**State of Maine Judicial Branch**

**Office of Information Technology**

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**REQUEST FOR INFORMATION**

**RFI# 202208131**

**Provider Management System**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| --- | --- |
| **RFI Coordinator** | *All communication regarding this RFI must be made through the RFI Coordinator identified below*.**Name:** Alex Beach **Title:** Associate IT Project Manager**Contact Information:** alexander.beach@courts.maine.gov  |
| **Submitted Questions Due** | *All questions must be submitted to the RFI Coordinator identified above by:***Date:** Friday, September 16th, no later than 5:00 p.m., local time |
| **Response Submission** | **Submission Deadline:** Friday, September 30th, no later than 5:00 p.m., local time**Submit to:** alexander.beach@courts.maine.gov  |

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# PUBLIC NOTICE

**\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\***

**State of Maine**

**Maine Judicial Branch (MJB)**

**RFI# 202208131**

**Provider Management System**

The State of Maine Judicial Branch (MJB) is seeking information from developers (hereinafter referred to as “vendors”) for a modern provider management system. The system will be used statewide by administrative court personnel as well as mediators, interpreters, guardians ad litem (GALs), bail commissioners, and mental health evaluators (hereinafter referred to as “providers”) contracted by the MJB to provide services in court cases.

A copy of the RFI, as well as the Question & Answer Summary and all other related documents to this RFI, can be obtained at the following website: <http://www.maine.gov/dafs/bbm/procurementservices/vendors/rfis>. The MJB encourages all interested vendors to obtain a copy of the RFI and submit a response.

Responses must be submitted to the RFI Coordinator, Alex Beach, at alexander.beach@courts.maine.gov and be submitted by 5:00 pm, local time, on Friday, September 30th.

**\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\***

# RFI DEFINITIONS/ACRONYMS

The following terms and acronyms shall have the meaning indicated below as referenced in this Request for Information:

|  |  |
| --- | --- |
| **Term/Acronym** | **Definition** |
| **RFI** | Request for Information |
| **RFP** | Request for Proposal |
| **State** | State of Maine |
| **MJB** | State of Maine Judicial Branch |
| **AOC** | Administrative Office of the Courts |
| **FOAA** | Maine Freedom of Access Act |
| **Respondent** | Any individual or organization submitting a response to this RFI. |
| **Provider** | A mediator, interpreter, guardian ad litem (GAL), bail commissioner, or mental health evaluator providing services to the MJB. |
| **User** | An MJB employee utilizing the provider management system. |
| **Odyssey** | The MJB’s electronic case management system |
| **AdvantageME** | The State of Maine’s electronic procurement system |

**State of Maine Judicial Branch**

**RFI# 202208131**

**Provider Management System**

# PART I: INTRODUCTION

## A. Purpose & Background

This Request for Information (RFI) is an information gathering and market research tool, not a formal solicitation of a specific requirement (such as in a “Request for Proposals” document). The State of Maine Judicial Branch (MJB) is seeking information regarding a modern provider management system from interested parties as defined in this RFI document. This is an opportunity for interested parties to help the MJB better understand a marketplace and/or specific subject matter.

The MJB includes thirty-four (34) court locations in all of Maine’s sixteen (16) counties, which are organized into eight (8) judicial regions. The MJB is a centralized state court system managed by the Administrative Office of the Courts (AOC). For reference, the 2021 Annual Report for the Maine Judicial Branch can be accessed at <https://www.courts.maine.gov/about/reports-data.html>. The report provides information concerning the business of the MJB including annual caseload statistics and the number and type of staff.

The MJB utilizes independent providers for a variety of court services. Providers include mediators, interpreters, guardians ad litem (GALs), bail commissioners, and mental health evaluators and are managed by separate offices or divisions within the AOC. . Different processes are used to manage providers, assign them to cases, provide for the submission of their reports, and process their payments. The MJB is seeking an electronic system to make the following components of provider management more efficient:

* Provider assignment and scheduling;
* Provider report generation;
* Data reports for court administration; and
* Provider expense reimbursement.

