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.

Solicitation Response(SR) | Dept: 0506 | ID: ESR06282300000006710 | 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:	VS0000042987
Legal Name:	BUSINESS SOLUTIONS AND TECHNOLOGIES LLC
Alias/DBA:	
Total Bid:	$607,363.00
Response Date:	06/29/2023
Response Time:	11:08
Responded By User ID:	Bizsolutions
First Name:	Diana
Last Name:	Lewis
Email:	d.lewis@bizsolutions.tech
Phone:	4802289924

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 ESR06282300000006710	1

VENDOR
VS0000042987 BUSINESS SOLUTIONS AND TECHNOLOGIES LLC

Solicitation Number: CRFQ 0506 MIS2300000003

Total Bid: 607363 **Response Date:** 2023-06-29 **Response Time:** 11:08:15

Comments: Discounts already applied.

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	144480.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: See pricing summary in attachments.
Delivery Days = 60 business days, 12 weeks

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	120907.000000	604535.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: This includes licenses and sustaining support:
64,350 Support
56,557 Licenses (20 caseworkers)

120907/year
ServiceNow PSDS Professional Licenses (20 caseworkers) minimum

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	120907.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: This includes licenses and sustaining support:
64,350 Support
56,557 Licenses (20 caseworkers)

120907/year
ServiceNow PSDS Professional Licenses (20 caseworkers) minimum

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	120907.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: This includes licenses and sustaining support:
64,350 Support
56,557 Licenses (20 caseworkers)

120907/year
ServiceNow PSDS Professional Licenses (20 caseworkers) minimum

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	120907.000000	0.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: This includes licenses and sustaining support:
64,350 Support
56,557 Licenses (20 caseworkers)

120907/year
ServiceNow PSDS Professional Licenses (20 caseworkers) minimum

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	2828.000000	2828.00

Comm Code	Manufacturer	Specification	Model #
43232200			

Commodity Line Comments: ServiceNow PSDS Professional License

Extended Description:

Additional user licenses

Cloud-Based Statewide Case Management System
RFP: MIS2300000003

Price Summary

Prepared for:
West Virginia
Health and Human
Resources

Business Solutions and Technologies, LLC
dba BizSolutions.Tech
One Creative Place
Charleston, WV 25311
www.BizSolutions.Tech

Prepared by
Diana Lewis
VP Strategic Initiatives
June 24, 2023

Price Summary

Implementation Services*

- On-site Workshop
- Record and Playbook Flow
- Foundational Data Loading and Configuration
- User Management
- Portal - Public PSDS Portal
- Portal - Employee Center
- Metrics Definition
- Reports and Dashboards
- Performance Analytics
- Workspace
- Training Materials and Class Sessions
  - DHHR User Training Development – Complaint Flow - slides, hands on practice exercises, training quick reference cards, training video
  - DHHR Case Worker Training Delivery – Onsite instructor-led
    - 1 Day of Training, on site in Charleston, for a total of 15 users
  - Superuser Training Delivery - Onsite instructor-led – 5 students
    - Reporting and Dashboard Training
    - Portal Administration – Announcements
    - Mail Templates
    - Knowledge Management
    - Performance Analytics - User training
  - ServiceNow System Administration – Onsite Instructor-led – 5 students
  - Open House for Q&A and on-site marketing for DHHR staff
- Go-Live HyperCare Support

One Time Implementation Services	$ 144,480

*Implementation Services - The quoted hours will be billed as the hours are consumed. If hours are not spent, they will be retained and can be used for future enhancements. Team will manage scope and hours to ensure that no overages occur.

Licensing and Support Services – Initial Year Term		
Sustaining Support**		64,350
Licensing (20 users) – PSDS Professional		56,557
Licensing and Support Services – Year 1 Optional Renewal		
Sustaining Support**		64,350
Licensing (20 users) – PSDS Professional		56,557
Licensing and Support Services - Year 2 Optional Renewal		
Sustaining Support**		64,350
Licensing (20 users) – PSDS Professional		56,557
Licensing and Support Services - Year 3 Optional Renewal		
Sustaining Support**		64,350
Licensing (20 users) – PSDS Professional		56,557
Licensing and Support Services - Year 4 Optional Renewal		
Sustaining Support**		64,350
Licensing (20 users) – PSDS Professional		56,557
Total Licensing and Support Services - 5 years	$	604,536
Additional User Licenses - 1 user – PSDS Professional		2,828
Additional User Licenses	$	2,828

**Sustaining Support - This budget may be used for support and enhancements, within the budget provided. After the initial go-live, customers typically issue additional PO's to support special projects and ongoing enhancements.

CERTIFICATION REGARDING LOBBYING

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents of all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, United States Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

Organization: Business Solutions and Technologies LLC

Street address: 1 Creative Place

City, State, Zip: Charleston, WV 25311

Diana Lewis
CERTIFIED BY: (type or print)

VP Strategic Initiatives
TITLE:

(signature) (date)

Approved by OMB

0348-0046

Disclosure of Lobbying Activities

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

(See reverse for public burden disclosure)

1. Type of Federal Action: a. contract ____ b. grant c. cooperative agreement d. loan e. loan guarantee f. loan insurance	**2. Status of Federal Action:** a. bid/offer/application _____ b. initial award c. post-award	**3. Report Type:** a. initial filing _____ b. material change **For material change only:** Year _______ quarter _______ Date of last report___________

4. Name and Address of Reporting Entity: ____ Prime _____ Subawardee Tier______, if Known: **Congressional District, if known:**	**5. If Reporting Entity in No. 4 is Subawardee,** Enter Name and Address of Prime: **Congressional District, if known:**
6. Federal Department/Agency:	**7. Federal Program Name/Description:** CFDA Number, *if applicable*: _________________
8. Federal Action Number, *if known:*	**9. Award Amount**, *if known:* **$**
10. a. Name and Address of Lobbying Registrant *(if individual, last name, first name, MI):*	**b. Individuals Performing Services** *(including address if different from No. 10a)* *(last name, first name, MI):*
11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.	**Signature: _________________________________** **Print Name:________________________________** **Title:____________________________________** **Telephone No.: _______________ Date: _______**
Federal Use Only	**Authorized for Local Reproduction** **Standard Form - LLL (Rev. 7-97)**

INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action, or a material change to a previous filing, pursuant to title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.

2. Identify the status of the covered Federal action.

3. Identify the appropriate classification of this report. If this is a followup report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.

4. Enter the full name, address, city, State and zip code of the reporting entity. Include Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or subaward recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants and contract awards under grants.

5. If the organization filing the report in item 4 checks "Subawardee," then enter the full name, address, city, State and zip code of the prime Federal recipient. Include Congressional District, if known.

6. Enter the name of the federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.

7. Enter the Federal program name or description for the covered Federal action (item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.

8. Enter the most appropriate Federal identifying number available for the Federal action identified in item 1 (e.g., Request for Proposal (RFP) number; Invitations for Bid (IFB) number; grant announcement number; the contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Included prefixes, e.g., "RFP-DE-90-001."

9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in item 4 or 5.

10. (a) Enter the full name, address, city, State and zip code of the lobbying registrant under the Lobbying Disclosure Act of 1995 engaged by the reporting entity identified in item 4 to influence the covered Federal action.

    (b) Enter the full names of the individual(s) performing services, and include full address if different from 10(a). Enter Last Name, First Name, and Middle Initial (MI).

11. The certifying official shall sign and date the form, print his/her name, title, and telephone number.

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)

[✓] 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.

____
Company

____
Authorized Signature

____
Date

Cloud-Based Statewide Case Management System
RFP: MIS2300000003

Prepared for:
West Virginia
Health and Human
Resources

Business Solutions and Technologies, LLC
dba BizSolutions.Tech
One Creative Place
Charleston, WV 25311
www.BizSolutions.Tech

Prepared by
Diana Lewis
VP Strategic Initiatives
June 24, 2023

Cover Letter

Mike Stockman
Founder and CEO
Charleston, WV

Diana Lewis
VP Strategic Initiatives
Charleston, WV

Dear Evaluation Team Members,

Upon review of your Request for Proposal (RFP), BizSolutions.Tech is excited about the opportunity to partner with West Virginia Health and Human Services to provide a cloud-based Statewide Case Management System. We understand your need for an effective solution for citizens to report child welfare issues and complaints.

At BizSolutions.Tech, we strive to:

- Do good work for our customers
- Maintain ongoing relationships with our customers and partners
- Build solutions that evolve and grow with business needs
- Provide a positive, constructive teaching approach to ensure success and build trust
- Be good people

Our company is based in **Charleston, WV**. We were founded in 2017, as a small and veteran-owned business. From inception, we have delivered successful technology implementations in a variety of industries and with companies of all sizes. I believe our IT and implementation expertise will result in a successful solution that meets your needs.

We are enthusiastic about the opportunity to partner with you to accomplish your goals and to make West Virginia stronger. I look forward to continued conversation and thank you for your time and consideration of our response.

Sincerely,

Mike Stockman	Diana Lewis
Founder and CEO	VP, Strategic Initiatives
Mike.Stockman@BizSolutions.Tech	D.Lewis@BizSolutions.Tech

Contents

About BizSolutions.Tech

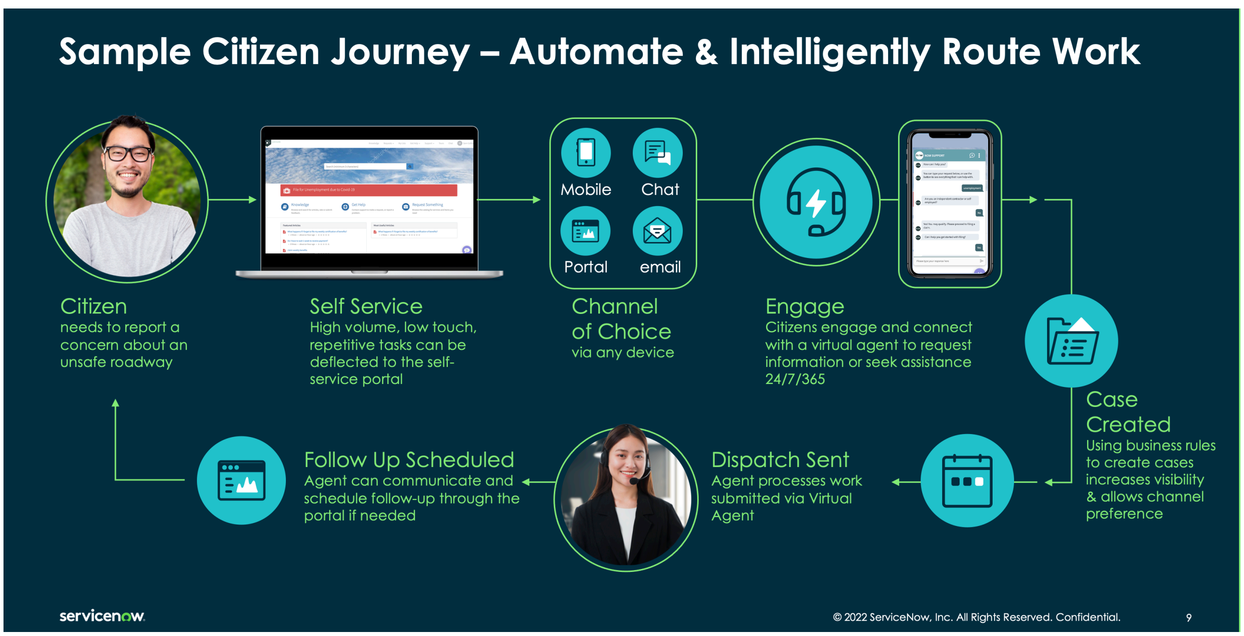
Business Solutions and Technologies LLC, dba BizSolutions.Tech is a **West Virginia** based company that brings over 40 years of IT implementation, support, and training experience, for customers ranging from local to global. We also have 14 years of experience with the ServiceNow platform. We are seasoned IT professionals, who focus on providing thoughtful, well designed, value-driven solutions for our customers.

