integrate with our solutions. For example, many Salesforce customers use the Salesforce API to move customer-related data from custom-developed and packaged applications into the Salesforce service on a periodic basis to provide greater visibility into their activities.

Lower Total Cost of Ownership and Dramatic Return on Investment (ROI). Salesforce enables customers to achieve significant up-front savings relative to the traditional enterprise software model. Customers benefit from the predictability of their future costs since they generally pay for the service on a per subscriber basis for the term of the subscription contract. Because Salesforce deploys all updates on Salesforce servers, new features and functionality automatically become part of the Salesforce service (on the update release date) and therefore benefit all Salesforce customers immediately.

About Coastal Cloud

Coastal Cloud is a woman-led, award-winning Salesforce Expert partner which provides consulting, implementation and managed services to businesses, nonprofits, education institutions and the public sector. Coastal Cloud was formed with the goal of creating a modern consulting firm led by expert consultants focused on client outcomes.

Your results are our focus. We strive to earn a trusted, long-term relationship with each client, and we pride ourselves in earning the highest client satisfaction ratings in the industry. With every client, in every meeting, on every project, our goal is to fully deliver the value that your organization needs. As a result, Coastal Cloud has received Salesforce's Partner Innovation Award, rated number one in customer success globally by Salesforce, three years in a row.

In addition, Coastal Cloud has earned a 5/5 customer satisfaction rating on the Salesforce AppExchange and is the #1 rated consulting partner on G2Crowd.com. The secret to delivering success with our clients is really no secret at all. We have made each customer's goals our goals, and have built the company with that single purpose. We know that in order to achieve this we have to work not as individual groups, but as a collective team that shares and develops best practices, experience, and innovative ideas learned across over 5,000 projects.

Our team of 470+ on-shore experts are dedicated to helping our clients move away from inflexible, costly, legacy systems and business models, towards a new generation of solutions that are flexible, affordable, mobile and social. We partner with our clients to plan and execute a migration to next-generation systems that focus on our client's mission, not on systems issues. We are experts at program management, project execution, business analysis, data modeling, data migration, user training and the skills necessary for a successful implementation of user-oriented technology.

Our team has extensive experience providing public sector solutions to local and state government entities in communities and states across the country. We have partnered with multiple agencies, along with public-private partners, to deliver efficient and effective solutions for disaster management, disaster recovery, grant and loan management, wildlife tracking, vaccine management, economic and workforce development and much more.

Coastal Cloud is headquartered in Palm Coast, Florida and has delivery centers in Florida, Colorado, and Kentucky. We also have many employees residing in the state of Texas. No matter how big or small the project, our team will leverage experience across industries and the power of the Salesforce platform to deliver excellence.

Project Management

Coastal Cloud believes the best project implementation approach pairs solid methodology with open, honest client communication. Our recommendation is a hybrid model using the best aspects of the Waterfall and Agile Project Management methodologies, achieving a balance of strategic solution planning and design coupled with iterative delivery. With this approach, we confirm the overall architecture and release phasing upfront, then deliver in development cycles, allowing for immediate customer feedback. The phases noted in the Work Plan above are suggestions and will be confirmed with staff during kickoff. This model achieves a balance of strategic solution planning and design, coupled with iterative delivery so we can:

- Deliver new features and functions in short sprints employing a repeatable methodology.
- Demonstrate features and functions for each sprint to validate design and functionality with the appropriate stakeholders.
- Measure results, adjust design as needed and inform future iterations.

Successful project management includes the Coastal Cloud and client project managers working closely together on the coordination of project tasks and resources. Our approach, facilitated by our project management tools, allows for close collaboration throughout the life of the project. Additionally, Coastal Cloud employs a collection of integrated tools - best in class technology for communication, collaboration, planning, testing, project management and quality control - to deliver projects.

Subcontractors

Coastal Cloud does not plan to use subcontractors for this project. Coastal Cloud employs more than 470 consultants, all in North America, who collectively hold 1,700+ Salesforce certifications. We have been named the #1 Salesforce Partner for Client Satisfaction three years in a row and have the most 5-star ratings in the world of any Salesforce implementer. We are the fifth largest Salesforce Systems Integration firm in the Public Sector, and we are the only firm dedicated 100% to Salesforce implementations. As part of your team, we have the right people for the job at hand. We attract top-tier talent due to our unique culture and our focus on skill development, bringing expertise to next-generation technologies. .

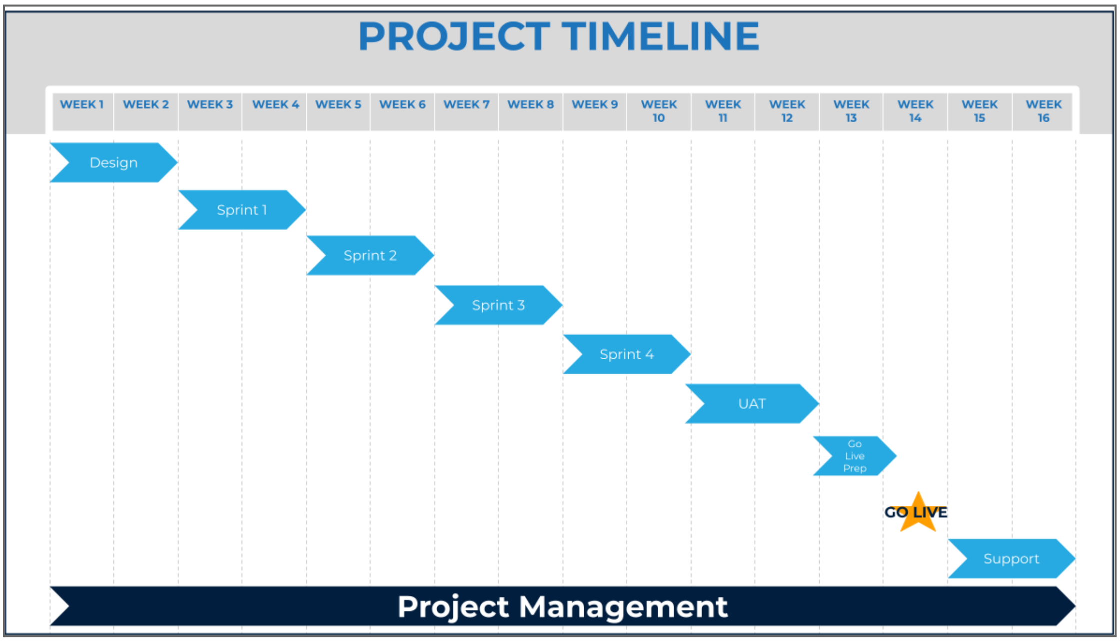
Project Schedule and Plan

Coastal Cloud has identified a 20 week project timeline for this implementation. The proposed project timeline is detailed below and will begin immediately upon signature of the contract. The timeline can be adjusted based on the needs of the agency. Requirements/discovery will convene immediately after kickoff. Discovery has been expanded in each sprint on the timeline.

Coastal Cloud will conduct sprint planning and grooming at the beginning of each sprint. The client should be present for these sessions. For sprint reviews, Coastal Cloud will conduct working demos at the conclusion of each sprint. Coastal Cloud will conduct demonstrations of the work completed in each sprint. Coastal Cloud will review each user story during requirements confirmation with your team. Your team is responsible to accept/deny/modify each user story before it is added to the backlog.

Timeline

Below please find our estimated timeline for this project that includes major project workstreams and milestones



Expected Dependencies, Caveats or Risks

Dependencies and risk factors depend on the availability of subject matter experts from the state to be able to engage with Coastal Cloud in a timely manner for building of requirements, testing and training prior to Go Live. Customer success is our core value, so we will work with your team to understand your time frame for each deliverable.

Delegation of Duties

Project Roles

We typically staff a team with a mix of skills based upon industry and the functional and technical scope. Based on our understanding of the project scope, we would assign the following roles to this project and have included the following representative group of experienced Coastal Cloud consultants who may be assigned to the project.

- *Managing Director* -- senior executive responsible for overall client satisfaction
- *Director* – responsible for staffing, client relationship and project success
- Solution Architect – responsible for requirements gathering and solution design
- *Project Manager* – responsible for developing and maintaining the project plan, executing status meetings, change management and training
- *Certified Consultants and Developers* – responsible for detailed design, configuration, integration, migration, and testing

Internal Staff Roles

Based on our understanding of the project scope, we suggest engaging the following internal team members to help the project move most efficiently. A skilled and knowledgeable person may fill more than one role.

- *Executive Sponsor* – executive responsible for the daily relationship and all project delivery activities.
- *Project Manager* – responsible for developing and maintaining the project plan, executing status meetings and driving issue management
- *Program Subject Matter Expert* - Provide business process expertise and detailed knowledge of the solution usage and functionality, establishes business deployment criteria for new solution, represents user perspective in developing the solution, review field mapping and data for Account, Contact & Opportunity in weekly working sessions
- *Data Subject Matter Expert* - Has the ability to export data out of current system(s) of record, responsible for cleansing data for import into Salesforce
- *Integration Subject Matter Expert* - Can provide technical support as needed around the data model and structure of the database that needs to be integrated. This can be a contractor or an agency employee.
- *System Administrator/Power Users* - Provides technical support to the project as needed, manages application day to day after deployment, participates in project sessions for knowledge transfer, trained and certified in Salesforce, serves as liaison to the users to ensure the application meets day-to-day needs, involved in user acceptance testing, participates in demonstrations as needed, go-to support during post-deployment.

Maintenance and Support

Coastal Cloud has included hourly support in our contract price for implementation. This will be for monthly support for ours for the first year. In addition, Salesforce Premier Success is included for other agency needs. All maintenance is included in the Salesforce license price.

Salesforce Premier Success Plan

Salesforce is pleased to offer the Premier Success Plan to the State of West Virginia. The Premier Success Plan helps you go beyond achieving your business goals by providing direct access to Salesforce experts to help you adopt and deploy faster, unlimited usage of our entire online course library, quick response times for questions and support, and more.