## B. Current Conditions

Provider management processes, including rostering, assignment to court cases, report submission, and payment, are managed by separate offices or divisions within the AOC as determined by the type of provider. Except for mediators, who currently use a web portal to submit expense reimbursement vouchers, most provider management and reimbursement processes are paper-based and require manual data entry and review by court staff.

Additionally, the MJB is engaged in a long-term effort to implement an electronic case management system (“Odyssey”) statewide. Odyssey is currently live in Bangor District Court, Bangor Superior Court, as well as the Violations Bureau and the Business and Consumer Docket. The MJB plans to implement Odyssey at remaining courts on a rolling basis. In terms of provider management, Odyssey does include some basic functionality for assigning providers to cases; however, the core Odyssey product does not fulfill all or most of the MJB’s provider management requirements, particularly for expense reimbursement. It is vital that any external provider management solution interface with Odyssey for purposes of verification, such as confirming valid case numbers.

**C. Challenge Statement**

The RFI is intended to explore an overarching question: How can the MJB make provider management more efficient, streamline provider scheduling, and provide data on provider usage and other statistics?

**D. General Provisions**

1. All contact with the State regarding this RFI must be made through the RFI Coordinator. No other person or state employee is empowered to make binding statements regarding this RFI.
2. This is a non-binding request for information. Therefore, no award shall be made as a result of the RFI process.
3. Issuance of this RFI does not commit the MJB to pay any expenses incurred by a Respondent in the preparation of their response to this RFI. This includes attendance at personal interviews or other meetings and software or system demonstrations, where applicable.
4. Issuance of this RFI in no way constitutes a commitment by the State of Maine to issue a Request for Proposal (RFP).
5. All responses should adhere to the instructions and format requests outlined in this RFI and all written supplements and amendments, such as the Summary of Questions and Answers, issued by the MJB.
6. All submissions in response to this RFI will be considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA) (1 M.R.S. §§ 401 et seq.): [State of Maine Freedom of Access Act.](http://www.mainelegislature.org/legis/statutes/1/title1sec401.html)
7. All applicable laws, whether or not herein contained, shall be included by this reference. It shall be Proposer’s/Vendor’s responsibility to determine the applicability and requirements of any such laws and to abide by them.

# PART II: INFORMATION SOUGHT

1. **Objectives of the RFI**

A priority of the MJB is to provide a justice system that is safe, accessible, efficient, and impartial. The MJB is committed to ensuring providers have efficient technological tools to fulfill essential job functions, as well as court staff being able to effectively manage providers. In pursuit of these objectives, the MJB is seeking whether a provider management system will, at a minimum:

* 1. Identify individuals as different types of providers;
	2. Assign providers to cases to perform designated tasks;
	3. Create scheduling pools, when applicable, of different types of providers for each court or region;
	4. Schedule providers to cases manually and automatically using scheduling pools;
	5. Submit various provider reports that can be filed to the electronic case record;
	6. Generate reports for management and data analysis purposes;
	7. Allow providers to electronically submit requests for payment;
	8. Allow designated court staff to review, approve, and process expense reimbursement requests electronically submitted by providers; and
	9. Integrate with the MJB’s electronic case management system (Odyssey) and the State of Maine’s electronic accounting and procurement system (AdvantageME).

With this RFI, the MJB seeks information regarding the features, quality, reliability, operation, warranty, serviceability, installation, and use of provider management software and related products and services.

1. **Products, Services and Functionality of Interest**

The primary focus of this RFI is to determine the capabilities and services of vendors and the functionality of their provider management system and related products. **Appendix C** contains a detailed list of product features and functionality of interest to the MJB. Please address each item listed in **Appendix C** and how your product, or related products, meet the identified requirements.

1. **Other Information Requested from Vendors**

In addition to the information concerning provider management products and capabilities, the MJB also requests information concerning the following:

* **Durability**. Provide an estimate of the average number of years your software is likely to be supported before requiring a replacement or mandatory upgrade.
* **Configuration and Customization**. Provide details on the level of configuration and customization related to the needs identified in subsection A that is available for your product.
* **Warranty**. Provide details on the warranty you provide on software.
* **Long-term Stability**. Provide evidence that your company would provide software support and upgrades for the next 10 to 20 years.
* **References.** Provide court locations/jurisdictions where product is operational.

