



Cloud-Based Statewide Case Management System
RFP: MIS2300000003

Prepared for:
West Virginia
Health and Human
Resources

Business Solutions and Technologies, LLC
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June 24, 2023

06/29/23 10:48:53
WV Purchasing Division



Cover Letter

Dear Evaluation Team Members,



Mike Stockman
Founder and CEO
Charleston, WV

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



Diana Lewis
VP Strategic Initiatives
Charleston, WV

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
Founder and CEO
Mike.Stockman@BizSolutions.Tech

Diana Lewis
VP, Strategic Initiatives
D.Lewis@BizSolutions.Tech

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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
	<p>From CRFQ:</p> <p>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:</p> <ul style="list-style-type: none"> • advocating for the rights of foster children and foster parents

- participating in 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.

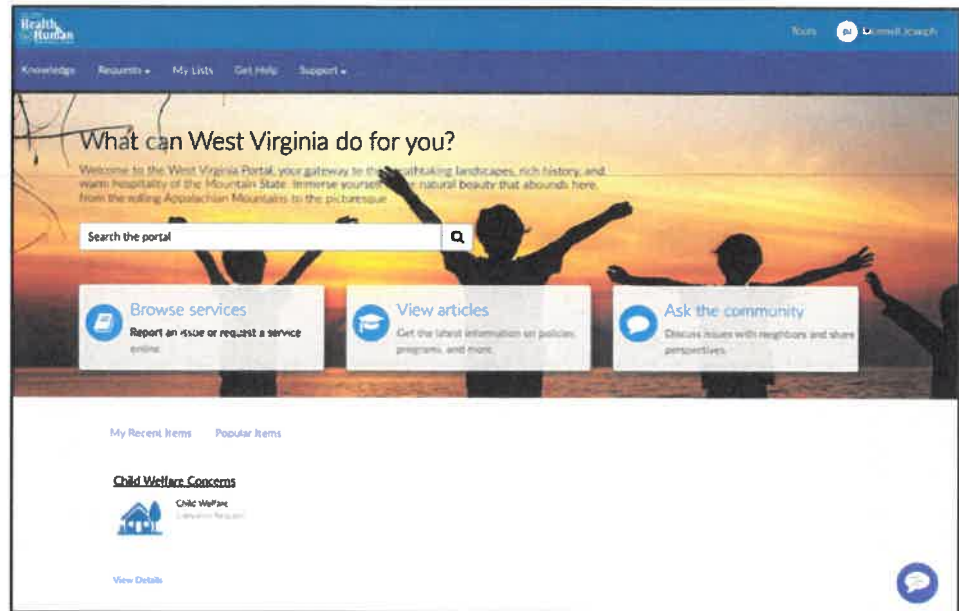


Figure 1-Citizen Portal

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.

Child Welfare Concern

Playbook Details Tasks

Complaint playbook ▾ ⋮ ⤴

- Intake** 3 remaining
 - Gather complaint details
 - Add involved parties
 - Verify primary address
 - Notify customer
- Triage** 2 remaining
- Research** 3 remaining
- Respond** 1 remaining
- Resolve** 2 remaining
- Close** 2 remaining

Figure 4-Example Playbook

My Lists

- All Cases
- Action Needed
- My Cases**
- My RMAs
- My Claims
- My Requests
- My Complaints

Cases

All > Initiated as request = fals

Number	Short description	Contact	State	Updated
SER0001006	Child Welfare Concern	Bonnie Smith	New	2023-06-16 11:03:32
SRC0001139	SNAP Application	Michael James	Open	2023-06-16 07:57:06
SRC0001140	Donated Appliance Pickup Request	Bob Campbell	Inspection in progress	2023-06-16 08:01:01

Figure 5-My Submitted Case List

Here is a picture of the kitchen. It is sad.

Diana Lewis
2023-06-17 11:53:51

Kitchen.jpeg
293 KB

Diana Lewis
2023-06-16 11:03:25
SER0001006 Created

Agency & Business Service Requests details

Number	SER0001006	Priority	4 - Low
State	New	Updated	just now

Attachments

Kitchen.jpeg (293.2 KB)

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

Home > Knowledge > Public Services (Knowledge Base) > Search

Social Services - Foster Care

KB0010012 - Latest Version [Subscribe](#) [Actions](#) **Most Useful**

How to become a foster parent?

Revised by Donnell Joseph • 6h ago • 13 Views • ☆☆☆☆☆

Foster Homes

How do I become a foster parent?