We have made a commitment to growing the technical competency of **West Virginia students** by providing ServiceNow technical training and providing jobs in **West Virginia**. Our mission is to build the **West Virginia economy** by bringing technical jobs and revenue to the state.

About ServiceNow

ServiceNow makes work, work better for people. The ServiceNow cloud-based platform and products deliver digital experiences that help people do their best work.

For ServiceNow, this is what success looks like for citizens and caseworkers:



The Now Platform enables you to:

- **Connect your enterprise** – Create seamless experiences for employees and citizens.

- **Transform operations** – Empower employees to address citizen needs quickly and proactively. Solve issues by connecting the entire organization. Make it easy to find information, make requests, and track services.
- **Unleash the power of IT** - Modernize your operations to optimize productivity, cost, and resilience with a single platform for IT.
- **Drive workforce productivity** - Make it easier for employees to get what they need, when they need it. Embed intelligence into every interaction to deliver experiences that break down silos and unlock productivity. Empower service delivery teams with targeted, purpose-built solutions.
- **Reduce citizen effort** – Make government service more available through assisted and self service. Promote engagement and advocacy.
- **Drive customer satisfaction** – Create easy-to-use interfaces that enhance the customer experience. Keep everyone engaged, productive, and informed.
- **Build apps fast** - Create intuitive experiences users love. Quickly build digital workflow apps to automate any process in an easy-to-use, no-code environment.
- **Adopt a trusted solution -** Thousands of customers use ServiceNow, including over 85% of the Fortune 500, over half of the Fortune 100, and many small- and medium-size organizations worldwide. Our customers span almost every industry and vertical from finance, energy, and education to state and federal, and managed service providers—in 50 countries. Once customers adopt the ServiceNow platform, they stay with it. ServiceNow had an approximate 98% customer retention rate in 2022.

ServiceNow was founded in 2004. Since that time, ServiceNow has grown from a small private company with a few employees in San Diego, California to a public company (NOW on the NYSE) with over 20,500 employees in over 70 offices worldwide, with headquarters in Santa Clara, California.

Proposal

This section summarizes the solution proposed, based on the scope and requirements in the CRFQ. For easy reference, each section shows the related wording from the CRFQ.

1	**PURPOSE AND SCOPE**
	From CRFQ: The West Virginia Department of Health and Human Resources (DHHR) has established within its Office of Inspector General (OIG) an office of the Foster Care Ombudsman (FCO). Mandated by state statute W.V. Code §9-5-27, this newly established child welfare-directed service is responsible for: • advocating for the rights of foster children and foster parents

	• participating m any procedure to investigate and resolve complaints filed on behalf of a foster child or foster parent • monitoring the development and implementation of federal, state, and local legislation, regulation, and policies with respect to foster care services; and • establishing and maintaining a statewide uniform report system to collect and analyze data relating to complaints for the purpose of identifying and resolving significant problems facing foster-children and foster-parents as a class. The FCO is responsible for generating and distributing periodic reports prepared to standard and ad hoc specifications to serve the needs and interests of various stakeholder groups. As such, the purpose of this request for quotations is to obtain competitive bids for a Foster Care Case Management system. The FCO will: • **receive, evaluate, refer, assign, monitor, investigate, and report** on child-welfare related concerns, complaints, and otherwise identified systemic issues as determined by the FCO or assigned/recommended by its stakeholders inside and outside state government. • In addition to providing **hosting and technical support** for the technology, the chosen vendor will provide services to include **system design, installation, application/report configuration, user training, support services, and periodic upgrades/enhancements** for the chosen solution.

System Design

BizSolutions.Tech's proposed system design provides a comprehensive and tailored cloud-based DHHR Case Management system, built on the ServiceNow® Public Sector Digital Services (PSDS) platform. It is pre-built for government agencies with out-of-the-box digital workflows, service catalogs, configurable business rules, and workspaces on a single platform with a single architecture. While the scope of the current CRFQ is for handling child welfare related complaints and concerns, this solution can grow to handle many other services for your organization.

PSDS licensing is based on the number of government employees. Citizens may obtain user accounts to enable secure communication, at no additional charge. While the questions and answers in Addendum 1 indicated no user accounts were required for this CRFQ, some citizen capabilities are shown here, since they are included in the platform at no additional charge.

Your tailored solution, built on the PSDS platform, will provide the resources necessary to support the case management process for complaints as follows:

Receive

A portal will be provided for citizens to report child welfare issues and complaints.

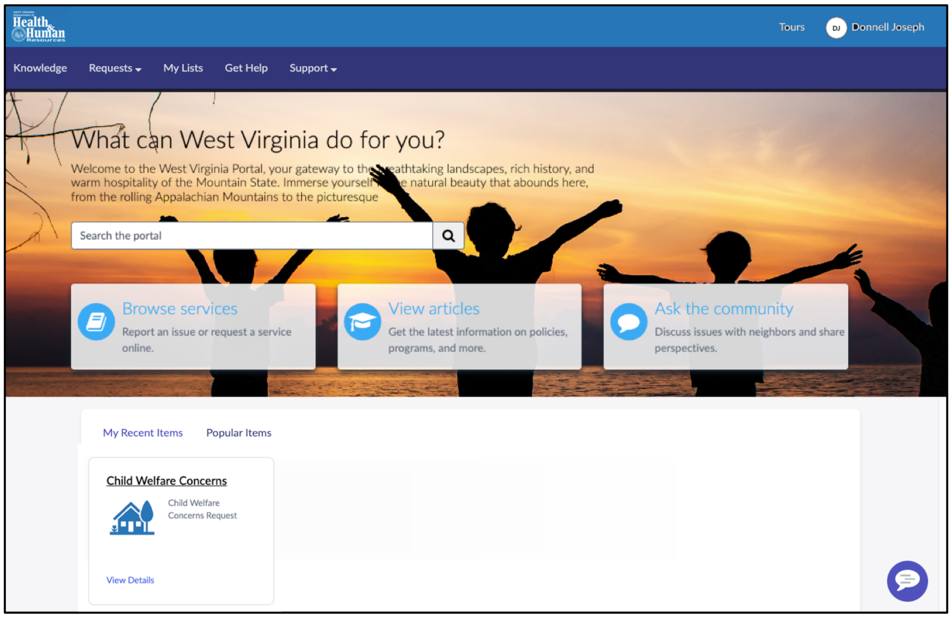


Figure 1-Citizen Portal

The complaint form will be tailored to accommodate the specific needs of DHHR.

Figure 2-Catalog Item for reporting Child Welfare Concerns

Figure 3-Concern Form

After the form is submitted, cases will automatically be created and will initiate a workflow based on DHHR standard processes. The form will use the playbook capability on the Now Platform to ensure the appropriate tasks are completed, and that required information is provided during each process phase. Estimated times can be allotted for each process phase or task, and case workers can capture their time spent on each task.

If desired by DHHR, the case submitter may use the portal to check status and establish two-way communication between the submitter and the assigned case worker. This is default functionality and can be removed.

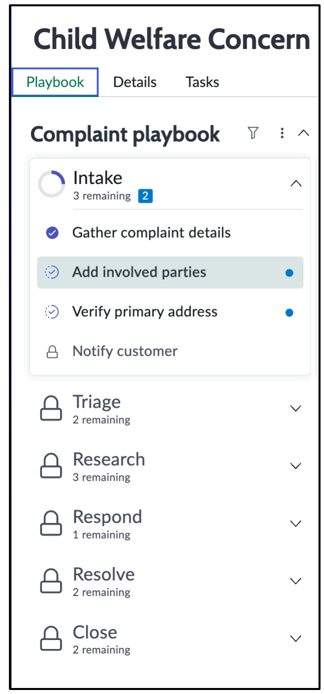


Figure 4-Example Playbook

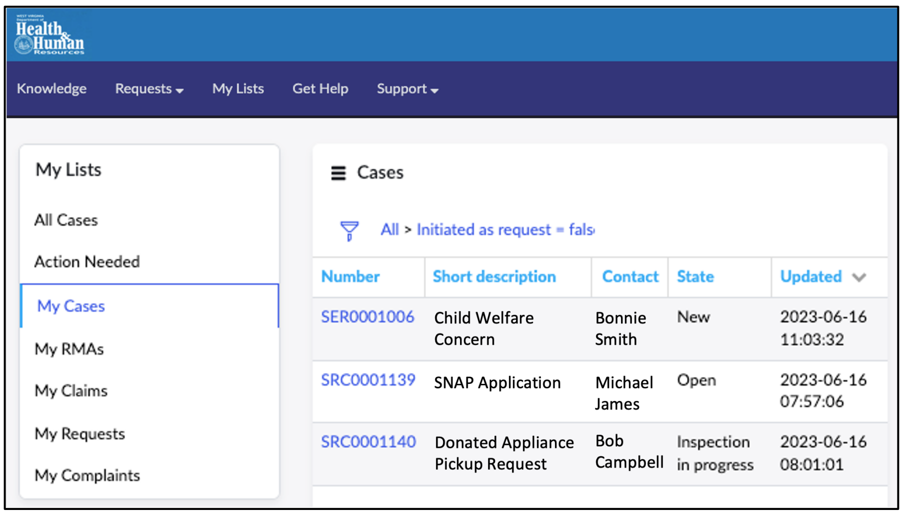


Figure 5-My Submitted Case List

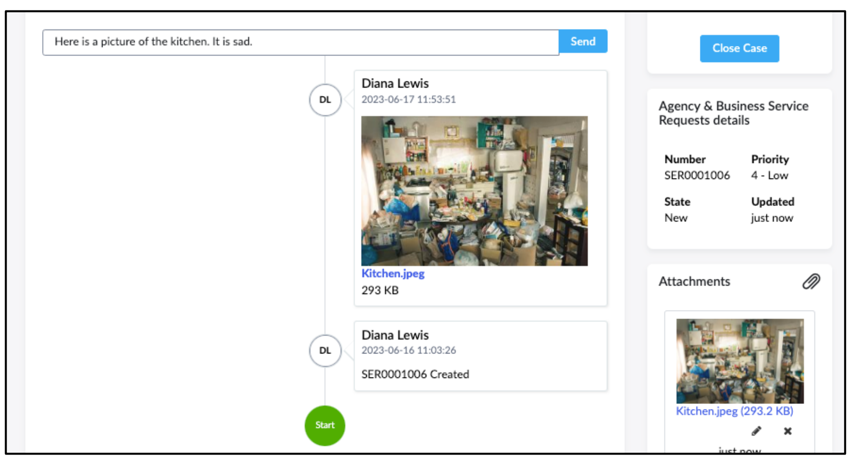


Figure 6-Communicate with Case worker regarding specific case

Additionally, the portal can contain useful resources for citizens, such as additional instructions or frequently asked questions. Announcements can also be created and shared via the portal. This information, and the visibility of the articles, can be maintained by the DHHR team.

