# ADDENDUM #2

DATE: July 24, 2020

TO: All Prospective Bidders

FROM: Dennis Sienna, Purchasing Agent II

RE: **RFP# DS060420 CSD Case Management**

All respondents are hereby advised of the following amendments to the Request for Proposal documents which are hereby made an integral part of the bid documents for the subject contract, prepared by the University of Connecticut Procurement Services Department.

Proposals submitted shall be deemed to include contract document information as shown in Addendum No. 2. Respondents shall be required to acknowledge receipt of this addendum in their proposal response. Failure to acknowledge receipt of this addendum by the respondent may result in the rejection of their proposal response.

**BIDDER NOTE:** This addendum must be completed, signed and submitted with your proposal response to be considered for award. If you have already submitted a proposal, please complete the addendum and submit same ***via*** ***email***, clearly marked with the bid number, response date, and return address. This will be accepted as part of your proposal response, PROVIDING IT IS RECEIVED BY THE PURCHASING DEPARTMENT BY THE TIME AND DATE SPECIFIED WITHIN IN THE RFP.

**Bid Due has been extended as follows: Thursday, July 30, 2020 at 2:00PM ET*(All submissions shall be via email).***

**Changes, deletions and clarifications to the RFP document are as follows:**

1. **RFP, Section 6.1.12 “Joint Venture”** references paragraph 3.13 for specific requirement(s) related to joint venture proposals. Where is paragraph 3.13?

Typo in RFP, refer to section 7.42

**Questions for Appendix A - Technical Proposal Response Matrix**

**Functional Tab**

2. Line 16 - Do they have a preferred e-signature application/partner in mind for this? And/or already in place?

The university has contract with Docusign.

1. Line 22 - How is file management being done today? Is this a system/application we are replacing or one we should anticipate for integration?

Currently, the Center for Students with Disabilities (CSD) has a digital file management system with interactive functions for students and faculty. This product was developed several years ago in-house by Student Affairs Information Technology (SAIT). The new application will replace the current system. The new application will not require integration with the current system; however, data from the current system will need to be uploaded to the new application.

1. Line 27 - Is your team open to integrating with other guest/visitor management systems such as Traction Guest? Please see <https://tractionguest.com/> . This is a product created by Traction on Demand

Possibly. The management system would need to meet the requirements of the RFP.

5. Line 40 - Can they provide more clarity here around what this looks like either today or future state? Is this a simple request form with picklist options?

This is not a picklist. Rather a means via a student account in the case management system for students to request their textbooks and/or other text-based course material in alternate format along with a means for CSD to deliver the digital content to the students. Currently CSD has a simple web-based form for students to complete each semester to request text-based course material in alt format. However, the form is not connected to the students “account” in our database, nor does it allow for communication with or delivery to the student.

1. Line 42 - What do they mean by interface? What specifically are the integration requirements here?

By interface, we mean a CSD staff dashboard that is part of the overall case management system that will allow delivery of digital course content to students’ Google accounts. UConn uses Google applications for students only. Currently CSD purchases (monthly fee) a Google account to delivery digital content to students via their Google accounts. However, there is no connection between CSD’s Google account any other CSD application (I.e. the current case management system). Thus, there is no record of CSD delivering alt media to students in the student case in our current case management system.

1. Line 43 - Similar to row 40 above, is this a simple request form with picklist fields? More clarity here would be appreciated.

This is not a picklist. Rather a means via a student account in the case management system for students to request communication access (I.e. interpreters, CART, etc.) and to track their requests, cancel, see what interpret or CART provider is assigned etc. Then on the CSD staff side, a dashboard to view all requests, schedule interpreters, obtain materials when needed and track the process via color-coding, flags or other means.

1. Line 47-48 - What is meant by the term interface?

"Talk” with Kaltura and/or 3Play Media. We don’t need to the media to move between the case management system and Kaltura or 3Play Media. Rather we need to be able to track student requests for captioned media and where the media is in the process from request to completion.