# PART III: KEY RFI EVENTS AND PROCESSES

## Questions

**1. General Instructions**

1. It is the responsibility of each interested party to examine the entire RFI and to seek clarification in writing if they do not understand any information or instructions.
2. Interested parties should use **Appendix B** – Submitted Questions Form – for submission of questions.
3. The Submitted Questions form must be submitted by e-mail and received by the RFI Coordinator, identified on the cover page of this RFI, as soon as possible but no later than the date and time specified on the RFI cover page.
4. The Submitted Questions form must include the RFI number and title in the subject line of the e-mail. The MJB assumes no liability for assuring accurate/complete/on time e-mail transmission and receipt.

**2. Question & Answer Summary**

Responses to all questions will be compiled in writing and posted on the following website: http://www.maine.gov/dafs/bbm/procurementservices/vendors/rfis. It is the responsibility of all interested parties to go to this website to obtain a copy of the Question & Answer Summary. Only those answers issued in writing on this website will be considered binding.

## Submitting the Response

1. **Responses Due**

Responses must be received no later than the date and time listed in the timeline above.

1. **Delivery Instructions**

Responses must be submitted to the RFI Coordinator, via e-mail, listed on the cover page of this RFI document.

1. **Response Format**

Responses to this RFI may be developed in a manner that suits the respondent. A list of key questions is included within the RFI and all submissions, regardless of format, will be reviewed. Respondents are asked to be brief and to respond to as many questions as possible within the RFI. Number each response to correspond to the relevant question or instruction of the RFI to allow comparison and clarity.

# PART IV: REVIEW OF RESPONSES RECEIVED

**General Information**

1. The MJB will review responses received for the purpose of gathering information and market research only. The MJB will not score or rate responses received.
2. The MJB reserves the right to communicate and/or schedule interviews/presentations with Respondents, if needed, to obtain clarification of information contained in the responses received and/or additional information to enhance marketing research efforts.

# APPENDIX A

**State of Maine**

**Maine Judicial Branch (MJB)**

**RESPONSE COVER PAGE**

**RFI# 202208131**

**Provider Management System**

|  |  |
| --- | --- |
| **Lead Point of Contact - Name/Title:** |  |
| **Organization Name (if applicable):** |  |
| **Tel:** |  | **Fax:** |  |
| **E-Mail:** |  | **Website:** |  |
| **Street Address:** |  |
| **City/State/Zip:** |  |

# APPENDIX B

**State of Maine**

**Maine Judicial Branch (MJB)**

**SUBMITTED QUESTIONS FORM**

**RFI# 202208131**

**Provider Management System**

|  |  |
| --- | --- |
| **Organization/Responder’s Name:** |  |

|  |  |
| --- | --- |
| **RFI Section & Page Number** | **Question** |
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*\* If a question is not related to any section of the RFI, state “N/A” under “RFI Section & Page Number”.*

*\*\* Add additional rows, if necessary.*

# APPENDIX C

**State of Maine**

**Maine Judicial Branch (MJB)**

**PROVIDER MANAGEMENT REQUIREMENTS**

**RFI# 202208131**

**Provider Management System**

Please provide a complete response to each product, service or functional area of interest listed

below. Responses should follow the below organizational structure when providing the

information requested.