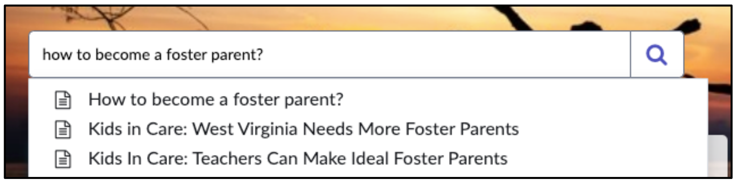


Figure 7-Example Knowledge Search on Citizen Portal

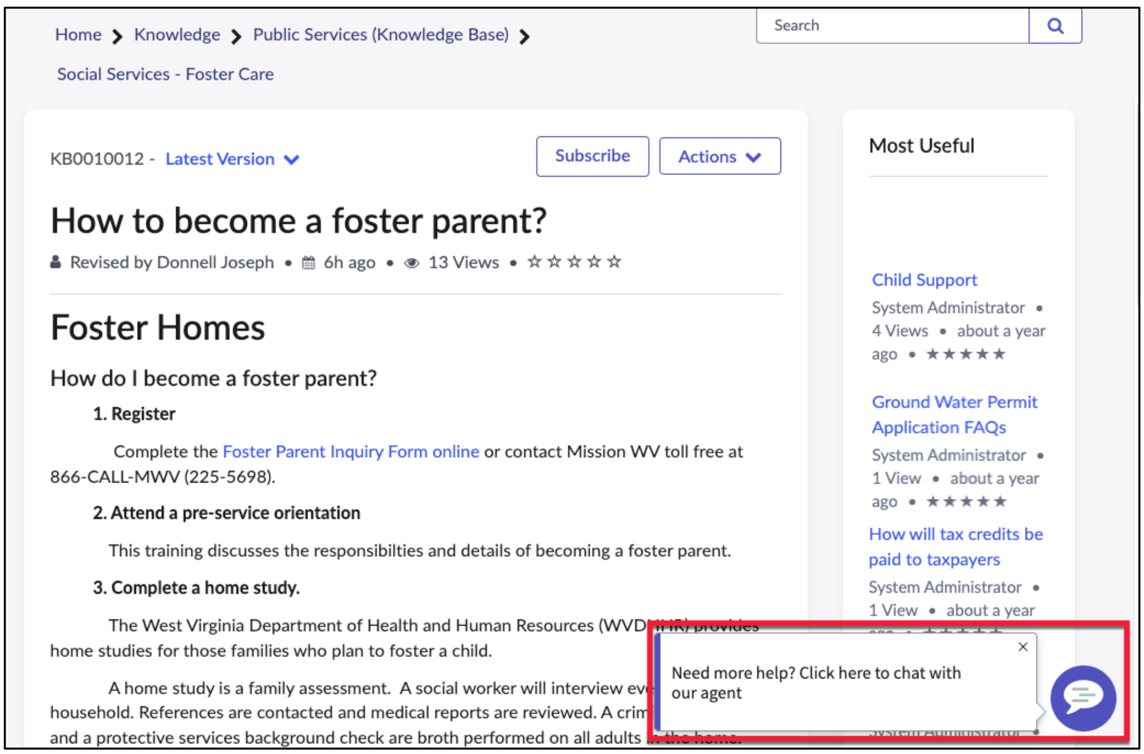


Figure 8-Example Knowledge Article on Citizen Portal

Live agent chat (shown above) is available, provided there is adequate staffing to monitor and respond to incoming questions. For this CRFQ, it was not a clear requirement. Virtual agent functionality is also available which provides a trainable chat bot experience for your citizens. Turning on these features and configuring them in the future, would provide another great communication channel for your constituents.

Evaluate

Cases are automatically routed to the appropriate group to perform the initial evaluation. This work is displayed on a purpose-built workspace designed to facilitate the work of the DHHR employees.

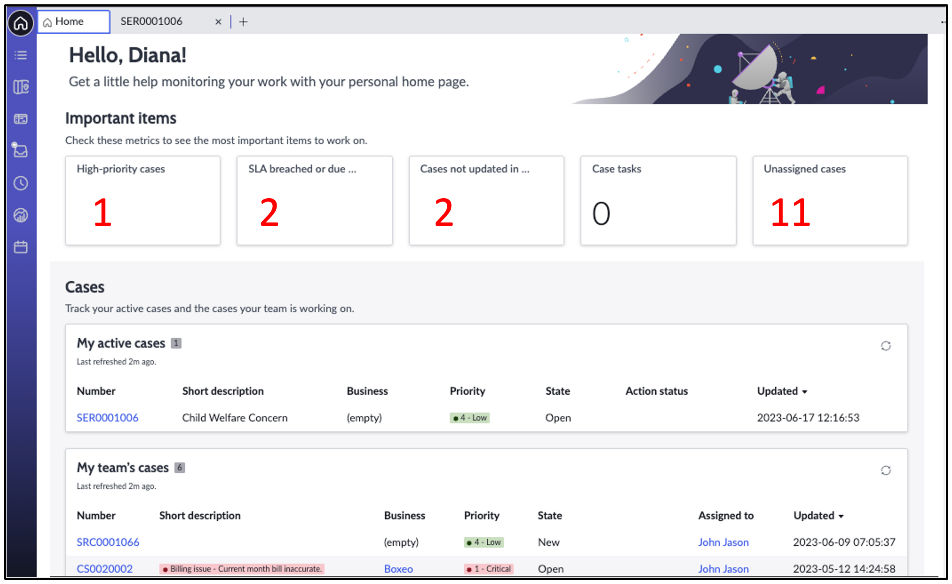


Figure 9-Case Workspace Home Page

When the evaluation is complete, and appropriate information is documented, the case moves to the next phase of the process.

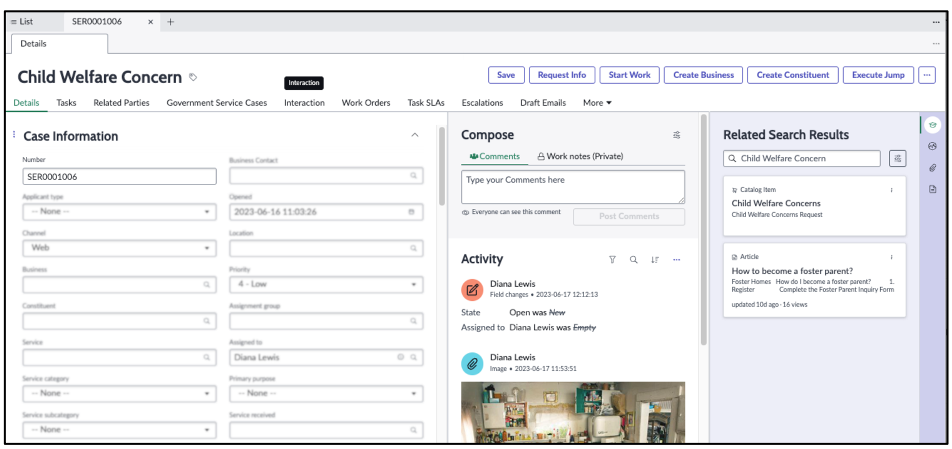


Figure 10-Example Incoming Concern/Complaint

Refer

Depending on the type of case, and other factors, cases are referred to an appropriate group for the next phase of work.

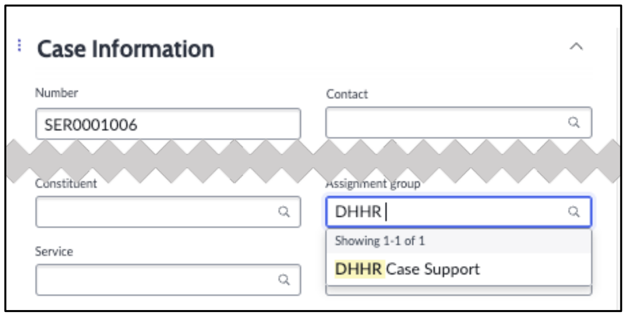


Figure 11-Assign to Group

Assign

The case is assigned to an individual from the assigned group to continue with the work.

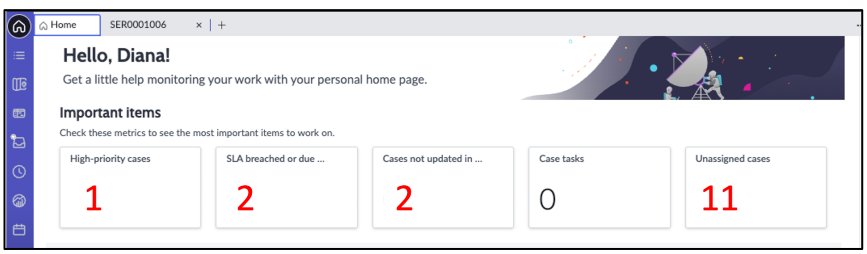


Figure 12-Workspace for Group members of the assigned case

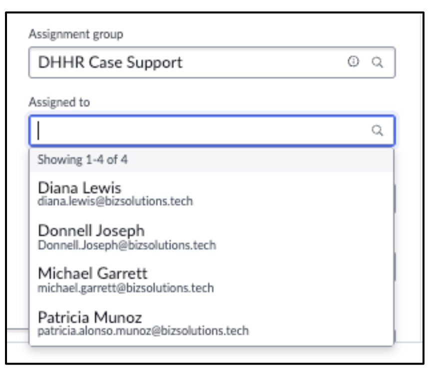


Figure 13-Select Assignee from Group List

Monitor

Dashboards are available for managers to monitor overall case worker progress and the distribution of the department's work. The dashboard allows managers to drill down into details as needed.