Benefits of the Salesforce Premier Success Plan include:

- 24/7/365 support
- One-hour response time for business-stopping issues
- Online case submission
- Chat and phone support
- Custom code troubleshooting for developers
- 25% discount on Trailhead Academy courses and certifications
- Personalized success paths
- Expert onboarding and implementation coaching
- Expert adoption and optimization coaching
- Ask an Expert Office Hours
- Business Value Reviews
- Technical Health Reviews

The Salesforce Government Cloud (or Salesforce Government Cloud Plus) requires the Government Cloud (or Plus) Premier Success Plan, which provides technical support from Qualified U.S. Citizens. Subject to the Government Cloud (or Plus) Premier Success Plan, access to systems and permissions that could permit access to Customer Data inside of the Salesforce Government Cloud storing U.S. government, U.S. government contractors, and FFRDC Customer Data will be restricted to Qualified U.S. Citizens. Qualified U.S. Citizens are individuals who are United States citizens and are physically located within the United States when accessing the Salesforce Government Cloud (or Plus) systems; and have completed a background check as a condition of their employment with Salesforce.

Tasks required for the migration of all State of West Virginia data

Coastal Cloud and the State of West Virginia will identify the requirements for the Salesforce implementation. These requirements will be used to determine the data that will need to be migrated from legacy systems to Salesforce as well as how this will be done (one time data load or set on a schedule using a middleware tool called Scribe). The requirements will also dictate whether any of the data which must be migrated will need to be transformed. Excel spreadsheets will be used to collect the data fields that need to be transferred.

These same spreadsheets will be used to determine whether any data transformations are required for conversion.

Coastal Cloud will evaluate the State of West Virginia's data migration needs and provide a revised estimate for the data migration. In general, the migration approach will include:

- Migration Planning
- Data Mapping and Cleansing
- Mock Data Migration
- Final Data Load

The methodology Respondent will employ to ensure the schedule is met
Coastal Cloud believes the best project implementation approach pairs solid methodology with open, honest client communication. Our recommendation is a hybrid model using the best aspects of the Waterfall and Agile Project Management methodologies, achieving a balance of strategic solution planning and design coupled with iterative delivery. With this approach, we confirm the overall architecture and release phasing upfront, then deliver in development cycles, allowing for immediate customer feedback. The phases noted in the Work Plan above are suggestions and will be confirmed with staff during kickoff. This model achieves a balance of strategic solution planning and design, coupled with iterative delivery so we can:

- Deliver new features and functions in short sprints employing a repeatable methodology.
- Demonstrate features and functions for each sprint to validate design and functionality with the appropriate stakeholders.
- Measure results, adjust design as needed and inform future iterations.

Successful project management includes the Coastal Cloud and client project managers working closely together on the coordination of project tasks and resources. Our approach, facilitated by our project management tools, allows for close collaboration throughout the life of the project. Additionally, Coastal Cloud employs a collection of integrated tools - best in class technology for communication, collaboration, planning, testing, project management and quality control - to deliver projects.

Our Project Management Methodology includes the following components:

- Project Planning and Control
- Technical and Account Status Reporting
- Risk Management
- Root Cause Analysis and Resolution
- Change Request Administration in compliance with the Department's processes and procedures

- Change Management in compliance with the Department's processes and procedures
- Release Management

Critical to our success is a continuous improvement model with a focus on:

Measure and Manage
This includes project management and engagement management activities throughout the project. This includes the
- Planning and preparation of efficient project execution through the delivery and client team
- Ensuring timely and transparent communications to ensure the client is fully involved and aware of critical project aspects of scope, timelines, and budget.

Project Communications
Communication is the underlying tenet in our project management methodology. Coastal Cloud believes in and
practices clear, frequent, and open communication. Some of the mechanisms that we will use include:
- Weekly status meetings – to accurately reflect the current state of each of the projects.
- Steering Committee meetings – to drive the strategic vision of the program.
- Client Engagement Executive - to provide an additional level of communication and accountability for the success of the project we assign an executive to supplement the project team and lines of communication

Change Management
- Effectively initiate the project
- Ensure timely and accurate notification of process and organizational change to all affected parties
- Ensure communities understand how to employ new processes and systems

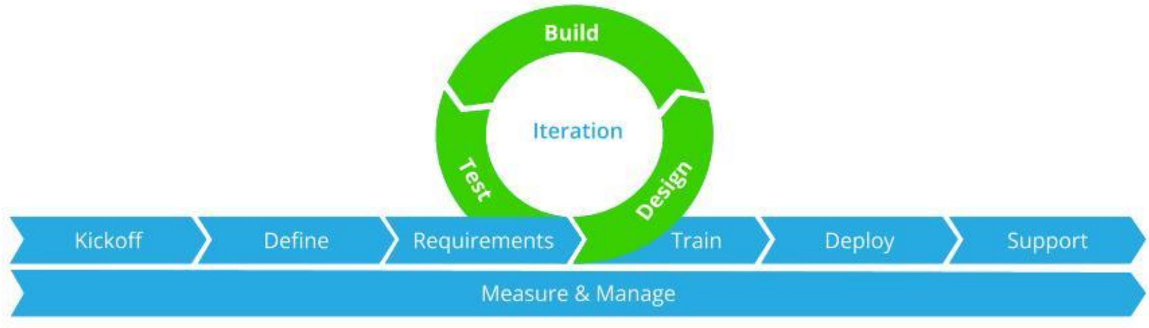
Testing and Quality Management
- Ensure delivered features and functions meet requirements and deliver expected benefits.
- Ensure the project and the deliverables generated by the project meet our high quality standards.

Taskray
At Coastal Cloud, we run our business using the same tools we recommend to our clients. Projects are managed in TaskRay, a Salesforce native application designed to help project managers plan out projects, execute work, and report on

the most vital metrics. TaskRay provides a clean way to organize tasks into sprints or into project phases depending on the size of a project or a particular client's needs. In addition to time-saving templates and automations, TaskRay ensures all relevant data is stored in and accessible from a central place. TaskRay users can pull customized and reliable reports, rather than manually compiling them from multiple sources.

Our Project Management Methodology includes the following sub components:

- Kickoff: the formal initiation of the project. Key to this step is client review and acknowledgement of
- the key aspects of the project scope, timelines, milestones, roles and responsibilities.
- Define: confirm our approach to task grouping and scheduling that we have outlined in a proposed
- solution.
- Design: re-confirm the steps we plan to take for each identified task.
- Build: implement the design according to the design outlined in the list of tasks.
- Test: employ our Testing and Quality Management methodology to ensure the system is meeting requirements and the goals of the project, delivered features and functions meet requirements and deliver expected benefits and the project and the deliverables generated by the project meet our high quality standards.
- Train: delivery of our Train-the-Trainer, User training, and Admin training to ensure our clients are equipped to maximize the platform at the completion of the project.
- Deploy: employ our release management methodology to move developed components through the development, test, and ultimately production environments.
- Support: delivering tailored services to meet custom client needs in go-live support, solution management or technical enhancements as needed.
- Measure & Manage: This includes the planning and preparation of efficient project execution through the delivery and client team and ensuring timely and transparent communications to ensure the client is fully involved and aware of critical project aspects of scope, timelines, and budget.



Training

Effective user training is a critical success factor in the implementation of any solution. Coastal Cloud has a robust training approach that has been refined over the years to accommodate each client's unique needs. We have significant experience in the analysis, design, development and delivery of Salesforce systems user training solutions to meet the objectives of our clients.

General Requirements

Please find our responses to the statewide case management system requirements inline below:

3.1.1 Enterprise level, Cloud-Based, statewide case management system which must be compatible with the West Virginia Office of Technology's current operating system, Windows 11.

100% Multi-Tenant, Cloud Application
Salesforce offers market leading Platform as a Service (PaaS) and market leading Software as a Service (SaaS) solutions.

Salesforce is a multi-tenant, cloud-based web application. No additional software or infrastructure is required. Salesforce manages the entire solution, thus freeing up DHHR to manage its mission, not manage an infrastructure solution. Additionally, Salesforce is browser agnostic and supports all major browsers (Firefox, Chrome, Safari, Edge). No installations on users' laptops or desktops are required and thus the solution is accessible from anywhere with an internet connection and a supported browser is available, including mobile devices. As long as the user can access a supported browser to login to the Salesforce site they will not require local administrator rights to run the application.

Enterprise Cloud Platform with On Demand Scalability
DHHR can optimize its mission activities by managing all interactions and data through a customer success "platform of engagement." Salesforce built and maintains a multi-tenant application architecture that has been designed to enable the Salesforce service to scale securely, reliably and cost-effectively.

Salesforce's multi-tenant cloud solutions provide a single, shared infrastructure, one code base, one platform that is all centrally managed, with platform-based Application Programming Interfaces (APIs) to support all integration traffic, and (3) three major release upgrades a year included as part of the subscription service at no additional cost. The Salesforce Lightning Platform offers a core set of technologies that not only power the Salesforce Software as a Service (SaaS) and high-productivity application Platform as a Service (PaaS) products, but also allows organizations to build and rapidly deploy custom apps with just a few clicks, all from a single canvas, connect data from any system, and manage it from anywhere on any desktop and mobile device. Salesforce is a proven platform designed for ease of use, rapid deployment, and can be adapted to meet and scale for ever changing demands, even in crisis situations. Salesforce is architected to seamlessly scale from one user to millions of users without DHHR having to do anything differently.

3.1.1.1 System must be modular to allow system upgrades and enhancements, must be scalable for increasing the number of licensed users and to support unlimited persons, cases, contacts, activity transactions, and reports.

Configuration vs. Customization

Salesforce offers DHHR a scalable, no-code, low-code development platform that will allow you to quickly develop and deploy a solution for DHHR. Salesforce's low-code development platform promotes configuration over custom code, coupled with a market leading user experience for DHHR's end users.

Salesforce's best practice is to have solutions that are 80 percent, or more, configuration based with the remaining functionality being customizations. In an ideal setting a solution would be 90 percent configuration. Regardless of the development approach, DHHR should aim to achieve this goal even if it means reengineering existing business processes.

It is important to note that not all vendor solutions define approaches to out of the box, configuration, and customization of their software the same way. Additionally, third party products are pre-built solutions powered and integrated with the Salesforce Platform.

For example, DHHR may require custom fields for your solution. In order to meet this requirement, some vendors need to actually program "code or physically extend their RDBMS schema with non-programming "configuration tools"; and some vendors, like Salesforce, have pre-built "Administration Screens" where systems administrators or business analysts can go to quickly add new fields, pick list values, workflows, create users, add validation rules, etc. through a simple wizard-based point and click interface and system setup parameters. Salesforce considers these types of common system changes to be "administrative" changes rather than "configuration" or "programming".

