**ATTACHMENT 2**

**SUPPLEMENTAL INFORMATION QUESTIONNAIRE**

**FOR**

**CERTIFICATE OF INSURANCE TRACKING SOLUTION**

**RFP 22-4243**

The following questions pertain to the Respondent's capabilities regarding the implementation and support of the Certification of Insurance Tracking Solution. You may supply supporting materials as required and individually titled appropriately based upon the material provided section, but please provide your written answers to the questions below (Example: Implementation Plan, Question 1):

IMPLEMENTATION PLAN

1. Provide an Implementation Plan that includes the following items:
   1. proposed implementation tasks including weekly status updates
   2. typical implementation timeline from contract execution to productive use
   3. resource needs including time required of District staff for implementation, organized by discipline (e.g.: Risk, IT, etc.) or role (e.g.: primary application user, email administrator, etc.)
   4. deliverables from District staff needed to efficiently implement the software solution
2. What are the expected skillsets of District staff who will be the primary application user once the system is in productive use?

Click here to input skillset information.

TRAINING

1. What is the proposed training plan for the software? Click here to enter training plan detail
2. What are the general commitments of time for training of District staff?Click or tap here to enter training time commitments
3. Provide an example training class agenda, if applicable.
4. Is online training available for new users or to refresh current users on a continued basis while District is Respondent’s customer?  Yes  No

DATA MIGRATION

1. What information does the District need to provide to the Respondent to import active (current) COIs? Both the data and .pdf version of the COI documents will need to be imported.

Click or tap here to enter data import information

1. Is the District’s data segregated from other customer data?  Yes  No
2. How long is the data maintained in the system and can specific data be deleted if required by the District?

Click or tap here to enter how long data is maintained

1. What is the process by which the District can extract data from the system through ad-hoc reporting or through the API (or other interface) without vendor intervention at any time, if applicable?

Click or tap here to enter how the District can extract data

1. How are data, including files, returned to the District should the District discontinue services?

Click or tap here to enter how data and documents are returned to the District

SUPPORT FOR THE SOFTWARE

1. What are the hours of support desk services and the support center locations?

Click or tap here to enter support desk hours and locations.

1. What level of familiarity do support staff have with the system?

Click or tap here to enter level of familiarity

1. How many support staff are available to respond to inquiries?

Click or tap here to enter support staff

1. What are the support modes available (e.g.: email, calls, knowledge base, ticketing system, etc.)?

Email Calls Knowledge Base Ticketing System Other

If Other, please explain.

1. What is the process by which District staff can access support tickets and status?

Click or tap here to enter support ticket process

1. Are there Service Level Agreement (SLAs) for the support desk? If yes, provide a copy of the SLA(s).

Click or tap here to enter SLA information

1. Are there Service Level Agreements (SLAs) for application availability? If yes, provide a copy of the SLA(s). What is the application system up-time over the last three years?

Click or tap here to enter SLAs for application availability

1. Are there different tiers of support to address specific issues?

Click or tap here to enter tiers of support

1. What is the escalation process if the District is not satisfied with the Respondent’s services?

Click or tap here to enter escalation process

1. Are online system documentation or searchable knowledge (e.g.: knowledgebase, etc.) available?

Click or tap here to enter online system documentation information

1. Are application programming interface (API) tools available to interface with third-party industry standard tools and if so, what support is available for these tools?

Click or tap here to enter API tools

REPORTING

1. How many standard reports come with the system?

Click or tap here to enter standard report information

1. Can the standard reports be modified by the user and saved as a new report?

Click or tap here to enter report information.

1. Does the system have ad-hoc reporting capability?

Click or tap here to enter ad-hoc reporting information

1. Can the reports be saved for public or private use?

Click or tap here to enter report public or private use

1. Does the reporting tools pull data from all modules of the software?

Yes No

1. Can you report on configured fields?

Yes No

1. Can reports be scheduled to run at specific times or intervals and emailed to selected users by the system?

Click or tap here to enter information on reports running on schedule

1. What file formats (e.g. .csv, .pdf, .xls) can reports be delivered and downloaded.

Click or tap here to enter out report file formats

HOSTING PLATFORM AND THIRD-PARTY SOFTWARE

1. What is the system’s hosting platform (e.g.: Amazon Web Services, Microsoft Azure, etc.)?

Click or tap here to enter hosting platform information

1. What are the host locations for the primary and backup software system?

Click or tap here to enter primary and backup software system hosts

1. Where is the data processed?

Click or tap here to enter where the data is processed

1. Are any third-party integrations (e.g.: Docusign, Adobe Acrobat, Microsoft Office 365, etc.) available? Provide documentation for the integration.
2. Are there any other third-party software requirements?