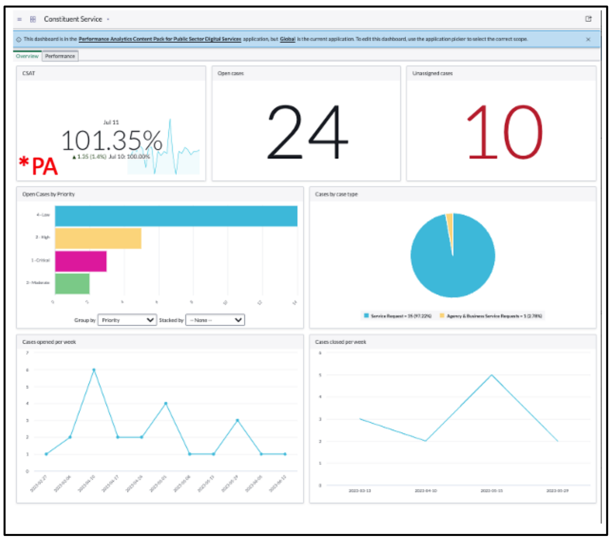


*Figure 14-Dashboard with Report Widgets and *PA Widgets*

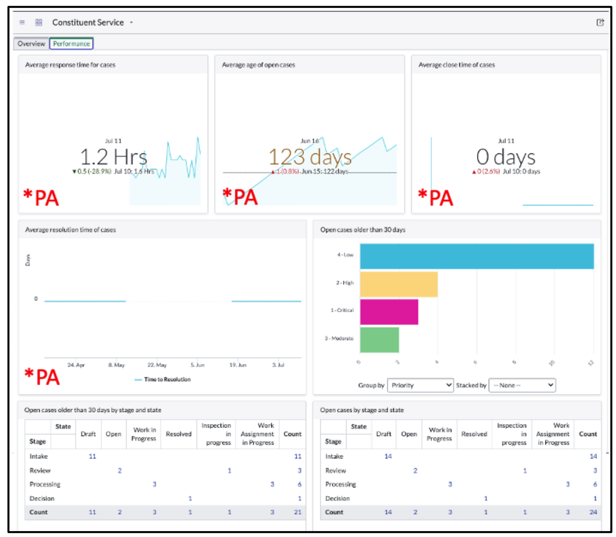


*Figure 15-Dashboard with Report Widgets and *PA Widgets*

Case workers can monitor their work via the Agent Workspace.

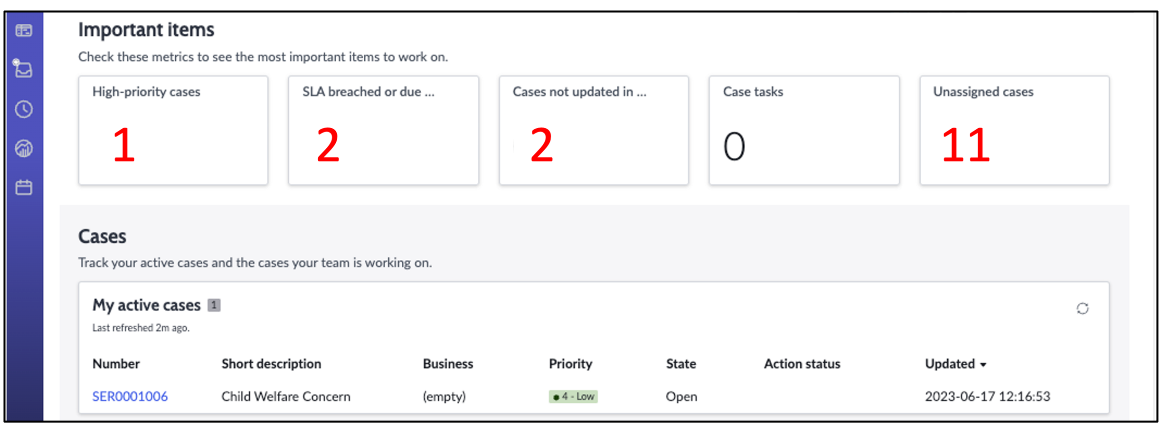


Figure 16-Agent Workspace

Service level agreement (SLA) timers can be established for different activities to facilitate monitoring of cases that are at risk or already exceeding the desired time frames.

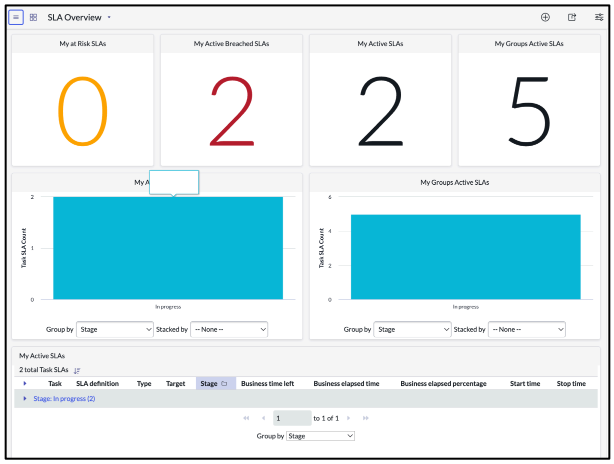
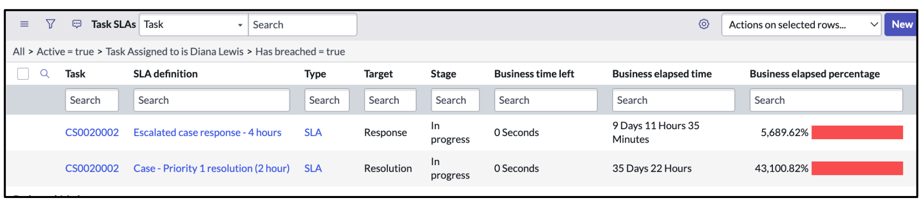


Figure 17-SLA Overview Dashboard

Clicking on the highlighted value or chart takes you to the list of cases that have expired or are nearing expiration.


Task SLAs
All > Active = true > Task Assigned to is Diana Lewis > Has breached = true

Task	SLA definition	Type	Target	Stage	Business time left	Business elapsed time	Business elapsed percentage
CS0020002	Escalated case response - 4 hours	SLA	Response	In progress	0 Seconds	9 Days 11 Hours 35 Minutes	5,689.62%
CS0020002	Case - Priority 1 resolution (2 hour)	SLA	Resolution	In progress	0 Seconds	35 Days 22 Hours	43,100.82%

Figure 18-Drill down view of the list of cases that have exceeded the SLA

An initial set of dashboards will be configured as part of the proposed system design. The DHHR team members will be trained on how to create additional reports and dashboards, as needed.

Investigate

Case workers will specify the individuals related to the case (involved parties) and their relationship to the situation.

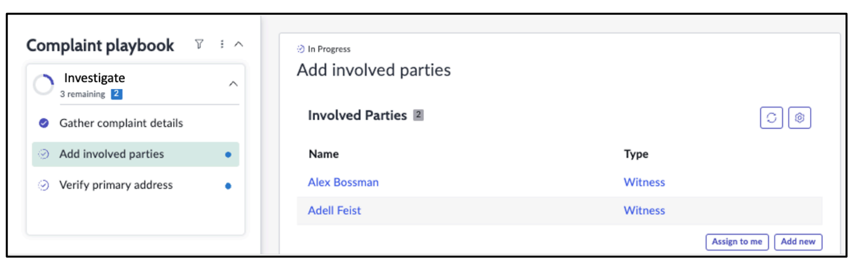


Figure 19-Playbook and Adding Involved Parties

Case workers can capture the notes from interviews and any other documentation relating to the case (emails, photos, videos, legal documents, school reports, etc.). The history is captured in the Activity stream and the audit log for each case.

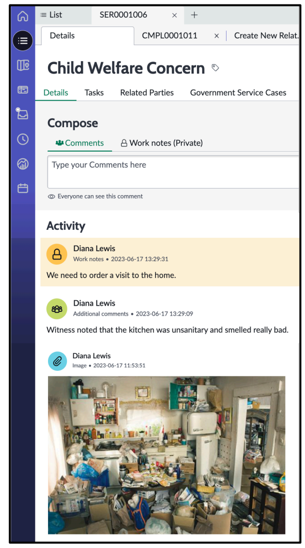


Figure 20-Activity Stream with Notes

Case Email - The case worker can use the client mail feature from the case record in the Now Platform to communicate with people associated with the case. Outgoing emails, and the incoming replies are automatically captured in the activity log for the case. When incoming mail is received, the record can be highlighted so the case worker is notified that new information is available.

Email Templates - Commonly used email templates will be created as part of the system design. These templates can be selected as appropriate from the case record. Superusers on the DHHR staff will be trained and empowered to set up new email templates in the future.

Notifications - The case workflow includes standard notifications that would be sent at predefined stages in the process, like when a case is received or resolved.

On completion of the case, the findings and future actions are documented on the case record.

Throughout the life of a case, reminders can be set for tasks, and special notifications can be set to pop up on individual case records.

Report

The ServiceNow reporting capability is easy to use, has a variety of visualization options, and will include a base set of reports created specifically for DHHR Case Management. Most important, you will not need to export information to spreadsheets or other BI tools to get the information you need. Reports may be scheduled and published, but often live reports and dashboards are preferred, since they show up-to-the-minute information.

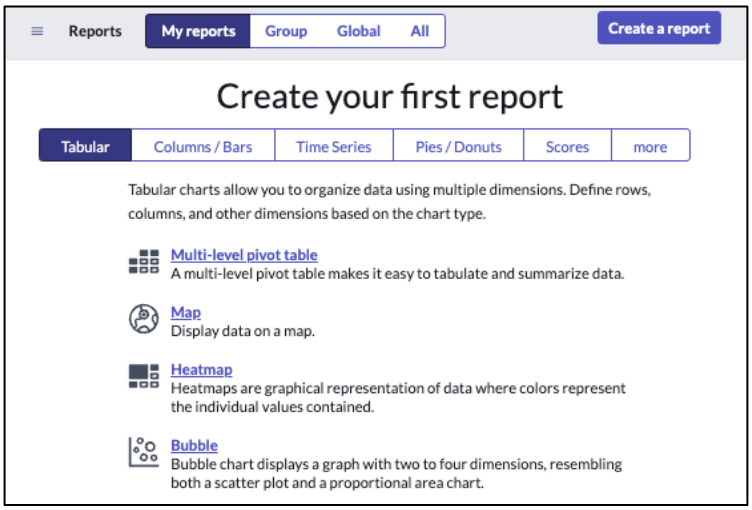


Figure 21-Reporting Landing Page

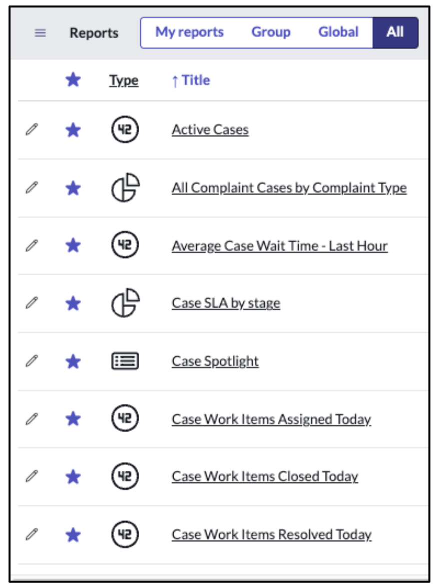


Figure 22-Sample List of Reports

Dashboards will be created for different stakeholder audiences. Dashboards will contain multiple reports and score widgets to highlight the desired level of detail, always with the ability to drill down for more detail as needed.