The Salesforce Platform allows customers to build apps fast with just a few clicks, designed for desktop and mobile devices, all from a single canvas, including pre-built AppExchange solutions. To help IT deliver apps faster, the Salesforce Platform offers a simple yet powerful set of declarative, point-and-click tools that anyone can use to achieve business goals at lightning speed. Without writing code, developers and business users alike can quickly and easily create custom apps on the Salesforce Platform with complex business logic and beautiful user interfaces designed specific to every screen. Salesforce Lightning Builder tools allow DHHR to work in alignment with agile development methodologies as IT meets business demands faster.

If and where it may be needed, Developers can leverage the Apex programming language. Apex is an object-oriented, on-demand language. It is like Java, with similar syntax and notation, and is strongly-typed, compiled on demand, and fully integrated into the Platform. All of the application services come right out of the box, from a powerful workflow engine to API services, integration services, authentication, event log framework, analytics, and collaboration.

Scalability

Salesforce is a pure multi-tenant, cloud-based web application. Multi-tenancy gives applications elasticity. Salesforce applications can automatically scale from one to millions of users. Processing more than 5 billion transactions each day, Salesforce is used for large-scale deployments. Any application that runs on the Salesforce Platform is automatically architected to seamlessly scale from 1 user to millions of users without the customer having to do anything differently.

All applications (including mobile, offline and read-only options) and data running on the Salesforce Platform are deployed to and replicated across multiple data centers in different geographies. Every application, no matter how large or small, gets the full benefits of the backup, failover, disaster recovery, and other infrastructure services required for an organization's mission-critical applications.

3.1.1.2 System must have administrative ability to create enterprise-wide announcements to be displayed on the user home page, which can be targeted to all users, or specific group users, or specific users. System must enable real time collaboration or access sharing with system users.

Salesforce Chatter is a great solution within the platform to create enterprise-wide announcements as mentioned above.

Salesforce Chatter offers many features to boost collaboration between users. Chatter's functionality mirrors that of a social media platform, with tagging, @mentioning, and more.

Here are the main things you can do with Salesforce Chatter:

- Post updates or comments in Groups or on a record.
- Share files and links.
- Post polls.
- Create draft posts to share later.
- View Chatter Feeds for past activity relating to a specific record, or across your organization.
- "Like" and reply to posts/comments.
- Pin posts for better visibility e.g. pin an important post to the top of a Chatter group.
- Bookmark posts, to refer back to later.

- Follow records or users to receive notifications when updates occur (manage Chatter Email Digest frequency).
- Send private messages.

Further, Chatter Groups allow particular sets of users to collaborate on Salesforce. Groups have three visibility settings:

- **Public**: anyone can find, join, and view the feed.
- **Private**: anyone can find the group but they must ask to join. Only once a user is a member, will they be able to see and add posts.
- **Unlisted**: members must be invited and the group is not searchable. Only members can view and post. Unlisted groups can be enabled in Chatter Settings via Setup.

3.1.1.3 System must allow for speech to text functionality where applicable, and be accessible from laptops, desktops, and tablets.

Salesforce is a web-based solution that supports the industry-standard interfaces HTTP, XML, and SOAP. We provide a unified experience for any device (desktop, laptop, tablet, and mobile devices) through an adaptive design. Our mobile applications work with common systems, such as iOS, Android, and Windows Phone, which are recommended for the best mobile experience. We take advantage of common technologies such as HTML to build our pages, and incorporate a higher-level Visualforce framework (similar to HTML) and declarative Lightning Components that allow our customers to build custom pages for their unique business purposes.

iOS devices or Android devices can use their operating system's native speech-to-text functionality to populate free text fields in Salesforce from the mobile app.

For desktop, any OS native speech to text or software will work to populate fields within the Salesforce interface.

3.1.1.4 System must provide the capability for authorized users to drill down to individual data elements in dashboard reports. System must enable user, manager, and administrative dashboard and reporting tools for performance, workload, task and case status monitoring by case, user, team, and/or enterprise.

All dashboard components provide drill-down capabilities. Dashboard components may either drill-down to other dashboards or to a detailed underlying report. Reports provide drill-down capabilities as well to filter and further examine report details. Filters can either be applied by drag-and-drop options or via URL.

You may also allow users to click individual groups, axis values, or legend entries of a dashboard to view the source report filtered by what they clicked. For example, if users click a wedge of a pie chart, they are taken to the source report filtered to show values for just that wedge.

3.1.1.5 System must provide a quick search capability based on a single and or an advanced multiple field/filters.

Global Search Capabilities

Salesforce offers the following ways to search for data stored in the system with access controls based on role and profile.

Sidebar Search

From the sidebar search box users can search a subset of record types and fields. Wildcards and filters can be used to refine the search. Users can narrow results by clicking object names on the left side of the page under Search Results. You're taken to a search results page that lists only records for that object.

Advanced Search

Users can search a subset of record types in combination and more fields, including custom fields and long text fields such as descriptions, notes, and task and event comments. Wildcards, operators, and filters can be used to refine the search.

Global Search

Users can leverage the global search box in the header of all Salesforce pages to search for more records, including articles, documents, products, solutions, Chatter feeds, files, folders, emails, groups, and people. Global search includes more fields, including custom fields, and long text fields such as descriptions, notes, tasks and event comments. Choose any searchable object in the dropdown list next to the global search box to narrow your search to only those objects. Wildcards, operators, and filters can be used to refine the search. Nickname matching helps users find records with less guessing as the search engine automatically returns associated nicknames for Account, Contact, Lead and User records in the results. Search for Contacts using the Account Name by entering the first or last name (or both), plus the account name. Contacts that match the search terms and relate the specified account are returned. In addition, administrators have the ability to determine which custom objects should be returned in the global search results, hiding records that are not useful for end users and allowing them to find relevant information faster. Custom synonym groups can also be built to generate results for commonly associated terms. Standard synonym groups are enabled by default.

With Salesforce, selecting the search box or typing keywords will provide users with instant results for either auto-suggested records or objects to filter search criteria. The records are chosen based on various factors, including record activity, search terms, and which object is searched. Choose any searchable object in the dropdown list next to the global search box to narrow your search to only those objects. And, as a user types in search terms, the results are expanded to include records that match the search terms entered, even if they aren't in the same order as the user entered them. For example, a user searches for "headquarters salesforce san francisco" and the record with salesforce headquarters is located in san francisco appears. If the user doesn't see the record they are looking for they can continue performing a full search. These instant results are also available in the lookup dialog search, where users associate one record to another.

Salesforce also provides a redesigned search experience to help users find the record they are looking for faster. Search results feature Top Results, which display the most relevant records for the objects a user accesses the most. The search scope bar allows users to filter results by object. Top Results, Feeds, Applications, and More always appear on the bar. The other objects change their order depending on how often a user accesses them. If a user can't find an object, they can use the More link to see an alphabetical list of all available objects. Most frequently used objects that don't fit in the search scope bar appear at the top of the list. If a user wants to see results for multiple objects, they use Top Results. Top Results make finding a record easier and faster because it lists the top record results, by relevance, for each of the user's most frequently used objects.

Salesforce search results pages also include a sort drop-down. In addition, users can click the column headers to sort results. Users can adjust column widths and wrap long lines of text in search results, making it easier for users to scan results without scrolling back and forth. Also, an improved sorting menu gets search results in order. Users find sorting helpful when faced with too many search results, even within a specific object type. The sort drop-down lists all the columns shown in the search results layout for the user to choose from. Results are sorted by relevance by default. If users sort from the Top Results page, they are taken to the object's results page to see a longer list of sorted results.

Enhanced Instant Results

When a search term gets no results because of a possible misspelling, users see suggestions that match corrected spellings of the search term. Salesforce checks only the record name. Spell correction works for only one term, even when multiple terms are entered. If multiple terms are misspelled, Salesforce corrects only the first misspelled term. Users who include the account name when they search for a contact or opportunity get more relevant search results. For example, search for the contact Carole White associated with the Global Media company faster by entering Carole White Global.

List View Search Capabilities in Lightning App
DHHR can use the search bar to search the field data in your list views and find the records you need in record time.

Field-level Security in Search
When users search for records, search doesn't return results for data in restricted fields. Field-level security is enforced in custom objects and all standard objects, except Cases, Knowledge Articles, and Users.

3.1.1.6 System must allow name fields must include capacity to enter and store nicknames, appellations, and suffixes.

The contact object in Salesforce is the primary object for storing individual records. Within that object the ability to allow nicknames, appellations and suffixes is available.

3.1.1.7 System must maintain a chronological and reportable audit trail of activity by user and/or case, including a history of modifications to all data and event logs by record and/or user.

Core Auditing Capabilities
Within Salesforce, the creator and last updater, as well as timestamps, are recorded for every record. Additionally, the Salesforce Platform and Salesforce Applications have a multitude of history tracking and auditing features that provide valuable information about the use of an organization's applications and data, which in turn can be a critical tool in diagnosing potential or real security issues. Auditing features include:

- *Record Modification Fields* - All objects include fields to store the name of the user who created the record and who last modified the record. This provides some basic auditing information.
- *Field History Tracking* - Enable auditing for individual fields (up to 20 fields per object), which will automatically track any changes in the values of selected fields. Although auditing is available for all custom objects, only some standard objects allow field-level auditing.
- *Login History* - Review up to 20,000 successful and failed login attempts to DHHR for the past six months. DHHR can also track the geographic location of the IP addresses of your logins in your personal settings. You can track the geographic location of the login IP addresses for any of your users in the user's detail page. To get more detailed geographic information, such as city and postal code, you can download the login history. Due to the nature of geolocation technology, the accuracy of geolocation fields (for example, country, city, postal code) can vary.

- *Identity Verification History* - Review up to 20,000 records of your org users' identity verification attempts from the past six months. For example, suppose that two-factor authentication is enabled when a user logs in. When the user successfully provides a time-based, one-time password as proof of identity, that information is recorded in Identity Verification History.
- *Setup Audit Trail* - Administrators can view a Setup Audit Trail for the past six months within Salesforce, which logs when modifications are made to DHHR's configuration.

While the Login History and Setup Audit Trail are available for six months within Salesforce, they can be downloaded and stored locally to meet longer audit log retention requirements.

Customers may also integrate the application logs with their organizational SIEM implementation.

Real-Time Event Monitoring

With the Real-Time Event Monitoring feature, you can stream and store event data and create transaction security policies for several new events in Salesforce, all in real time. When you enable Real-Time Event Monitoring, you automatically get Enhanced Transaction Security—Salesforce's latest and greatest feature for creating transaction security policies. Use Event Manager to view and monitor events in your org.