# BACKGROUND INFORMATION

# Overview of Company and Solutions

# Company history

# Organizational structure

# Products currently offered or deployed

# Examples of implementations similar to MJB scope and scale

# Number of staff supporting products listed above

# Strategies for emerging technologies

# Business Model

# SaaS availability

# Product licensing

# Support/maintenance services

# Help Desk/issue resolution

# Product enhancement/upgrade strategies

# Product modification, customization, configuration capabilities

# Product release scheduling and deployment

# PRODUCT FUNCTIONALITY INFORMATION

# Application Components/Modules

# Provider Assignment and Scheduling. The Vendor must address whether their system can:

* + - 1. Create scheduling pools based on provider type (i.e. interpreter, mediator, etc.) for each court and/or region by case type (i.e. family matters, small claims, forcible entry and detainer, criminal, etc.), or other criteria such as language for interpreters.
			2. In instances in which there is a single provider (not a pool), the system would need the ability to assign a specific individual to a specific case and court event.
			3. Create Provider sessions, including either single or multiple court events, on regular dates and as needed by the court.
			4. Assign one or more Providers to a session, a case, or an event within a case (e.g. mediation, interpretation for court hearing) on a specific date, where they will perform services for all cases scheduled in that session.
			5. Manually assign a Provider to a case as a case party or as an assignee.
			6. Automatically assign/associate one or more Providers assigned to a session to all cases scheduled in the session.
			7. Manually input other factors that can be used to identify scheduling or other conflicts.
			8. Receive dates when a type of Provider is available or unavailable for future court sessions.
			9. Prevent a user from manually assigning a Provider to a session or a case on a date the Provider is noted as unavailable and alert the user of the scheduling conflict.
			10. Prevent a user from manually assigning a Provider to a session or a case on a date the Provider is noted as having a conflict and alert the user of the conflict (e.g. interpreter is a family member or friend of a party in the case).
			11. Not automatically assign a Provider to a session or a case when there is unavailability or other conflict noted.
			12. Generate a scheduling notice to inform the court clerk and provider of the assignment.
			13. Maintain a record of the actual Provider(s) assigned to a session.

			**Example**: If there are multiple mediators assigned to the same session, the system should be able to indicate which of those mediators conducted the mediation for a specific case in the session.
			14. Allow a user to change the Provider assigned to a session or a case as needed.
			15. Allow a Provider to have the appropriate access to a case based on their provider type once they are actively assigned to a session or to a case.
			16. For certain provider types, define the number of days past assignment to deactivate a provider assignment and have the system automatically add this when initially assigning a provider to a Session.

**Example**: Once assigned to a case, the provider should have access to the file for that case up to “X” number of days after the session date to allow the provider to complete any necessary follow-up. Once the calculated date has been reached, the system will automatically deactivate the provider assignment without court staff doing this manually.

* + - 1. Add a flag to a provider record with a message when a court office needs court staff to contact the provider prior to assigning the provider to a Session or to a case.

			**Example:** The flag could be used to direct a user to contact the AOC before scheduling/assigning a specific provider.
			2. Indicate if a provider is a subcontractor working for a specific agency.
			3. Add new provider types if needed and manage providers within that new type.

# Provider Report Generation. The Vendor must address whether their system can:

* + - 1. Create standard forms that can be utilized from a provider online application.
			2. Define which forms are available from the provider online application based on the provider Type (i.e. a Mediator will have different form templates available to use than a GAL) and/or Case Type (i.e. a Small Claims mediation will have different forms available than an FDP mediation).
			3. Allow a provider to indicate a specific case in the provider online application first, then select a form template to create.
			4. Allow a selected form to populate applicable case data so the provider does not have to manually enter the data.
			5. Save the form at any point and return to it later without losing any of the data already entered.
			6. Obtain and record electronic signatures.
			7. Print a completed provider form when additional signatures (i.e. Case Party, Attorney, etc.) are needed and/or provide a physical form to the case parties/participants.

# Enter specific data elements in an online application that will be included in a finished form filed on a case and for that data to be passed from the online application to Case Management System as distinct data.

# Generate reports on data passed from the online application to the Case Management System.

* + - 1. Display data element fields based on how a prior data element was answered (i.e. “branching” questions).
			2. Initiate and electronically file a completed form from the online application.
			3. Identify specific types of submissions from a provider that will route to a Task Queue when they have been successfully electronically filed into the case management system.
			4. Generate management reports based on data associated with a provider assignment and/or data noted by a provider.