1. Line 54 - Would this need to be integrated to any sort of learning application to automatically populate available Exams for the Student or would the expectation be that the student inputs that manually? Similar question around the teacher/class for the exam - does that auto-populate via integration or is it populated manually?

The case management system does not need to integrate with Blackboard, UConn’s course management system. We expect instructors to upload their exams to the “exam module” of the case management system and CSD staff will administer as needed (print or make available digitally).

1. Lines 53-71 reference Exams. How does this work today? Which technologies are you using if any?

Currently, CSD has a homegrown case management system that includes an exam module. The exam module has a student facing dashboard that allows students to schedule exams that they need to take at the Center. It has an instructor facing dashboard that allows instructors to approve the scheduling of the exam at the Center, provide details about the exam (date, time, type of exam- paper/online, materials allowed, etc.) and securely upload the exam for CSD to access and administer. Once the student takes the exam, the CSD team uploads the completed exam to the faculty dashboard for them to access and download. The CSD facing dashboard allows us to see the students’ requests, faculty details and exam, schedule date/time, confirm, assign seats, download exams, start/end an exam to track time, upload completed exams to get back to instructors, establish lead times for submitting exam requests (ex. 1 week in advance of the exam date- though a CSD staff member can override this in the CSD management system), etc.

1. Line 72 - Can you help us understand how this is being done today?

Currently, CSD has a homegrown case management system that includes a notetaking module. When a CSD professional drafts an accommodation letter with notetaking assistance – peer notetaker, that shows up in the notetaking module as a class needing to hire a notetaker. The CSD team can email the class roster to inform students in the class we are hiring a notetaker. When a student “applies” to be a notetaker and is qualified, then the CSD team can “hire” the notetaker in the module and the class shows up as having a hired notetaker rather than still needing to hire a notetaker. The notetaker receives access to the dashboard and can upload their notes once they are “hired” in the notetaking module. This connects to the student receiving the accommodation of notes account in the case management system to then access the uploaded notes.

1. Line 59 - Does this mean the chosen application would contain all exam data? Or would this be exportable via an integration to another application?

Yes, the case management system will have/hold/store all the exam data, but it should be available to export to Microsoft Excel so that it can be manipulated.

1. Lines 72-87 reference notes and note taking. How does this work today? Which technologies are you using if any?

Currently, CSD has a homegrown case management system that includes a notetaking module. When a CSD professional drafts an accommodation letter with notetaking assistance – peer notetaker, that shows up in the notetaking module as a class needing to hire a notetaker. The CSD team can email the class roster to inform students in the class we are hiring a notetaker. When a student “applies” to be a notetaker and is qualified, then the CSD team can “hire” the notetaker in the module and the class shows up as having a hired notetaker rather than still needing to hire a notetaker. The notetaker receives access to the dashboard and can upload their notes once they are “hired” in the notetaking module. This connects to the student receiving the accommodation of notes account in the case management system to then access the uploaded notes.

1. Line 95 - references a module to track, engage, monitor students who participate in Beyond Access (tracks I, II, III). What functions are required for this module? What is the specific functionality required.

Beyond Access is CSD’s enhanced services program that is fee-based. We want to track student applications, payment, attendance in meetings along with other activities that are part of their plan (i.e. social activities, career-related activities, etc...), develop and track plan progression, and capture meeting notes along with emails/contact with parents/family members.

1. Line 97 - references tracking fees charged, collected, and refunds. Is this just tracking fees from a separate payment processing system, or is there a need for a payment processing system to manage these payments?

There is not a need for a payment process. Payment is handled through the Bursar's Office. However, CSD staff need a mechanism to track when a student is billed and makes payment. Currently, this is done on an MS Excel spreadsheet.

1. What applications are required integration points for this project?

PeopleSoft and The Housing Directory are required. Additionally, preferred include Blackboard, MS Outlook, dining and parking systems.