Performance targets may be set and monitored two ways:

- At the case level, or the process phase within a case, using the SLA capability. SLA clocks run and provide visual cues (red, yellow, green) for status. Reports may be run to show how many cases exceeded the SLA clock, and how many completed before the clock ran out. Notifications may be triggered when clocks are nearing their expiration.
- At the overall process level (e.g., Average age of cases over time, with forecast). Process level targets would be created and monitored using Performance Analytics (PA). PA is an advanced reporting capability, which includes notifications and forecasting.

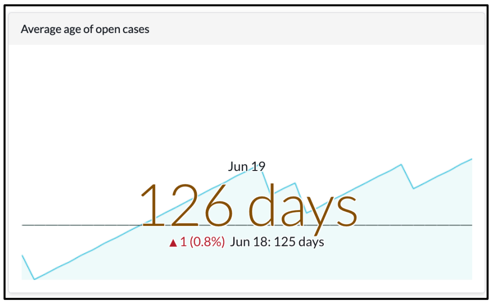


Figure 23-Average Age of Open Cases with Target Line

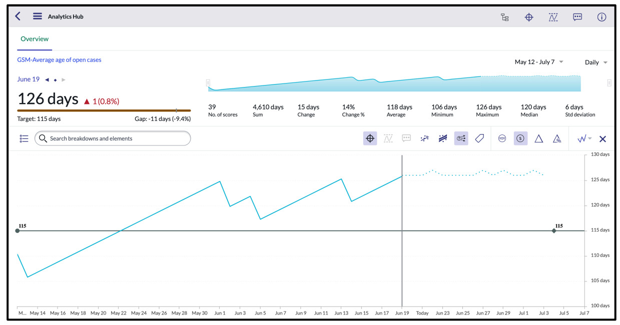


Figure 23-Drill down view of Indicator with Target and Forecast

Individual Case Reports may be exported to PDF from the case record. Different formats and content will be available based on the level of detail appropriate for the audience (Summary or Detail). For example:

- Summary format could show high-level information like reported by, subject, description of issue, reported date, current status, and case worker.
- Detail format could include all case details, including the Activity stream.

The case worker will distribute the report, using the client email feature on the case record. This ensures records are kept regarding the sharing of case information.

Employee Center

The Employee Center is a one stop shop for DHHR internal users. Initially, this portal will house procedures and FAQs for case workers, and can display announcements, scheduled by your administrator. In addition, this portal can be visible to all DHHR employees for no license fee. To synchronize large numbers of users, an integration with your user management system would be required. This additional user integration is not included in this quote but could be accommodated through a change order.

As your ServiceNow implementation evolves, this portal can consolidate internal services (all of DHHR, or all of WV) into one Employee Center. Notice this sample has HR, IT, Legal, etc.

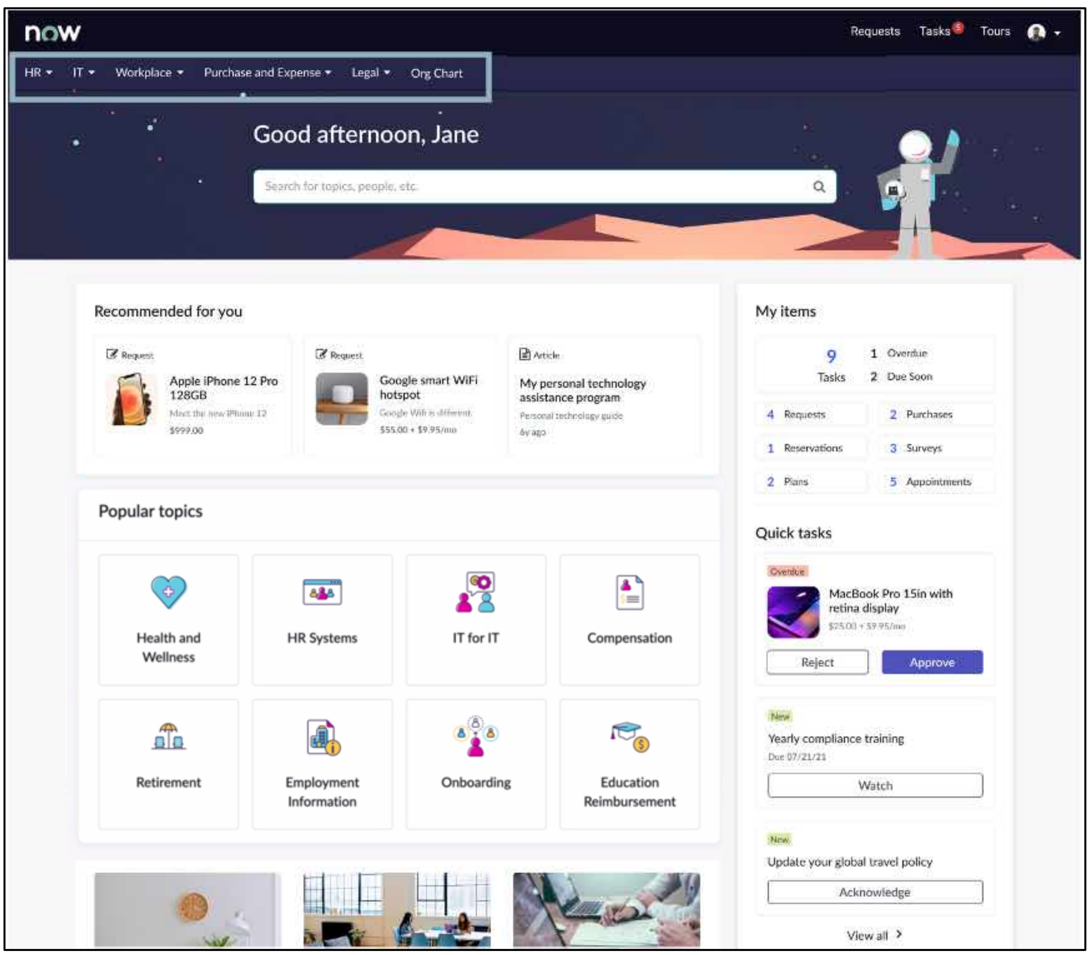


Figure 24-Example of Employee Center Portal

Installation

ServiceNow's PSDS base configuration will be installed on the platform by ServiceNow and it will be maintained and backed up according to ServiceNow Application Platform as a Service (aPaaS) standard operating procedures. BizSolutions.Tech will enable any additional functionality as needed per the design.

Application / Report configuration

BizSolutions.Tech will configure the applications based on the requirements documented during the team workshops. Reports will also be configured using ServiceNow's Reporting and Performance Analytics applications. Dashboards and scheduled reports will and expected report content including sharing requirements.

User training

- DHHR User Training Development – Complaint Flow
    - Training Slides
    - Training Quick Reference Cards
    - Training Video
- DHHR Case Worker Training Delivery – On-site instructor-led
    - 1 Day of Training, on site in Charleston, for a total of 15 users
- Superuser Training Delivery – On-site instructor-led – 5 students
    - Reporting and Dashboard Training
    - Portal Administration – Announcements
    - Mail Templates
    - Knowledge Management
    - Performance Analytics - User training
- ServiceNow System Administration – On-site Instructor-led – 5 students
- Open House for Q&A and on-site marketing for DHHR staff
- Travel expenses will not be required, as the instructors are located in Charleston, WV.

Support services

BizSolutions.Tech will be your first line of support for system issues, enhancements, and defect correction. As needed, BizSolutions.Tech will have access to the ServiceNow Impact team assigned to the DHHR project, to provide advanced support. BizSolutions.Tech will provide training and training materials to your users. Additionally, we can train your IT support organizations on day-to-day internal and external user support.

Upgrades/enhancements

The ServiceNow platform has two major upgrades throughout the year. Between those upgrades are patches that can enhance functionality and resolve any issues identified in the platform. BizSolutions.Tech will coordinate, test, and apply upgrades and patches, as needed throughout the contract. Based on experience, customers typically require only one major release per year. As necessary, we can jump a release to stay in sync with ServiceNow's current release version.

BizSolutions.Tech excels at ongoing engagement with customers, throughout their ServiceNow journey. The quote includes a budget for ongoing support which may be used for support and enhancements. After the initial go-live, customers typically issue additional purchase orders to support special projects and ongoing enhancements.

RFP Specifications and Responses

3.1	**Contract Items and Mandatory Requirements:** Vendor shall provide Agency with the Contract Items listed below on an open-end and continuing basis. Contract Items must meet or exceed the mandatory requirements as shown below. **NOTE:** Some sections contain multiple requirements, so they are broken into parts to allow separate responses for each requirement.		
	Status key: ☑ Meets or Exceeds ☒ Not available ? Some questions		
#	Requirement	Status	Comments
3.1.1	Compatible with the West Virginia Office of Technology's current operating system, Windows **11**	☑	ServiceNow platform is compatible with Windows 11, using any of the following browsers: • The latest public release of Firefox or Firefox ESR • The latest public release of Chrome • Safari version 9.1 and later • Microsoft Edge version 90 • Internet Explorer version 11 Other notes: • Edge mode is supported. • Compatibility mode is not supported. • Setting Security Mode to High (via the Internet Options > Security tab) is not supported. • Internet Explorer 11 is susceptible to memory leaks, causing performance impacts.
3.1.1.1	Allow system upgrades and enhancements	☑ ☑	ServiceNow platform is designed with configuration, customization, and upgrades in mind. https://www.servicenow.com/now-platform.html?state=seamless Additional licensed users can be added for price specified in the WVOasis price sheet.

