



Robert P. Astorino  
County Executive

Department of Social Services

Kevin McGuire  
Commissioner

Philippe Gille  
First Deputy Commissioner

**40470**

**Date:** May 21, 2014

**To:** Board of Acquisition and Contract

**From:** Kevin M. McGuire  
Commissioner  
Dept. of Social Services

John B. McCaffrey  
Chief Information Officer  
Dept. of Information Technology

**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

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Authority is hereby requested to exempt an agreement between the County of Westchester and 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 the period July 1, 2014 through June 30, 2015 pursuant to Section 3 (a) xxi thereof.

Since 2006, the device called Santrax was made available to the County through a New York State Office of General Services Contract (Contract Number: PT60291). Therefore, the proposed procurement was exempt from the operation of the Westchester County Procurement Policy pursuant to Section 3(a) (i). In 2010, the transcription component was taken out of the aforesaid agreement leaving the Department of Social Services with no option other than to enter into a separate agreement for the provision of this automated telephony system. Sandata Technologies, LLC was chosen based on its existing contractual relationship with State and the County and also based on its experience with the device.

This transcription service, provided through Santrax, is a vital tool for the Department's 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. Moreover, Emergency Services workers are also 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.

The proposed agreement will serve a **public purpose** by assisting the County to enhance the quality of services provided to the children and families in the area of child welfare.

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

Creating a new data base and website with a new vendor would be costly and time consuming. In light of the fact that Sandata Technologies, LLC has been working with the department for the benefit of the County since 2006, and also by virtue of their experience and expertise, Sandata Technologies, LLC is in a unique position to deliver the services under the proposed agreement.

Therefore, based on the expertise, experience and familiarity of the contractor in working with this device and the long-standing relationship the contractor has with the County, it is proposed that the best interests of the County would be served by entering into this agreement with Sandata Technologies, LLC for the continued provision of this device. This recommendation is made pursuant to Section 3(a) (xxi) of the Westchester County Procurement Policy.

Pursuant to Section 3(a) xxi, the Westchester County Procurement Policy and Procedures are not applicable to any procurement for which this Honorable Board determines, by resolution passed prior to commencing such procurement, that compliance with the Policy would not be in the best interests of the County. A

separate resolution with even date will be submitted requesting authority to enter into this agreement with the vendor.

Approval of the annexed resolution by your Honorable Board is respectfully requested.

APPROVED BOARD OF ACQUISITION & CONTRACT - 06/19/2014 - 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, 2014 through June 30, 2015.

APPROVED BOARD OF ACQUISITION & CONTRACT - 06/09/2014 - COUNTY CLERK VIEIRA, SECRETARY