Enhanced Transaction Security

Enhanced Transaction Security policies give DHHR the ability to take real-time security actions based on event triggers. With Enhanced Transaction Security, you can monitor events according to the policies that you establish. When a policy is triggered, you can receive a notification and/or take an action.

For example, suppose that you activate a policy to limit the number of concurrent sessions per user to three. A user with three login sessions tries to create a fourth session. DHHR can require a user to end one of their existing sessions before proceeding with the new session. At the same time, you are notified that the policy was triggered.

Event Monitoring Analytics App

DHHR can use the built-in Event Monitoring Analytics App to explore your monitoring data in Salesforce. The Event Monitoring Analytics App integrates with Event Monitoring and Setup Audit Trail data to give you insights into your user and org behavior. App creation is easy and with its pre-built dashboards and datasets, you can start exploring right away. This app helps you drill into your org's data and swiftly identify suspicious behavior, slow page performance, and poor user adoption. Get valuable information instantly from your Salesforce event logs, such as the number of people and IP addresses accessing your org, which Visualforce requests are timing out, and which users make changes in Setup. DHHR can detect performance problems early, such as queries taking too much time, by getting notifications when a KPI value exceeds your established threshold. Hourly event log file integration with the Event Monitoring Analytics app is unavailable. Data is refreshed once a day in the app.

3.1.1.8 System must allow administrators to add, delete, change, or control user role-based security permissions by users or user group types.

User Profiles

All user and application-level security are defined and maintained by the organization administrator, and not by Salesforce. DHHR appoints the organization administrator. An organization's sharing model sets the default access that users have to each other's data.

A user's Profile, Role and Permission Sets defines access permissions. The user Profile controls access permissions to:

- Applications
- Connected Applications
- Data Objects (Internal and External)
- Login Hours and IP Ranges
- Session Settings
- Password Policies

The user's Role, as well as the placement of that role in the organization-defined Role Hierarchy, controls user access to specific data records. For example, a user's Profile may indicate that a user has read, create, edit and delete permissions to the Contact object (table) in the database. However, the user's Role will determine which actual contact records the user can access, which may be a subset of all defined contact records in the database.

Permission sets allow administrators to define additional access rights that a specific user may require that do not need to be defined for the larger group a profile is attached to.

Finally, Restriction Rules enable granular control of the records or a subset of records that a specific user group is permitted to see.

3.1.1.9 System must provide access to all applications and user documentation, vendor use, and help tool within a single site. System must integrate seamlessly with back-office systems including versions of Microsoft Suite and/or Google Docs. System must allow document attachments to be scanned and associated with one or more person/case records, as well as complaints, notes, and other identifiers. System must allow documents to be thumbnail/first page previewed prior to full access.

Salesforce Training and Learning Resources

Salesforce incorporates the following training and learning resources and best practices as part of the proposed subscription service as well as additional Salesforce instructor-led training that is available for an additional cost. There are also a variety of training resources accessible from within the Salesforce application.

Salesforce Help and Training Portal

Salesforce provides an intuitive help and training portal which brings together a rich set of resources that would give DHHR a centralized way to help solve problems quickly and easily. Salesforce also provides context-sensitive help icons throughout the application screens to make it easier for users to get unique help without searching. It is notable that we don't provide large, offline help manuals. All our help is online, so we assure that online help is extremely thorough and effective for usability.

In-App Guidance in Lightning Experience

In Lightning Experience, add prompts and walkthroughs to your app to share information, train, or onboard users. Write the content, select the target audience, and specify where it appears and for how long. You can add multiple items to the same page, but they don't appear at the same time. By default, a user sees only one item per 24 hours, per app. Salesforce shows it again or cancels scheduled recurrences based on whether the user interacts with or ignores the prompt or walkthrough. There are four types of In-App Guidance:

- *Floating Prompt:* Promote feature discovery and adoption with a short message that users can quickly read and dismiss. Place the prompt at one of nine different locations on a page.
- *Targeted Prompt:* Highlight a specific element on a page by pointing to the element with an arrow and graying out the rest of the page. Select the specific element that you want to target and position the prompt relative to the element.
- *Docked Prompt:* Drive feature adoption and help guide users through more complicated tasks. Embed images, videos, and step-by-step directions in a larger-sized prompt that stays available for users.
- *Walkthrough:* Provide guided, in-context training and onboarding on a single page or across multiple pages. Connect up to 10 floating, targeted, or docked prompts in a step-by-step, guided experience.

Salesforce Printable Tip Sheets & User Guides

In addition to online help, Salesforce publishes printable documentation to help you be successful with Salesforce. These documents include tip sheets, user guides, and other resources that describe the features and capabilities of Salesforce.

Trailhead: the Free, Fun Way to Learn Salesforce
Trailhead is accessible through the Search Documentation link in-app or through the Trailhead web page.

Everyone can learn Salesforce. Whether you are an admin, user or developer, there is a learning trail for you. Customers can sign up for a free Developer edition account and take advantage of the fun and free interactive learning curriculum provided at Salesforce Trailhead (https://trailhead.salesforce.com/en/home). Users can pick specific trails, modules or projects based on role (admin, user, etc.), experience level (beginner, intermediate, advanced), products (Service Cloud, Salesforce Platform, etc.) or topics (App Logic, CRM, Data Management, etc.) to learn new skills and absorb the information they need quickly.

Developer Community
DHHR will also have access to the Developer Community, Salesforce's free developer program for the Salesforce Platform. The Developer Community website is a free community-based online portal for developers, where developers can learn, access key resources, and discuss a diverse set of topics anchored around the Salesforce Platform. These topics include Apex Code, Visualforce, Web service APIs, database topics, packaging and distribution of your applications, and much more.

The Salesforce Developer Community is comprised primarily of a technical body of developers and architects, system administrators and IT management.

The primary goal for the Developer Community is to promote community, learning and conversations. This is done through articles, the blogging community and its blogs, tech notes, sample code, providing a free Developer Edition account, together with discussion boards, RSS feeds, documentation, webinars, on-demand sessions, newsletters, event calendar and wikis.

Salesforce Premier Success Plan
With the Premier Success support plan, which includes support, training, and administration, DHHR will have unlimited access to our complete library of more than 100 online courses to build expertise in Salesforce products, drive value, and maximize ROI.

Customer Success Community
Customer Success offers many resources and tools to get started, including the Customer Resource Center (success.salesforce.com) with online Help, Learning

Center and Communities, where you can tap into training videos, a knowledge base, or reach out to other customers for best practices.

Ongoing success monitoring is a key part of Customer Success. Salesforce's cloud computing model enables us to monitor usage data, to determine whether customers are getting the most from their subscription. We share this information with customers through Personal Account Reviews and Success Scorecards, along with actionable recommendations for improvement. Customer Success offers programs to help customers roll out new features or products, with training and adoption toolkits, to ensure our customers' business benefit is always growing, and that they remain customers for life.

Additional Salesforce Training

Should DHHR desire instructor-led training in addition to online training and training that is included in the Premier Success Plan, for an additional cost, Salesforce offers a number of instructor-led courses tailored for user types.

Salesforce provides comprehensive training and certification options for every Salesforce user whether Administrator, Developer, Business Analyst, and others. Putting the right training plan in place for all Salesforce users is essential to a successful ongoing deployment. Salesforce Certification provides assurance that the team responsible for your Salesforce deployment is an expert in their field and up-to-date on the latest capabilities from Salesforce. As your team gets trained, certification is an important milestone to demonstrate readiness. And as you hire and contract with Salesforce Partners, be sure to look for Salesforce Certified Professionals to ensure that you are getting the right level of expertise, whether that is Certified Administrators, Developers, Solution Designers, or Technical Architects.

Salesforce Integration Overview

Connecting Salesforce to an existing enterprise application is a common and frequently performed task. Integration options range from native Web Services support (APIs, outbound workflow, etc.) to import/export utilities to middleware integration via packaged connectors to toolkits for Java, .NET, and other open platforms. Our solution provides the ability to call out to virtually all common APIs, to enable synchronization, push / pull, and mash-ups with external apps/systems. Salesforce itself is based on web-service based APIs that in turn simplify access to Salesforce data from external systems. Our customers heavily leverage API-based integration.

The APIs are provided with the Salesforce Platform to build integration interfaces with third party applications or by our integration partners to use in their connectors. Any 3rd party application that accesses your Salesforce instance via the APIs, will be subject to the same security protections that are used in your Salesforce user interface. Therefore, the third party application will need to use a "granted" user in order to access the Salesforce data. These are open APIs (based on industry-standards such as REST and SOAP) that you can use to integrate Salesforce endpoints with external endpoints such as apps or enterprise integration hubs. As an example, you have the Batch and Bulk APIs used in the Data integration patterns or the SOAP and REST APIs used for UI integration patterns.

Developer Toolkits
These toolkits provide the ultimate in integration flexibility and choice. The Salesforce Platform supports all major development environments and tools, including Java, .NET, PHP, and Ruby on Rails.

Microsoft Integration
Salesforce integrates with Microsoft productivity apps and services, including Outlook, Teams, Office, and SharePoint. Options include:

- *Outlook Integration*. Sales reps can work with Salesforce records in Outlook, log Outlook emails to Salesforce, and draft Outlook emails using Salesforce templates.
- *Einstein Activity Capture*. This tool syncs contacts between Outlook and Salesforce and automatically captures Outlook emails and events in the activity timeline of Salesforce records.
- *Teams integration*. Users can mention Salesforce records in Teams to facilitate collaboration. They can preview record details, pin records to channel tabs for easy access, and update records with inline editing. Reps can also post important conversation moments to Salesforce Chatter feeds directly from Teams.
- *Extended Mail Merge*. You can merge data from Salesforce records into Word documents, including form letters, envelopes, and labels.
- *Files Connect (additional licensing option)*. Salesforce can access content from cloud-based Microsoft systems, including SharePoint and OneDrive.
- *CRM Analytics Connector for Excel (additional licensing option)*. Users can quickly import Excel data into CRM Analytics.
- *Power BI Connectors*. You can use data from Salesforce objects and reports in Power BI visualizations.

Partner solutions are also available to support integration between Salesforce and Microsoft products.

Google Docs
Salesforce offers capabilities for integrating with Google apps, including Google Docs and Gmail. Your administrator can enable these features.

With the integration between Salesforce and Google Docs, you can:

- Associate a Google doc to a Salesforce record and create, edit, or view Google docs from a Salesforce record.

- Share a Google doc with any Google user in DHHR.
- Use a browser button to associate Google docs with Salesforce records even when you are not working in Salesforce.
- Add Google docs to Salesforce CRM Content, which allows you to manage all types of content in a centralized location.

