



Robert P. Astorino  
County Executive

Department of Social Services

Kevin McGuire  
Commissioner

**18882**

**Date:** April 20, 2011

**To:** Board of Acquisition and Contract

**From:** Kevin McGuire  
Commissioner, Department of Social Services

Marguerite Beirne  
Chief Information Officer, Department of Information Technology

**Subject:** Resolution authorizing the County of Westchester, acting by and through its Department of Social Services, to enter into 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 for an amount not to exceed \$60,000 to be paid pursuant to an approved program budget and subject to appropriation for the period July 1, 2011 through June 30, 2012

Attached for your consideration is a resolution which, if approved by your Honorable Board, would authorize the County of Westchester, acting by and through its Department of Social Services, to enter into 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 from the field for transcription and availability by utilizing a product device called Santrax for an amount not to exceed \$60,000 to be paid pursuant to an approved program budget and subject to appropriation for the period July 1, 2011 through June 30, 2012.

Since 2006, the aforesaid services were being procured through New York State Office of General Services Contracts (NYS OCGS), (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). DSS was informed by NYS OGS that the transcription service component of the contract is beyond software and not included in this contract.

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 \$64,260 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 2010**, 321 child welfare staff made a total of 3,185 successful calls to Santrax for case note transcription.

Therefore, the County of Westchester, acting by and through its Department of Social Services, is seeking your Honorable Board’s approval to enter into this agreement with Sandata Technologies, LLC for continued provision of the product device, Santrax. Authority to exempt the proposed agreement from the application of the Procedures of the Westchester County Procurement Policy pursuant to Section 3(a) xxi was requested in a separate resolution.

Accordingly, your Honorable Board’s approval of the attached resolution is most respectfully urged and recommended.

## RESOLUTION

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

**RESOLVED**, that the County of Westchester, acting by and through its Department of Social Services, is authorized to enter into 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 for an amount not to exceed \$60,000 to be paid pursuant to an approved budget for the period July 1, 2011 through June 30, 2012; and be it further

**RESOLVED**, that the Agreement is subject to County appropriations; and be it further

**RESOLVED**, that this Agreement is also subject to further financial analysis of the impact of any New York State Budget (the "State Budget") proposed and adopted during the term of this Agreement. The County shall retain the right, upon the occurrence of any release by the Governor of a proposed State Budget and/or the adoption of a State Budget or any amendments thereto, and for a reasonable time after such release(s) or adoption(s), to conduct an analysis of the impacts of any such State Budget on County finances. After such analysis, the County shall retain the right either to terminate this Agreement or to renegotiate the amounts and rates approved herein. If the County subsequently offers to pay a reduced amount to the Contractor, then the Contractor shall have the right to terminate this Agreement upon reasonable prior written notice, 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.

Account to be  
Charged/Credited

	Fund	Dept	Major Program, Program & Phase Or Unit	Object/ Sub-Object	Trust Account	Dollars
2011	101	22	5000	4420	-----	\$30,000
2012	101	22	5000	4420	-----	\$30,000

Budget Funding Year(s): 2011-12  
(must match resolution)

Start Date: 7/1/11

End Date: 6/30/12

Funding Source

Tax Dollars: 33%

State Aid: 41%

**\$60,000**

Federal Aid: 26%

(must match resolution)

Other:

APPROVED BOARD OF ACQUISITION CONTRACT - 05/19/2011 - JOMARA VEIRA, SECRETARY