# Data Reports for Court Administration. The Vendor must address whether the system can:

* + - 1. Generate reports that provide usage data. For example, the data would show the number of cases for which an interpreter was used as well as the language that was spoken.

# Generate other reports that provide system data that can be exported to Excel.

# Provider Payment and Expense Reimbursement Review. The Vendor must address whether their system can:

* + - 1. Define different types of expenses (i.e. mileage, services, etc.) available for a provider to select when completing a payment request electronically based on the type of provider.
			2. Indicate expense details by case or by a group of cases when completing an expense request for payment electronically (e.g. date, start/end time, case number, expense type, payment type, etc.).
			3. Create fee codes and/or fee schedules that would account for different provider expenses, such as mileage reimbursement, minimum payment, etc.
			4. Allow the court to have a variety of payment request forms to be used based on the type of provider and to display, at the election of the provider, only the applicable form based on the provider type.
			5. Allow the provider to complete a payment request using a court approved form that will automatically populate case related data (i.e. case #, party names, etc.) and details regarding their expenses on the form.
			6. Allow the court to define a status (i.e. in progress, declined, court approved, accounting approved, pending check, etc.) to be used with the payment request process.
			7. Allow the online application to display a status associated with a payment request as it moves through the approval process and update the status automatically.
			8. Allow a user or provider to determine the status of a payment request for a provider by viewing their provider record.
			9. Identify provider payment requests rejected for payment requests at each stage of processing, including when the Finance Department reviews a batch of payment requests for submission to AdvantageMe.
			10. Allow a provider to electronically sign a completed payment request.
			11. Allow a provider to create and submit a payment request from an online application or manually. This should be a copy of the form generated online and the expense details.
			12. Automatically associate a payment request to a provider record and the applicable case in Odyssey Case Manager when it is submitted from the online application.
			13. Allow a provider to create and submit a payment request that is not associated to a case (e.g. coaching, continuing education, etc.)
			14. Allow a user to manually associate a payment request to a provider record and the applicable case in Odyssey Case Manager when it is submitted over the counter by the provider.
			15. Create different task queues for reviewing provider payment requests based on provider type and/or case type.
			16. Automatically route a provider payment request that has been submitted electronically to a task queue based on the provider type.
			17. Allow a user to route a provider payment request submitted over the counter to a task queue based on the provider type (i.e. mediator expenses go to a different task queue than interpreter expenses) or expense submission type (i.e. case related expenses for a mediator go to a different task queue than non-case related expenses).
			18. Allow a user to review a submitted payment request from the task queue to determine if it is correct and mark it electronically as approved.
			19. Allow an approved payment request to go to a finance task queue for the next step of verification.
			20. Allow a user to electronically correct/edit a submitted payment request so it can be approved.
			21. Allow a user to indicate a submitted payment request is denied from the task queue which will require the provider to correct and resubmit.
			22. Allow a provider to correct and resubmit a previously denied payment request.
			23. Allow a user to provide additional comments for the submitter regarding why their submitted payment request has been denied.
			24. Allow a submitter to receive additional comments provided by a reviewer as to why their submitted payment request has been denied.
			25. Retain additional comments as historical data when a submitted payment request has been denied.
			26. Generate a list of initially approved payment requests submitted in a date range that can be printed, signed by the reviewer, and sent to Finance for the next step of review/approval.
			27. Allow a finance user to indicate a submitted payment request is approved for payment. Submission to the State for issuance of a check will not be in Odyssey Case Manager.
			28. Allow a Finance user to generate a file containing approved provider payment requests in the applicable format for AdvantageME.
			29. Send AdvantageME payment files as part of an outbound integration.
			30. Process an inbound file from AdvantageME to capture payment details (i.e. Check #, Check Amount) regarding a provider’s payment request.
			31. Update the status of a payment request when an inbound file from AdvantgeME has been processed in Odyssey Case Manager.
			32. Allow user to set parameters for payment (including stages for payment, maximum hours per stage, maximum costs per state, etc).
			33. Track submissions and parameter balances by docket number for each stage so that the provider and user can see that information either when completing or processing the request for payment (for example, a GAL appointed to a child protection case has a certain number of hours that can be billed for different stages of this case. This feature would allow the GAL to enter the number of hours they are billing for a specific stage and, prior to submission, see the balance of available hours that remain for that stage).
			34. Provide a warning prior to submission if the payment request by the provider exceeds the parameters for payment (i.e. for hours per stage, costs, etc.) that have been set for that provider type and case type.
			35. Allow a provider to edit the payment request when a warning is triggered because the payment request exceeds the parameters for payment.
			36. Allow a provider to request an exception and provide/attach a justification in support thereof when a warning is triggered because the payment request exceeds the parameters for payment.
			37. Allow a user to easily access a list of submissions by a provider for each docket number so they can be reviewed for (1) compliance with parameters set for that case type, and (2) the number of requests for exceptions to those parameters.
			38. Allow a provider to attach documents to their payment request.
	1. **Accessibility.**
		1. Compliance with the State of Maine Digital Accessibility and Usability Policy: <https://www.maine.gov/oit/sites/maine.gov.oit/files/inline-files/digital-accessibility-policy.pdf>