The integration between Gmail and Salesforce automatically logs emails you send from your Google account as activities on lead and contact records in Salesforce. You can also compose emails in Salesforce and send them through your connected Gmail account. The email is also logged on the record from which it was sent.

Attachments
Salesforce supports the attachment of any file type to virtually any object or record within Salesforce. Attachments have the following standard fields:

- Description of the uploaded file
- Name of the uploaded file
- A privacy setting to indicate that the attachment is only accessible to the owner and administrators
- Size of the uploaded file

You can attach image, PDF, Excel, audio, and video formats to any record.

3.1.1.10 System must support users and administrators to schedule and prompt future date tasks, activities, calls, and follow- ups, and do so with role-based permissions, to other users.

Schedule Tasks
Salesforce enables organizations to automatically create tasks when workflow rules are triggered. Tasks are to-do items that need to be followed up on. They can be associated with accounts, contacts, leads, or other custom objects. You can follow up on the task yourself, or assign it to another user. Workflow and alerts can be driven off any regular or custom field added to the application. Tasks can also be created manually from the home page and can be associated with accounts, contacts, leads, or other custom objects. Using workflow, user task creation can be triggered via events as well as time.

Administrators can pre-define tasks and populate them with standard data such as priority, status, and due date to ensure prompt follow-through. You can follow up the task yourself or assign it to another user.

Users can leverage the Tasks view to track and prioritize their work. This task list gives users a full picture of what's on their plate for all the processes and customer relationships they are engaged in. Users can view a list of all their open tasks showing the contacts, accounts, and other records the tasks are related to. Details about the tasks are right there on the same page. Users can create a task or use actions (e.g. Change Date, Change Priority, Change Status, etc.) on the page to quickly update a task. Users can switch to views of tasks due today, recently completed tasks and delegated tasks.

You can create tasks that repeat on a daily, weekly, monthly, or yearly basis by selecting the Create Recurring Series of Tasks checkbox when creating a task.

Salesforce displays event and task reminders in a reminder window. The reminder window opens whenever a reminder is triggered. When you log in, a sound plays if you have reminders that have been triggered since the last time you logged in. You can customize reminders in your personal settings.

Sharing Model

Application access to all data, including personal data, stored in the platform is controlled through a very comprehensive set of security features and access controls that apply to users and integrations. User and application-level security settings are defined and maintained by the Customer's Salesforce administrator, who is typically an employee of the customer and is appointed by the customer.

An organization's sharing model specifies the standard access that users have to data. There are four sharing models: Private, Public Read Only, Public Read/Write and Public Read/Write/Transfer. There are also several sharing model elements: Profiles, Roles, Hierarchy, Post Types, Page Layout and Field Level Security.
Details about sharing models and sharing model elements are given below:

- To specify the objects that users have access to, you can assign permission sets and profiles.
- To specify the fields that users have access to, you can use field-level security.
- To specify the individual records that users can view and edit, you can set organization-wide sharing settings, define a role hierarchy, and create sharing rules.

3.1.1.11 System must allow users to return to using a quick search feature to the three (3) most recently accessed records or activities. System must provide capabilities to determine whether a caller, a person, or case record already exists to avoid duplication. System must provide a means to merge identified duplicate records.

In the Recent Items section of the Salesforce sidebar, you'll find a list of up to 10 items (records, documents, custom objects, and the like) you've most recently added, edited, or viewed.

Also, as a Salesforce admin, you can customize the Recently Viewed list that appears on the home page for most standard and custom objects. Choose and order the fields to display so that your users see the information that's most important for your company. For most list views, your users can select which fields to display and how to order the view columns. However, they can't edit the recent records quick list on object home pages. Only Salesforce admins can select and order the fields to display for the recent records quick list. Admins can't make any other changes to this default list.

Duplicate Management

Salesforce provides a native duplicate management capability to control whether and when you allow users to create duplicate records inside Salesforce. Customers have the ability to customize the logic that's used to identify duplicates, determine whether duplicates are permissible, and create reports on the duplicates you do allow users to save (if applicable).

When a user attempts to save a new record, the record is first compared with existing Salesforce records to identify possible duplicates. The criteria used to compare records and identify the possible duplicates are defined by a matching rule. A matching rule is made up of individual fields that are assembled into an equation. Each field contains matching criteria that tell the rule how to compare the fields and what conditions need to be met for the specific field to be considered a match. A simple matching rule might specify that if two records' Email and Phone values match exactly, they are possible duplicates. Or you can use a variety of "fuzzy" matching methods to compare the fields. You can use the standard matching rules or create your own custom matching rule.

Next, a list of possible duplicates is returned. What happens when the record being saved is identified as a possible duplicate depends on what's defined in the duplicate rule. For example, the duplicate rule could block users from saving the possible duplicate record or allow them to save it anyway. Both the Block and Allow options include an alert, which tells users why they can't save the record and what they need to do. The Allow option includes the ability to report on the duplicate records.

With Salesforce Lightning Experience, duplicate rules are run as users complete fields on a record, alerting users before saving that they are entering data that matches a record already in Salesforce. Duplicate Management also covers personal accounts. Users can compare and merge duplicates by accessing duplicate record sets. By using a new action on Salesforce account and contact records, your team can compare and integrate third-party industry data field by field.

3.1.1.12 System must manage essential information in a global record including demographics, telephone numbers, email addresses, county, region, map, links, contacts, notes, documents, file attachments, and associated persons including but not limited to relatives, children, attorneys, and collaterals. System must allow addresses to be United States Postal Service (USPS) validated. System must also allow entry of foreign addresses and characters. System must allow for APO (Military) addresses if individuals are deployed or stationed overseas.

Salesforce allows an out of the box data model to associate all of the above mentioned demographics into one global record. This data model is referred to as the “household” data model, and is especially useful for including associated parties such as children and relatives. In the household model, people (salesforce contacts) are grouped together into an overarching household (account record) and associated appropriately.

3.1.1.13 System must allow retention/display of photographic images, audio and video files in their native format within contact records as needed. System must support documentation storage within a case or record, in all common formats including Portable Document Format (PDF), Microsoft Suite, Google Docs, etc. and must be document level searchable.

Salesforce supports the attachment of any file type to virtually any object or record within Salesforce. Attachments have the following standard fields:

- Description of the uploaded file
- Name of the uploaded file
- A privacy setting to indicate that the attachment is only accessible to the owner and administrators
- Size of the uploaded file

You can attach image, PDF, Excel, audio, and video formats to any record.

Salesforce Content and Document Management Capabilities
Salesforce offers the following different ways to store, publish, and tag files and documents. All file types are supported from traditional business documents such as Microsoft® PowerPoint presentations to audio files, video files, Web pages, and Google® docs.

3.1.1.14 System must provide capability for person and case specific alerts to be set by users, such as status indicators and validation messages, to provide feedback to users when accessing a case or record. System must support full case management workflow enabling labels (i.e., receive complaint, preliminary data collection, investigation, in process, awaiting approval to close, etc.) and time tracking by status, workflow from initial contact to case closure.

Validation Rules

Salesforce supports Validation Rules that allow you to define rules for data entry values. Validation rules verify that data entered meets the standards specified or the record will not be saved. Validation rules can also include customized error messages to display to users when they enter invalid values based on specified criteria. This is a point-and-click, wizard-driven process. You can create validation rules for objects, fields, campaign members, or case milestones.

Case Management Workflow

Salesforce allows you to configure time-based workflows that automatically trigger reminders and even re-routes when the workflow ages.

Email alerts are emails generated by an automated process and sent to designated recipients. These actions consist of the standard text and list of recipients for an email. You can associate email alerts with processes, flows, workflow rules, approval processes, or entitlement processes. You can also choose to notify the affected user by email for various operations, such as:

- Changing a case's owner and choosing to notify the new owner by email.
- Creating a user and choosing to welcome the user by email.
- Creating a task and choosing to notify the task owner by email.
- Creating an assignment rule and choosing to notify users when they've been assigned a case.

Users can create email alerts for case teams so that each time a case is created or updated, team members are notified.

3.1.1.15 System must support automated or manual assignment of a unique case identifier upon creation of a new case. System must provide a way to navigate a case summary view. System must support correspondence production including letter and email templates, then can be connect to workflows, can be auto populated with case record or person specific data, and can be transmitted and timestamped.

Each case in the system will have its own unique identifier as a Case number is a sequential, auto generated number that is searchable within the solution.

Case assignment rules can be used to easily route/assign cases to queues or individual users based on business rules and any known case data.

You can also manually add a record to a queue by changing the record's owner to the queue. Alternatively, an assignment rule can add cases or leads to a queue based on specific record criteria. Records remain in a queue until they're assigned an owner. Any queue members or users higher in a role hierarchy can take ownership of records in a queue.

Omni-Channel routes work requests to the most available and qualified support agents in the console. You can also provide real-time operational intelligence to support supervisors with Omni-Channel Supervisor. Omni-Channel integrates seamlessly into the console in both Salesforce Classic and Lightning Experience.

All you need to do is create a queue and routing configuration, select your support agents and create Presence Statuses for Omni-Channel that indicate whether an agent is online and available to receive incoming work items, or whether the agent is away or offline. Omni-Channel supercharges your queues to route work items to your agents in real time. The work items in the queue are assigned the priority that you specified in the routing configuration. That way, you can route work items in real time to the agents who are assigned to those queues.

Skill Based Routing

Skills-based routing looks at the skills required to complete a work item (requested skills) and matches these skills to the skills that are assigned to the agent (agent's skills). Omni-Channel routes the work to the first agent who has all requested skills and who is available (that is, has the capacity to take the work item). You can even transfer a work item, such as a case, to a different skill set, so an agent with the right skills can resolve the issue. If you enable skills-based routing rules on a routing configuration, and assign the routing configuration to a queue, the queue's membership no longer applies to routing. Work is routed to available agents with the right skills. If skills-mapping criteria aren't met and no skills are assigned to a work item, the work is routed to any available agent in your org.

3.1.1.16 System must support the ability to generate correspondence to an individual, a group of individuals with similar characteristics, or to a predefined distribution list. System must support templates as form letters, fill-in form letters, customized form letters, or custom letters using integrated Hyper Text Markup Language (HTML) editor without Microsoft Word. System must support capability to create output in hard copy, paper letters, emails, or Google Docs.