- 1. Register**
Complete the [Foster Parent Inquiry Form online](#) or contact Mission WV toll free at 866-CALL-MWV (225-5698).
- 2. Attend a pre-service orientation**
This training discusses the responsibilities and details of becoming a foster parent.
- 3. Complete a home study.**
The West Virginia Department of Health and Human Resources (WVDHHR) provides home studies for those families who plan to foster a child.
A home study is a family assessment. A social worker will interview every household. References are contacted and medical reports are reviewed. A criminal background check and a protective services background check are both performed on all adults who live in the home.

Need more help? Click here to chat with our agent

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.

The screenshot shows a 'Case Information' form with the following fields and values:

- Number: SER0001006
- Contact: (empty)
- Constituent: (empty)
- Assignment group: DHHR | (dropdown menu open showing 'DHHR Case Support')
- Service: (empty)

Figure 11-Assign to Group

Assign

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

The screenshot shows a workspace dashboard for user Diana. It includes a greeting 'Hello, Diana!' and a section for 'Important Items' with the following counts:

High priority cases	SLA breached or due	Cases not updated in	Case tasks	Unassigned cases
1	2	2	0	11

Figure 12-Workspace for Group members of the assigned case

The screenshot shows a dropdown menu for selecting an assignee from the 'DHHR Case Support' group. The list of assignees is as follows:

- Diana Lewis (diana.lewis@bizsolutions.tech)
- Donnell Joseph (Donnell.Joseph@bizsolutions.tech)
- Michael Garrett (michael.garrett@bizsolutions.tech)
- Patricia Munoz (patricia.alonso.munoz@bizsolutions.tech)

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.

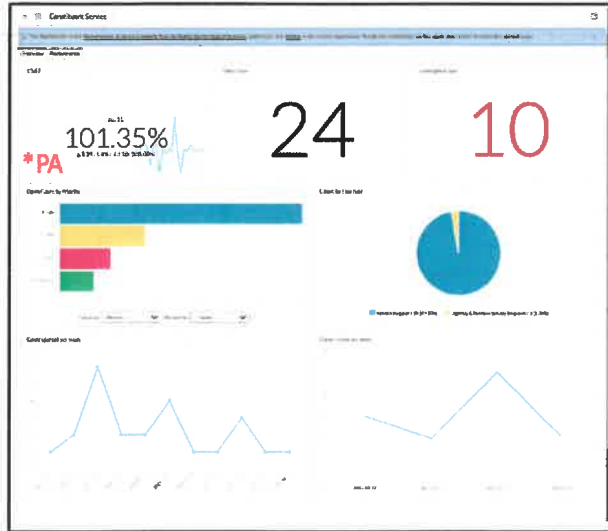


Figure 14-Dashboard with Report Widgets and *PA Widgets

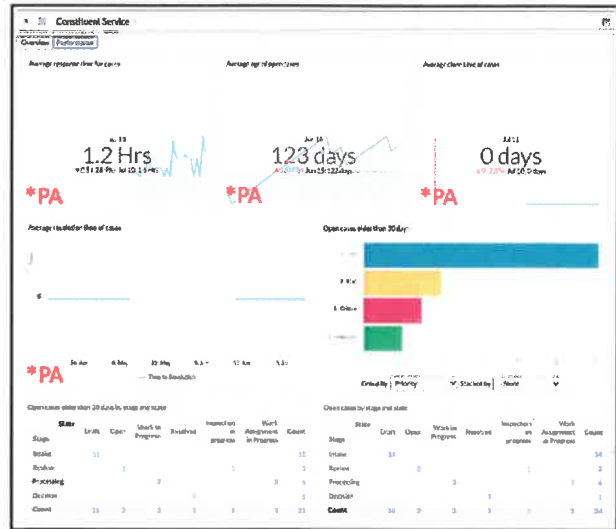


Figure 15-Dashboard with Report Widgets and *PA Widgets

Case workers can monitor their work via the Agent Workspace.

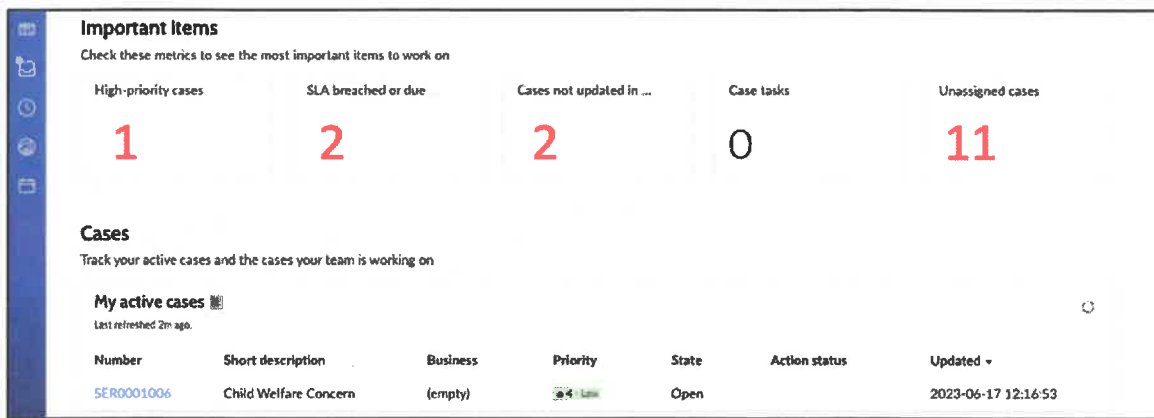


Figure 16-Agent Workspace

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	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.