	Scalability: Allow for increasing the number of licensed users and to support unlimited persons, cases, contacts, activity transactions, and reports	☑	There are no limits to the persons, cases, contacts, activity transactions and reports in the PSDS Professional License.
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	☑ ☑	Announcements broadcast messages to portal users (internal and external). They display in an announcement banner or an announcement widget. Announcements can also be sent by email. Through user criteria, you can create announcements visible only to specific users, groups, roles, organizations, and more. Using Sidebar, agents can have real-time collaboration/chats with other internal users, regarding a case or interaction from the Workspace. These Sidebar discussions facilitate the exchange of information and knowledge to help resolve issues faster and with higher-quality outcomes. Additional chat capabilities may be enabled by using options, such as Microsoft Teams and Slack. This capability allows the agent to chat with internal and external users. Access sharing – Sharing documents, links to records, and reports is easy using the sidebar chat capabilities. If screen sharing is required, an integration with Microsoft Teams, Zoom, or Slack would accommodate a screen sharing scenario. These integrations also allow for group

			meetings with internal and external participants.
3.1.1.3	System must allow for speech to text functionality where applicable, and be… accessible from laptops, desktops, and tablets	? ✓ ✓	We asked for clarification on this requirement during the open question window but did not receive a response. The use case for this is not clear, so we made an assumption that this is required for transcriptions of online collaborative meetings. Integration with Microsoft Teams would accommodate transcription of collaboration sessions. Other applications like Zoom, integrate with ServiceNow and have this transcription capability. For the purpose of this CRFQ and meeting all of the mandatory requirements, we have included one integration of a collaboration tool, either Microsoft Teams or Zoom. Note: This proposed solution would require 3rd party licensing for Teams or Zoom, which is not included in this quote. ServiceNow® mobile apps have been officially tested on the following devices: Apple iPhone, Apple iPad, and Android. Additional devices might work as well. The Now Platform supports any device (laptop, desktop) that supports the browsers specified in 3.1.1

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	☑	The ServiceNow® Reporting application enables you to create, schedule, and share reports in a wide variety of formats. Reports can be published to Dashboards designed for different audiences (Managers, Executives, etc.) The Performance Analytics application provides additional reporting capabilities, like reporting on calculated indicators, displaying variances against global and personal targets, and sophisticated trending and forecasting. Both Reporting and Performance Analytics support drilling down to underlying records. See the Reports section on page 15, for more detail and examples.
3.1.1.5	System must provide a quick search capability based on a single and or an advanced multiple field/filters	☑	Global text search The global text search field in the Now Platform UI enables search of multiple tables from a single search field (e.g., search on a name to locate records relating to that person). Portal Search Each portal features a prominent search box, which locates information published to the portal, like Knowledge Articles, Items to Order, Frequently Asked Questions. List Search From a list, you can search from the search box, the column headers, and from a full-featured condition builder,

			which allows filtering by field, and multiple criteria. Agent assist The Agent assist feature in Workspace automatically displays possible solutions for records that agents open.
3.1.1.6	System must allow name fields must include capacity to enter and store nicknames, appellations, and suffixes	☑	The Now Platform allows configuration of new fields on tables to address custom requirements for storing information needed, like nicknames, etc.
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	☑	Case records have a History feature, whereby you can view the changes to the case via a list or calendar view. Each change to the record is captured, including: • Field values that change, New field value, Old field value • Number of times this record and field have been updated • Date and time when the change occurred. • User who made the change.
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	☑	The Now Platform provides several levels of security before an end user has the capability to perform CRUD (Create, Read, Update, Delete) operations on a table: User Authentication/Login: Users, Groups, and Roles Application and Modules Access: Controlled by roles configured at the Application and Module level Database Access: Access to tables and their records and fields are controlled

			via globally defined system properties (deny access is the default behavior) as well as table and field level access controls. In addition to table-level access control, the Now Platform also provides role-based access control. This allows you to create roles that can access specific ServiceNow applications and capabilities. You then assign one or more of these roles to users or user groups, The Now Platform comes with predefined base roles, and many ServiceNow applications also come with predefined roles. You can also define your own roles.
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.	☑ ☑ ☑	As an Application Platform as a Service, the Now Platform allows access to data, applications, tools, and interfaces through one platform allowing users to leverage a common data model and set of tools to automate processes across the organization. Documents attached to case records, launch seamlessly into their native applications, such as Word, Excel, or Google Docs formats. ServiceNow allows data and information to be captured and files attached in various common formats such as Word, Excel, PPT, Media, HTML, etc. These attachments can be added to any record type: person, case, task, etc.

	System must allow documents to be thumbnail/first page previewed prior to full access	☑	The Portal and Workspaces allow users to see attachments in the Activity stream as a thumbnail and then are able to click to open the file.
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.	☑	Follow-up field On cases and case tasks, agents and/or supervisors, or other internal users may select a date and time field. The agent case list can be sorted by date and time.
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.	☑ ☑ ☑	See 3.1.1.5 for Search capabilities The History tab shows a chronological history of records accessed and lists viewed. The Workspace provides for keeping multiple cases open at the same time to enable multitasking. Avoid Duplicates When typing a caller name, a list is shown of users with matching names. This list can be tailored to show nicknames, and appellations. When selecting a name, you can view more information about the name to ensure you are selecting the correct name (e.g., I'm looking for John Smith from Apple Street). Once a name is selected, a list of related records for that person displays. This allows you to browse and select open cases, instead of creating new. If duplicates do get created by accident, administrators can use the Merge Tool to resolve the duplication.

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.	✓ ✓ ✓ ✓ ✓	All of these data elements and attachments are accommodated. Maps for viewing location and driving directions will be done with Google maps API. Persons can be identified and associated with cases using the Involved parties section. The person's relationship to the case can be specified here. Households may be defined, with each having a Head of Household who is able to open and manage cases on behalf of the other members of the household. USPS.com has a Web Tools API Portal that allows apps to be integrated for address verification. Google maps supports foreign addresses and characters USPS API supports Military Zip Code matching.
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.	✓	Attachments are available throughout the platform and almost all file types are supported. ServiceNow recommends that videos not be streamed (many videos playing to many users at the same time) since the instance is not optimized for streaming services. This does not seem to be the use case for this requirement.

	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.	☑ ☑	All of the mentioned documents are supported for attachments. All document types except images allow for searching at document level.
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.	☑ ☑ ☑	Special handling notes may be configured to pop up on related records (e.g., foster parent has a certification that has expired and needs to be renewed). This alert could pop up on any case record associated with that foster parent. Other status indicators (action status) display on the case list to highlight records which are blocked internally, externally, or require attention. ● Blocked internally Workflows and playbooks provide labeling for the stages in the standard flow, and the information required at each stage. Time tracking can be required on the case and case tasks, through the lifecycle of the case.
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.	☑ ☑	Unique record numbers are automatically assigned for cases, and case tasks. Case records may be viewed and navigated via the Workspace or via the

	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.	☑ ☑ ☑	classic form. If a special abbreviated case summary is required for a specific user audience, that can be configured. Automated notifications may be configured for different stages in the lifecycle of a case. These notifications are captured in the Activity stream with date and time. Email templates may be selected from the mail tab on the case record. These email templates can accommodate auto-filling of information, like the case worker's name. These emails, and any associated replies are captured in the Activity stream with date and time. Paper mail printing is not available in an automated fashion but could be accomplished using a special mail template on the case record. This template would contain the appropriate mail sections: address, subject, salutation, body, and signature. Once the mail is built from the template, the text can be copied and pasted into a Word or Google Docs file, where it can then be printed and mailed.
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.	☑	The Now Platform can send information based on manual request or automated based on criterion (i.e., data changing as in being reassigned, closed, or virtually any condition). The information may be sent via email, SMS, MS Team integration, and other integrations as determined as necessary.

		☑	Electronic delivery of this correspondence could leverage groups, distribution lists or other conditions. Specific formats could be text, html, xml, pdf, etc.
	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.	☑	Templates/form letters are easy to build. Several will be provided with the implementation, and superusers will be trained on how to create and publish new ones as needed.
	System must support capability to create output in hard copy, paper letters, emails, or Google Docs.	☑	The easiest way to print hard copy, is to copy/paste from the email template on the case, into a Google Doc that can be printed. This approach is included in this quote.
		?	For high volumes of letters, hardcopy or paper-based output is possible via direct print from a user's desktop or to organizational network printers when properly integrated. Note: hardcopy would require configuration which is not out of the box. This is typically a specific view and a client script for desktop printing and mid-server integration with printer for network printers accepting reports or Flow Designer documents. This approach is not included in the quote.
		☑	For high volumes of letters, like the annual thank you letter for foster parents, a superuser familiar with mail merges in Google Docs, or Microsoft Word, could perform a mail merge. A simple filter and export from the platform could provide the data required for the bulk mail merge. Then

			the batch can be printed from a word processor. Training for this is included in this quote.
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.	☑ ☑ ☑	Role based security access will be attributed to each user. Cases will only be visible to users having the proper roles. Creating, editing and deleting will also be controlled with roles. Cases can be assigned to groups automatically or manually. Once assigned to a group, only a member of that group may be assigned to the case. The case records can be set up to enable case transfers and task delegation by any group member; or it can be set to limit reassignment by people with additional roles. Workflows and playbooks are customizable to follow and support the department's standard procedures. Automated task generation can be defined as part of the flow.
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.	☑	Estimated costs may be assigned to tasks and/or stages in the workflow. Actual time may also be captured by the case workers during different activities. The estimated costs and estimated actual costs may be calculated using an average case worker hourly rate. This type of information can be reported using the Performance Analytics

			application which is included in this quote.
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.	☑	Workflows and service level agreement clocks can monitor time and automatically notify workers when the clock is nearing expiration. Approval requirements are communicated via email. Approval notifications may be configured for reminders, should the approval be left without response, after a specified number of days.
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.	☑	Theme Builder allows administrators the ability to brand a portal. Administrators will also be trained on how to manage knowledge bases, knowledge articles, announcements, and other portal content.
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.	☑ ☑ ☑ ☑	On the public-facing Citizen Portal, each user can enable text resize to increase the size of text up to 200% through their browser settings. In addition, administrators can configure accessibility features on the portal, globally or for specific users. Users can individually enable user preferences for themselves to meet their specific accessibility needs. The Customer Service application uses the Google re-CAPTCHA service. Security is built into all levels of the Now Platform. Security features can be implemented, from managing failed logins and encrypted password protection, to access control rules and audit logs.

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.	☑	Administrators can add new tables and fields to a table to store and display data. Some base capabilities include the following: make a field mandatory, change the field label or hint, add users to a Watch List allowing multiple users to subscribe to notifications, highlight list fields, modify string field length, specify default values in a field, make a field dependent, require unique values for a field, define field styles, record numbering, and identify choice lists for drop down fields.
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	☑ ☑ ☑	A playbook provides a step-by-step guidance through the life cycle of a government service case. The Service Request Playbook automatically appears in the Playbook tab when you create a service request case in the Workspace. A playbook takes a workflow and breaks it into multiple stages or lanes. Each stage in a playbook includes one or more activities, or steps, for you to complete. Stages can also include automated activities, such as auto-sending an email to a customer when a stage or activity is complete. A user can set Favorites also which can find and go to the user's most used pages quickly by adding them to the Favorites menu in the Next Experience Unified Navigation. See the detail for Reports, on page 15.

	graphics, including management reports for operational, performance and outcomes, incorporating conditions highlighting for important variances to targets.		
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.	☑ ☑ ☑ ☑ ☑	All these capabilities are available in the Now Platform. See the detail for Reports, on page 15.
3.1.1.25	System upgrades, enhancements, and error corrections must be at no additional cost/charge when such	☑	One major release upgrade per year is included in the quote. There is no additional license fee for upgrades,

	upgrades, enhancements, and error corrections are generally made available to its other clients of similar systems at no additional cost/charge.		only the hours for testing and implementation support are required, and are budgeted for, in Sustaining Support. ServiceNow patches will be published to correct platform errors and release new functionality. Prior to deployment into production, each Requirement/Deliverable will be tested internally by the BizSolutions.Tech team, then tested and approved by the DHHR acceptance test resource(s). If despite this due diligence, a defect is found after it is implemented, in the first 30 days, we will perform the correction under warranty at no charge. If identified after 30 days, the remedy will be corrected and billed against the sustaining support budget.
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.	☑ ☑	Citizen Portal will contain a service catalog which, in the future, can contain many options for requesting service. For this CRFQ, one service request will be created for submitting a complaint. The citizen will fill in the form and submit. A public use email may be used to receive inquiries from citizens. Incoming emails do not comply with a predefined format so they will require a manual review to determine if it is related to an existing case or if a new case is required. If an email is received from a known email address from an involved party already in the system, this will help the