The email tools provided by Salesforce help users plan and execute high-impact email campaigns targeted at recipients. Users get a host of features that powers email to work for DHHR, including the ability to relate emails to other records, add custom fields to emails, use triggers with emails, modify the email layout, and manage emails using the Salesforce API.

Mass Email

Create and manage email campaigns and send rich-media HTML mass email blasts. Salesforce can also integrate with third-party marketing solutions and offers out-of-the-box integration with several top email marketing vendors.

Email Templates

Set up professional-looking HTML email templates for agents to personalize and send. Email templates can include DHHR's branding and graphics for maximum impact. Templates can be delivered in a Lightning App Builder component that's more powerful and visually appealing. Users can pull up their Salesforce Classic templates in text, HTML, or custom formats in Lightning for Outlook. Users can also include Salesforce records in their email messages when you add merge fields to these templates. To boost productivity even more, users can access shared Classic template folders from Outlook

Document Generation

You can generate documents from Microsoft Word (.docx) and Microsoft PowerPoint (.pptx) templates. These templates can include values from any JSON-based data in the text, including data from any Salesforce object. You can optionally convert the resulting documents to PDF format.

With OmniStudio Document Generation, you can generate contracts, proposals, quotes, reports, non-disclosure agreements, service agreements, and so on.

3.1.1.17 System must support user addition of notes, complaints, inquiries, tasks, calls, and other vital data to person and case records in accordance with role-based security permissions that include view, add, edit, and delete levels of access. System must support role-based case assignment/ownership, task delegation, and case transfer both individually and as a group, to, among, and between users. System must provide for customizable workflows incorporating the steps and statuses already available in the standard workflows and incorporating automatic generation of related tasks.

With Global Actions, users can add a note from within any page in Salesforce.

Notes offers immense flexibility, allowing users to create a note from any Lightning page. You can also view or restore previous versions of a note, and include images in their notes.

Some key features:

- Easily Create a Note from Any Page: With Global Actions, users can now add a note from within any page in Salesforce. Users can keep a note private or relate it to one or more records.
- View and Restore Previous Versions of Notes: Your users can go back to previous versions of a note to see what's changed. They can also revert to any previous version of a note.
- Include Images in Notes: Your users can add clarity and value to their notes by including images from their computer or the web.
- Filter the Notes List View: Users can filter the list of notes on the Notes home page, making it easier to find the notes they're looking for. Users can filter for notes they own, recently viewed notes, or notes shared with them.
- Spelling: Users can see their spelling errors highlighted automatically when they create or edit a note with the enhanced note taking tool.

Case Assignments and Complaint Management

With Salesforce complaint management, you can monitor your entire complaint management workflow. For every complaint that's submitted, the Complaint Management connect API creates a case record, a public complaint record, and case participant records. Go to these records to view complaint and complainant details. Based on the values of public complaint fields, you can configure case assignment rules to automatically route complaints to a queue or to the right people in the team. You can also enable CRM Analytics and create a CRM app for Complaint Management. By using the app, your customer experience managers and complaint team managers can visualize prebuilt dashboards. These dashboards provide valuable insights on complaints volume, trends, root causes, and products or services that receive a high number of complaints.

Salesforce cases originate from various channels including chat, phone, and social may be assigned manually or automatically via assignment rules to queues or to individual users. When cases are assigned to a queue, users who are members of that queue would have visibility and access to those cases, and can act on and manage them accordingly. Omni-Channel is the Service Cloud's comprehensive customer service solution that pushes work to qualified agents in real time, right from the Salesforce console.

Multi-tiered queuing and routing capabilities, including skills based routing, enable individuals or groups to review and act on inquiries and quickly resolve customer issues. For example, Salesforce Omni-Channel provides the framework for routing work to the appropriate agents. Work items are routed to queues based on attributes of the work item (channel, type, language, geography, etc.). Agents are assigned to different Presence Statuses (skill sets) that determine access to those queues. Presence Status indicates whether an agent is online and available to receive incoming work items. An agent is assigned to one or more Presence Statuses via their profile or permission set. If these profiles or permission sets change, all agents assigned to them receive the updates automatically.

Route Work to Agent

Manage complex routing processes from a centralized location to create efficient, flexible, and productive service experiences. Support agents can use the Omni-Channel utility in the Service Console to change their presence status, accept and decline work requests and see their existing work requests. Work can be routed to agents based on their skills and their skill level enabling the right work to be routed to the right person. After a designated timeout period, a skill marked as additional is dropped from Omni-Channel routing. The case is then routed to the best-matched agent, even if the agent doesn't have all the skills. Omni-Channel Flow unifies the routing setup for all supported channels. Omni-Channel Flow supports voice calls, chats, messaging sessions, cases, leads, and custom objects. You can even route work or an inbound channel item, such as a chat, back to the agent who originally worked with the customer.

Give Agents More Context with a Customized Screen Pop

Personalize service by providing the agent with more information about the conversation. With screen pop, it automatically opens up to three records on the agent's screen when a voice call, message, or chat is routed to the agent. For example, you can show the customer's contact, case, and order records on separate sub-tabs, along with the primary work record.

Create Case Teams

A case team is a group of people that work together to solve cases. For example, a case team can include support agents, support managers, and product managers. Based on assigned roles, all team members can be in sync while working on a case. Case Contact Roles can also be utilized to know who to contact and their role.

Process Enactment and Workflow Management

Workflow management and process enactments are core strengths and foundational services of the Salesforce Platform that enable customers to easily automate business processes and operate more efficiently using point-and-click. Processes can be simple tasks - such as creating an activity, emailing an alert, updating a data field, or posting a message to a chatter feed - or more complex – such as sending data to external or third party systems and applications via an integration message, creating new records and updating existing related records, launching other processes/flows, submitting records for approval, and more. You can also use groups, group memberships, topics, and topic assignments with workflow rules and Flow.

The Salesforce Platform comes with Flow, to build out workflows and processes, it also allows maintaining them as the demands of DHHR grow. Salesforce Flow and approvals enable DHHR to rapidly design and run any business process in the cloud without infrastructure, software, or code. Salesforce Flow's simple and powerful design allows you to create your processes by using a convenient visual layout with point-and-click efficiency.

For every business rule or system event a customer needs to enact, one or more actions can be defined for execution when the specified conditions are met. These actions are created using point-and-click visual editors by a system administrator or business analyst and do not require complex procedural source code. Flows can collect data and perform actions in your Salesforce org or an external system. Salesforce Flow provides two types of flows: screen flows and auto launched flows. Screen flows are utilized when organizations want to collect data from people. For example, a guided tutorial or wizard with screens.

To launch a flow internally when a record changes or when a user clicks a button, DHHR can use an auto-launched flow. For example, if DHHR wants to add automation to a page or application to perform an action to a record when a user clicks a button.

Salesforce Platform Encryption

With Shield Platform Encryption, DHHR can access encrypted data from most elements in flows, except when filtering or sorting records. You can update the value for an encrypted field or reference an encrypted field in logic, but you can't look up records based on a specific value in an encrypted field.

3.1.1.18 System must allow agency to attach an actual or estimated cost per activity unit to all activities within the workflow to enable estimates of the activity cost of providing complete handling and investigatory services.

This functionality would be out of the box if the intent is to attach an estimate document that was created in a format such as a word or excel format. However, this functionality could also be built as a data field whereby you could input the estimate in the database itself, giving you the advantage of being able to maintain and report on that estimate as needed.

3.1.1.19 System must include monitoring functionality allowing progress to be monitored and alerts/reminders generated when workflow nears completion or needs approval.

Validation Rules

Salesforce supports Validation Rules that allow you to define rules for data entry values. Validation rules verify that data entered meets the standards specified or the record will not be saved. Validation rules can also include customized error messages to display to users when they enter invalid values based on specified criteria. This is a point-and-click, wizard-driven process. You can create validation rules for objects, fields, campaign members, or case milestones.

Case Management Workflow
Salesforce allows you to configure time-based workflows that automatically trigger reminders and even re-routes when the workflow ages.

Email alerts are emails generated by an automated process and sent to designated recipients. These actions consist of the standard text and list of recipients for an email. You can associate email alerts with processes, flows, workflow rules, approval processes, or entitlement processes. You can also choose to notify the affected user by email for various operations, such as:
Changing a case's owner and choosing to notify the new owner by email.
Creating a user and choosing to welcome the user by email.
Creating a task and choosing to notify the task owner by email.
Creating an assignment rule and choosing to notify users when they've been assigned a case.

Users can create email alerts for case teams so that each time a case is created or updated, team members are notified.

Approvals
Approval process setup in Salesforce supports both simple approvals as well as multi-step approvals. You can apply approvals to virtually any record, standard or custom. Along with the majority of customizations you will make in the system, this is done within a point and click, drag and drop interface in Salesforce--no IT support or code required.

3.1.1.20 System must provide means for administrators to update the look and content of the public facing portal and the administrator created content on associated weblinks.

To make your customer's Experience Cloud as familiar as possible, your customer Experience Builder Site must match the look and feel of the DHHR website and be very easy to use. Salesforce Service Cloud offers tools to help DHHR efficiently configure a customer experience builder site without any design or programming or IT help.

- *Site Templates for Self-Service:* Site Templates for Self-Service lets you build, brand, and deploy self-service customer support experience builder sites that look great on any device.

- *Cases:* Experience Cloud users have the option to view the lifecycle of a case from start to finish: all case interactions appear in a unified, chronological Chatter case feed. User efficiency is enhanced by utilizing quick actions for cases. With mass actions your customers can select up to 100 records in a list view and perform mass updates rather than updating records one at a time. Digital Experience users benefit from the added functionalities of Chatter, while features on the support side make it easier for agents to provide more efficient, personalized support. In experience builder sites and the Service Console, agents can control whether a feed item is private or public. Public feed items are visible to both internal and external users. Private feed items are visible only to internal users.
- *Chatter Questions:* With Chatter Questions, you can promote collaboration among users and service agents by giving users the ability to ask and contribute to questions in Chatter. When users are logged in to a digital experience, they're also able to ask questions and participate in threaded discussions. Members in the digital experience can answer questions in Chatter just like commenting on a post in Chatter. The person who asked the question or the question's moderator can select the best answer—which is prominently displayed in the feed—allowing other users to quickly and easily find the best response to their question. View counts allow users to easily gauge how interested people are in a post or how well-placed it is. The count tally increases any time a post is commented on, liked, or the post's detail page is viewed. When members view questions, we also show related questions to help them find what they're looking for. Users can also filter questions by All Questions, Unanswered Questions, Questions with No Best Answer, and Questions with Best Answer. Hyperlinks to your posts and comments can be used anywhere you see fit throughout the experience builder site.
- *Searching for Information:* Global search in experience cloud allows both guest users and logged-in users to search for and access articles, search and view discussions, search data or records they have access to, and contact agents through official support channels. As members enter search terms, the search publisher has the option of showing suggested results in one list or tabbed lists for Articles, Discussions, Cases or the other record types the user has access to. Experienced cloud users can further filter their search results for the following objects: accounts, knowledge articles, cases, contacts, dashboards, files, leads, opportunities, people, and tasks.
- *Point-and-Click Style Editor:* Easily configure DHHR's self-service portal to match your corporate branding with clicks not code. You can use the style editor to adjust multiple portal themes including the fonts and colors of text, background, headers, and footers — all using a visual, point-and-click interface. Advanced users can opt to modify the style, font-family scripts directly through the same interface.