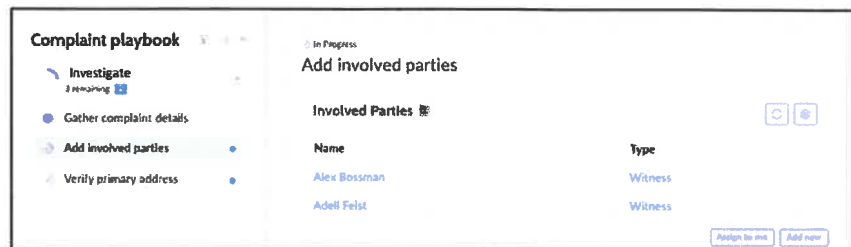


Figure 19-Playbook and Adding Involved Parties

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.

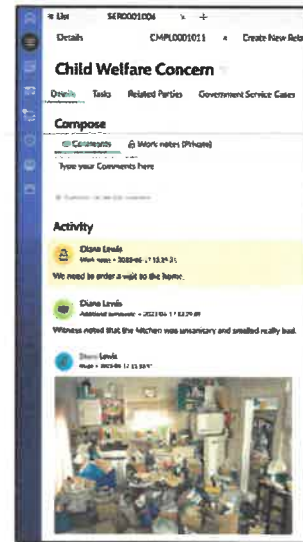


Figure 20-Activity Stream with Notes

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.

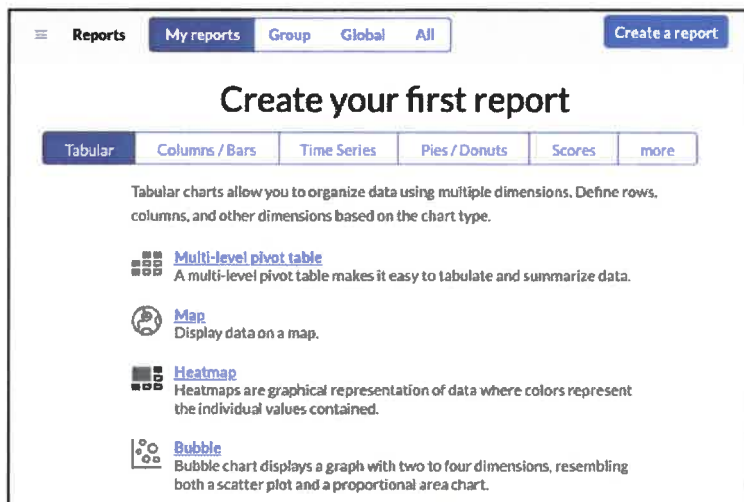


Figure 21-Reporting Landing Page

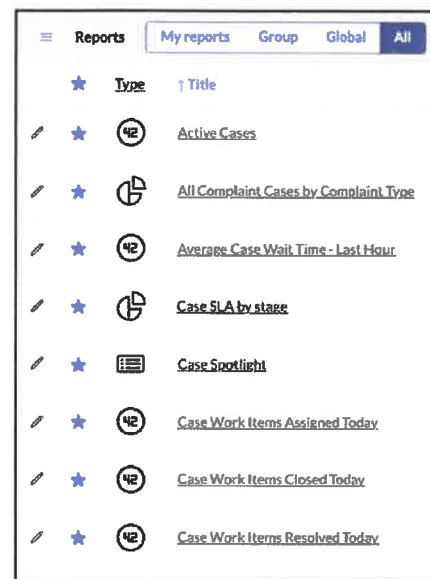


Figure 22-Sample List of Reports

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.