			1. Compliance with the revised Section 508 Standards for any provided products and services:
			<https://www.section508.gov/manage/laws-and-policies/>
			2. Compliance with Web Content Accessibility Guidelines (WCAG) 2.0 (Level A and AA, Success Criteria 12) for any provided products and services:
			<https://www.w3.org/TR/WCAG20/>

# INFRASTRUCTURE AND TECHNICAL INFORMATION

# Technical Environment

# Software development tools

# Database(s) supported

# Data model

# Architecture (e.g. client/server, N-tier, open/closed)

# Information exchange tools/methods (e.g. APIs, broker, ESB)

# Reporting tools

# Software configuration management (e.g. bug tracking tool, method of release)

# Security

# Please provide a summary of a recent SOC 2 Type II audit, if available.

# Hardware Specifications (What hardware and system configurations of the following are required for this implementation?)

# Server details (processor, memory)

# Operating system

# Network environment

# Virtual environment, redundancy, disaster recovery

# Disk usage, storage requirements

# Client requirements

# Mobile device capability

# Printer capability

# Possible configuration options

# Responsibility for hardware and system software maintenance

# PRODUCT DESIGN, DELIVERY AND SUPPORT

# Product Delivery Methodology/Practices

# Business Development to Contract

# Assessment of opportunities (fit and capacity)

# Response to RFPs

# Contract negotiation

# Contract to Delivery

# Analysis of needs/fit/suitability

# Identification of gaps/modifications

# Design and development of customizations

# Support for configuration

# Testing and deployment

# Onsite “go live” assistance

# Delivery to Maintenance

# Help Desk/customer support management

# Client environment replication

# Support for custom coding

# Assistance with product upgrades/updates

# User groups/other input

# Implementation Methodology/Practices

# What project management functions and responsibilities are required during implementation?

# Address project consulting services

# What training, instructional requirements and information are part of this implementation?

# Training methodology

# Training options

# Training requirements

# Syllabus information

# What timelines are recommended?

# Provide a sample implementation timeline

# What do you see as the Client’s responsibilities?

# What is the MJB responsible for during implementation?

# What is the vendor responsible for during implementation?

# Support

# What support services are offered? Address the following:

# In-context help (within product)

# Toll-free support number

# Client maintained/staffed support desk

# Online support

# Sample Service Level Agreement, if any

# What are your support goals? Address the following:

# Response times and resolution times to the following incident levels:

# Emergency

# Critical

# Standard help call (during and before/after standard business hours)

# Other options

# What is recommended for problem escalation procedures?

# How are incidents tracked and handled?

# What tools does your support staff use?

# What are the timelines and procedures for system enhancements/updates, etc.?

# How are updates managed?

# How often are updates released

# What is the typical downtime during an update?

# Can your product be updated easily due to legislative changes affecting provider pay scales, analytical reporting, forms revisions, or other business process changes?

# How are enhancements/new feature requests handled?