1. Is there an existing middleware tool in place today that we should assume leveraging for the purposes of sizing this effort?

We currently manage a datawarehouse but don’t have any other middleware service.

1. Can you elaborate on the direction and frequency of integrations that we should assume for sizing this effort?

We’d like two way integrations depending on the data we would look if not real time then for 15-30 min updates, multiple times a day, daily or if cyclical perhaps semesterly or annually. Preference is to more regularly and less semester/annual.

1. Can you help us understand the volume and number of tables that will be migrated into the selected platform for sizing/scoping purposes?

There is currently 80GB of data stored in a MS SQL2016 database. Exact table information needs to be gathered. It can be provided.

1. Can you walk through “Day in a life” of how a student, notetaker, faculty would interact? Do they create cases or work on resolving cases?

Students, notetakers and faculty do not address case management. Students make accommodation requests through CSD. CSD staff, students and instructors engage in an interactive process to determine appropriate accommodations and then work together to coordinated approved accommodations. Notetakers take notes in their classes for which they are hired to do so and upload their notes to the notetaker/class dashboard for the student receiving the notes to access.

1. Regarding appointments and interactions – can you describe the typical student scenarios (various personas)?

CSD works with 4500 students with disabilities at the University. The largest disability category is psychiatric conditions followed closely by chronic health conditions, then ADHD. We work with students with all different conditions. There isn’t a “typical” student.

1. With regard to integration to Peoplesoft and THD, are you expecting this to be real time, bi-directional, view only, batch load – how will this data be used?  Do they need to take action and report on data from other systems?

We are preferably looking for bidirectional. Accommodations from this system will go to the housing system for a student so Residential Life can know what accommodation needs to be met in housing. Peoplesoft data in this system can be used to check on class information for students needing accommodations and contact professors.

1. ‘MyAccess’ looks to be your portal where students can request accommodations. Can you please confirm, and are there other key areas of the platform?

MyAccess is the portal that students request accommodations, upload documentation, request accommodation letters and can access their letters once drafted, schedule exams to be taken at CSD, and access notes if they are approved for peer notetaking.

1. Is ‘Oscars’ used for case management today. What is the process like today?

Currently, the Center for Students with Disabilities (CSD) has a digital file management system, called OSCARS, with interactive functions for students and faculty. This product was developed several years ago in-house by Student Affairs Information Technology (SAIT). The new application will replace the current system. OSCARS is a case management system that receives information from PeopleSoft and THD and sends information to THD. The current modules within OSCARS includes, student data, course, housing, disability, accommodations (requested and approved), notetaking and exams administration modules and reporting tools. OSCARS has a student and instructor facing side called MyAccess. MyAccess is the portal that students request accommodations, upload documentation, request accommodation letters and can access their letters once drafted, schedule exams to be taken at CSD, and access notes if they are approved for peer notetaking. MyAccess is the portal that faculty use to access accommodation letters, see the list of students in their courses with approved accommodation and provide exam information for those tests that will be administered at the CSD.

1. How many of student population are employees? Are they the notetakers?

About 20 student employees and 250 notetakers.

1. With respect to Faculty – Are they viewing all student data? Or, Are they requesting services for CSD students or accessing and viewing the data?

Faculty do not view all student data. Only accommodation letters, lists of students approved for accommodations in their courses, and exam administration information related to having tests proctored at the CSD.

1. Line 13, What documents would typically be uploaded?

Medical documentation (I.e psycho ed reports, letters from doctors/therapists, etc...).

1. Line 16, What LMS is being used by UCONN? Is there another common software or interface that faculty consistently utilize?

Blackboard.

1. Line 16, Do you currently have an eSignature solution that is being used by CSD (example: DocuSign)?

No.