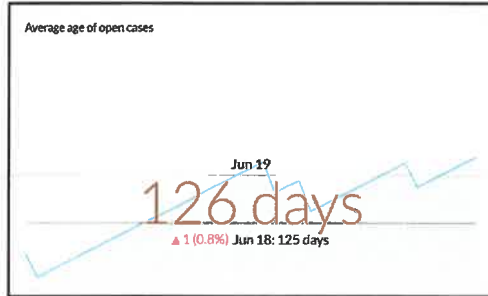


Figure 23-Average Age of Open Cases with Target Line

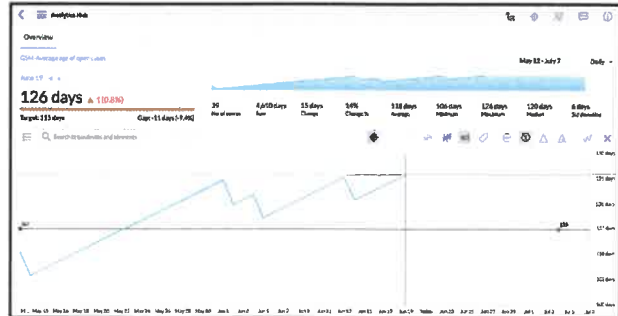


Figure 23-Drill down view of Indicator with Target and Forecast

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.

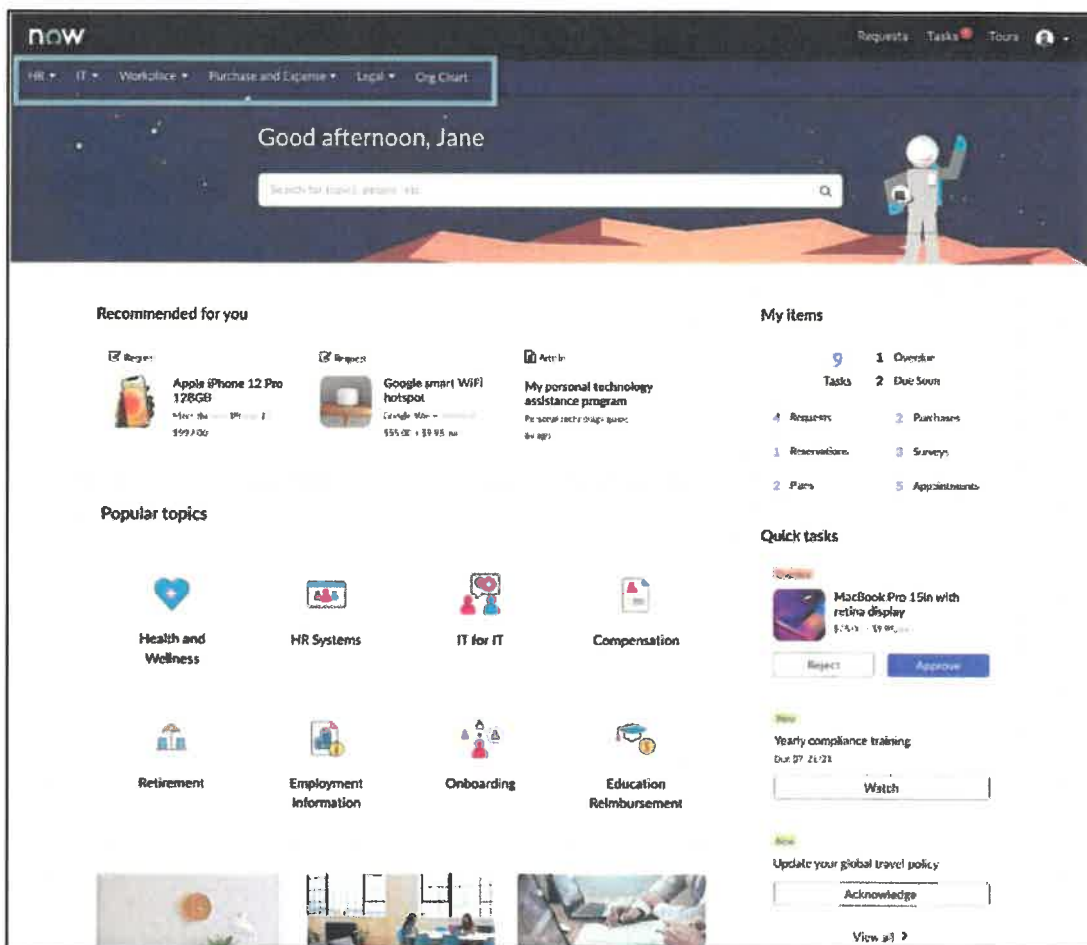


Figure 24-Example of Employee Center Portal

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: <input checked="" type="checkbox"/> Meets or Exceeds <input checked="" type="checkbox"/> Not available <input type="checkbox"/> ? Some questions			
#	Requirement	Status	Comments
3.1.1	Compatible with the West Virginia Office of Technology's current operating system, Windows 11	<input checked="" type="checkbox"/>	<p>ServiceNow platform is compatible with Windows 11, using any of the following browsers:</p> <ul style="list-style-type: none"> • 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 <p>Other notes:</p> <ul style="list-style-type: none"> • 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	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<p>ServiceNow platform is designed with configuration, customization, and upgrades in mind. https://www.servicenow.com/now-platform.html?state=seamless</p> <p>Additional licensed users can be added for price specified in the WVOasis price sheet.</p>