Click or tap here to enter third-party software requirements

1. What browsers are supported and is there a plan to continue support through browser updates?

Click or tap here to enter browser information

SECURITY

1. Does your software need to interface with the District’s Office 365 platform to send emails on the District’s behalf? If yes, provide documentation on how the email interface is accomplished.

Yes No

If Yes, click or tap here to enter how the interface is accomplished

1. How are the Office 365 credentials processed?

Click or tap here to enter how the credentials are processed

1. Can roles be configured to restrict access to confidential or sensitive information within the system (role-based security)?

Click or tap here to enter how roles are configured

1. Is data encryption used and how is data secured when transmitted?

Click or tap here to enter data security information

1. What login security and validation(s) does the system support, such as Security Assertion Markup Language (SAML), single sign on (SSO), multi-factor authentication (MFA), or active directory (AD)? Please provide documentation.
2. How does the system process credentials with the District’s systems?

Click or tap here to enter how the system processes credentials

1. If AD is not supported, are users able to reset their own passwords without contacting support?

Yes No

1. What is the organization’s process to prevent and respond to data breaches?

Click or tap here to enter process for preventing/responding data breaches

1. Has the organization’s system has ever been breached? If yes, please explain.

Yes No

If yes, click or tap here to provide the explanation

1. At a high-level, what disaster recovery/business continuity practices are maintained, if any?

Click or tap here to enter disaster recovery/business continuity practices

SOFTWARE LICENSING AND AGREEMENTS

1. What is the usage/licensing fee model (e.g.: per COI, per named user, concurrent users, etc.)?

Click or tap here to enter usage/licensing fee model

1. As a SaaS implementation, what services do you provide for the environment (e.g.: infrastructure, backups, disaster recovery, upgrades, support, storage amount, etc.)?

Click or tap here to enter services provided

1. Provide a copy of all standard contracts or license agreements. The District reserves the right to review the Respondent’s standard agreements and request changes to comply with Florida Law or the District’s policies and procedures. The final award is dependent upon a successfully negotiated contract.
2. Are there any additional software products that are required for Respondent’s software to operate?

Click or tap here to enter additional software products

NEW RELEASES AND APPLICATION UPDATES

1. How long has the product been available?

Click or tap here to enter how long the product has been available

1. How frequently does the product have major and minor new releases?

Click or tap here to enter frequency of major/minor releases

1. What is the process for suggestions to user requested enhancements?

Click or tap here to enter process for user requested enhancements

1. Do all clients have the same version of software (multi-tenant) or does each client have their own version (single tenant)?

Click or tap here to enter client version information

1. What is the process for applying new releases and must we accept them?

Click or tap here to enter process for applying new releases

1. Are there opportunities for client testing prior to releases?

Yes No

1. How long is a new release noticed before implemented?

Click or tap here to enter new release information

1. Are release notes available?

Yes No

1. Can certain functions of the software be toggled off and on?

Yes No

1. Will the District have an available test environment for training and new release testing purposes? Are there any limitations/costs or fees to refresh data from production environment to test environment?

Click or tap here to enter test environment information

1. How are bug fixes handled? Are hot fixes used or are bugs corrected only at new releases?

Click or tap here to enter how bug fixes are handled

PRICING

1. Indicate itemized list of items and fees (e.g.: usage/licensing fees, current data migration, implementation, ongoing software support, training, cloud data storage, interfaces, custom development, test environment, etc.) and how fees are determined (e.g., by COI, by user, by gigabyte of data). The District reserves the right to purchase individual proposed items or services.
2. If not included above, are there any data storage fees, thresholds, and overage fees?

Click or tap here to enter data storage fees information

1. How long is data maintained in the Respondent’s software solution?

Click or tap here to enter how long data is maintained

1. When do usage/license fees begin (i.e.: at contract execution, implementation date, etc.)?

Click or tap here to enter when usage/license fees begin

1. Are there any penalties for a longer implementation schedule due to District’s staffing challenges?

Click or tap here to enter any penalties

For the purposes of calculating licensing and other itemized fees, the District obtains approximately 500 renewals and new COIs per year The software will need to be accessible by approximately 15 of the 600 District staff however, it is preferred that software access is unlimited. The District will pay for services and software on an annual basis.

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