1. Line 17, What would be in the student dashboard and what are the driving features for its use?

Currently the student interface is called MyAccess. MyAccess is the portal that students request accommodations, upload documentation, request accommodation letters and can access their letters once drafted, schedule exams to be taken at CSD, and access notes if they are approved for peer notetaking. We would also like students to be able to coordinate any/all approved accommodations through the new dashboard, including but not limited to: requesting interpreters/CART providers, alt media, captioning, assistive technology, along with accessing notes, scheduling exams, requesting accommodation letters, etc.

1. Line 18, Are all of these pieces of information in Peoplesoft today so they can be integrated in the solution? If they are in different systems, please list the other systems and if they have available APIs for integration.

Not all of the information needed for the case management system is in PeopleSoft. The case management system will need to integrate with PeopleSoft and The Housing Directory (required). Additionally, preferred integrations include Blackboard, MS Outlook, dining management and parking.

1. Line 28, How many languages will need to be supported?

English.

1. Line 35, Do faculty normally request the coordinated accommodations for each student or is that handled by CSD directly?

It is a combination of both faculty and CSD working together.

1. Line 38: Are "advisors" counted a CSD staff or are they another group of people who will be accessing records? How many advisors are there?

No, advisors are not part of the CSD staff and do not access CSD’s case management system.

1. Line 40, Can you please give more detail to the Alt Media use case?

Currently CSD has a simple web-based form for students to complete each semester to request text-based course material in alt format. However, the form is not connected to the students “account” in our database, nor does it allow for communication with or delivery to the student. UConn uses Google applications for students only. Currently CSD purchases (monthly fee) a Google account to delivery digital content to students via their Google accounts. However, there is no connection between CSD’s Google account any other CSD application (I.e. the current case management system). Thus, there is no record of CSD delivering alt media to students in the student case in our current case management system.

1. Line 41, What information would faculty need to see in a dashboard?

Ideally faculty need to see a list of students approved for accommodations by course with their approved accommodations, accommodation letters, and manage the coordination of accommodations such as exam administration, notetaking (be able to view the notetakers notes or add notes), course modification agreements, alt media and captioning requests.

1. Line 42, What specifically would need to "interface" with Google? What are you intending this integration to do?

Delivery of alt media to students Google accounts. UConn uses Google applications for students only. Currently CSD purchases (monthly fee) a Google account to delivery digital content to students via their Google accounts. However, there is no connection between CSD’s Google account any other CSD application (I.e. the current case management system). Thus, there is no record of CSD delivering alt media to students in the student case in our current case management system.

1. Line 43, 44, & 45: Describe who the service providers are? Are they part of any of the identified groups? Are they third parties?

Service providers are Disability Service Professionals (aka the case mangers), Accommodations Coordinators, Assistive Technology Coordinators, Interpreting Services coordinators, Receptionists, Proctors, and Administrators. The only third party group are the contract interpreters and CART providers. They will need limited access to the Communication Access module.

1. Line 45: How many contractors would need to access this system?

We don’t expect any contractors to access this system. May need clarification on this question as to who’s considered a contractor.

1. Line 47: What specifically would the interface/integration do for Kaltura?

Kaltura is the application the university uses to host media (videos, podcasts, etc.). We don’t need to the media to move between the case management system and Kaltura or 3Play Media. Rather we need to be able to track student requests for captioned media and where the media is in the process from request to completion.

1. Line 48: What specifically would the interface/integration do for 3 Play Media?

3Play Media is the university’s current contract holder for captioning services. We don’t need to the media to move between the case management system and Kaltura or 3Play Media. Rather we need to be able to track student requests for captioned media and where the media is in the process from request to completion.

1. Line 49: Can you please give more detail to this use case and how things happen today?

Currently all scheduling of University staff and contracted interpreters and CART providers is tracked on an Outlook calendar and confirmations, meeting/course materials, etc... are emailed between parties. We would like this integrated into the case management system and to be able to provide limited/specific access to contracted interpreters and CART providers to the scheduling and materials sharing portion of the module.