<p>3.1.1.4</p>	<p>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</p>	<p><input checked="" type="checkbox"/></p>	<p>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.)</p> <p>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.</p> <p>Both Reporting and Performance Analytics support drilling down to underlying records.</p> <p>See the Reports section on page 15, for more detail and examples.</p>
<p>3.1.1.5</p>	<p>System must provide a quick search capability based on a single and or an advanced multiple field/filters</p>	<p><input checked="" type="checkbox"/></p>	<p>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).</p> <p>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.</p> <p>List Search From a list, you can search from the search box, the column headers, and from a full-featured condition builder,</p>

			<p>which allows filtering by field, and multiple criteria.</p> <p>Agent assist The Agent assist feature in Workspace automatically displays possible solutions for records that agents open.</p>
3.1.1.6	System must allow name fields must include capacity to enter and store nicknames, appellations, and suffixes	<input checked="" type="checkbox"/>	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	<input checked="" type="checkbox"/>	<p>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:</p> <ul style="list-style-type: none"> • 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	<input checked="" type="checkbox"/>	<p>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:</p> <p>User Authentication/Login: Users, Groups, and Roles</p> <p>Application and Modules Access: Controlled by roles configured at the Application and Module level</p> <p>Database Access: Access to tables and their records and fields are controlled</p>

			<p>via globally defined system properties (deny access is the default behavior) as well as table and field level access controls.</p> <p>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.</p>
3.1.1.9	<p>System must provide access to all applications and user documentation, vendor use, and help tool within a single site.</p> <p>System must integrate seamlessly with back-office systems including versions of Microsoft Suite and/or Google Docs.</p> <p>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.</p>	<p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p>	<p>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.</p> <p>Documents attached to case records, launch seamlessly into their native applications, such as Word, Excel, or Google Docs formats.</p> <p>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.</p>

3.1.1.12	<p>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...</p> <p>associated persons including but not limited to relatives, children, attorneys, and collaterals....</p> <p>System must allow addresses to be United States Postal Service (USPS) validated...</p> <p>System must also allow entry of foreign addresses and characters. ...</p> <p>System must allow for APO (Military) addresses if individuals are deployed or stationed overseas.</p>	<p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p>	<p>All of these data elements and attachments are accommodated.</p> <p>Maps for viewing location and driving directions will be done with Google maps API.</p> <p>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.</p> <p>USPS.com has a Web Tools API Portal that allows apps to be integrated for address verification.</p> <p>Google maps supports foreign addresses and characters</p> <p>USPS API supports Military Zip Code matching.</p>
3.1.1.13	<p>System must allow retention/display of photographic images, audio and video files in their native format within contact records as needed.</p>	<p><input checked="" type="checkbox"/></p>	<p>Attachments are available throughout the platform and almost all file types are supported.</p> <p>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.</p>

	<p>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.</p>	<p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p>	<p>All of the mentioned documents are supported for attachments.</p> <p>All document types except images allow for searching at document level.</p>
3.1.1.14	<p>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.</p> <p>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.</p>	<p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p>	<p>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.</p> <p>Other status indicators (action status) display on the case list to highlight records which are blocked internally, externally, or require attention.</p> <p>● Blocked internally</p> <p>Workflows and playbooks provide labeling for the stages in the standard flow, and the information required at each stage.</p> <p>Time tracking can be required on the case and case tasks, through the lifecycle of the case.</p>
3.1.1.15	<p>System must support automated or manual assignment of a unique case identifier upon creation of a new case.</p> <p>System must provide a way to navigate a case summary view.</p>	<p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p>	<p>Unique record numbers are automatically assigned for cases, and case tasks.</p> <p>Case records may be viewed and navigated via the Workspace or via the</p>

	<p>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.</p>	<p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p>	<p>classic form. If a special abbreviated case summary is required for a specific user audience, that can be configured.</p> <p>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.</p> <p>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.</p> <p>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.</p>
<p>3.1.1.16</p>	<p>System must support the ability to generate correspondence to an individual, a group of individuals with similar characteristics, or to a predefined distribution list.</p>	<p><input checked="" type="checkbox"/></p>	<p>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.</p>

