

Electronic Fillable Form Creation & Hosting Services

Attachment A

Statement of Work

STATEMENT OF WORK

The Contractor will provide licenses for the Solution to enable OSC users to create, manage, and analyze forms effectively across various departments to streamline data collection, provide feedback, submit registrations, and perform other related tasks.

Contractor Requirements

The Contractor must:

- Provide licenses for 25 users, with options for scaling up as needed by OSC.
- Ensure there is no inappropriate or unauthorized use of OSC data at any time. To this end, the Contractor shall maintain appropriate administrative, technical, and organizational security measures to safeguard against unauthorized access, disclosure, or theft of data by the Contractor or any third party.

Such security measures must follow a recognized industry practice not less stringent than the measures the Contractor applies to its own personal data and non-public data of similar kind. Upon OSC's request, the Contractor shall 1) disclose its non-proprietary security processes and technical limitations to OSC such that OSC can ensure adequate protections are applied to its confidential data, and/or 2) provide OSC with a completed Consensus Assessment Initiative Questionnaire ("CAIQ"), documenting the Contractor's security controls.

Implementation

The Contractor is responsible for all efforts in implementing the Solution to meet OSC's requirements, including any configuration and/or customization as identified on Attachment B-1 (Solution Requirements Matrix). The Contractor must present a final version of the Solution to OSC for verification that it meets the requirements as stated by the Contractor on Attachment B-1. The Contractor must address any deficiencies identified by OSC in order to ensure the Solution meets the stated requirements. Any customization made to the Solution to meet OSC's requirements must become a supported configuration of the Solution and be maintained in future releases of the Solution at no additional cost to OSC.

Mandatory Solution Requirements

The Solution must be capable of the following:

- Allow OSC users to create custom, fillable forms either by creating a custom document within the Solution, editing pre-generated templates within the Solution, or editing pre-made OSC forms created by third-party applications (e.g., Adobe, Microsoft Office).
- Apply conditional logic to form fields, creating dynamic and fillable forms based on user input.
- Analyze and report on responses to forms OSC creates within or through the Solution.
- Allow documents integrate with, and transfer data to, other tools and platforms (e.g., Adobe, Microsoft Office).
- Allow OSC users to download and distribute forms created from the Solution.
- Support use of custom and trademarked images such as the OSC logo, seal of the State of New York, etc.
- Maintain compliance with the United States Health Insurance Portability and Accountability Act (HIPAA).
- Must have the flexibility to add design features such as: OSC logo and brand standards, colors and fonts for branding and consistency.
- Use Fluid Text Boxes that don't cut off text or limit word count.
- Offer easy drop down features that do not require manual processing (e.g., fillable pdfs in Adobe Acrobat).
- Allow users to collect, manage, and share data from one platform.
- Not require coding for any form field including conditional fields.
- Offer a library of drag-and-drop no code form fields.
- Offer a database of template options for instant data collection.
- Have the option for Smart PDF forms to enhance efficiency and data accuracy.
- Allow OSC users to manage and organize data across teams.
- Have white labeling for branding purposes.
- Have an administrator console to manage users, access and customization settings, view comprehensive form and submission data trends, create reports, and monitor activity.

Preferred Solution Functionality:

While not mandatory, OSC prefers the Solution to have the following characteristics:

- 24-hour customer service / tech support via phone and/or virtual chat (with all services located within the contiguous United States).
- Virtual training meetings available when needed.

- Database of online training videos to be accessed as needed.
- Artificial Intelligence (AI) features to automate certain aspects of the Solution for ease of use (but OSC data shall not be used train the model).
- No-code app that can be downloaded to any device.
- Built in workflow for testing and approvals.
- Introductory best practices training session(s) for OSC staff.

Ongoing Support:

The Contractor must provide comprehensive training materials, user manuals, tutorials, virtual training, and support for onboarding licensed OSC users as directed by OSC. The Contractor will also be responsible for providing troubleshooting services to OSC users during the initial phase and for any ongoing operational needs.