1. Line 50: What licenses would be tracked?

Assistive technology software licenses, such as Read&Write or Sonocent.

1. Line 53: Exam Module - Can you please provide more information on this

Currently, CSD has a homegrown case management system that includes an exam module. The exam module has a student facing dashboard that allows students to schedule exams that they need to take at the Center. It has an instructor facing dashboard that allows instructors to approve the scheduling of the exam at the Center, provide details about the exam (date, time, type of exam- paper/online, materials allowed, etc.) and securely upload the exam for CSD to access and administer. Once the student takes the exam, the CSD team uploads the completed exam to the faculty dashboard for them to access and download. The CSD facing dashboard allows us to see the students’ requests, faculty details and exam, schedule date/time, confirm, assign seats, download exams, start/end an exam to track time, upload completed exams to get back to instructors, establish lead times for submitting exam requests (ex. 1 week in advance of the exam date- though a CSD staff member can override this in the management system), etc. It would be helpful to have additional functions, such as not allowing a student to schedule an exam for a date/time that the CSD is unable to proctor an exam because our space is already reserved.

1. Line 54, 55, & 56: Where will the exam details come from? Will the student manually enter them in the request?

Students and faculty. However, it would be helpful to have some information about the course auto populate from Peoplesoft, such as day/time. It would also be helpful if the CSD staff could add information to the exam details for CSD administrative use.

1. Line 59: What Exam data do you want stored?

Student info, course info, type of exam (final, mid-term, essay, m/c, online, paper), date/time of exam, start/end time of exam, time used to complete exam, accommodations used during exam, instructor contact info, exam returned to instructor.

1. Line 61: Can you please expand on the use case? Would faculty not drive this via the LMS?

The LMS (Blackboard) is not integrated with the current case management system. Currently, CSD has a homegrown case management system that includes an exam module. The exam module has a student facing dashboard that allows students to schedule exams that they need to take at the Center. It has an instructor facing dashboard that allows instructors to approve the scheduling of the exam at the Center, provide details about the exam (date, time, type of exam- paper/online, materials allowed, etc.) and securely upload the exam for CSD to access and administer. Once the student takes the exam, the CSD team uploads the completed exam to the faculty dashboard for them to access and download. The CSD facing dashboard allows us to see the students’ requests, faculty details and exam, schedule date/time, confirm, assign seats, download exams, start/end an exam to track time, upload completed exams to get back to instructors, establish lead times for submitting exam requests (ex. 1 week in advance of the exam date- though a CSD staff member can override this in the CSD management system), etc. It would be helpful to have additional functions, such as not allowing a student to schedule an exam for a date/time that the CSD is unable to proctor an exam because our space is already reserved.

1. Line 72: Can you clarify how each of the user types for the "Notetaking module" would interact with the system? What are the expectations for note taking? What note taking applications are currently in use or supported at UCONN?

Currently, CSD has a homegrown case management system that includes a notetaking module. When a CSD professional drafts an accommodation letter with notetaking assistance – peer notetaker, that shows up in the notetaking module as a class needing to hire a notetaker. The CSD team can email the class roster to inform students in the class we are hiring a notetaker. When a student “applies” to be a notetaker and is qualified, then the CSD team can “hire” the notetaker in the module and the class shows up as having a hired notetaker rather than still needing to hire a notetaker. The notetaker receives access to the dashboard and can upload their notes once they are “hired” in the notetaking module. This connects to the student receiving the accommodation of notes account in the case management system to then access the uploaded notes. Other notetaking assistance used includes technology-based notetaking such as OneNote, Sonocent, Glean, SmartPens, etc.

1. Line 74: Please clarify what would be automated.

The sending of emails directly from the notetaking module within the case management system within specific timeframes. For example, a recruitment email sent to a class roster advertising the need for a notetaker as soon as an accommodation letter with that course and approved accommodation is drafted. With follow up emails sent every so many days until a notetaker is hired or another notetaking accommodation option is identified.