	<p>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.</p> <p>System must support capability to create output in hard copy, paper letters, emails, or Google Docs.</p>	<p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input checked="" type="checkbox"/></p>	<p>Electronic delivery of this correspondence could leverage groups, distribution lists or other conditions. Specific formats could be text, html, xml, pdf, etc.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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</p>
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			the batch can be printed from a word processor. Training for this is included in this quote.
3.1.1.17	<p>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.</p> <p>System must support role-based case assignment/ownership, task delegation, and case transfer both individually and as a group, to, among, and between users.</p> <p>System must provide for customizable workflows incorporating the steps and statuses already available in the standard workflows and incorporating automatic generation of related tasks.</p>	<p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p>	<p>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.</p> <p>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.</p> <p>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.</p>
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.	<input checked="" type="checkbox"/>	<p>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.</p> <p>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</p>

	<p>upgrades, enhancements, and error corrections are generally made available to its other clients of similar systems at no additional cost/charge.</p>		<p>only the hours for testing and implementation support are required, and are budgeted for, in Sustaining Support.</p> <p>ServiceNow patches will be published to correct platform errors and release new functionality.</p> <p>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.</p>
<p>3.1.1.26</p>	<p>System must enable a public facing web form and</p> <p>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.</p>	<p><input checked="" type="checkbox"/></p> <p><input checked="" type="checkbox"/></p>	<p>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.</p> <p>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.</p> <p>If an email is received from a known email address from an involved party already in the system, this will help the</p>

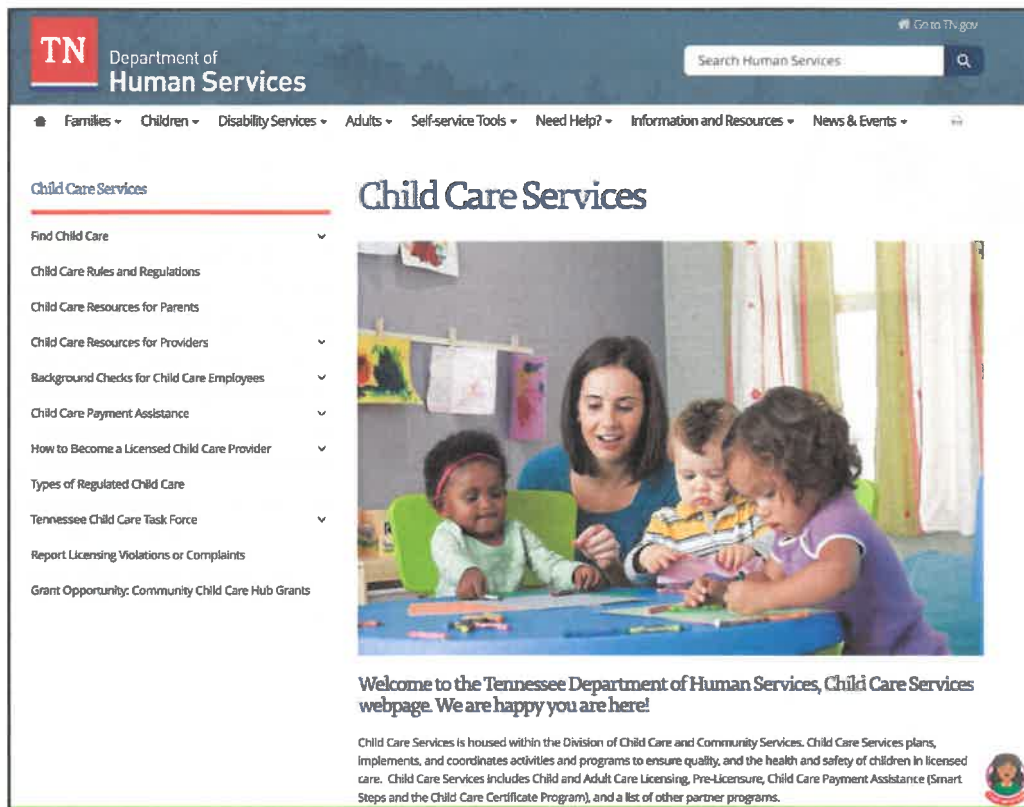
		<input checked="" type="checkbox"/>	<p>process of linking to new or existing cases. But since an involved party may be related to multiple cases, an association to a particular case cannot be assumed.</p> <p>A better approach is to allow external users to register, so they can access the portal, and 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</p>
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.	<input checked="" type="checkbox"/>	<p>Please see the Experience and References section on the following page..</p>

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/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)*



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



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.

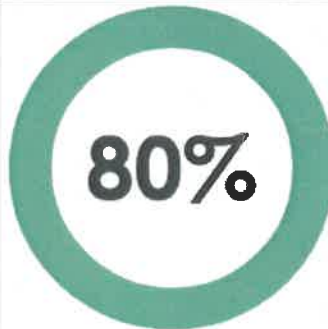


"This platform is a way for our citizens to interact with key government personnel, as well as report trees down, potholes, and things like that. We've created a 'one-stop shop' to provide easier and more convenient access to all County information and services."