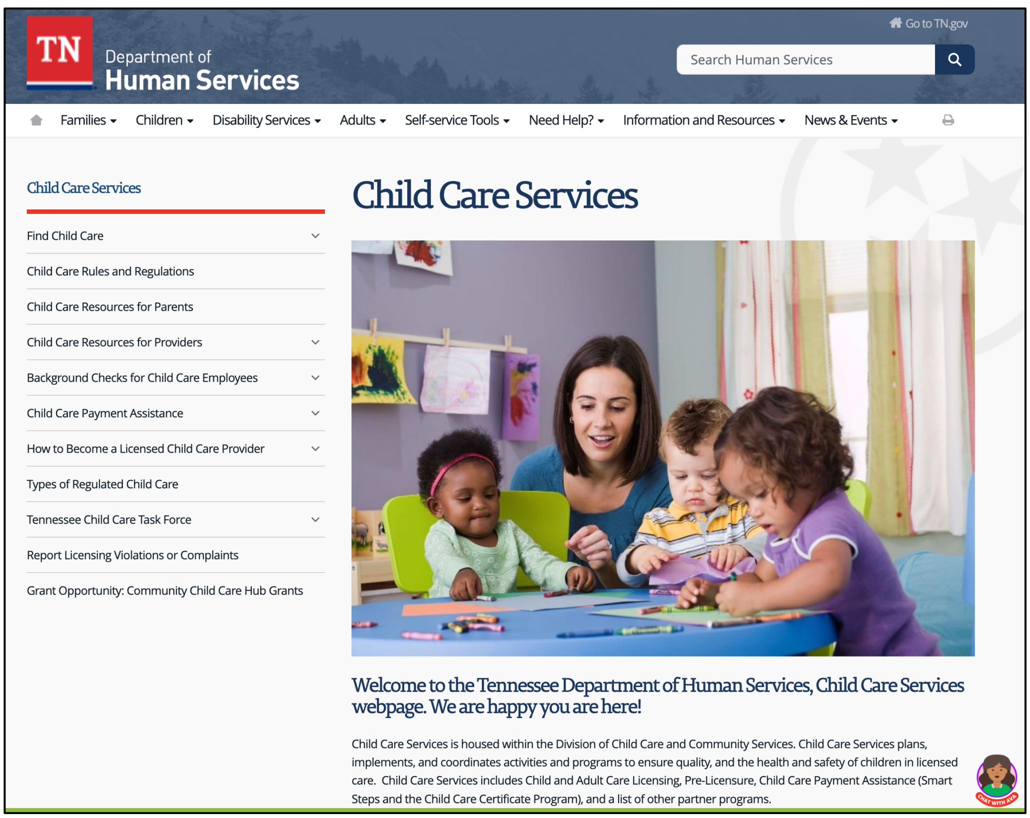
		☑	process of linking to new or existing cases. But since an involved party may be related to multiple cases, an association to a particular case cannot be assumed. A better approach is to allow external users to register, so they can access the portal, and view their existing cases. If they have new information, for an existing case, they can provide it on the status page. These updates are saved directly to the case and the case worker is notified that new information is available. There are no additional license charges for external users
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.	☑	Please see the Experience and References section on the following page..

Experience and References

ServiceNow PSDS Implementations

The following implementations have been built on the ServiceNow PSDS Platform. Since this is a public document, only the departments have been provided to protect personal information. We will gladly provide names and contact details should we be short-listed for the program.

Tennessee Department of Health and Human Services	South Dakota	Delaware
Child Care Services https://www.tn.gov/humanservices/for-families/child-care-services.html	All Agencies / Entire State https://www.sd.gov/	Division of Unemployment https://labor.delaware.gov/divisions/unemployment-insurance/



Customer Results

Customers achieve huge efficiency gains and improve citizen satisfaction. What do they say?

90% reduction in query assignment times *(Tennessee DHS)*

66% Adoption of self-service portals *(Washington DOH)*

TN Department of Human Services

Outcomes

99% Reduction in inquiry assignment times

70% Reduction in inquiry resolution times

Consistent Omni-channel experience for Tennesseans

"We immediately saw dramatic improvements in quality and efficiency. Instead of taking 36 hours to assign an inquiry, it now takes less than two minutes.

50% Reduction in support ticket volume digitized *(SMALS)*

90 Automated services available *(Washington DOH)*

Tennessee delivers rapid economic assistance at scale

TN Department of Human Services

85% Less time spent waiting in line

30% Less time needed to deliver assistance

40% Of inquiries resolved by Virtual Agent outside business hours

Challenge

- Front offices lacked a consistent process to assign tasks to the correct employee
- Silos between departments led to duplicate inquiries and delayed the distribution of essential assistance
- The pandemic and a major tornado led to a spike in the need for support

Solution

- Launched a public portal to distribute emergency relief benefits in just 72 hours
- Consolidated 18 inbound contact channels into a single portal for faster and easier handling
- Integrated Virtual Agent with the emergency relief program, customer portal, and social channels for efficiency and scale

"With the 1DHS portal, we have a single access point for childcare, family assistance, and child support, and we plan to add other programs in the future."

Howard County Department of Technology and Communication Services

Mission

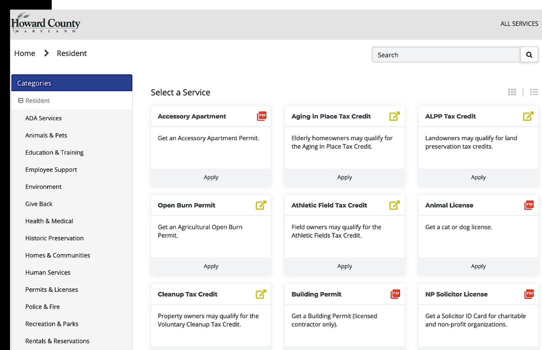
Support the county's many different departments, agencies, and functions necessary to run local government.

Problem

Disjointed citizen experience with multiple disconnected contact points, including websites, emails and phone numbers. 4-6 week paper based approvals. Many fragmented systems to track citizen requests and complaints.

Solution

Single platform that provides citizens one place to access the full range of 700+ services offered by the county government and affiliated agencies.

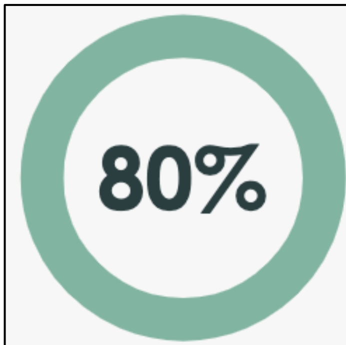


HOWARD COUNTY
MARYLAND

"This platform is a way for our citizens to interact with key government personnel, as well as report trees down, potholes, and things like that. We've created a 'one-stop shop' to provide easier and more convenient access to all County information and services."

CIO, Howard County, Maryland

Analyst Guidance



By 2023, more than 80% of the government's digital implementations that do not build on a technology platform will fail to meet objectives.

Source: Gartner

"By 2022, half of all digital government key performance indicators will include a citizen/ customer experience metric to ensure citizen centric services."

-Gartner

BizSolutions.Tech Certifications and Implementation Experience

How can we help? We can guide you through the journey. We have extensive certifications, teaching credentials, and implementation experience. The experience specifically related to this project are highlighted with the green check mark.

Education and Teaching Credentials

Accreditation - Public Sector Digital Services
Certified Implementation Specialist (CIS)
Customer Service Management Pro
IT Service Management Pro

Certified System Administrators (CSA)

Certified Application Developers

Certified to teach ServiceNow courses:

Micro-Certs

Flow Designer	CMDB Health
Configure the CMDB	Predictive Intelligence
Performance Analytics	Integration Hub
Virtual Agent	

Implementation Experience

Customers: Sport Vehicle Manufacturers, Financial Institutions, Toy Manufacturers, Data Centers, Aerospace, Satellite Manufacturers, Restaurants, Banks, Retailers, Point of Sale Manufacturers

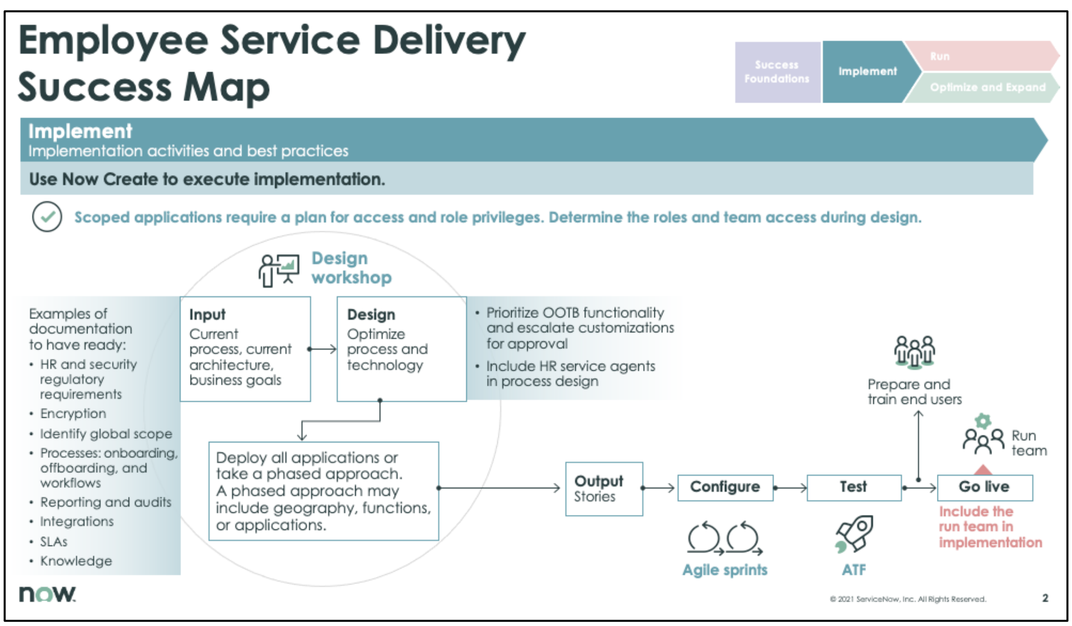
>80 Implementations	☑
10 Upgrade cycles, since 2017	☑
Customer/Citizen Portal	☑
Employee Portal	☑
Mobile Development	☑
Service Catalog	☑
Catalog items > 500	☑
Entitlements, Costing, Time Tracking and Billing	☑
Workspace	☑
Workflow	☑
Dashboards and Reporting	☑
Integrations – Zoom, Teams, Jira, Salesforce, Slack, Custom	☑
Performance Analytics	☑
Custom Development	
Multiple Languages (English, German, Dutch, Spanish)	
United States Government Security controls	

Program Management Methodology

BizSolutions.Tech uses the ServiceNow methodology, Now Create, for managing the development releases. Why use Now Create?