1. Line 95: Can you give more detail on Beyond Access?

Beyond Access is CSD’s enhanced services program that is fee-based. We want to track student applications, payment, attendance in meetings along with other activities that are part of their plan (i.e. social activities, career-related activities, etc...), develop and track plan progression, and capture meeting notes along with emails/contact with parents/family members.

1. Line 104: What system is admissions currently using to track prospective students and visits to UCONN?

They currently use Slate.

1. General, What are your main objectives for implementing SFDC?

As described in the RFP proposal document, this will be a case management system for the Center for Students with Disabilities to also track accommodations such as housing, exams, and more.

1. General, What are the existing systems that we will be replacing?

Currently, the Center for Students with Disabilities (CSD) has a digital file management system, called OSCARS, with interactive functions for students and faculty. This product was developed several years ago in-house by Student Affairs Information Technology (SAIT). The new application will replace the current system. OSCARS is a case management system that receives information from PeopleSoft and THD and sends information to THD. The current modules within OSCARS includes, student data, course, housing, disability, accommodations (requested and approved), notetaking and exams administration modules and reporting tools. OSCARS has a student and instructor facing side called MyAccess. MyAccess is the portal that students request accommodations, upload documentation, request accommodation letters and can access their letters once drafted, schedule exams to be taken at CSD, and access notes if they are approved for peer notetaking. MyAccess is the portal that faculty use to access accommodation letters, see the list of students in their courses with approved accommodation and provide exam information for those tests that will be administered at the CSD.

1. General, Is there any Launch Strategy associated to this project with currently envisioned project kick-off and implementation timeline?

Not at ths time as we’d look for the vendor to layout project tasks and estimated timelines to identify this.

1. Appendix A - Technical - Row 12 - "Ability to allow properties and complex filters of properties to be the basis for dynamic population selections for the purpose of automated communication workflows" Please elaborate on this requirement.

We’d like the ability to sort and filter on attributes for data or reports to be able to send custom notification or workflows.

1. Appendix A - Functional - Row 8 - "System must securely (receive/send) share data with PeopleSoft, THD (housing software), and other enterprise solutions (i.e. Transportation, Dining Services applications, HuskyCT)"

"Other than the possible integrations listed alongside, are there any other systems or application with which UCONN foresees the Salesforce application will need to integrate?

PeopleSoft, The Housing Directory (THD), Blackboard (HuskyCT)

• Do you expect the integrations to be real-time and/or batch processing?

Preferably batch processing but we can discuss integrations if available via apii’s, etc.

• Do you have any standard integration tools or methodologies?

We maintain a MS SQL datawarehouse and are able to transfer flat files via SFTP but are open to discuss other options

• Unidirectional and bi-directional integrations?

Depending on the need could be either.

• Please also describe the nature of Integration, whether its API based or client want to use middleware for integration.

Most integrations have been flat files or api’s but we’re open to discussing other options.

• Is there any existing middleware which client is currently leveraging? If not, are you open to leverage MuleSoft platform?"

We’re not familiar with Mulesoft but could disucss based on how this works. We manage a datawarehouse.

1. Appendix A - Functional - Row 10 - "must deploy accross multiple campuses (i.e. Regional campuses and Professional Schools, including Social Work, Medical & Dental schools)" How many users will be accessing this platform? Please share a persona-wise distribution.

Refer to Section 3.1 of the RFP.

1. Appendix A - Functional - Row 15 - "Student interface to coordinate all approved accommodations, including exam scheduling, equipment loans, notetaking assistance, course modification agreements, alternate media, captioning, communication access (interpreters, transcriptions, CART), etc." Please elaborate on each of the functionality - the personas involved, data flow between systems. How are these functionality carried out currently? Please explain in detail about exam scheduling, equipment loans, notetaking assistance, course modification agreements, alternate media, captioning, communication access (interpreters, transcriptions, CART).