CIO, Howard County, Maryland

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Analyst Guidance



80%

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	Implementation Experience
<p>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:</p>	<p>Customers: Sport Vehicle Manufacturers, Financial Institutions, Toy Manufacturers, Data Centers, Aerospace, Satellite Manufacturers, Restaurants, Banks, Retailers, Point of Sale Manufacturers</p>
<div style="display: flex; flex-wrap: wrap; justify-content: space-around;"> <div style="text-align: center; margin: 5px;">  Administration Fundamentals </div> <div style="text-align: center; margin: 5px;">  Service Portal Fundamentals </div> <div style="text-align: center; margin: 5px;">  Platform Implementation </div> <div style="text-align: center; margin: 5px;">  ITSM Fundamentals </div> <div style="text-align: center; margin: 5px;">  ITSM Implementation </div> <div style="text-align: center; margin: 5px;">  Service Mapping </div> <div style="text-align: center; margin: 5px;">  Custom User Training </div> </div>	<ul style="list-style-type: none"> >80 Implementations <input checked="" type="checkbox"/> 10 Upgrade cycles, since 2017 <input checked="" type="checkbox"/> Customer/Citizen Portal <input checked="" type="checkbox"/> Employee Portal <input checked="" type="checkbox"/> Mobile Development <input checked="" type="checkbox"/> Service Catalog <input checked="" type="checkbox"/> Catalog items > 500 <input checked="" type="checkbox"/> Entitlements, Costing, Time Tracking and Billing <input checked="" type="checkbox"/> Workspace <input checked="" type="checkbox"/> Workflow <input checked="" type="checkbox"/> Dashboards and Reporting <input checked="" type="checkbox"/> Integrations – Zoom, Teams, Jira, Salesforce, Slack, Custom <input checked="" type="checkbox"/> Performance Analytics <input checked="" type="checkbox"/> Custom Development Multiple Languages (English, German, Dutch, Spanish) United States Government Security controls
<p>Micro-Certs</p> <div style="display: flex; flex-wrap: wrap; justify-content: space-around;"> <div style="border: 1px solid #ccc; padding: 2px; margin: 2px;">Flow Designer</div> <div style="border: 1px solid #ccc; padding: 2px; margin: 2px;">CMDB Health</div> <div style="border: 1px solid #ccc; padding: 2px; margin: 2px;">Configure the CMDB</div> <div style="border: 1px solid #ccc; padding: 2px; margin: 2px;">Predictive Intelligence</div> <div style="border: 1px solid #ccc; padding: 2px; margin: 2px;">Performance Analytics</div> <div style="border: 1px solid #ccc; padding: 2px; margin: 2px;">Integration Hub</div> <div style="border: 1px solid #ccc; padding: 2px; margin: 2px; width: 100px; text-align: center;">Virtual Agent</div> </div>	

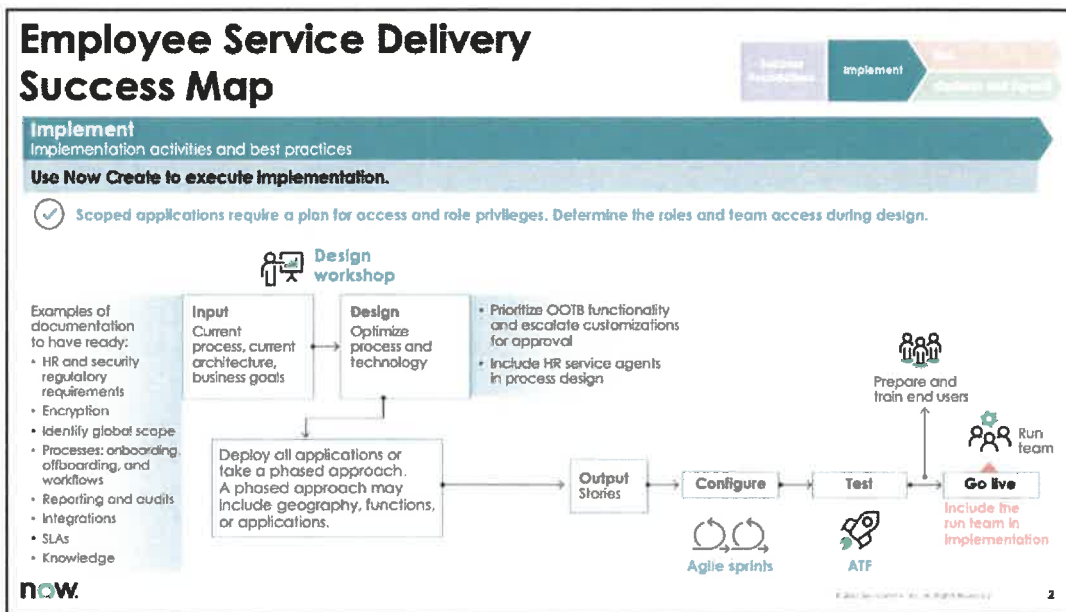
Program Management Methodology

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
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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
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- 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.