- Faster time to value: The Now Platform is deployed quickly so that customers can start benefiting from their investment.
- Scalability and adaptability: Now Create provides the best delivery approach to meet the demands of even the largest and most complex customers.

- Collaboration is central to our approach.



BizSolutions.Tech Provided Resources

Engagement Manager	Project Manager/ Scrum Master	Business Analyst	Developers/ Administrators	Testers	Training Developers	Instructors

Detailed Roles and responsibilities will be provided during project kickoff.

DHHR Required Resources

Executive Decision Maker	Executive Stakeholders	Process Owners	Representative for **each** persona: case worker, schoolteacher, foster parent	User Acceptance Testers

- Executive Decision Maker – Makes funding decisions.
- Executive Stakeholders – Identifies objectives to be met.
- Process Owner – Defines process definition for complaint lifecycle, in collaboration with BizSolutions.Tech team. Responsible for making decision when multiple DHHR opinions are presented. Responsible for providing input to the development stories (requirements) and approving the documentation prior to development starts.
- Representatives for each persona – Provides feedback on solutions built, within the scope of the project (case worker, schoolteacher, foster parent).
- User acceptance test participants – Ensures functionality is working as defined in the stories (case worker).

Teamwork is key to our success!

Growth Potential

We recognize this initial phase focuses on complaints; however, utilizing PSDS Government Data Model and single architecture on the Now Platform, West Virginia can define the complex relationships and processes including, personas, business roles, services, and related parties during the initial design. The benefit is laying a foundation, which will support onboarding of Assessment, Service Planning, Case Management, Financial Management, and all the modules included in a complete Comprehensive Child Welfare Information System (CCWIS) solution.

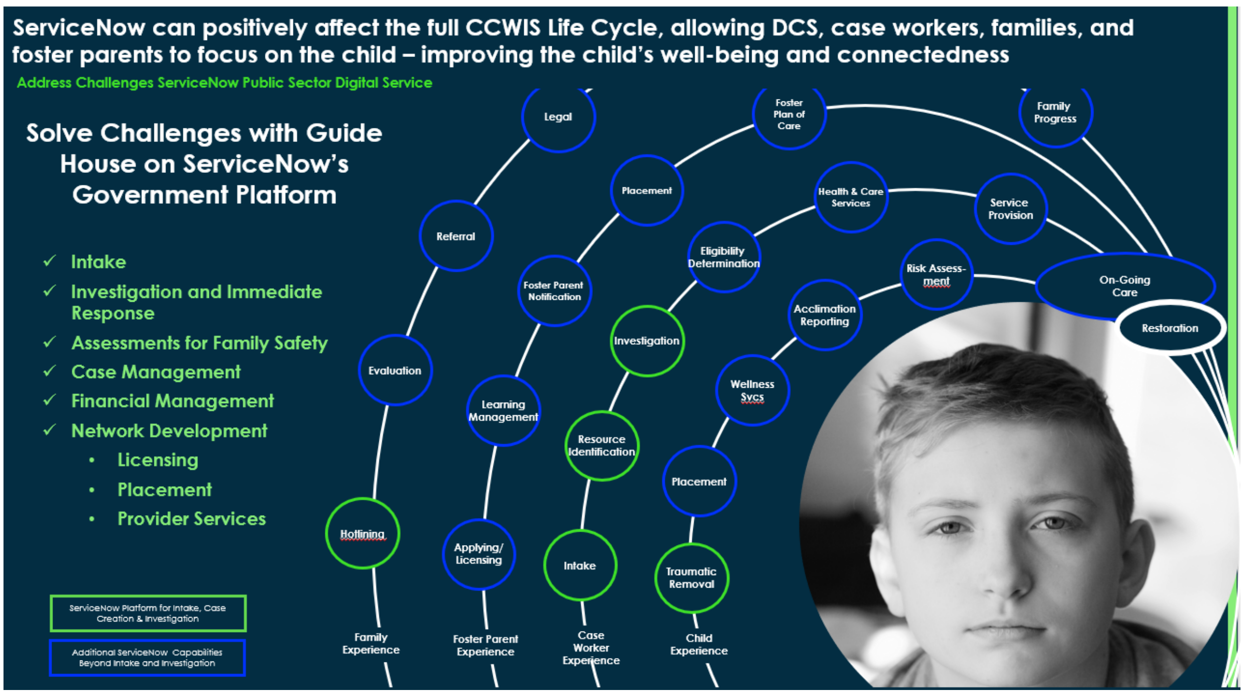


Figure 25-Examples of PSDS capabilities for future consideration

By taking the full lifecycle of foster care into consideration up front, new services can be added, tailored to the agency's requirements, and quickly implemented. This brings accelerated and increasing value for the agency's investment. Using the low code/no code configuration approach, new workflows may be added with confidence for trouble-free system upgrades.

The Continuous Improvement Journey

It all begins with ServiceNow's single, unified platform that can weave together the way your business works.

Ready now, built for the future

OPTIMIZE processes to empower people to do their best work

CONNECT silos to create seamless experiences for employees and customers

CREATE new value by enabling innovation at scale and speed

As you start to map more processes and workflows across the organization, the organization becomes more and more connected. Eventually, you get to the point where everything is connected, where you've digitized your mission critical services, and you've built a service mesh or fabric that's linking everything together.

The value of flexibility is unique to each customer. It is not uncommon for use cases to evolve and for realization of additional uses and business opportunities to occur. There is no limit to the ways you can reinvent new ways to work across the enterprise more efficiently.

The Now Platform creates the **foundation for opportunity** and **continuous improvement**.

- Lay the foundation for a shared services center of excellence that facilitates more self-service among employees.
- Improve agility for HR to adapt to employee needs — specifically, a scalable solution that can layer in a unified service experience.
- Provide integrations for third-party employee service portals.

> **"Each of our HR centers has their own funding stream so we couldn't tell them to stop utilizing their homegrown time and attendance system. But I can consolidate all of their data at our level. Over time, the goal is to turn off all of the different systems and remove the siloed structure of our approach to HR."**
>
> *Deputy chief human capital officer, United States Department of Health and Human Services*

Technology is vital to creating new possibilities. The Now Platform will enable you to imagine a more holistic vision for employee experience, now and into the future.

Start small, think BIG. The possibilities are endless.

Deliverables

Initial Implementation

The quoted hours will be billed as the hours are consumed. If hours are not spent, they will be retained and can be used for future enhancements.

On-site Workshop

During the Workshop, team members from BizSolutions.Tech and DHHR will meet to discuss and align on the process, data, and reporting requirements. The output from the workshop will be the requirements, in the form of stories. Travel expenses will not be required, as the key team members are located in Charleston, WV.

Record and Playbook Flow

One record type and playbook flow is included with this quote – Child welfare concern/complaint. For the flow, the associated activities will have estimated time and actual times collected as case workers complete the activities.

Foundational Data

The standard PSDS Data Model includes structures for constituents, households, companies, agencies, related parties, assignment groups, users, roles, etc. These structures will be configured per the requirements. Data that are available in spreadsheets will be uploaded. Data entry training will be provided if needed.

User Management

- Initial load of case workers that will be using the system. Procedure for ongoing user access management will be provided.
- Portal entry page, with self-registration and Captcha for external users to obtain user accounts, for submitting complaints.

Portal

- Branded PSDS Portal for public use, containing service catalog, with services to be requested, knowledge base, announcements, service request status, and agent chat.
- Employee Center Portal for internal use, as a one-stop-shop for all internal resources, like FAQs, procedures, requests, etc.

Metrics Definition

- As is and To be key performance indicators (metrics), such as quantity of cases closed per month.

Reports and Dashboards

- Executive Dashboard (organization view)
- DHHR Supervisor Dashboard (department view)
- Case Worker Dashboard (individual view)
- Individual Case Report Formats (summary, detail, and one other)

Performance Analytics

- Indicators defined, data collection jobs created, targets set and superusers trained.

Workspace

- PSDS Workspace with landing page summarizing current work and service timer alerts (SLAs); work lists, internal chat, and case records.
- Integration with collaboration product capable of voice to text or voice recording, and external collaboration. DHHR can choose from Microsoft Teams or Zoom. Collaboration product pricing not included in quote.

Training Materials and Class Sessions

DHHR User Training Development

User training materials to cover the lifecycle of the Complaint Case record, to include:

- Instructor Slides
- Hands on practice exercise
- Quick reference cards
- Training video

DHHR On-Site Class Sessions

Room Requirements – If students can bring their own computers, a training room will be provided at our offices at the Northgate Office Park. Otherwise, a room needs to be provided with computers that have supported browsers and internet access.

Training Session Content and Audiences

Course	Audience	Location	Days	Students
Complaint Case Management and Navigation	Case workers	On-site, Charleston, WV	½ Day	15
Reporting and Dashboards – Creating	Superusers	On-site, Charleston, WV	1 Day	5
Portal Administration – Announcements				
Mail Templates – Managing				
Knowledge Management – Creating				
Performance Analytics – User training				
ServiceNow Administration	Administrators	On-site, Charleston, WV	3 Days	5
Open House – Q&A, Marketing	DHHR Staff	On-site, Charleston, WV	½ Day	Unlimited

Go-Live Support

During the go-live transition, Hypercare is a standard service, which ensures that any identified questions, issues, or defects are addressed immediately.

Hypercare is a time-limited, enhanced level of assistance to ensure appropriate levels of support are provided immediately following an implementation go-live or a release upgrade. The objective of the plan is to establish specific activities that will occur and that are above and beyond the standard production support plan. This is a standard service and is included in the quote.

Testing and Warranty

Prior to deployment into production, each Requirement/Deliverable will be tested internally by the BizSolutions.Tech team, then tested and approved by the DHHR acceptance test resource. If, despite this due diligence, a defect is found after it is implemented, in the first 30 days, BizSolutions.Tech will perform the correction under warranty at no cost. After 30 days, the remedy will be corrected and billed against the sustaining support budget.

Sustaining Support

Sustaining support will be provided, with a budget set for the calendar year. This includes time required for upgrades. The hours are only charged if used and may be used for enhancements, provided the upgrade hours are reserved and used first before using on enhancements.

Signatures

IN WITNESS WHEREOF, the parties by their duly authorized representatives have agreed to this SOW. The effective date of this exhibit shall be the earliest date of signature below.

ServiceNow

By: ________________________________

Name: Larry Coune

Title: Account Executive – State and Local

Date: June 27, 2023

Business Solutions and Technologies, LLC:

By: ________________________________

Name: Michael R Stockman

Title: Founder / CEO

Date: June 27, 2023