3.1.1.21 System must provide a public facing portal that enables modification of text size and other page appearance qualities to comply with the Americans with Disabilities Act (ADA) standards as well as industry standard login/password requirements. System must provide a customizable web form incorporating a CAPTCHA response test.

Accessibility

Salesforce is committed to providing on-demand enterprise applications accessible to all individuals. This includes users working with assistive technology, such as speech recognition software and screen readers. To help meet our goal of accessible design, Salesforce follows the internationally recognized best practices in Section 508 of the Rehabilitation Act and the Web Content Accessibility Guidelines (WCAG) 2.1 Level AA.

Salesforce introduced the Lightning User Experience, which brings a re-imagined user interface that is modern, efficient, and highly accessible. The Lightning Experience is engineered with Accessible Rich Internet Application (ARIA) features built in that help assistive technology users have the best possible experience with Salesforce. We provide software releases three times a year, ensuring that our customers can easily take advantage of the accessibility features introduced in each release.

The Salesforce Accessibility Conformance Report (ACR) (https://www.salesforce.com/company/legal/508_accessibility/) serves as a guide in evaluating conformance to Section 508 of the Rehabilitation Act and WCAG within Salesforce Lightning Experience UI. The accessibility features available within Salesforce applications are dependent on the application UI configuration and Lightning component usage. For this reason, adherence to accessibility requirements should be evaluated throughout the design and final testing of the Salesforce application and not merely on a specific ACR. However, any ACR referenced herein, or anywhere else on Salesforce's website, or otherwise publicly available, shall not be construed to be included in any contract, either explicitly or implicitly, in whole or in part, absent Salesforce's express acknowledgment through language in the contract itself that such report or its substantive equivalent is included.

The ACRs encompass the features and functions of Salesforce products and provide an explanation of supporting features. Salesforce supports customers and partners by making itself available to review these ACRs and our product features.

CAPTCHA

Web-to-Case allows for a reCAPTCHA to be added to ensure spam cases are not submitted to your webform.

3.1.1.22 System must enable administrative development of data field labels, characteristics, and picklists. System must also enable users to search picklists using drop down menus.

DHHR can define custom fields against any Salesforce object (table) through a simple four-step wizard of:

- choosing the field type;
- naming and setting other relevant characteristics of the field based on field type;
- setting field-level access permissions for users; and
- placing the field in the user interface.

Once the field is defined, it is immediately available in the user interface, in reporting, as well as through the API should the field be needed for programmatic access, data migration, or integration purposes.
Salesforce supports 23 different types of data fields including but not limited to the following:

- Text
- Date
- Time
- Checkbox
- Picklist
- Formulas
- Geolocation
- Email
- Url

Validation rules can be applied to these fields to ensure quality data. Once defined, a data field or group of data fields can be added to a tab in the user interface. Dynamic Forms and Actions allow you to display specific data fields under certain conditions. You may want to display specific fields if the workflow process is in a specific step for instance. Salesforce Data Import Wizard or Data Loader can be used to import data including custom fields. Those fields are available to use when creating reports, charts and dashboards.

3.1.1.23 System must allow automation of business practices of the agency and allow administrators to create workflow within the application. System also allows for users to set a specific list of favorites, such as searches, templates, and contacts. System must also provide comprehensive standard reports and graphics, including management reports for operational, performance and outcomes, incorporating conditions highlighting for important variances to targets.

Workflows

As stated previously, Salesforce supports workflow for all records in the system. Please see below for more information for workflow functionality specific to case/complaint management.

Users can also star, or favorite, records on any table in the solution that they want to save for quick reference.

Case Management Workflow

Salesforce allows you to configure time-based workflows that automatically trigger reminders and even re-routes when the workflow ages.

Email alerts are emails generated by an automated process and sent to designated recipients. These actions consist of the standard text and list of recipients for an email. You can associate email alerts with processes, flows, workflow rules, approval processes, or entitlement processes. You can also choose to notify the affected user by email for various operations, such as:
Changing a case's owner and choosing to notify the new owner by email.
Creating a user and choosing to welcome the user by email.
Creating a task and choosing to notify the task owner by email.
Creating an assignment rule and choosing to notify users when they've been assigned a case.

Users can create email alerts for case teams so that each time a case is created or updated, team members are notified.

3.1.1.24 System must provide capacity to create and generate comprehensive case reports, pre-formatted, relevant to the review/investigation type, the reader, and level of detail required. System must provide for historical reports to show trends and comparisons between time periods. System must provide for generation and distribution of standard and ad-hoc reports at regular intervals as set by users with role-defined permissions. System must provide a library of standard reports supporting common aspects of case management and investigatory practice. System must provide ad hoc report generator for enterprise management, with capacity for ad hoc report criteria to be saved for future reports. System reporting engine must allow report writers to create, publish, schedule, and distribute standard and ad hoc reports in varying formats including graphs and charts.

Core Reports and Dashboards

Salesforce includes a powerful suite of analytics and reporting tools to help you view and analyze your data that can be accessed via the web or mobile device in real-time. Analytic capabilities consist of several integrated parts:

Reports

A report returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. To help you monitor DHHR, Salesforce offers a wide range of standard reports, accessible in the standard reports folders on the Reports tab. All our standard reports are "templates" so they can be used as report starting points from which users can alter fields, criteria, etc. and use the "Save As" function to easily capture a version more specific to their unique needs. Users can also create new custom reports to access exactly the information they need. Subtotal and limit data to help users analyze trends and get a concise picture of what is happening in DHHR. Report Builder is intuitive and user friendly. There is no need for IT support or advanced scripting capabilities to run reports.

Dashboards

A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or custom Visualforce pages. They provide a snapshot of key metrics and performance indicators for DHHR. Each dashboard can have up to 20 components. Administrators control access to dashboards by storing them in folders with certain visibility settings. Dashboard folders can be public, hidden, or restricted to groups, roles, or territories. If you have access to a folder, you can view its dashboards. To view a dashboard component, users need access to the folder for the underlying source report. Each dashboard has a running user, whose security settings determine which data to display in a dashboard.

Folders

A folder is a place where you can store reports, dashboards, documents, or email templates. Folders can be public, hidden, or shared, and can be set to read-only or read/write. You control who has access to its contents based on roles, permissions, public groups, and license types. You can make a folder available to your entire organization, or make it private so that only the owner has access.

Other important points about dashboards:

- Dashboard components aren't simply nice-looking, static pictures. They're live, actionable objects. You can click on a dashboard component to drill down to the underlying report that generated it, and click on any item in that report to drill down to the source data. So you can quickly understand the reasons behind the results.
- Dashboards are full participants in Salesforce's enterprise social collaboration platform. For example, a manager could post a dashboard snapshot to their Chatter feed to share it with their “followers”, or to a specific Chatter group, along with comments, so that they can find answers, congratulate team members, or issue calls to action. And both dashboards and Chatter are available on mobile devices, as well as PCs.

- Salesforce Reports and Dashboards allows users to configure reports in the Report Builder and add to a new and/or existing dashboard with the click of one button. Dashboard settings for reports can be maintained from the chart settings of a report.

Schedule Reports
Salesforce provides the ability to subscribe to or schedule the automatic execution and delivery via email of reports and dashboards. You can schedule reports and dashboards to run on a daily, weekly, or monthly basis and have them automatically emailed to Salesforce users. In addition, when subscribing to a report, users have the option to choose to receive new results as an .xlsx or .csv file attached to the subscription email.

Export Reports
Reports can be exported into Microsoft Excel (.xls) or comma-separated values (.csv) formats. In addition, Salesforce allows users to choose the export type, which allows reports to maintain their visual structure when exported into third-party tools (tabular, summary, and joined reports).

3.1.1.25 System upgrades, enhancements, and error corrections must be at no additional cost/charge when such upgrades, enhancements, and error corrections are generally made available to its other clients of similar systems at no additional cost/charge.

All upgrades, patches, and other system maintenance are provided as part of the subscription service at no additional cost to DHHR. In addition, Salesforce releases three complimentary upgrades each year, in Winter, Spring, and Summer versions. All Salesforce users are always on the latest version of our platform because everyone gets instant upgrades (typically on an opt-in basis). Each time Salesforce releases a new version of the application and the platform, the entire community can take advantage of the latest innovations from our product development team. Because of our multi-tenant architecture, Salesforce is able to provide all of our customers with a service based on a single version of our application. We are able to upgrade all of our customers at the same time with each release. As a result, we do not have to maintain multiple versions of our application. Each release will be delivered automatically in a transparent manner and will not break your configurations.

3.1.1.26 System must enable a public facing web form and a public use email to integrate and populate, as specified by the administrator, to contact, person, or case records to avoid duplication of data entry.

Coastal Cloud recommends leveraging Salesforce Experience Cloud to ensure avoiding duplication of data entry. With Experience Cloud, authenticated users only will have access to the webform. This will ensure that any webform entries will populate the correct records in the database (case/contact etc) and avoid duplication. More information about Experience Cloud can be found below.

Experience Cloud

Experience Cloud is an online collaboration and business process platform that connects employees, customers, partners, suppliers, and distributors. Organizations can create fully branded public or private experience builder sites that connect members directly with one another — and with relevant content, data, and business processes. Experience Cloud is the only community platform that combines the power of social with mobile participation, trusted security, fast deployment, and a direct connection to business processes. Today's customer expects to interact with their government, share experiences with other customers, and find the information they need from any mobile device. To meet these expectations, organizations need to deepen customer and brand relationships, understand rapidly changing customer needs, and connect customers directly to their business processes. Experience Cloud was built to address all of these needs. Experience Cloud goes beyond portals by adding social collaboration, extensive branding, customization, and mobile access, while retaining enterprise security and tight integration with business processes.