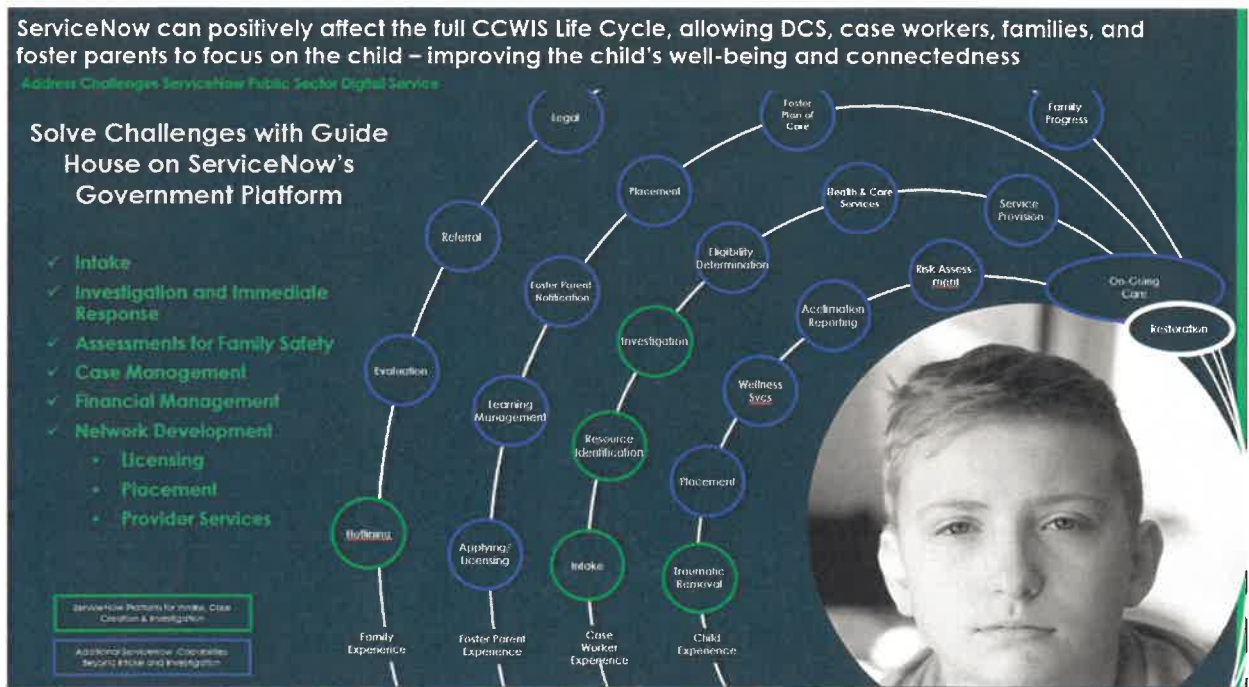
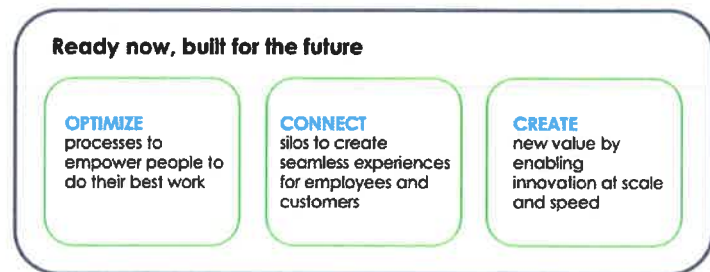


Figure 25-Examples of PSDS capabilities for future consideration

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.



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	Administrators	On-site, Charleston, WV	3 Days	5
ServiceNow Administration				
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: Larry Coune

Name: Larry Coune

Title: Account Executive – State and Local

Date: June 27, 2023

Business Solutions and Technologies, LLC:

By: Michael R Stockman

Name: Michael R Stockman

Title: Founder / CEO

Date: June 27, 2023



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

- o 1 Day of Training, on site in Charleston, for a total of 15 users

Superuser Training Delivery - Onsite instructor-led – 5 students

- o Reporting and Dashboard Training
- o Portal Administration – Announcements
- o Mail Templates
- o Knowledge Management
- o 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.