See answer to questions above regarding current workflow and additional functionality needs.

1. Appendix A - Functional - Row 17 - "customizable student dashboard" Please elaborate the content needed to be viewed on Student Dashboard.

“Customizable” meaning to be able to add/delete/edit messages (text) for greetings and reminders at different times of the semester/year.

1. Appendix A - Functional - Row 88 - "Module to Track and coordinate Academic Adjustments including Attendance Flexibility, Deadline Extensions, Alternate Assignments, Course Substitutions, etc. " How is the functionality carried out currently? What are the painpoints?

Currently, this is a time intensive manual process with several spreadsheets, a web-based form, and many email exchanges and phone conversations with faculty and a lot of CSD staff involved. Somehow, we would like to streamline this process by having a module in the case management system that will have both a faculty and student facing side. General ideas include when a faculty member has a student in their course approved for one or more academic adjustment they can go to a form or other on the faculty dashboard to create a course modification agreement. Of course, CSD staff must be involved in the process and developing the final agreement. The student would only see the final agreement on their dashboard.

1. General, Do you have a Project Management tool in place? Would you like us to propose our in-house solution “Cloud Management Center” for this?

Yes. But No you cannot use it.

1. General, "Regarding data migration.

1. How many data sources are going to provide data to the CRM system?

We manage a datawarehouse so we can probably merge to send from one source.

1. What is the purpose of the data that is being imported? Please provide use case examples. "

There is a current homegrown solution and ideally we’d like to migrate this data currently in our SQL datawarehouse. We also would like to integrate with multiple systems to send data so students can select housing based on their accommodation, or the parking system for selection of parking, etc.

1. General, What is the overall Data storage plan do you have from Salesforce? How much of this data has already been consumed in the system?

Currently our homegrown system we have 150GB.

1. General/Privacy, For the sake of privacy of our customers, Appirio requests that (unless if its a disqualifying element) the named references be shared with University of Connecticut at a later stage/closer to the deal signing. Kindly confirm if this is fine.

That will be fine.

1. General/Privacy, The PDF link in the RFP doc under section '5.6.5 BIDDER CONTRACT COMPLIANCE MONITORING REPORT' for the form 'Notification to Bidders/Contract Compliance Monitoring Report' is not redirecting to the actual form, but rather to the site: https://portal.ct.gov/CHRO  Hence kindly share the actual correct form. Thanks

Attached

1. Case Management, Please explain how cases are assigned. Are queues used?

Currently, cases are assigned by an Associate Director within the CSD to the various Disability Service Professionals (DSP). In general cases are assigned to a specific DSP with a specialty in the student's disability (I.e. one of our DSP’s specializes in working with students with ADHD and LD, another DSP specializes in working with students with ASD, etc.

1. Case Management, How are cases escalated between different tiers of support?

Currently, once a DSP approves accommodations, they notify the specific accommodations teams of the need to coordinate accommodations. Some accommodations are somewhat automated, like notetaking assistance – peer notes. As soon as a DSP drafts an accommodation letter that includes peer notetaker, that course and the request for a notetaker show up in the notetaking module. Other accommodations are manual, like notetaking assistance – technology based. The DSP must inform the CSDTech team that a student is approved for technology so the tech team can reach out to the student to coordinate accommodations.

1. Case Management, What kinds of system notifications go out today (emails?) - do you anticipate the same notifications?

Emails. We would like to continue to use email but also text.

1. Case Management, Describe the ownership / security for the cases, customers, contact in each User Group.

All professional staff have access to the current case management system and are responsible for ensuring the security of the information they’re adding/reading/editing. Student employees have limited access to the case management system and can only see statistical data and approved accommodations (no disability related information). They are also responsible for ensuring the security of the information they’re reading/editing/adding. The current case management system is secured through the use of roles in active directory.

1. Case Management, What are your SLAs?

Service-Level Agreement’s

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