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Robert P. Astorino
County Executive

Department of Social Services

Kevin P. Mahon
Commissioner

Date: May 17, 2010

To: Board of Acquisition and Contract

From: Kevin P. Mahon
Commissioner

Marguerite Beirne
Chief Information Officer

Subject: Resolution to exempt from the Westchester County Procurement Policy an agreement with Sandata Technologies, LLC, for the provision of an automated telephony system that allows all case notes to be called in by caseworkers in the field for transcription and availability by utilizing a product device called Santrax pursuant to Section 3(a) xxi thereof.

Authority is hereby requested to exempt an agreement, pursuant to Section 3(a) xxi, between the County of Westchester and Sandata Technologies, LLC for the provision of an automated telephony system to be used by caseworkers for transcription of case notes for the period July 1, 2010 through June 30, 2011 for an amount not to exceed \$60,000.

Since 2006, these services were being procured through the New York State Office of General Services Contracts (NYS OGSC), (Contract Number: PT60291) and, therefore, the proposed procurement was exempt from the operation of the Westchester County Procurement Policy pursuant to Section 3(a)(i). The device called Santrax, delivered through Sandata Technologies, LLC, was procured through the aforesaid agreement with New York State and provided to the County through contracts with third party software providers, first ASAP Software, then Dell. The Department of Social Services was informed by NYS OGSC that the transcription service component of the contract is beyond software and no longer included in this contract.

This transcription service, provided through Santrax, is a vital tool for DSS Child Welfare caseworkers. These workers are mandated to provide documentation of field visit observations in a timely manner in the form of case notes entered into "Connections", the statewide child welfare data base. Caseworkers phone in notes from the field on a secure toll-free number and access the resulting transcription within twenty-four (24) business hours on a protected website. This not only frees the caseworker to

focus on more important aspects of each case, it also makes it easier for a caseworker to ensure that the notes are accurate and complete. The system has proven very valuable since its inception and now it is used throughout the agency by all caseworkers at all District Offices including Peekskill, Mt. Vernon, White Plains, and Yonkers. Moreover, Emergency Services workers are mandated to utilize Santrax during every shift. Santrax creates an audio file on the secure website within 20 minutes of the call completion. In this way, daytime field staff can listen to the notes and have quick access to the events of the previous Emergency Services shift when they arrive the following day.

Child welfare caseworkers would be adversely affected if this tool were discontinued. Creating a new data base and website with a new vendor would be costly and time consuming. Since the department worked extensively with Sandata Technologies, LLC to establish our secure data base and website and, in light of the fact that Sandata Technologies, LLC has been working with the department for the benefit of the County since 2006, and, by virtue of their experience and expertise, Sandata Technologies, LLC is in a most unique position to deliver the services under the proposed agreement.

The proposed agreement will serve a **public purpose** through the provision of a system which frees caseworkers from the burden of transcription, allowing them to spend more time providing quality services to the children and families in their case loads.

The **goals and objectives** of this agreement are:

- To ensure timely and accurate documentation of child welfare activities within the mandated timeframe
- To facilitate the entry of case notes into “Connections”, the statewide child welfare data base
- To free caseworkers to pursue the vital family engagement activities of their cases

The **goals and objectives are in the best interests of the County regarding public safety** in that all case notes of child welfare workers are accurately documented within twenty four (24) business hours and readily available for use in case hearings, court hearings, etc.

The **goals and objectives are in the best interests of the County regarding fiscal responsibility** in that the cost of the proposed agreement is considerably less than the cost of four (4) full time employees with salaries plus fringes of approximately \$61,785 each, which is what it would take to support the existing volume of notes and meet the goal of completing the transcriptions within twenty four (24) hours. Sandata can provide 10 to 50 professional transcribers in order to meet this twenty four (24) hour turnaround requirement.

Without this service caseworkers would spend more time documenting their case notes and less time on their actual cases.

The goals and objectives of this agreement will be tracked and monitored using the Performance Measurement Indicators developed by the Department and approved by the County Budget Office.

The Department is able to report that in 2009, 414 child welfare staff made a total of 2,709 successful calls to Santrax for case note transcription.

Therefore, it is proposed that the best interests of the County are served by entering into this agreement with Sandata Technologies, LLC for continued provision of the product device, Santrax. This recommendation is made pursuant to Section 3(a) xxi of the Westchester County Procurement Policy. A separate resolution will be submitted requesting authority to enter into this agreement.

APPROVED BOARD OF ACQUISITION & CONTRACT - 6-17-2010 - JOMARY VIEIRA, SECRETARY

RESOLUTION

Upon a communication from the Commissioner of the Department of Social Services and the Chief Information Officer, be it hereby

RESOLVED, that pursuant to Section 3(a) xxi of the Westchester County Procurement Policy and Procedures, it is hereby determined that application of the procedural requirements contained therein, including the necessity of soliciting proposals, is neither cost effective nor expedient, and accordingly, not in the best interests of the County in connection with the procurement of an agreement with Sandata Technologies, LLC for the provision of an automated telephony system utilizing a product device called Santrax for the period July 1, 2010 through June 30, 2011 for an amount not to exceed \$60,000 to be paid pursuant to an approved budget and subject to appropriation; and be it further

RESOLVED, that the County Executive or his duly authorized designee is empowered to execute all documents and take all actions necessary to effect the purpose of the resolution.

APPROVED BOARD OF ACQUISITION & CONTRACT - 6-17-2010 - JOMARY VIEIRA, SECRETARY