Designed with account management in mind, the Customer Account Portal gives your customers a private and secure place to access and update their account information. Branding sets partner with audience targeting, making it easy to dynamically change the appearance and style of your community based on the audience viewing the page. And Community Pulse displays your most important community metrics front and center in the Workspaces area.

Salesforce provides three types of communities that can be used for a broad variety of purposes; from customer service to marketing or engagement of resellers, suppliers, organizations, and partners.

Experience builder sites deliver rich collaboration, mobile access, and consistent branding for even the largest groups. For example, a service Experience builder site enables customers to answer questions for other customers, quickly find the information they need, or work with service reps to resolve issues — decreasing time to resolution while increasing engagement and loyalty.

Partner experiences provide even greater ties to business processes, along with the added power of role-based security to segment the data that's been shared with different members. For example, partner experiences enable organizations to manage reseller relationships by keeping some lead and funding information private, but enabling collaborative selling between partners, leading to more engaged partners and increased deal flow. You can connect, share, update, and synchronize accounts, contacts, activities, cases, and custom objects with your government partners instantly. Great for organization, vendor, and extended team effectiveness.

Employee experiences deliver on the promise of doing business from anywhere and any device. An employee digital experience is a social intranet that helps organizations transform culture, tear down walls, and be more productive by allowing employees to collaborate across on any device, contribute knowledge, use apps, and engage fellow employees. Employees can collaborate, share files, get information that is most relevant to them, and is connected to business processes for improved productivity.

Freshen up your site list by archiving outdated sites that have outlived their usefulness (archive), and make space for the shiny new sites that your users need. Create multilingual Lightning Web Runtime (LWR) sites to reach international audiences and build LWR sites more quickly with new drag-and-drop components. You can also optimize your site's performance with several content delivery network (CDN) enhancements.

3.1.2 Vendor must actively provide a statewide case management, customer relationship management, or investigations management system to a minimum of three state agencies. Evidence of compliance with requirement shall be provided with bid. Vendor must provide contact information including contact name, phone number and email address of a director (or equivalent) of a program where they have successfully installed and supported an Enterprise level, Cloud-based statewide case management system. Evidence of compliance with requirement shall be provided with bid response.

One More Child Florida

Company:	One More Child
Contact:	Stephen Robert, Chief Operating Officer
Phone:	(863) 688-4981
Email:	Stephen.Robert@onemorechild.org
Address:	Joe K. Blanton Campus 1015 Sikes Blvd. Lakeland, FL 33815

Florida Department of Economic Opportunity

Contact:	Caroline "Tisha" Womack, Deputy Chief Financial Officer
Phone:	(850) 245-7105
Email:	caroline.womack@deo.myflorida.com
Address:	107 East Madison St. Caldwell Building

Tallahassee, FL 32399

Florida Division of Emergency Management

Contact: Kevin Guthrie, Director of Emergency Management
(Luke Strickland, Chief of Staff, to schedule with Director)
Phone: (850) 518-2373
Email: Luke.Strickland@em.myflorida.com
Address: 2555 Shumard Oak Blvd.
Tallahassee, FL 32399

Sample of Prior Relevant Experience

Coastal Cloud has a strong history of successful implementations and a wide variety of solutions on the Salesforce platform for clients across the US. Coastal Cloud's solutions helped each of these clients streamline and modernize their programs.

One More Child Florida

One More Child is a nonprofit organization that provides services to vulnerable children and struggling families. We have been expanding our partnership with entities in Florida in various programs including foster care. One of their programs serves single moms who are working toward self-sufficiency by creating a network of care, guidance and support in local communities. One More Child needed a solution that allowed moms to be able to better self-service their service planning, and to streamline interactions with case workers. Our solution provides a portal that empowers Moms to apply for the program, and to set and achieve goals. The solution is being used as a case management, service planning, funding management and program performance management tool.

As part of an ongoing relationship with this entity, we have developed an integrated foster care system to manage foster care recruitment and retention to benefit One More Child's mission to help children across the state of Florida. Our solution digitally transforms how One More Child recruits foster and adoptive parents, places children, manages foster care families, and streamlines all of their processes that support the needs for a successful program. To that end, we also developed a robust recruiting website, self service portal, and internal case management solution for child placements. The self service portal enables applicants to manage their own applications. Applicants can apply online, be provided with a preset list of tasks and next steps, track the status of their application and/or any status updates directly, and upload necessary documents and interact with agency staff. In addition, the solution is configured to enable the placement of foster care youth with the best fit for foster care families. This placement functionality can also automate workflows such as email notifications of placements; task assignments to families or staff etc. This solution allows One More Child to easily interact with prospective foster parents and provides cutting edge technology to enhance this program. All activity taking place in the system is easily reported to analyze operational performance and to identify where the organization is having the most impact.

Florida Department of Economic Opportunity

At the Florida Department of Economic Opportunity (DEO), Coastal Cloud implemented a grants management solution, known as the Subrecipient Enterprise Resource Application (SERA), which allows DEO the ability to manage the entire lifecycle of grants management, from processing to awards and disbursement of funds. It also enables DEO to easily meet state and federal level reporting requirements. SERA also enables subrecipients to enter and monitor live data in the system through an easy-to-use, mobile friendly, cloud-based portal. They can request funds, submit status reports, run program reporting, and stay up to date anywhere they have internet access.

With the addition of Disaster Recovery Case Management processes for Hurricanes Irma, Matthew & Hermine, applicants can apply for disaster relief and monitor the progress of their case using the mobile-friendly cloud portal. The Case Manager functions allow processing of each application through the multi-step guided process of awarding the funds and rebuilding homes. With real-time data and actions on a single platform, the system can generate live reporting anytime to meet federal auditing and reporting requirements.

Most recently, Coastal Cloud was chosen to implement a solution for Florida's Housing Assistance Fund, enhancing DEO's current grant system to support the HAF program and allows residents or case managers to request information; evaluate eligibility; apply for HAF funds; award grants; manage grants and subrecipient agreements from post award through close-out; manage the approval process for funds requested; track the grants process via reports and dashboards; meet federal government reporting requirements.

Florida Division of Emergency Management

Florida Department of Emergency Management (DEM) initially selected Coastal Cloud to implement an Enterprise Grants Management Solution. Facing unprecedented challenges brought on by the COVID-19 pandemic, DEM needed to quickly add additional features to manage equipment tracking, non congregate shelters for quarantine and isolation (known as Safer-FL), and critical asset inventory With Salesforce's scalability and our team's responsiveness, Coastal Cloud was able to respond within days, and implement within weeks, the additional features to help DEM maximize time and resources during this time.

Within one platform, Florida leaders within the Division of Emergency Management and Department of Health are able to manage State and county needs. Citizens within the county are able to register for non-congregate shelter, self-report key health activities. The state can monitor through critical dashboards within a secure environment that streamline operations and reporting processes.

Oklahoma Office of Management and Enterprise Services

Oklahoma was in search of a way to disperse the CARES Act funding to communities responsibly and quickly. Coastal Cloud partnered with Guidehouse to provide a solution that would allow communities to Plan, Learn, Apply, Qualify, and Stay in Touch, using the power of Salesforce. In just a matter of weeks from the point of engagement, the platform was live and ready to partner with communities to get critical funding where it was needed the most.

The Oklahoma Office of Management and Enterprise Services needed a solution that would also help them respond to the massive influx of questions due to COVID-19 and further manage the CARES Act. Many business owners needed help managing their applications and receiving funds. Coastal Cloud's solution organized all of this information into one system for tracking. Oklahoma's teams can work cohesively in one place, eliminating duplicated efforts and manual tasks.

Collier County Department of Community and Human Services

In 2021, Collier County realized a previous vendor that implemented a grants management system for CARES Act funding would not meet the ongoing needs for American Rescue Plan Funding. The county then turned to Coastal Cloud to implement the Enterprise Grants Management system. We are continuing to work closely with county staff on the successful solution to help manage grant money received from the American Rescue Plan Act to aid economic recovery in the wake of the COVID-19 pandemic. In addition to the technology implementation, Coastal Cloud brought in grants policy experts familiar with federal requirements to write the county's final ARPA plan, amendments, procedures and more to take that workload off the county and ensure consistent process and technology implementation across all ARPA grants.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: MIS2300000003

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:
(Check the box next to each addendum received)

[X]	Addendum No. 1	[ ]	Addendum No. 6
[ ]	Addendum No. 2	[ ]	Addendum No. 7
[ ]	Addendum No. 3	[ ]	Addendum No. 8
[ ]	Addendum No. 4	[ ]	Addendum No. 9
[ ]	Addendum No. 5	[ ]	Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Coastal Cloud Holdings LLC
Company

Sara Hale
Authorized Signature

6/19/2023
Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.

Revised 6/8/2012

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Printed Name and Title) Heather Warrell, Director of Public Sector

(Address) 1 Hammock Beach Pkwy, Suite 200, Palm Coast, FL 32137

(Phone Number) / (Fax Number) (270) 300-0297 / (888) 621-1611

(Email address) heather.warrell@coastalcloud.us

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through *wv*OASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

Coastal Cloud Holdings LLC
(Company)

(Signature of Authorized Representative)

Sara Hale, President 6/12/2023
(Printed Name and Title of Authorized Representative) (Date)

(800) 237-9574 / (888) 621-1611
(Phone Number) (Fax Number)

sara.hale@coastalcloud.us
(Email Address)

8.2 Vendor Supply: Vendor must carry sufficient inventory of the Contract Items being offered to fulfill its obligations under this Contract. By signing its bid, Vendor certifies that it can supply the Contract Items contained in its bid response.

8.3 Reports: Vendor shall provide quarterly reports and annual summaries to the Agency showing the Agency's items purchased, quantities of items purchased, and total dollar value of the items purchased. Vendor shall also provide reports, upon request, showing the items purchased during the term of this Contract, the quantity purchased for each of those items, and the total value of purchases for each of those items. Failure to supply such reports may be grounds for cancellation of this Contract

8.4 Contract Manager: During its performance of this Contract, Vendor must designate and maintain a primary contract manager responsible for overseeing Vendor's responsibilities under this Contract. The Contract manager must be available during normal business hours to address any customer service or other issues related to this Contract. Vendor should list its Contract manager and his or her contact information below.

Contract Manager: Heather Warrell, Director of Public Sector
Telephone Number: (270) 300-0297
Fax Number: (888) 621-1611
Email Address: heather.warrell@coastalcloud.us